

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, November 4, 2022
Time: 9:00 a.m. to 12:00 p.m.
Place: Virtual meeting held via Zoom
[Connect with Zoom](#)
Passcode: 042255
Phone: 877-853-5257 (Toll Free)

9:00 a.m.	Call meeting to order, declaration of quorum and introductions	Chair Kloster
9:10 a.m.	Comments from the Chair and Committee Members <ul style="list-style-type: none">• Committee input on Creating a Safe Space at TPAC (Chair Kloster)• Responses from Wufoo feedback from committee members (Chair Kloster)• Updates from committee members around the Region (all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe)	
9:30 a.m.	Public communications on agenda items	
9:33 a.m.	Consideration of TPAC minutes, October 7, 2022 (<u>action item</u>)	Chair Kloster
9:40 a.m.	Metropolitan Transportation Improvement Program (MTIP) Formal Amendment 22-5291 (<u>action item, Recommendation to JPACT</u>) Purpose: For the purpose of adding three new and amending three existing projects in the 2021-26 Metropolitan Transportation Improvement Program to meet required Federal Highway Administration obligation or delivery approval steps.	Ken Lobeck, Metro
9:55 a.m.	Metro/ODOT Regional Mobility Policy Update: Draft Policy, Measures and Action Plan for the 2023 Regional Transportation Plan (<u>action item, Recommendation to JPACT</u>) Purpose: Request TPAC to recommend that JPACT support moving forward the draft policy, measures, targets and implementation plan for further testing and refinement as part of the 2023 Regional Transportation Plan update.	Kim Ellis, Metro Glen Bolen, ODOT
10:40 a.m.	Regional Transportation Plan (RTP) Call for Projects Policy Framework and Draft Revenue Forecast Purpose: Share the policy framework and draft revenue forecast for the 2023 RTP Call for Projects for TPAC discussion and feedback.	Kim Ellis, Metro Ted Leybold, Metro
11:55 a.m.	Committee comments on creating a safe space at TPAC	Chair Kloster
12:00 p.m.	Adjournment	Chair Kloster

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមទូរសព្ទទូរសារកេរចំពោះ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib www.oregonmetro.gov/civilrights. Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwu ua ntej ntawm lub rooj sib tham.

2022 TPAC Work Program

As of 10/25/2022

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

<p><u>November 4, 2022 9:00 am – noon</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Creating Safe Space at TPAC (Chair Kloster)• Responses from Wufoo feedback from committee members (Chair Kloster)• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 22-5291 <u>Recommendation to JPACT</u> (Lobeck, 15 min)• Metro/ODOT Regional Mobility Policy Update: Draft Policy, Measures and Action Plan for the 2023 RTP <u>Recommendation to JPACT</u> (Kim Ellis, Metro/ Glen Bolen, ODOT; 45 min)• RTP Call for Projects Policy Framework and Draft Revenue Forecast (Kim Ellis/Ted Leybold, 75 min)• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)	<p><u>November 9, 2022 – TPAC Workshop</u> 9:00 am – noon</p> <p>Agenda Items:</p> <ul style="list-style-type: none">• Regional Freight Delay & Commodities Movement Study (Tim Collins, Metro/Chris Lamm, Cambridge Systematics; 90 min)
<p><u>December 2, 2022 9:00 am – noon</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Creating Safe Space at TPAC (Chair Kloster)• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe)• 2022-23 UPWP administrative amendments (Chair Kloster) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 22-**** <u>Recommendation to JPACT</u> (Lobeck, 15 min)• RTP Call for Projects Policy Framework and Draft Revenue Forecast <u>Recommendation to JPACT</u> (Kim Ellis, Metro; 45 min.)• MTIP Formal Amendment I-5 Rose Quarter Discussion (Ken Lobeck, TBD; 30 min)• I-5 Rose Quarter Project Briefing (Megan Channell, ODOT, 30 min)• Cascadia Corridor Ultra High Speed Ground Transportation: Overview and Update (Ally Holmqvist, Metro; Jennifer Sellers, ODOT; Jason Beloso, WSDOT; 45 min)• Climate Smart Strategy JPACT/Council Workshop Recap (Kim Ellis, Metro; 30 min)• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)	<p><u>December 21, 2022 – MTAC/TPAC Workshop</u> 9:00 am – noon</p> <p><u>WORKSHOP MEETING CANCELLED</u></p>

2023 TPAC Work Program

As of 10/25/2022

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

All meetings are scheduled from 9am - noon

<p><u>TPAC meeting January 6, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Committee member updates around the Region (Chair Kloster & all)• Creating Safe Space Protocols & Democratic Rules (Chair Kloster)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min)• I-5 Rose Quarter Project Briefing <u>Recommendation to JPACT</u> (Megan Channell, ODOT; 30 min)• MTIP Formal Amendment 22-XXXX I-5 Rose Quarter Project <u>Recommendation to JPACT</u> (Ken Lobeck, TBD; 30 min)• Earthquake Ready Burnside Bridge Resolution 22-**** <u>Recommended to JPACT</u> (Alex Oreschak; 40 min)• <i>82nd Avenue Project update (Elizabeth Mros-O'Hara, Metro/ City of Portland TBD; 30 min)</i>• Carbon Reduction Program Update (Leybold/Cho/ Ellis, Metro; 60 min)• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)	<p><u>TPAC workshop, January 11, 2023</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none">• High Capacity Transit Strategy Update: Corridor Investment Readiness Tiers (Ally Holmqvist, Metro; 45 min)
<p><u>TPAC meeting, February 3, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none">• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none">• MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min)• Carbon Reduction Program <u>Recommendation to JPACT</u> (Leybold/Cho/Ellis, Metro; 60 min)• <i>Recommended Projects for Implementing the 2021 TSMO Strategy (Caleb Winter, Metro/Kate Freitag, ODOT/A.J. O'Connor, TriMet; 45 min)</i>• Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)	<p><u>MTAC/TPAC joint workshop, February 15, 2023</u></p> <p>Agenda Items:</p>

<p><u>TPAC meeting, March 3, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • UPWP Draft Review (John Mermin, 30 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>TPAC workshop, March 8, 2023</u></p> <p>Agenda Items:</p>
<p><u>TPAC meeting, April 7, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • UPWP Resolution 22-**** <u>Recommendation to JPACT</u> (John Mermin, 20 min) • 2024-2027 MTIP – Performance Evaluation Results and Public Comment (Cho, 30 min) • 2023 RTP Draft System Evaluation (Eliot Rose, 30 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>MTAC/TPAC joint workshop, April 19, 2023</u></p> <p>Agenda Items:</p>
<p><u>TPAC meeting, May 5, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 2024-2027 MTIP – Public Comment Report (Grace Cho) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>TPAC workshop, May 10, 2023</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • High Capacity Transit Strategy Update: Draft Report (Ally Holmqvist, Metro; 30 min)

<p><u>TPAC meeting, June 2, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • 2024-2027 MTIP – Adoption Draft and Public Comment Report (Cho, 30 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>MTAC/TPAC joint workshop, June 21, 2023</u></p> <p>Agenda Items:</p>
<p><u>TPAC meeting, July 7, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • 2024-2027 MTIP – Adoption Draft <u>Recommendation to JPACT</u> (Cho, 30 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>TPAC workshop, July 12, 2023</u></p> <p>Agenda Items:</p>
<p><u>TPAC meeting, August 4, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>MTAC/TPAC joint workshop, August 16, 2023</u></p> <p>Agenda Items:</p>

<p><u>TPAC meeting, September 1, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>TPAC workshop, September 13, 2023</u></p> <p>Agenda Items:</p>
<p><u>TPAC meeting, October 6, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	
<p><u>TPAC meeting, November 3, 2023</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 22-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min) 	<p><u>TPAC workshop, November 8, 2023</u></p> <p>Agenda Items:</p>

TPAC meeting, December 1, 2023

Comments from the Chair:

- Committee member updates around the Region (Chair Kloster & all)
- Monthly MTIP Amendments Update (Ken Lobeck)
- Fatal crashes update (Lake McTighe)

Agenda Items:

- **MTIP Formal Amendment 22-XXXX**
Recommendation to JPACT (Lobeck, 10 min)
- Committee Wufoo reports on Creating a Safe Space at TPAC (Chair Kloster; 5 min)

Parking Lot: Future Topics/Periodic Updates

- Columbia Connects Project
- Best Practices and Data to Support Natural Resources Protection
- Regional Emergency Transportation Routes Update Phase 2 (John Mermin, Metro & Carol Chang, RDPO)
- Cost Increase & Inflation Impacts on Projects
- TV Highway updates
- 82nd Avenue updates
- TSMO updates
- DLCD Climate Friendly & Equitable Communities Rulemaking (Kim Ellis, Metro)
- Ride Connection Program Report (Julie Wilcke)
- Get There Oregon Program Update (Marne Duke)
- RTO Updates (Dan Kaempff)
- Update on SW Corridor Transit
- UGB updates
- TOD updates
- 2040 Planning Grants updates
- Transit Oriented Development (Andrea Pastor)
- High Speed Rails updates (Ally Holmqvist)

Agenda and schedule information E-mail: marie.miller@oregonmetro.gov or call 503-797-1766.

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Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: October 26, 2022
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments (during October 2022)

BACKGROUND

Formal Amendments Approval Process:

Formal/Full MTIP Amendments require approvals from Metro JPACT& Council, ODOT-Salem, and final approval from FHWA/FTA before they can be added to the MTIP and STIP. After Metro Council approves the amendment bundle, final approval from FHWA and/or FTA can take 30 days or more from the Council approval date. This is due to the required review steps ODOT and FHWA/FTA must complete prior to the final approval for the amendment.

Administrative Modifications Approval Process:

Projects requiring only small administrative changes as approved by FHWA and FTA are completed via Administrative Modification bundles. Metro normally accomplishes one "Admin Mod" bundle per month. The approval process is far less complicated for Admin Mods. The list of allowable administrative changes are already approved by FHWA/FTA and are cited in the Approved Amendment Matrix. As long as the administrative changes fall within the approved categories and parameters, Metro has approval authority to make the change and provide the updated project in the MTIP immediately. Approval for inclusion into the STIP requires approval from the ODOT. Final approval into the STIP usually takes between 2-4 weeks to occur depending on the number of submitted admin mods in the approval queue.

MTIP Formal Amendments

October FFY 2023 Formal MTIP Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: OC23-02-OCT

Total Number of Projects: 7

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # TDM-2026 MTIP ID 71262	Metro	Portland Transportation Demand Management Activities	Through the RTO program Portland will conduct outreach and education to connect residents on available bike/ped/transit transportation alternatives and options to help reduce vehicle trips (2022-24 RFFA Award from Key 22134, 22135 and 22138)	<u>COMBINE PROJECT:</u> The Formal Amendment combines the project and funding into Key 21593 to be implemented together. See next project
(#2) ODOT Key # 21593 MTIP ID 71067	Metro	Transportation Demand Management (Metro) Portland Transportation Demand Management Activities	Through the Metro RTO program, Portland will conduct outreach and education to connect residents on available bike/ped/transit transportation alternatives and options (2019-21 RFFA Award) Keys 20812/20813/20814 Through the Metro RTO program, Portland will conduct outreach and education to connect residents on available bike/ped/transit transportation alternatives (2019-21 RFFA Keys 20812, 20813, & 20814 plus 2022-24 awards in Keys 22134, 22135, 22138)	<u>COMBINE PROJECT:</u> The Formal Amendment combines Key TDM-2026 into Key 21593 to be obligated and implemented together
(#3) ODOT Key # 22435 MTIP ID 71257	ODOT	OR47/OR8/US30 Curb Ramps	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along OR47, OR8, and US30 to reduce mobility barriers and make state highways more accessible to disabled persons	<u>COST INCREASE:</u> Add OTC approved funding to address a construction phase funding shortfall due to inflationary cost impacts.

(#4) ODOT Key # 22432 MTIP ID: 71248	ODOT	US30BY Curb Ramps	At various location on US30 Bypass in the NE Portland area, construct ADA compliant curbs and ramps.	<u>COST INCREASE:</u> Add OTC approved funding to address a construction phase funding shortfall due to inflationary cost impacts.
(#5) ODOT Key # 21614 MTIP ID: 71168	ODOT	US26: SE 8th Ave - SE 87th Ave US26: SE 8th Ave - SE 58th Ave Sec.	Update signals and improve intersection warning signage to improve safety on this section of highway.	<u>SCOPE & COST CHANGE:</u> Reduce project limits and adjust approved ARTS program funding for the project
(#6) ODOT Key # 21638 MTIP ID: 71191	ODOT	OR213: I-205 - OR211 OR213: Glen Oak Rd - S Barnards Rd Sec.	Improvements including signals, reflectorized back plates, advance intersection warning signs, flashing lights, radar detection units and stop bars to increase safety on this section of highway.	<u>SCOPE & COST CHANGE:</u> Reduce project limits, adjust approved ARTS program funding, and correct the approved fund code for the project
(#7) ODOT Key # New MTIP ID: TBD	TriMet	TriMet Beaverton Transit Center Renovation (2022 5339b)	Reconfigure, update, and renovate depreciated and undersized bus layover facilities at TriMet's Beaverton Transit Center to provide a safer pedestrian environment, improved layover pull-in/ pull-out procedures, and added space for service operations	<u>ADD NEW PROJECT:</u> Add new FTA 5339b discretionary award to the MTIP supporting the Beaverton Transit Center renovation.

Approval Status for the October FFY 2023 Formal MTIP Amendment, OC23-02-OCT:

- TPAC approval date: October 7, 2022
- JPACT approval date: October 20, 2022
- Metro Council approval date: Schedule for Thursday, November 10, 2022

Administrative Modifications**October (AM23-01-OCT1)**

Key	Lead Agency	Name	Change
21178	ODOT	US26 (Powell Blvd): SE 99th - East City Limits	<u>COST INCREASE:</u> The admin mod adds \$15 million of IIJA Great Streets funding to the project to address construction phase funding needs.

October (AM23-02-OCT2)

Key	Lead Agency	Name	Change
19357	Tualatin Hill PRD	Beaverton Creek Trail: Westside Trail - SW Hocken Ave	<u>COST INCREASE:</u> Additional funds are committed to the PE phase to address a phase funding shortfall.
20329	West Linn	OR43: Marylhurst Dr - Hidden Springs Rd (West Linn)	<u>PHASE SLIP:</u> Slip construction phase from FFY 2023 to FFY 2024. No scope or cost change is involved.

Meeting minutes



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: **Transportation Policy Alternatives Committee (TPAC)**

Date/time: Friday, October 7, 2022 | 9:00 a.m. to 12:00 p.m.

Place: Virtual online meeting via Web/Conference call (Zoom)

Members Attending

Ted Leybold, Vice Chair
Karen Buehrig
Allison Boyd
Chris Deffebach
Lynda David
Eric Hesse
Jaimie Lorenzini
Jay Higgins
Tara O'Brien
Chris Ford
Laurie Lebowsky-Young
Lewis Lem
Katherine Kelly

Alternates Attending

Jamie Stasny
Peter Hurley
Dayna Webb
Mike McCarthy
Neelam Dorman
Glen Bolen

Members Excused

Don Odermott
Karen Williams
Idris Ibrahim
Jasmine Harris
Rob Klug
Shawn M. Donaghy
Jeremy Borrego
Rich Doenges

Guests Attending

Bryan Graveline
Chris Smith
Cody Field

Affiliate

Metro
Clackamas County
Multnomah County
Washington County
SW Washington Regional Transportation Council
City of Portland
City of Happy Valley and Cities of Clackamas County
City of Gresham and Cities of Multnomah County
TriMet
Oregon Department of Transportation
Washington State Department of Transportation
Port of Portland
City of Vancouver

Affiliate

Clackamas County
City of Portland
City of Oregon City and Cities of Clackamas County
City of Tualatin and Cities of Washington County
Oregon Department of Transportation
Oregon Department of Transportation

Affiliate

City of Hillsboro & Cities of Washington County
Oregon Department of Environmental Quality
Community Member
Federal Highway Administration
Clark County
C-Tran System
Federal Transit Administration
Washington Department of Ecology

Affiliate

City of Tualatin

Guests attending, (continued)

Cody Meyer	DLCD
Francesca Jones	Portland Bureau of Transportation
Jessica Pelz	Washington County
Lucia Ramirez	Oregon Department of Transportation
Matchu Williams	
Michael Weston	City of King City
Nick Fortey	FTA
Sara Wright	Oregon Environmental Council
Steve Kelley	Washington County
Steve Koper	City of Tualatin
Susie Wright	Kittelson & Associates
Theresa Conley	Oregon Department of Transportation
Will Farley	City of Lake Oswego

Metro Staff Attending

Ally Holmqvist, Clint Chiavarini, Connor Ayers, Eliot Rose, Grace Cho, Grace Stainback, Jessica Martin, John Mermin, Ken Lobeck, Kim Ellis, Lake McTighe, Marie Miller, Matthew Flodin, Molly Cooney-Mesker, Noel Mickelberry, Shannon Stock, Thaya Patton

Call to Order, Declaration of a Quorum and Introductions

Vice Chair Leybold called the meeting to order at 9:00 a.m. Introductions were made. A quorum of members present was declared. Reminders where Zoom features were found online was reviewed. Input was encouraged for providing safe space for everyone at the meeting via the link in chat. Comments would be shared at the end of the meeting. VC Leybold noted the responses from previous Wufoo feedback scheduled to be discussed at this meeting by Chair Kloser would be re-scheduled in November.

Comments from the Chair and Committee Members

- **Updates from committee members and around the Region** – none received
- **Monthly MTIP Amendments Update** (Ken Lobeck) VC Leybold referred to the memo in the packet on the monthly submitted MTIP formal amendments submitted during September 2022. Questions on the monthly MTIP amendment projects can be directed to Ken Lobeck.
- **Fatal crashes update** (Lake McTighe) It was noted there was no memo in the meeting packet this month. Ms. McTighe reported that in the three counties 19 people have died in traffic crashes since the last report to the committee; 8 in Multnomah County, 7 in Clackamas and 4 in Washington County. This equates to 7 walking, 7 driving, 4 riding a motorcycle and 1 person bicycling. At least 92 people have been killed in traffic crashes this year in the three counties. It was announced that eight grants were submitted for Federal Safe Streets for All safety grant initiatives showing strong support in the region.
- **2024-2026 Regional Travel Options grant program and timeline** (Grace Stainback) The next 3-year grant cycle was announced to kick off in January 2023. The RTO program funds and supports transportation demand management strategies to increase use of travel options, reduce pollution, and improve mobility. Travel options include anything besides driving alone – carpooling, vanpooling, riding transit, bicycling, walking, and telecommuting. This 2024-26 cycle

will total roughly \$9.14 million through RFFA funds over the 3-year cycle. An upcoming information session is planned Nov. 9. Partner agencies and communities are encouraged to attend to learn more about the application process.

Public Communications on Agenda Items – none received

Consideration of TPAC Minutes from September 2, 2022

MOTION: To approve minutes from September 2, 2022.

Moved: Eric Hesse

Seconded: Jay Higgins

ACTION: Motion passed with two abstentions; Tara O'Brien and Allison Boyd.

Metropolitan Transportation Improvement Program (MTIP) Formal Amendment 22-5289 (Ken Lobeck, Metro) The October FFY 2023 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment 22-5289 regular bundle was presented, that continues the effort to add required new projects, position projects for fall obligations, and complete necessary updates enabling the next federal approval step to occur. The bundle contains a total of seven project amendments. They include:

- Combining two Transportation Demand Management outreach projects (Keys TDM-2026 and 21593) for Portland. This action will streamline the project's obligation through FTA's flex transfer and TrAMS grant approval process enabling the final obligation and expenditure process for Metro and Portland to move forward faster.
- Adjusting Keys 22435 and 22432 which are ODOT ADA curb and ramp improvement projects that have a significant construction phase funding shortfall. Through OTC action, the amendment is adding the required extra funds.
- Amending Keys 21614 and 21638 which include scope changes plus adjusted milepost limits and cost adjustments.
- Adding TriMet's new FTA Section 5339b discretionary grant to renovate the Beaverton Transit Center.

MOTION: To provide JPACT an approval recommendation of Resolution 22-5289 consisting of additions and changes or new projects which are required to be added to the MTIP enabling federal reviews and fund obligations to then occur in fall of 2022.

Moved: Chris Deffebach

Seconded: Eric Hesse

ACTION: Motion passed unanimously.

Regional Mobility Policy Update: Draft Policy and Action Plan (Kim Ellis, Metro/Glen Bolen, ODOT/Susie Wright, Kittelson & Associates) The presentation began with a reminder of the project purpose to update the mobility policy and how we define and measure mobility for the Portland area transportation system, and to prepare for recommend amendments to the RTP and Oregon Highway Plan Policy 1F for the Portland area. Discussion planned was to seek input on the revised draft mobility policy (reliability measure and targets, implementation plan, and overall policy and measures), and prepare for recommendation to JPACT on Nov. 4 TPAC meeting.

Ms. Wright noted major changes since mid-August to address feedback. These included added travel speed-based reliability targets for the region's throughways based on additional analysis and discussions with ODOT and Metro staff, further clarified the process for applying the measures in system planning and plan amendments (VMT/capita the primary measure, define the system that

achieves the targets through planning, informed by the reliability targets, local agencies and Metro tasked with determining the complete system through transportation system planning processes balancing multiple policies in addition to the RMP, and updated actions and flowcharts showing the system planning and plan amendment processes).

Additional changes have included adding a 6th policy about using the mobility performance measures and targets, adding information on TSMO and TDM system completeness that reflects ongoing Metro work through the Regional TSMO and Regional Travel Options programs, expanding the draft implementation action plan to include more specificity on future actions needed to implement the policy, identified lead agency and timeline for each action, and clarification that further testing and refinement will occur through the 2023 RTP process.

The added new sixth policy added reads “Use mobility performance measures and targets for system planning and evaluating the impacts of plan amendments including Vehicle Miles Travelled (VMT) per capita for homebased trips and VMT/employee for commute trips to/from work, hours of congestion on the throughways, and system completeness.”

Information on Hours of Congestion (based on average travel speed) was presented. INRIX data found the speed data to be useful in identifying location and duration of reliability issues. 30-35 mph is a clear threshold where conditions tend to be better or worse rather quickly on Interstates and unsignalized throughways. Travel Demand Models showed clear equivalencies in segment Hours of Congestion based on speed versus based on v/c, locations of congestion also very similar between the two thresholds at the equivalent segment Hours of Congestion on Interstates and unsignalized Throughways, and more research needed on thresholds for signalized Throughways.

Draft planning actions for average travel speed targets shall be used to assess performance of throughways within the system planning study area for safe, efficient, and reliable speeds.

- Targets will include a **target minimum average travel speed that shall be maintained for a specific number of hours per day**, recognizing that the target is not likely to be met during a number of peak hours.
- These targets shall inform identification of transportation needs and consideration of system and demand management strategies and other strategies but **shall not be used as standards at the expense of nonmotorized modes and achieving system completeness for other modes** consistent with regional modal or design classifications or achieving the VMT/capita target for the region or jurisdiction.
- Analysis segmentation of facilities within the study area will be determined based on the analysis software or modeling tool utilized.
- Projections of VMT/capita must incorporate the best available science on latent and induced travel of additional roadway capacity.

Comments from the committee:

- Eric Hesse appreciated the additional information shared since the last meeting. This was important to know as we plan the implementation of the policy changes. It was noted the comparisons with v/c to speed with thresholds. There is a significant policy shift to address congestion with need for further definition for system planning. It was suggested to look at speed and understand how segments are defined and occurring and what this means regarding overall travel periods. Maps are helpful, but it was suggested to see more comparisons with hours of congestion to linked miles and locations. The travel models being 1-2 years out should be sooner for better forecasting.

Ms. Ellis appreciated the comments and acknowledged more work is needed to be done. It was agreed travel modeling needs to be done sooner. Ms. Wright added that the intent on draft targets of 35-40mph was to think about portions of the road segments with times of day that will have impact on reducing congestion. Further research on linked segments is planned.

- Mike McCarthy noted the balance of allowing our transportation travels to match our climate strategy goals in the place we want to see them. The public wants to see the freeways moving and improve the system. It was felt the 35mph threshold is a good speed. It was suggested that diversion of some sort measure be used to evaluate freeway function but caution this with safety on arterials. In terms of number of hours, less hours than 4 was suggested, with 2 hours rush hour time.

Ms. Ellis noted the number of hours in the current policy represents 2 hours rush time and 2 hours beyond that to measure peak time. The public doesn't expect to have free flow traffic during peak hours, but the policy is attempting to address congestion with several variables.

- Karen Buehrig noted it would be helpful to have time to talk through how this would impact certain areas so TPAC can better explain this to others. It was noted the importance of freeways that are signalized and that more research it to be done. There was concern about totally moving forward until we understand what the implications will be.
- Chris Deffebach noted the challenges of identifying what this means to us in terms of implications in diversion from the existing system and targets planned to keep congestion down while moving traffic flowing. Ms. Ellis noted this is just one measure. The goal is providing options for other modes of travel, with a comprehensive approach to reducing congestion on freeways while offering smart strategies for safe arterial traffic. Glen Bolen added the maps showing the needs from the public for regional mobility differ from possible solutions. A range of project can be funded, but having the entire system addressed is difficult.

Ms. Wright continued the presentation describing the system planning process and plan amendment process utilizing the mobility policy measures. Ms. Ellis outlined the Implementation Action Plan over the next several years. In **2023 actions** include:

- Test and refine the draft Regional Mobility Policy through 2023 Regional Transportation Plan update
- Establish baseline VMT/capita for home-based trips and VMT/employee for commute trips to/from work for TBD geographies (e.g., by 2040 type, by subarea of the region) in the 2023 RTP
- Report draft mobility performance in needs analysis and system analysis
- Further define and map TSMO "Key Corridors" for inclusion in 2023 RTP
- Develop implementation guidance for TDM/TSMO to support the Regional Mobility Policy
- Further operationalize policy in RTP congestion management process and corridor refinement planning policies
- Adopt the final Regional Mobility Policy in the 2023 Regional Transportation Plan
- Update Multimodal System Inventories (ODOT)

2024 Actions:

- Request consideration of the updated Mobility Policy for the Portland metropolitan area in the updated Oregon Highway Plan
- Amend Regional Transportation Functional Plan, Title 3, Transportation Project Development, to reflect the Regional Mobility Policy
- Develop a VMT-based spreadsheet tool to support evaluation of plan amendments
- Develop hours of congestion and travel speed forecasting guidance
- Update Regional Transportation Functional Plan to encompass additional relevant TSMO and TDM system planning guidance

- Update ODOT's Analysis Procedures Manual, development review procedures, and TSP guidelines to reference the updated Regional Mobility Policy
- Determine remaining needs for updates to the Oregon Highway Design Manual to acknowledge the adopted Portland Metro area mobility policy
- Develop model codes and guidance to support local implementation

2025 and beyond Actions:

- Implement Regional Mobility Policy through local TSP and comprehensive plan updates
- Incorporate regional mobility policy implementation guidance for TDM into Metro's Regional Travel Options (RTO) Strategy Update
- Update Transportation Analysis Zones (TAZs) to support local and regional planning needs
- Expand the region's Dynamic Traffic Assignment capabilities
- State and Regional Modeling Collaboration

Comments from the committee:

- Karen Buehrig commented on the implementation plan. Because there are so many far out dates for the implementation plan makes it challenging to reflect on the outcomes with the complexities. Noting the crucial element of updates to TSPs, to be able to have project solutions that reflect this mobility policy in the next RTP adoption is difficult. The importance of having the resources available in the near term so that local jurisdictions can update their TSPs in a timely way and input their projects into the RTP, time is needed for planning and engagement for projects.

Seeing VMT work scheduled to be done in 25-26 years makes it a concern about the abilities to identify and implement things that will be adopted in 2024. All the tools that are needed to implement the plan should be available at the time the plan is adopted. Timing is important. Further discussion was held on timelines with plans and how the needs assessment and feedback on implementations can be absorbed before the draft recommendation to JPACT. Ms. Ellis agreed to work on meeting arrangements and schedules to address these requests.

- Chris Deffebach noted the draft recommendation proposed to JPACT and Metro Council with the correct approach but knowing more work needed to be done before the plan can be implemented. It would be beneficial to have a clarified timeline with system completeness including projects for the RTP. Known funding could be included with draft funding added.

2023 Regional Transportation Plan (RTP) Schedule and Process Update (Kim Ellis) Ms. Ellis provided the committee a brief update on progress and next steps in the development of the 2023 update to the Regional Transportation Plan (RTP). The memo and attachment in the meeting packet were noted, Project Timeline and Schedule of Engagement Activities. It was noted feedback from the committee and from JPACTY on the vision and goals have strong support, with more people focus suggested with the refinements. Several RTP workshops were highlighted. It was noted there would be an online RTP Hub Training for agency staff responsible for submitting new and updated project information as part of the Call for Projects in January 2023. These training sessions will take place Dec. 6 & 7.

Comments from the committee:

- Karen Buehrig asked what the acronym REMTEC stood for. Ms. Ellis noted this was the technical committee for Regional Emergency Management Transportation Routes that is tracking progress of the RTP update.

- Tara O'Brien asked, that in terms of developing the costs for all the projects, is this a post draft revenue forecast, but does need to be included in at least planning level costs in the Call for Projects? Does this fit within the costs constrained or the follow up to Call for Projects? Ms. Ellis noted as part of the Call for Projects we expect these projects are priorities in the RTP and ask agencies to update their cost plans. The 2023 dollar estimates can be prepared with cost of increase adjustments made for inflation changes. Agencies should look at these estimates carefully. It was confirmed that when submitting projects we are starting from the initial 2023 cost estimates with correction to prior projects and additions noted.

Ms. O'Brien noted from her understanding some changes to the goals in terms of what needs to be entered, but in terms of the bucket RTP investment categories as we are starting to identify agency buckets, do we know exactly what these are yet or still in development in terms of different types of projects? Ms. McTighe noted there are still some refinements to the buckets with the categories to help add clarity. Metro is working on preparing this information with more shared at the November meeting with Call for Projects. Metro is developing an in-depth guide for updating projects.

Ms. O'Brien noted the new letter of support from governing bodies being circulated currently. It was ask if it needed to be an endorsement from the detailed project list. In order to have a full endorsement TriMet needs to have the costs known before the Call for Projects opens. What is required for the letter and what flexibility might there be? Ms. Ellis noted it's important for your policy makers to know what you are submitting to the RTP. Metro will help work on specifics with agencies.

- Karen Buehrig noted that Clackamas County is sometimes viewed as one organization, but also with different jurisdictions. Across time we've had different responsibilities with coordination. Do the counties or any of the agencies/organizations have the specific responsibility above just their own jurisdiction for parts of this process? Ms. Ellis noted it's up to the counties to decide how the responsibilities should be identified. Each should be staying within the financially restrained targets that each jurisdiction in Call for Projects will be following. It was noted that ODOT, TriMet and SMART are asked to work with coordinating committees as part of the submission of projects.
- Chris Deffebach noted that Washington County coordinated with the cities in the county so it's in the budget and understood with the cities. It was noted the timelines with the RTP schedule was tight. Regarding the letter of support it was confirmed that each city with projects should submit their letter of support, in addition to the County letter of support.
- Chris Ford asked for clarification with the letter of support. Ms. Ellis noted the intent is for local elected and agency leaders to know what projects are being submitted in the RTP with transparency and agreement. VC Leybold added this helps correct past cycles with RTP/MTIP coordination when elected were not aware of projects being submitted.
- Eric Hesse appreciated the information with Councils and elected providing their letter of support, but in an election year with new members being seated it makes it challenging with the tight timeline. Time of prioritizing projects from the beginning of the process to the final draft to Call for Projects is challenging, attempting to have agreement on the project list in this timeframe.
- Jaimie Lorenzini noted that some grants with the RFFA cycle asked questions on how agencies are responsible for parts of the application. It was asked if the letter of support for our RTP project lists would satisfy the grant requirements. Could one endorsement submission cover

the projects? Ms. Ellis noted each grant has its own requirements and did not know that one endorsement would be allowed for each submission requirement.

2023 Regional Transportation Plan (RTP) Revenue Forecast Next Steps (Ted Leybold, Metro) A brief update on progress and next steps in the development of the revenue forecast for the 2023 update to the Regional Transportation Plan was provided. The forecast will include revenues raised at the federal, state, regional and local levels for transportation projects and programs to be included or accounted for in the 2023 RTP.

There is an open-format workshop prior to the upcoming TPAC meeting on October 4 for local agency staff developing the forecast of revenues generated by their agencies for inclusion in the RTP forecast. The purpose of the workshop is to provide an opportunity to coordinate on the development of the forecast of local agency revenues and answer any questions about potential methods and timelines. Separate coordination meetings are being scheduled with transit agency and ODOT staff regarding revenues administered by those agencies.

Regional Transportation Plan (RTP) Equitable Funding Research Next Steps (Lake McTighe, Metro) An update on anticipated next steps to finalize and share the Equitable Transportation Funding Research Report and integrate findings from the research into the 2023 Regional Transportation Plan (RTP) Financial Plan was provided. A draft of the research report was presented on and discussed with members of TPAC at the September 14, TPAC workshop. TPAC provided initial comments at the workshop. Staff from TriMet and Clackamas, Multnomah and Washington counties followed up with written comments. Metro staff and Nelson Nygaard are reviewing the comments received and determining how to address them in the report. Metro staff will offer to meet with the agencies that submitted comments to discuss how they will be addressed.

Next steps planned:

October - Address and incorporate comments in the Equitable Transportation Funding Research Report. Meetings with agency staff to discuss comments. Make findings available to community leaders.

November – Share final report and present findings from report at Metro Council work session, with invitation to JPACT and TPAC members to attend (November 15 requested, TBA).

Early 2023- Develop draft of RTP Financial Plan of Chapter 5, incorporating findings from report.

Comments from the committee:

- Tara O'Brien would like to know what the final recommendations are especially in terms of revenue forecasts and implications with programs planned, since this is not going back to JPACT.
- Karen Buehrig noted mention of input into Chapter 5 and potentially Chapter 8. Will this influence the revenue forecast? VC Leybold said no, the revenue forecasts are based on current sources with no speculative ones part of the realistic forecast.
- Chris Deffebach asked if we still have a strategic budget where we put our longer-term projects in. Will there be more thought later on financial constrained projects from the strategic budget? Will known future revenue forecast include tolls by the December 7 deadline? VC Leybold noted future revenue discussions are happening now with ODOT. Accepted revenues will be in the financial constrained. Ms. Ellis noted the modeling of the strategic system is not planned until the 2023 RTP is adopted.

JPACT/Metro Council Safe and Healthy Urban Arterials Workshop Recap (John Mermin & Lake McTighe, Metro) A preliminary summary of policy feedback received at the September 29 JPACT – Metro Council Workshop on Creating Safe and Healthy Urban Arterials was provided. Participants shared themes from discussions at the workshop:

- Agreement on the frame of the issue, that these corridors are very important and there is a need to improve safety, equity and improve transit along them
- Listening to community members, especially those that live and work along the corridors, is important.
- The corridors should not be thought of as a burden, they are important resources for communities.
- Funding investments in these corridors is a priority, including funding completion of corridor plans.
- Acknowledged the tension between comprehensive vision planning and chasing the hotspots with limited resources. We have good visions but live in a limited resource environment and it takes time to deliver projects.
- The network on the map is a good starting point, (RTP major arterials) but there are other streets that have a similar traffic burden, safety and equity issues that could also be considered.
- There's a need for more resources and capacity at smaller municipalities to address issues along urban arterials in their communities.
- Land use plans and visions should guide transportation decisions on these corridors.
- It is important to have an openness to innovation and new ideas that can help accelerate progress and be cost-effective.
- Allowing flexibility in design to respond to local context and balance needs to move freight and longer distance trips with the needs of people living and working along the corridors.
- Continuing to coordinate local and regional plans and priorities.

Metro staff is developing an approach to the 2023 RTP Call for Projects which will reflect and be consistent with the policy input and direction provided by the Metro Council, policy and technical advisory committees and public engagement over the past year and half, as described in the 2023 RTP Work Plan, including the policy feedback provided at the September 29 workshop. The draft approach to the Call for Projects will be discussed with TPAC at the November 4 TPAC meeting.

Comments from the committee:

- Mike McCarthy asked how opposite feedback is being handled at these meetings. Mr. Mermin noted they are attempting to balance high-level feedback as best as possible.
- Eric Hesse noted the link to Call for Projects in the presentation and thinking of this meeting discussions. The coordination around various priorities can provide opportunities for facilities and programs to define with mutual investments for our region. It was noted the application open for TPAC community members with engagement from their visions and input starting in the new year. VC Leybold added an update on this recruitment can be presented by Chair Kloster at the Nov. meeting.

Committee comments on creating a safe space at TPAC (VC Leybold) – None received

Adjournment

There being no further business, meeting was adjourned by VC Leybold at 12:00 p.m.

Respectfully submitted,

Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC meeting, October 7, 2022

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1	Agenda	10/7/2022	10/7/2022 TPAC Agenda	100722T-01
2	TPAC Work Program	9/30/2022	TPAC Work Program as of 9/30/2022	100722T-02
3	Memo	9/28/2022	TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments (during September 2022)	100722T-03
4	Draft minutes	9/2/2022	Draft minutes from September 2, 2022 TPAC meeting	100722T-04
5	Resolution 22-5289	N/A	Resolution 22-5289 FOR THE PURPOSE OF ADDING NEW OR AMENDING EXISTING PROJECTS IN THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) TO MEET REQUIRED FALL OBLIGATION TARGETS OR FEDERAL APPROVAL STEPS (OC23-02-OCT)	100722T-05
6	Exhibit A to Resolution 22-5289	N/A	Exhibit A to Resolution 22-5289	100722T-06
7	Staff Report	9/28/2022	TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: October FFY 2023 MTIP Formal Amendment & Resolution 22-5289 Approval Request	100722T-07
8	Attachment 1	N/A	Attachment 1: OTC ADA program update	100722T-08
9	Memo	9/30/2022	TO: TPAC and interested parties From: Kim Ellis, Metro Project Manager Lidwien Rahman, ODOT Project Manager Glen Bolen, ODOT Region 1 RE: Regional Mobility Policy Update: Draft Policy, Measures and Action Plan for the 2023 Regional Transportation Plan	100722T-09
10	Attachment 1	9/30/2022	Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan	100722T-10
11	Attachment 2	August 2022	REGIONAL MOBILITY POLICY UPDATE AUGUST 2022 MTAC/TPAC WORKSHOP SUMMARY	100722T-11
12	Attachment 3	9/29/2022	Regional Mobility Policy Hours of Congestion Analysis	100722T-12
13	Attachment 4	N/A	Draft 2023 RTP Regional Mobility Policy (RMP) Overview	100722T-13

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
14	Attachment 5	N/A	RMP Where are we Headed?	100722T-14
15	Memo	9/30/2022	TO: TPAC and interested parties From: Kim Ellis, AICP, RTP Project Manager RE: 2023 RTP Schedule and Process Update	100722T-15
16	Memo	9/30/2022	TO: TPAC and interested parties From: Ted Leybold & Ken Lobeck, Metro RE: RTP Revenue Forecast Update	100722T-16
17	Memo	9/30/2022	TO: TPAC and interested parties From: Lake McTighe, Principal Planner RE: Next steps to finalize and share the Equitable Transportation Funding Research Report	100722T-17
18	Handout	9/26/2022	TriMet comments Metro Equitable Revenue Report	100722T-18
19	Handout	9/19/2022	Clackamas County comments Equitable Transportation Funding Research	100722T-19
20	Handout	9/27/2022	Multnomah County comments Equitable Transportation Funding Research Report	100722T-20
21	Handout	9/27/2022	Washington County Comments on the Equitable Transportation Funding Report	100722T-21
22	Memo	9/30/2022	TO: TPAC and interested parties From: John Mermin & Lake McTighe, Metro RE: 2023 Regional Transportation Plan (RTP) – Preliminary summary of 9/29 JPACT-Metro Council Workshop on Creating Safe and Healthy Urban Arterials	100722T-22
23	Slide	10/7/2022	Monthly fatal traffic crash report for Clackamas, Multnomah and Washington counties	100722T-23
24	Presentation	10/7/2022	October FFY 2023 Formal MTIP Amendment Resolution 22-5289	100722T-24
25	Presentation	10/7/2022	Regional mobility policy update	100722T-25
26	Presentation	10/7/2022	Preliminary summary of 9/29 JPACT-Metro Council RTP workshop on Creating Safe and Healthy Urban Arterials	100722T-26

BEFORE THE METRO COUNCIL

**FOR THE PURPOSE OF ADDING THREE NEW
AND AMENDING THREE EXISTING PROJECTS
IN THE 2021-26 METROPOLITAN
TRANSPORTATION IMPROVEMENT
PROGRAM TO MEET REQUIRED FEDERAL
HIGHWAYS ADMINISTRATION OBLIGATION
OR DELIVERY APPROVAL STEPS**

) RESOLUTION NO. 22-5291

) Introduced by: Chief Operating Officer
) Marissa Madrigal in concurrence with
) Council President Lynn Peterson
)

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation-related funding; and

WHEREAS, in July 2020, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved Resolution No. 20-5110 to adopt the 2021-24 MTIP; and

WHEREAS, pursuant to the U.S. Department of Transportation's MTIP amendment submission rules, JPACT and the Metro Council must approve any subsequent amendments to the MTIP to add new projects or substantially modify existing projects; and

WHEREAS, the approval of the Oregon Department of Transportation's (ODOT) National Electric Vehicle Infrastructure (NEVI) plan will result in a \$52 million NEVI funding award over a five-year period that must be deployed on Oregon's eleven EV Alternative Fuel Corridors; and

WHEREAS, the NEVI funding allows ODOT to now move forward with the MTIP and STIP programming and deployment of fast charging stations within the I-205 and I-84 corridors for electric vehicle drivers; and

WHEREAS, ODOT is moving forward to add their new American with Disabilities Act (ADA) Curb and Ramps design project to develop implementation projects for 2025 and 2026 to achieve ODOT's goal of providing better, and more equitable pedestrian access; and

WHEREAS, ODOT is addressing a funding shortfall for their OR141 ADA improvement project committing \$2,855,981 of Infrastructure Investment and Job Act (IIJA) funding to ensure the project continues to move forward; and

WHEREAS, ODOT is completing a scope change to their Willamette River Stormwater Source Control Improvement project to by adding \$7,562,660 of IIJA funding for design and right-of way needs allowing the number of improvement site locations to increase to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas; and

WHEREAS, Metro Parks and Portland Parks are committing over \$5 million of their local funds to address a funding shortfall for the Willamette Greenway Trail-Columbia Blvd Bridge project ensuring required design activities can continue; and

WHEREAS, all projects included in the November 2022 Formal MTIP Amendment required Oregon Transportation Commission approval which occurred during their recent September and November 2022 meetings; and

WHEREAS, Metro staff reviewed all projects for consistency with the RTP, including fiscal constraint verification in the long-range plan, possible air quality impacts assessment, and for consistency with regional approved goals and strategies; and

WHEREAS, Metro staff reviewed and confirmed the MTIP's financial constraint finding is maintained with this amendment; and

WHEREAS, on November 4, 2022, Metro's Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on November 17, 2022, JPACT recommended that the Metro Council approve this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts JPACT's recommendation approves this resolution.

ADOPTED by the Metro Council this ____ day of _____ 2022.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

2021-2026 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 22-5291

November FFY 2023 Formal Transition Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: NV23-03-NOV

Total Number of Projects: 6

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # 22738 MTIP ID NEW - TBD	ODOT	I-205: From I-5 to the Abernethy Bridge	Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations along I-205 from I-5 to the Abernathy Bridge, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon	<u>ADD NEW PROJECT:</u> Add the new OTC approved National Electric Vehicle Infrastructure (NEVI) funded project from the Infrastructure Investment and Jobs Act (IIJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure.
(#2) ODOT Key # 21740 MTIP ID NEW - TBD	ODOT	I-84: From I-5 to the Idaho Border	Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations every 50 miles along US 97 from I-5 to the Idaho border, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon	<u>ADD NEW PROJECT:</u> Add the new OTC approved National Electric Vehicle Infrastructure (NEVI) funded project from the Infrastructure Investment and Jobs Act (IIJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure.
(#3) ODOT Key # 22978 MTIP ID NEW - TBD	ODOT	Portland Metro Area 2024-2027 ADA Curb Ramp Design, Phase 1	Design for future construction of curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.	<u>ADD NEW PROJECT:</u> The formal amendment adds ODOT's new ADA Design project covering planned ADA cur and ramp improvements during FFY 2024-2027

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#4) ODOT Key # 22552 MTIP ID 71265	ODOT	Willamette River: Stormwater Source Control Improvements	Complete the design and ROW actions of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas	<u>SCOPE CHANGE:</u> The formal amendment provides approved funding for the 30 added site locations along US30 that will be included now in the project. Approved funding is from the Bridge program.
(#5) ODOT Key # 22431 MTIP ID 71247	ODOT	OR141/OR217 Curb Ramps	At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.	<u>COST INCREASE:</u> The formal amendment addresses a construction phase funding shortfall by adding OTC approved IIJA funds.
(#6) ODOT Key # 18832 MTIP ID 70774	Metro (Metro Parks) Portland (Portland Parks)	Willamette Greenway Trail: Columbia Blvd Bridge	Construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.	<u>COST INCREASE:</u> The formal amendment adds funding to address significant phase funding shortfalls to PE, UR, and Construction

2021-2027 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The new project is being added to the 2021-26 MTIP project. OTC approval for the funding was required and occurred during their 9/13/2022 meeting.



Metro 2021-26 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Update Entry
ADD NEW PROJECT
Add the new **Electric Charging**
Stations project to the MTIP

Lead Agency: ODOT		Project Type: Highway		ODOT Key: 22738
Project Name: I-205: From I-5 to the Abernethy Bridge	1	Fiscal Constraint Cat: Capital		MTIP ID: New - TBD
		ODOT Type: TBD		Status: 1
Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.).		Performance Meas: Climate		Comp Date: 12/31/2028
		Capacity Enhancing: No		RTP ID: 11584
		Conformity Exempt: Yes		CMP: Yes
		30 Day Notice Begin: 11/1/2022		TCM: No
		30 Day Notice End: 12/1/2022		TSMO Award: No
		Funding Source: ODOT		TSMO Cycle: N/A
		Funding Type: NEIV-IIJA		RFFA ID: N/A
		State Highway Route: I-205		RFFA Cycle: No
		Mile Post Begin: 0.00		UPWP: No
		Mile Post End: 25.00		UPWP Cycle: N/A
Short Description: Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations along I-205 from I-5 to the Abernethy Bridge, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon		Length: 25.00		Past Amend: 0
		Flex Transfer to FTA: No		Council Appr: Yes
		FTA Conversion Code: N/A		Council Date: 12/8/2022
		1st Year Program'd: 2023		OTC Approval: Yes
		Years Active: 0		OTC Date: 9/13/2022
	STIP Amend #: 21-24-2646		MTIP #: NV23-03-NOV	

Detailed Description: On I-205 in Region 1 from I-5 to the Abernethy Bridge, initiate deployment of National Electric Vehicle Infrastructure (NEVI) along I-205 which includes the construction of fast chargers for electric vehicle drivers. The project is one segment of multiple segments to the larger NEVI deployment effort occurring on other state highways.

STIP Description: Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations along I-205 from I-5 to the Abernathy Bridge, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
Highway Infrastructure Electric Vehicle IIJA (HIEV-IIJA)	Y130	2023	\$ 188,800					\$ 188,800
HIEV-IIJA	Y130	2023		\$ 424,000				\$ 424,000
HIEV-IIJA	Y130	2023					\$ 936,000	\$ 936,000
								\$ -
							Federal Totals:	\$ 1,548,800
State Funds								
State	Match	2023	\$ 47,200					\$ 47,200
State	Match	2023		\$ 106,000				\$ 106,000
State	Match	2023					\$ 234,000	\$ 234,000
								\$ -
							State Total:	\$ 387,200
Local Funds								
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ 236,000	\$ 530,000	\$ -	\$ -	\$ 1,170,000	\$ 1,936,000
Total Project Cost Estimate (all phases):							\$	1,936,000
Year of Expenditure Cost Amount:							\$	1,936,000

Programming Summary Details

Is the project is short programmed? No, the project is not short programmed.

Phase Change Amount:	\$ 236,000	\$ 530,000	\$ -	\$ -	\$ 1,170,000	\$ 1,936,000
Phase Change Percent:	100%	100%	0%	0%	100%	100%
Revised Match Federal:	\$ 47,200	\$ 106,000	\$ -	\$ -	\$ 234,000	\$ 387,200
Revised Match Percent:	20.00%	20.00%	N/A	N/A	20.00%	20.00%

Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary

General Areas

1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment adds the new OTC approved (9/13/2022 meeting) project to the MTIP that will begin deployment of the Oregon electric vehicle charging infrastructure. This project segment is on I-205 from I-5 east to the Abernethy Bridge.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, OTC Staff Item Report, Includes project Maps, Powerpoint presentation, and website Executive Summary
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? November, 1 , 2022 to December 1, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes

5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? If submitted, they will be reviewed and evaluated, plus sent on to Metro Communications staff
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Climate
2A	Does the amendment include fiscal updates?. Yes the project adds approved IIJA funds to the MTIP
2B	What is the funding source for the project? NEIV from the IIJA
2C	Was the Proof-of Funding requirement satisfied and how? Yes. OTC Staff Report item and action from the 9/13/2022 meeting was submitted.
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 11584 - Active Traffic Management (ATM) & Connected & Automated Vehicles (CAV) Region-wide Phase 1
1B	RTP Project Description: Deploy ATM recommendations from the ODOT Active Traffic Management Strategy. Specific projects to be determined. Deploy Connected, Automated and Electric Vehicle strategies.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Table 2 - Other - Engineering to assess social, economic, and environmental effects of the proposed action or alternatives to that action.
3A	Is the project considered capacity enhancing? No. The electric vehicle charging stations fall more in line with system management and operational improvements
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? No.
4	What RTP Goal does the project support? Goal #8 - Climate Leadership, Objective 8.4 - Low and No Emissions Vehicles – Support state efforts to transition Oregon to cleaner, low carbon fuels and increase the use of more fuel-efficient vehicles, including electric and alternative fuel vehicles.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No.

UPWP Consistency Check Areas	
1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? Yes. I-205 in the project limits is designated as part of the Eisenhower Interstate System on the NHS
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes - The project is located on multiple Metro modeling networks
2B	What is the Metro modeling designation? - Motor Vehicle = Throughway - Transit = Frequent Bus - Freight = Main Roadway Routes
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? Yes

Fund Type Codes References

Highway Infrastructure Electric Vehicle IIJA (HIEV-IIJA)	Federal Highway Infrastructure Electric Vehicle funding from the Infrastructure Investment and Jobs Act (IIJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure.
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Fund Codes

Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PL	Y130	Highway Infrastructure Electric Vehicle IIJA		100.00%	236,000.00	80.00%	188,800.00	20.00%	47,200.00	0.00%	0.00
	PL Totals			100.00%	236,000.00		188,800.00		47,200.00		0.00
PE	Y130	Highway Infrastructure Electric Vehicle IIJA		100.00%	530,000.00	80.00%	424,000.00	20.00%	106,000.00	0.00%	0.00
	PE Totals			100.00%	530,000.00		424,000.00		106,000.00		0.00
CN	Y130	Highway Infrastructure Electric Vehicle IIJA		100.00%	1,170,000.00	80.00%	936,000.00	20.00%	234,000.00	0.00%	0.00
	CN Totals			100.00%	1,170,000.00		936,000.00		234,000.00		0.00
Grand Totals					1,936,000.00		1,548,800.00		387,200.00		0.00



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022

TO: Oregon Transportation Commission

Kristopher W. Strickler

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item L – NEVI Update

Requested Action:

Receive an update from the Policy Data and Analysis Division Administrator Amanda Pietz and ODOT Climate Office on the OTC's \$100 million commitment to electric vehicle (EV) charging, with a focus on Oregon's Plan for the federal Infrastructure Investments and Jobs Act (IIJA) National Electric Vehicle Infrastructure (NEVI) program.

Background:

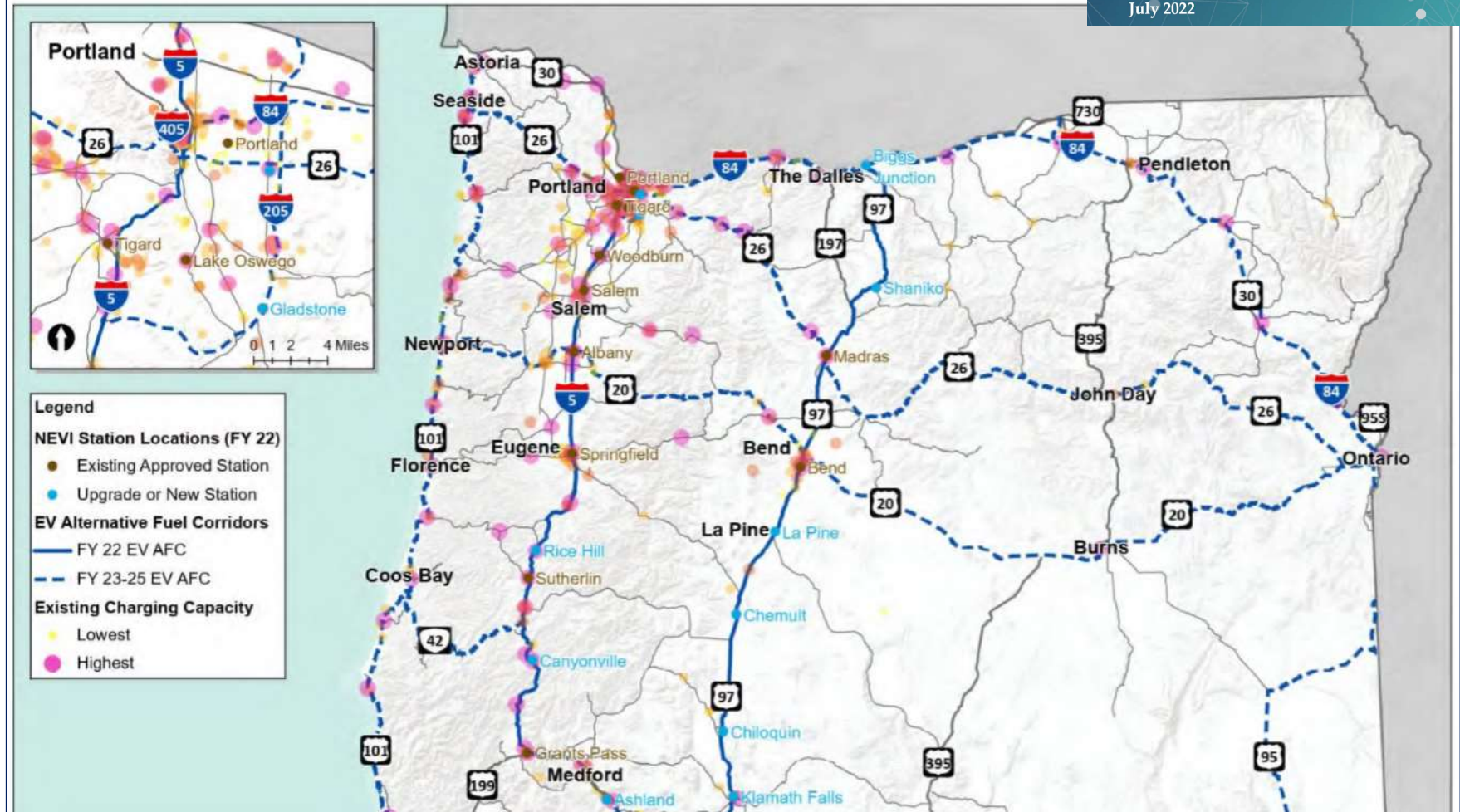
ODOT is the convening state agency on transportation electrification and leads electric vehicle charging infrastructure work. Following the IIJA investment in EV charging infrastructure nationwide, the OTC committed to \$100 million for EV charging infrastructure across the state. This allows ODOT to execute findings from the Transportation Electrification Infrastructure Needs Assessment (TEINA, June 2021) and its deployment strategy.

National Electric Vehicle Infrastructure (NEVI)

ODOT submitted Oregon's NEVI Plan in late July, and it is currently under review by the federal Joint Office of Energy and Transportation. Approval of the Plan is expected later this month.

Once approved, ODOT will receive \$52 million in NEVI funding over five years that must be deployed on Oregon's eleven EV Alternative Fuel Corridors (see map). Funding match requirements (20 percent) for these dollars bring the investment total to \$65 million.

Figure 26: Existing Charging Capacity and Planned NEVI Stations



2021-2027 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The new project is being added to the 2021-26 MTIP project. OTC approval for the funding was required and occurred during their 9/13/2022 meeting.



Metro 2021-26 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Update Entry
ADD NEW PROJECT
Add the new Electric Charging
Stations project to the MTIP

Lead Agency: ODOT		Project Type:	Highway	ODOT Key:	22740
Project Name: I-84: From I-5 to the Idaho Border	2	Fiscal Constraint Cat:	Capital	MTIP ID:	New - TBD
		ODOT Type	TBD	Status:	1
		Performance Meas:	Climate	Comp Date:	12/31/2028
Project Status: 1 = Pre-first phase obligation activities (IGA development, project scoping, scoping refinement, etc.).		Capacity Enhancing:	No	RTP ID:	11584
		Conformity Exempt:	Yes	CMP:	Yes
		30 Day Notice Begin:	11/1/2022	TCM:	No
		30 Day Notice End:	12/1/2022	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
		Funding Type:	NEIV-IIJA	RFFA ID:	N/A
Short Description: Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations every 50 miles along US 97 from I-5 to the Idaho border, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon	US30	State Highway Route	I-84	RFFA Cycle:	No
	0.00	Mile Post Begin:	42.08	UPWP:	No
	243.9	Mile Post End:	378.00	UPWP Cycle:	N/A
	243.9	Length:	335.92	Past Amend:	0
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	12/8/2022
		1st Year Program'd:	2023	OTC Approval:	Yes
		Years Active:	0	OTC Date	9/13/2022
		STIP Amend #: 21-24-2648		MTIP #: NV23-03-NOV	

Detailed Description: On I-84 in from I-5 to the Idaho Border, initiate deployment of National Electric Vehicle Infrastructure (NEVI) along I-84 which includes the construction of fast charging stations every 50 miles for electric vehicle drivers. The project is one segment of multiple segments to the larger NEVI deployment effort occurring on other state highways.

STIP Description: Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations every 50 miles along US 97 from I-5 to the Idaho border, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
Highway Infrastructure Electric Vehicle IIJA (HIEV-IIJA)	Y130	2023	\$ 225,600					\$ 225,600
HIEV-IIJA	Y130	2024		\$ 1,272,000				\$ 1,272,000
HIEV-IIJA	Y130	2024					\$ 2,808,000	\$ 2,808,000
								\$ -
Federal Totals:							\$	4,305,600
State Funds								
State	Match	2023	\$ 56,400					\$ 56,400
State	Match	2024		\$ 318,000				\$ 318,000
State	Match	2024					\$ 702,000	\$ 702,000
								\$ -
								\$ -
State Total:							\$	1,076,400
Local Funds								
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ 282,000	\$ 1,590,000	\$ -	\$ -	\$ 3,510,000	\$ 5,382,000
Total Project Cost Estimate (all phases):							\$	5,382,000
Year of Expenditure Cost Amount:							\$	5,382,000

Programming Summary Details						
Why project is short programmed: The project is not programmed.						
Phase Change Amount:	\$ 282,000	\$ 1,590,000	\$ -	\$ -	\$ 3,510,000	\$ 5,382,000
Phase Change Percent:	100%	100%	0%	0%	100%	100%
Revised Match Federal:	\$ 56,400	\$ 318,000	\$ -	\$ -	\$ 702,000	\$ 1,076,400
Revised Match Percent:	20.00%	20.00%	N/A	N/A	20.00%	20.00%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment adds the new OTC approved (9/13/2022 meeting) project to the MTIP that will begin deployment of the Oregon electric vehicle charging infrastructure. This project segment is on I-84 from the Portland area at I-5 east to the Idaho border
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, OTC Staff Item Report, Includes project Maps, Powerpoint presentation, and website Executive Summary
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? November, 1 , 2022 to December 1, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? If submitted, they will be reviewed and evaluated, plus sent on to Metro Communications staff
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Climate
2A	Does the amendment include fiscal updates?. Yes the project adds approved IJA funds to the MTIP
2B	What is the funding source for the project? NEIV from the IJA
2C	Was the Proof-of Funding requirement satisfied and how? Yes. OTC Staff Report item and action from the 9/13/2022 meeting was submitted.
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 11584 - Active Traffic Management (ATM) & Connected & Automated Vehicles (CAV) Region-wide Phase 1
1B	RTP Project Description: Deploy ATM recommendations from the ODOT Active Traffic Management Strategy. Specific projects to be determined. Deploy Connected, Automated and Electric Vehicle strategies.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, under Table 2
2B	What is the exception category per the regulation: Table 2 - Other - Engineering to assess social, economic, and environmental effects of the proposed action or alternatives to that action.
3A	Is the project considered capacity enhancing? No. The electric vehicle charging stations fall more in line with system management and operational improvements
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? No.
4	What RTP Goal does the project support? Goal #8 - Climate Leadership, Objective 8.4 - Low and No Emissions Vehicles – Support state efforts to transition Oregon to cleaner, low carbon fuels and increase the use of more fuel-efficient vehicles, including electric and alternative fuel vehicles.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No.

UPWP Consistency Check Areas	
1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? Yes. I-84 in the project limits is designated as part of the Eisenhower Interstate System on the NHS
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes - The project is located on multiple Metro modeling networks

2B	What is the Metro modeling designation? - Motor Vehicle = Throughway - Transit = Frequent Bus and Light Rail Transit - Freight = Main Roadway Routes
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? Yes

Fund Type Codes References	
Highway Infrastructure Electric Vehicle IJJA (HIEV-IJJA)	Federal Highway Infrastructure Electric Vehicle funding from the Infrastructure Investment and Jobs Act (IJJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure.
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PL	Y130	Highway Infrastructure Electric Vehicle IJJA		100.00%	282,000.00	80.00%	225,600.00	20.00%	56,400.00	0.00%	0.00
	PL Totals			100.00%	282,000.00		225,600.00		56,400.00		0.00
PE	Y130	Highway Infrastructure Electric Vehicle IJJA		100.00%	1,590,000.00	80.00%	1,272,000.00	20.00%	318,000.00	0.00%	0.00
	PE Totals			100.00%	1,590,000.00		1,272,000.00		318,000.00		0.00
CN	Y130	Highway Infrastructure Electric Vehicle IJJA		100.00%	3,510,000.00	80.00%	2,808,000.00	20.00%	702,000.00	0.00%	0.00
	CN Totals			100.00%	3,510,000.00		2,808,000.00		702,000.00		0.00
Grand Totals					5,382,000.00		4,305,600.00		1,076,400.00		0.00



Oregon

Kate Brown, Governor

Oregon Transportation Commission


Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022

TO: Oregon Transportation Commission



FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item L – NEVI Update

Requested Action:

Receive an update from the Policy Data and Analysis Division Administrator Amanda Pietz and ODOT Climate Office on the OTC's \$100 million commitment to electric vehicle (EV) charging, with a focus on Oregon's Plan for the federal Infrastructure Investments and Jobs Act (IIJA) National Electric Vehicle Infrastructure (NEVI) program.

Background:

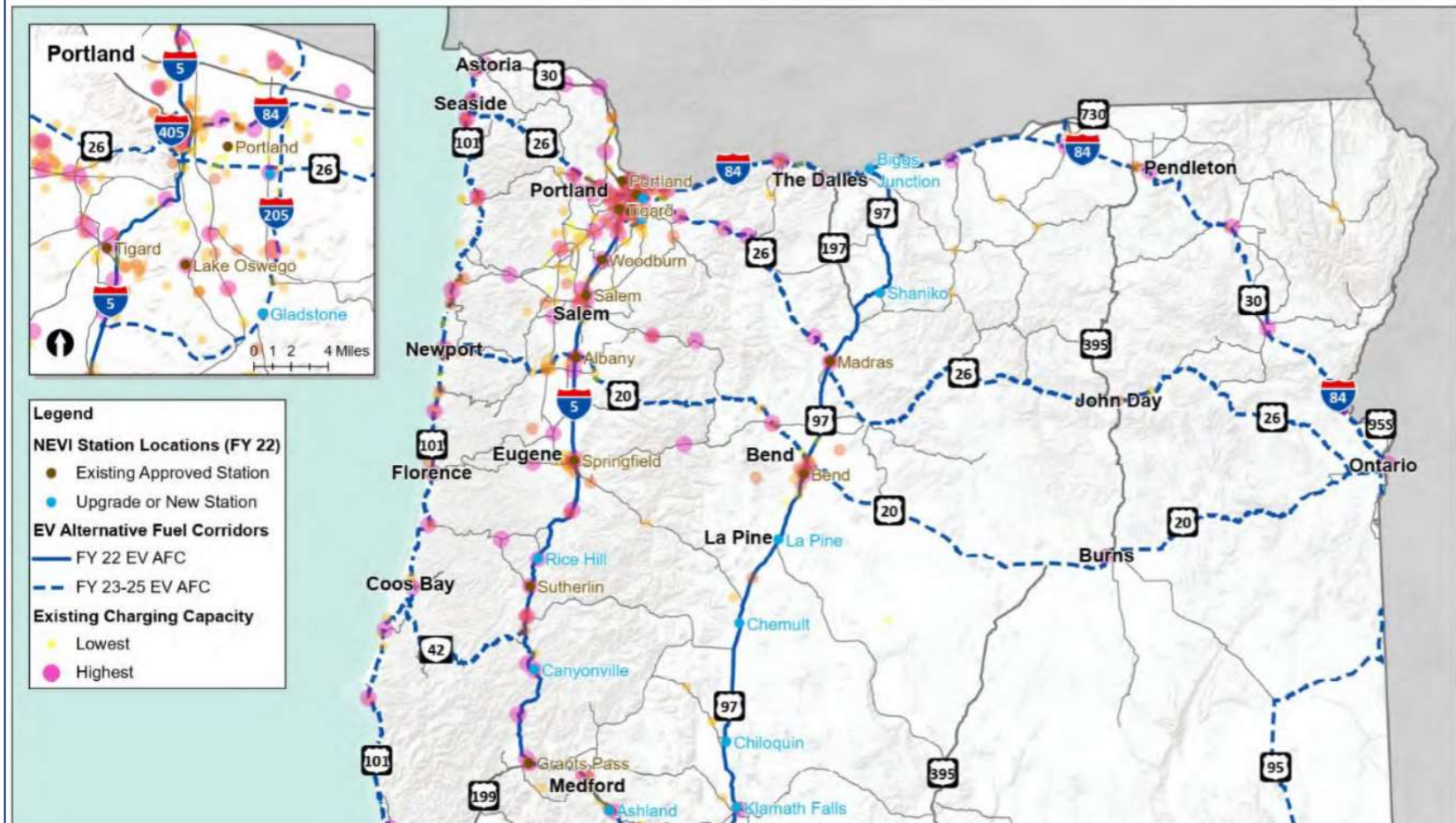
ODOT is the convening state agency on transportation electrification and leads electric vehicle charging infrastructure work. Following the IIJA investment in EV charging infrastructure nationwide, the OTC committed to \$100 million for EV charging infrastructure across the state. This allows ODOT to execute findings from the Transportation Electrification Infrastructure Needs Assessment (TEINA, June 2021) and its deployment strategy.

National Electric Vehicle Infrastructure (NEVI)

ODOT submitted Oregon's NEVI Plan in late July, and it is currently under review by the federal Joint Office of Energy and Transportation. Approval of the Plan is expected later this month.

Once approved, ODOT will receive \$52 million in NEVI funding over five years that must be deployed on Oregon's eleven EV Alternative Fuel Corridors (see map). Funding match requirements (20 percent) for these dollars bring the investment total to \$65 million.

Figure 26: Existing Charging Capacity and Planned NEVI Stations



2021-2026 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The new ADA curb and ramps design project with OTC approval is being added to the 2021-26 MTIP project



Metro 2021-26 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Update Entry
ADD NEW PROJECT
Add new OTC approved project to the MTIP

Lead Agency: ODOT		Project Type:	Other	ODOT Key:	22978
Project Name: Portland Metro Area 2024-2027 ADA Curb Ramp Design, Phase 1	3	Fiscal Constraint Cat:	Planning	MTIP ID:	New - TBD
		ODOT Type	ADA	Status:	2
		Performance Goal:	Safety	Comp Date:	12/31/2025
Project Status: 2 = Pre-design/project development activities (pre-NEPA) (ITS = ConOps.)		Capacity Enhancing:	No	RTP ID:	12095
		Conformity Exempt:	Yes	CMP:	No
		30 Day Notice Begin:	11/1/2022	TCM:	No
		30 Day Notice End:	12/1/2022	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
		Funding Type:	St STBG	RFFA ID:	N/A
		State Highway Route	Various	RFFA Cycle:	No
		Mile Post Begin:	Various	UPWP:	No
		Mile Post End:	Various	UPWP Cycle:	N/A
		Length:	Various	Past Amend:	0
Short Description: Design for future construction of curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	12/10/2022
		1st Year Program'd:	2023	OTC Approval:	Yes
		Years Active:	0	OTC Date	9/13/2022
		STIP Amend #: 21-24-2746		MTIP #: NV23-03-NOV	

Detailed Description: Across the Portland Metro region on Routes OR8, OR47, OR10, OR 43, OR99W, OR99E, OR213, US30, US26, I-5, I-84, I-205, and I-405, complete PE design requirements for future selected ADA compliant curb and ramp upgrade site locations

STIP Description: Design for future construction of curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Last Amendment of Modification: None. Initial MTIP programming

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
State STBG	Y240	2023		\$ 17,587,080				\$ 17,587,080
								\$ -
								\$ -
Note: State STBG originates from the IIJA.							Federal Totals:	\$ 17,587,080
State Funds								
State	Match	2023		\$ 2,012,920				\$ 2,012,920
								\$ -
								\$ -
							State Total:	\$ 2,012,920
Local Funds								
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals After Amend:			\$ -	\$ 19,600,000	\$ -	\$ -	\$ -	\$ 19,600,000
Total Project Cost Estimate (all phases):							\$	\$ 19,600,000
Year of Expenditure Cost Amount:							\$	\$ 19,600,000

Programming Summary Details

Why project is short programmed: The project is only programming the PE phase. Once the projects are identified and designed, they will be added as separate projects based on funding, routes, locations, etc. with only their implementation phases (ROW, UR, and construction) to reflect project delivery efforts/

Phase Change Amount:	\$ -	\$ 19,600,000	\$ -	\$ -	\$ -	\$ 19,600,000
Phase Change Percent:	0%	100%	0%	0%	0%	100%
Revised Match Federal:	Not Applicable	\$ 2,012,920	N/A	N/A	N/A	\$ 2,012,920
Revised Match Percent:	Not Applicable	10.27%	N/A	N/A	N/A	10.27%

Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						
Initial Obligation Date:						Other Notes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary

General Areas

1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment adds the new PE phase approved project per OTC approval on 9/13/2022.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, Route design site locations
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? November 1, 2022 to December 1, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? Any significant comments or numbers of comments were forwarded to Metro communication staff.
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas

1	Will Performance Measurements Apply? Not for the PE phase. Once specific projects are identified and implementation begins, then the performance measurement of Safety will apply.
2A	Does the amendment include fiscal updates? Yes, the approval of State STBG funds for the project
2B	What is the funding source for the project? ODOT, State STBG from the IIJA
2C	Was the Proof-of Funding requirement satisfied and how? OTC approval on 9/13/2022 committing the funding to the project.
2D	Was overall fiscal constraint satisfactorily demonstrated? Yes

RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12095 - Safety & Operations Projects
1B	RTP Project Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, Table 2
2B	What is the exception category per the regulation: Table 2 - Air Quality - Bicycle and pedestrian facilities.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? Not Applicable
4	What RTP Goal does the project support? Goal 5 - Transportation Safety, Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.
5	Does the project appear to be subject to Performance Measurements analysis and what type? Not for the PE phase
6	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No

UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? Yes, various identifications because on the multiple routes and site locations,
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)?
2B	What is the Metro modeling designation? Not applicable as the project is considered a planning project with only PE being programmed.
3	Is the project designated as a Transportation Control Measure (TCM)? No

Fund Type Codes References

State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA		100.00%	19,600,000.00	89.73%	17,587,080.00	10.27%	2,012,920.00	0.00%	0.00
	PE Totals			100.00%	19,600,000.00		17,587,080.00		2,012,920.00		0.00
	Grand Totals				19,600,000.00		17,587,080.00		2,012,920.00		0.00

Routes and Site Locations for ADA Design

Route	Highway	Begin MP	End MP	Ramps
OR8	029 Tualatin Valley	0.27	17.88	2760
OR47	029 Tualatin Valley	18.02	19.96	
OR10	040 Beaverton - Hillsdale	0.97	3.40	
OR10	142 Farmington	5.88	7.37	
OR99W	091 Pacific Highway West	1.31	16.67	
US30	092 Lower Columbia River	0.56	18.37	
OR213	068 Cascade Hwy North	0.06	9.40	
US30	100 Historic Columbia River	30.41	31.28	
		49.07	50.98	
		2.55	6.77	
US26	026 Mt. Hood	-0.13	73.97	
US26	047 Sunset	1.40	74.05	
OR281	281 Hood River	16.77	16.92	
OR282	282 Odell	2.05	2.64	
OR43	003 Oswego	0.01	11.55	
OR99E	081 Pacific Hwy East	1.45	13.64	
I-5	001 Pacific	282.71	308.31	
I-405	061 Stadium Freeway	0.98	4.26	
I-205	064 East Portland Freeway	3.25	25.79	
I-84	002 Columbia River	0.41	64.02	



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda Item F** – Americans with Disabilities Act (ADA) Program Update and Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to allocate ADA STIP Program funds to projects.

Requested Action:

Receive an update on efforts to deliver compliant ADA curb ramps on or along the ODOT Highway system, current challenges, and the program funding plan. Request approval to amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to add and modify projects by advancing funding from the 2024-2027 STIP.

Agenda Item F; Attachment 02

Attachment 1: ADA Program Update

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total (0 if new)	Proposed Total	Difference	Description of Change (up to 200 characters)
22560	5	Umatilla County curb ramps (pendleton) Phase 2	-0.7	2.9		RW, CN	ADA	SW ADA TRANSITION, BIKE/PED, SWIP	\$ 3,741,200.00	\$10,995,000.00	\$ 7,253,800.00	Add the Right of Way and Construction phase estimates. New funding totals are \$7,995,000 ADA, \$2,500,000 Ped/Bike Strategic advanced from the 24-27 STIP, and \$500,000 SWIP.
22561	5	Umatilla/Morrow County curb ramps phase	0.04	184.2		RW, CN	ADA	SW ADA TRANSITION	\$ 6,153,900.00	\$21,237,040.00	\$ 15,083,140.00	Add the Right of Way and Construction phase estimates.
	1	Region 1 ADA curb ramps	VAR	VAR		PE	ADA	SW ADA TRANSITION	\$ -	\$19,600,000.00	\$ 19,600,000.00	Advance a portion of the Preliminary Engineering phase from the 24-27 STIP so design for ramps planned for 2025 and 2026 construction can begin early.

2021-2026 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The project scope is being expanded resulting in a limits change and a cost increase.



Metro
2021-26 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Entry
SCOPE CHANGE**
Add approved funds to address
expanded project scope

Lead Agency: ODOT		Project Type:	Highway	ODOT Key:	22552
Project Name: Willamette River: Stormwater Source Control Improvements	4	Fiscal Constraint Cat:	Other	MTIP ID:	71265
		ODOT Type	Bridge	Status:	4
		Performance Goal:	Climate	Comp Date:	12/31/2026
Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated).		Capacity Enhancing:	No	RTP ID:	12092
		Conformity Exempt:	Yes	CMP:	Yes
		30 Day Notice Begin:	11/1/2022	TCM:	No
		30 Day Notice End:	12/1/2022	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
	Route	Funding Type:	IIJA	RFFA ID:	N/A
	US30	State Highway Route	US30BY	RFFA Cycle:	No
	6.91	Mile Post Begin:	0.80	UPWP:	No
	1.95				
	6.93	Mile Post End:	0.80	UPWP Cycle:	N/A
	9.20				
	0.02	Length:	0.00	Past Amend:	0
		Flex Transfer to FTA	No	Council Appr:	Yes
	I-405	FTA Conversion Code:	N/A	Council Date:	12/8/2022
	0.00	1st Year Program'd:	2022	OTC Approval:	Yes
	0.00	Years Active:	2	OTC Date	11/17/2022
	0.00	STIP Amend #:	21-24-2771	MTIP Amnd #:	NV23-03-NOV

Detailed Description:

In north Portland along the Willamette River on I-405 at MP 3.33, on US30 between ~~6.91 to 6.93~~, MP 1.95 to MP 9.20 and US 30 BY at MP 0.80, complete the design and ROW actions of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas. (PGB under RTP ID 12092 - Bridge)

STIP Description: Complete the design of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas.

Last Amendment of Modification: None. First amendment to the project

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
Federal Funds								
AC-STBGS	ACP0	2022	-	\$ 2,153,520				\$ -
State STBG - IIJA	Y240	2022		\$ 5,787,612				\$ 5,787,612
AC-STBGS	ACP0	2023			\$ 1,794,600			\$ -
State STBG - IIJA	Y240	2023			\$ 4,946,429			\$ 4,946,429
								\$ -
Federal Totals:							\$	10,734,041
State Funds								
State	Match	2022		\$ 246,480				\$ -
State	Match	2022		\$ 662,418				\$ 662,418
State	Match	2023			\$ 205,400			\$ -
State	Match	2023			\$ 566,141			\$ 566,141
								\$ -
State Total:							\$	1,228,559
Local Funds								
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:	\$	-	\$ 2,400,000	\$ 2,000,000	\$	-	\$	\$ 4,400,000
Phase Totals After Amend:	\$	-	\$ 6,450,030	\$ 5,512,570	\$	-	\$	\$ 11,962,600
Total Project Cost Estimate (all phases):							\$	11,962,600
Year of Expenditure Cost Amount:							\$	11,962,600

Programming Summary Details

Why project is short programmed:

Phase Change Amount:	\$ -	\$ 4,050,030	\$ 3,512,570	\$ -	\$ -	\$ 7,562,600
Phase Change Percent:	0%	169%	176%	0%	0%	172%
Revised Match Federal:	\$ -	\$ 662,418	\$ 566,141	\$ -	\$ -	\$ 1,228,559
Revised Match Percent:	N/A	10.27%	10.27%	N/A	N/A	10.27%

Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:		\$ 6,450,030				Federal Aid ID
Federal Funds Obligated:		\$ 5,787,612				SA00(048)
Initial Obligation Date:		4/12/2022				Other Notes
EA Number:		PE003390				
EA Start Date:		4/12/2022				
EA End Date:		Not Available				
Known Expenditures:		Not Available				

MTIP Programming Consistency Check Details and Glossary

General Areas

1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment provides approved funding for the added site locations along US30 that will be included now in the project. Approved funding is from the Bridge program. The scope adjustment results in a cost increase from \$4,400,000 to \$11,962,600 which is well above the 20% threshold for cost changes. OTC approval was required and occurred at their November 17, 2022 meeting.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report (CMR), STIP Impacts Worksheet, draft OTC Staff Report item, and project location map.
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? November 1, 2022 to December 1, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? A summary log and review evaluation will be included if a sufficient amount of comments are received impacting the amendment.
6	Added clarifying notes: Only Design and ROW phase added at this time to the current approved STIP.

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, RTP PM = Climate
2A	Does the amendment include fiscal updates? Yes. Approved funding from the ODOT Bridge program to address the expanded scope site locations.
2B	What is the funding source for the project? ODOT Bridge Program funding expected to be State STBG from the IJJA
2C	Was the Proof-of Funding requirement satisfied and how? Yes. OTC Staff Report
2D	Was overall fiscal constraint demonstrated? Yes. OTC approval is sufficient.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 12092 - Bridge Rehabilitation & Repair
1B	RTP Project Description: Projects to repair or rehabilitate bridges, such as painting, joint repair, bridge deck repair, seismic retrofit, etcetera, that do not add motor vehicle capacity.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes Table 2
2B	What is the exception category per the regulation: Other - Engineering to assess social, economic, and environmental effects of the proposed action or alternatives to that action.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? No. Not applicable
4	What RTP Goal does the project support? Goal #6 - Healthy Environment, Objective 6.1 Biological and Water Resources – Protect fish and wildlife habitat and water resources from the negative impacts of transportation
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No, the project does not require a special performance measurement evaluation.

UPWP Consistency Check Areas	
1A	Does the MTIP action also require an UPWP amendment: No.
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Yes
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? Yes, - US30 = Other NHS Routes - I-405 = Eisenhower Interstate System - US30BY = MAP 21 Principal Arterials
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes, Motor Vehicle Network
2B	What is the Metro modeling designation? I-405 and US30 = Throughway, US30BY = Major Arterial
3	Is the project designated as a Transportation Control Measure (TCM)? No

4	Is the project location identified on a Congestion Management Plan route? Yes
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Fund Type Codes References	
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects
State	General state funds committed to the project normally to support the match requirement against the federal funds.

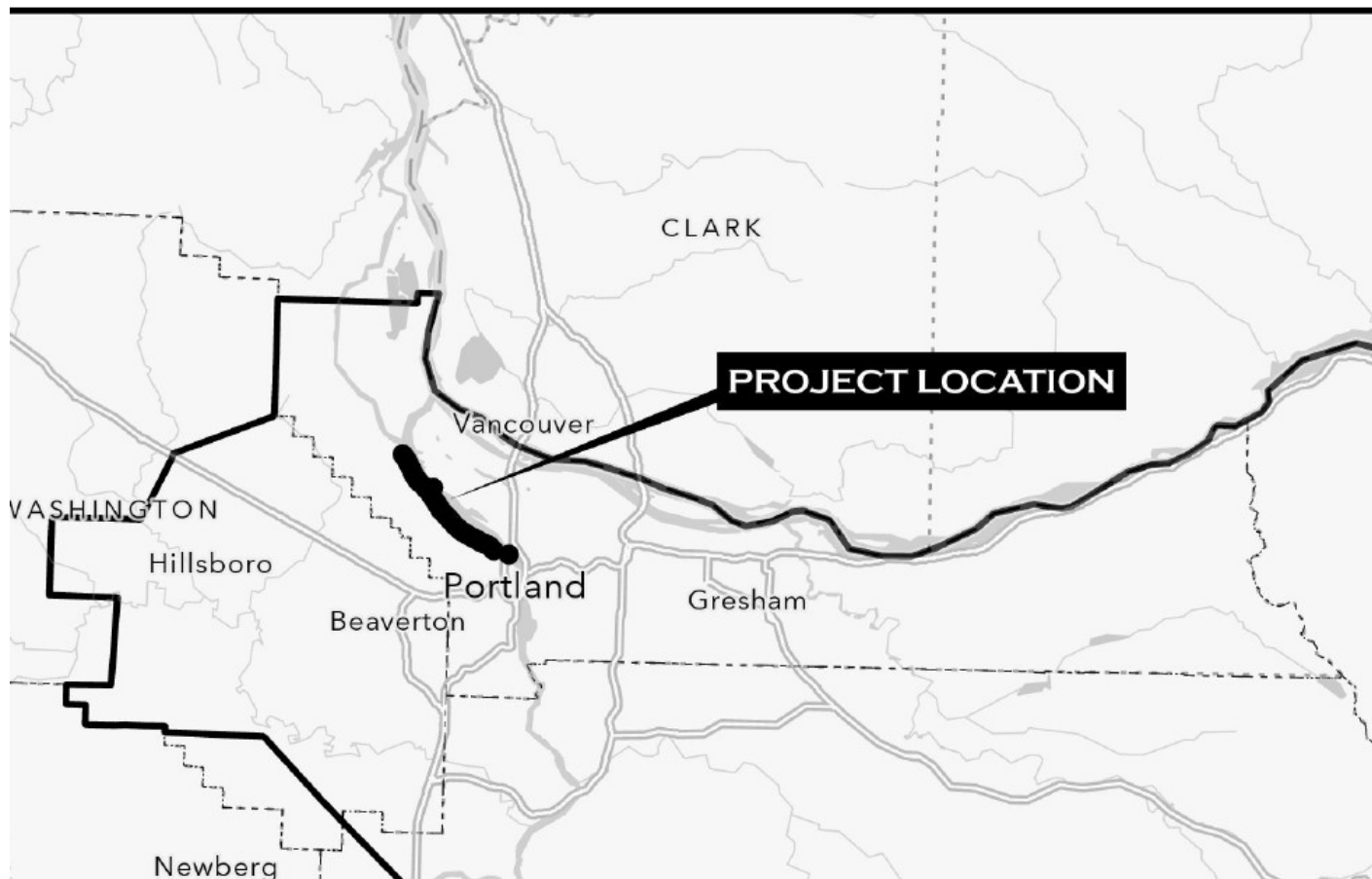
Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA		100.00%	6,450,030.00	89.73%	5,787,611.92	10.27%	662,418.08	0.00%	0.00
	PE Totals			100.00%	6,450,030.00		5,787,611.92		662,418.08		0.00
RW	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA		100.00%	5,512,570.00	89.73%	4,946,429.06	10.27%	566,140.94	0.00%	0.00
	RW Totals			100.00%	5,512,570.00		4,946,429.06		566,140.94		0.00
Grand Totals					11,962,600.00		10,734,040.98		1,228,559.02		0.00

Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette River: Stormwater source control improvements project from \$4,400,000 to \$11,962,600 for a total increase of \$7,562,600. The increase will be paid for using Portland Harbor funding which is being administered through the Bridge financial plan.

Project to increase funding:

Willamette River: Stormwater source control improvements (K22552)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2022	\$2,400,000.00	\$6,450,030
Right of Way	2023	\$2,000,000	\$5,512,570
Utility Relocation	N/A	\$0	\$0
Other	N/A	\$0	\$0
Construction	N/A	\$0	\$0
TOTAL		\$4,400,000	\$11,962,600



2021-2026 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The amendment increases the construction phase funding based on the revised phase cost estimate.



Metro 2021-26 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

**MTIP Update Entry
COST INCREASE**
Add IJA STBG to the Cons phase to
address a funding shortfall

Lead Agency: ODOT		Project Type:	Highway	ODOT Key:	22431
Project Name: OR141/OR217 Curb Ramps	5	Fiscal Constraint Cat:	O&M	MTIP ID:	71247
		ODOT Type	ADAP	Status:	4
		Performance Goal:	Safety	Comp Date:	12/31/2027
Project Status: 4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%, 90% design activities initiated).		Capacity Enhancing:	No	RTP ID:	12095
		Conformity Exempt:	Yes	CMP:	Yes
		30 Day Notice Begin:	11/1/2022	TCM:	No
		30 Day Notice End:	12/1/2022	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
		Funding Type:	St STBG	RFFA ID:	N/A
		State Highway Route	OR141	RFFA Cycle:	No
		Mile Post Begin:	4.97	UPWP:	No
		Mile Post End:	7.07	UPWP Cycle:	N/A
		Length:	2.10	Past Amend:	3
Short Description: At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	12/8/2022
		1st Year Program'd:	2021	OTC Approval:	Yes
		Years Active:	3	OTC Date	9/13/2022
		STIP Amend #: 21-24-2821		MTIP Amnd #: NV23-03-NOV	

Detailed Description:

On OR 141 (Hall Blvd at two location between MP 4.97 to 7.07) and on SW 72nd Ave (between SW Beveland Rd to SW Varnes St) in the Tigard area, construct ADA compliant curbs and ramps for safety improvements. (ADA PGB)

STIP Description: Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.

Last Amendment of Modification: Formal - COST INCREASE - June 2022 - JN22-13-JUN1 - Add funding to the PE and ROW phases to address funding shortfalls. Slip Construction to FFY 2024

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
State STBG	Z24E	2021		\$ 851,830				\$ 851,830
State STBG- IIJA	Y240	2021		\$ 1,279,257				\$ 1,279,257
AC-STBGS	ACP0	2023			\$ 748,348			\$ -
STATE STBG	Z240	2023			\$ 748,348			\$ 748,348
AC-STBGS	ACP0	2023					\$ 1,304,043	\$ -
State STBG - IIJA	Y240	2024					\$ 3,866,715	\$ 3,866,715
Federal Totals:							\$	6,746,150
State Funds								
State	Match	2021		\$ 97,496				\$ 97,496
State	Match	2021		\$ 146,417				\$ 146,417
State	Match	2023			\$ 85,652			\$ 85,652
State	Match	2024					\$ 149,254	\$ -
State	Match	2024					\$ 442,563	\$ 442,563
State Total:							\$	772,128
Local Funds								
								\$ -
								\$ -
Other funds = local overmatch contribution							Local Total	\$ -
Phase Totals Before Amend:			\$ -	\$ 2,375,000	\$ 834,000	\$ -	\$ 1,453,297	\$ 4,662,297
Phase Totals After Amend:			\$ -	\$ 2,375,000	\$ 834,000	\$ -	\$ 4,309,278	\$ 7,518,278
Total Project Cost Estimate (all phases):							\$	7,518,278
Year of Expenditure Cost Amount:							\$	7,518,278

Programming Summary Details

Is the project is short programmed? No

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ 2,855,981	\$ 2,855,981
Phase Change Percent:	0%	0%	0%	0%	197%	61.3%
Revised Match Federal:	\$ -	\$ 243,913	\$ 85,652	\$ -	\$ 442,563	\$ 772,128
Revised Match Percent:	N/A	10.27%	10.27%	N/A	10.27%	10.27%

Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:		\$ 2,375,000				Federal Aid ID
Federal Funds Obligated:		\$ 2,131,087				SA00(448)
Initial Obligation Date:		8/31/2021				Other Notes
EA Number:		PE003333				Cost increase exceeds 30% threshold
EA Start Date:		Not Available				
EA End Date:		Not Available				
Known Expenditures:		Not Available				

MTIP Programming Consistency Check Details and Glossary

General Areas

1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment addresses a construction phase funding shortfall by adding OTC approved IJJA funds. OTC approval occurred on 9/13/2022. The cost increase equals 61% which is well above the 30% threshold for administrative cost changes. This triggers the need for the formal amendment.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, Project Location Map, plus OTC September ADA item.
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? November 1, 2022 to December 1, 2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? Generally, no comments were submitted, but if any were and raise significant issues, they are forward to Metro Communications staff and Council office for further review.

6	Added clarifying notes: The project is one of many ODOT experiencing significant cost increases due to inflation. There is no scope change driving the cost increase.
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Fiscal Constraint Consistency Check Areas

1	Will Performance Measurements Apply? Yes, Safety
2A	Does the amendment include fiscal updates? Yes. New funding (State STBG) for the construction phase is being added to the project in support of the revised cost estimate
2B	What is the funding source for the project? ODOT from the new IIJA legislation
2C	Was the Proof-of Funding requirement satisfied and how? Specific funding increase approval through OTC.
2D	Was overall fiscal constraint demonstrated? Yes

RTP Consistency Check Areas

1A	RTP ID and Name: ID# 12095 - Safety & Operations Projects
1B	RTP Project Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes
2B	What is the exception category per the regulation: Table 2 - Sub category of "Safety" - and defined as "Projects that correct, improve, or eliminate a hazardous location or feature".
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? Not Applicable. The project is not capacity enhancing.
4	What RTP Goal does the project support? Goal 5 - Safety - Safety and Security, Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The project is not capacity enhancing or exceeds \$100 million dollars in cost.

UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not Applicable

Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes, Motor Vehicle, Transit, Bicycle, and Pedestrian modeling networks
2B	What is the Metro modeling designation? - Motor Vehicle = Minor Arterial - Transit = Frequent Bus - Bicycle = Regional Bikeway - Pedestrian = Pedestrian Parkway
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

Fund Type Codes References

AC-STBGS	Federal Advance Construction fund type code with the anticipated federal conversion code identified. For AC-STBGS, the anticipated conversion code is State STBG
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects
State STBG IIJA	Federal Surface Transportation Block Grant funds originating from the Infrastructure Investment and Jobs Act (IIJA) and appropriated to the State DOT for use on eligible projects.
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA	Y	60.03%	1,425,674.00	89.73%	1,279,257.28	10.27%	146,416.72	0.00%	0.00
	Z24E	Surface transportation block grants - flex FAST ext	Y	39.97%	949,326.00	89.73%	851,830.22	10.27%	97,495.78	0.00%	0.00
	PE Totals			100.00%	2,375,000.00		2,131,087.50		243,912.50		0.00
RW	Z240	SURFACE TRANSP BLOCK GRTS-FLEX		100.00%	834,000.00	89.73%	748,348.20	10.27%	85,651.80	0.00%	0.00
	RW Totals			100.00%	834,000.00		748,348.20		85,651.80		0.00
CN	Y240	Surface Transportation Block Grant (STBG) - Flex IIJA		100.00%	4,309,278.00	89.73%	3,866,715.15	10.27%	442,562.85	0.00%	0.00
	CN Totals			100.00%	4,309,278.00		3,866,715.15		442,562.85		0.00
Grand Totals					7,518,278.00		6,746,150.85		772,127.15		0.00



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022

TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda Item F** – Americans with Disabilities Act (ADA) Program Update and Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to allocate ADA STIP Program funds to projects.

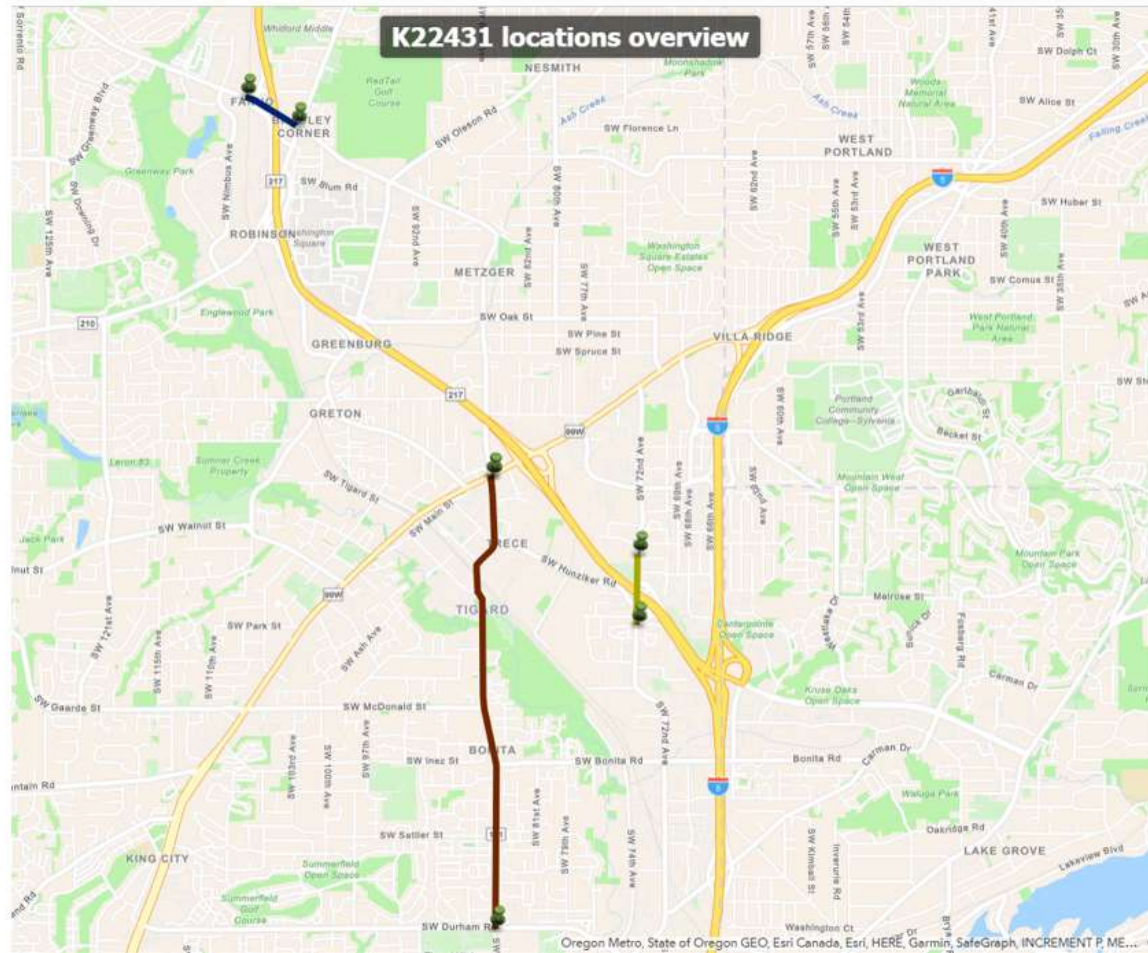
Requested Action:

Receive an update on efforts to deliver compliant ADA curb ramps on or along the ODOT Highway system, current challenges, and the program funding plan. Request approval to amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to add and modify projects by advancing funding from the 2024-2027 STIP.

Agenda Item F; Attachment 02

Attachment 1: ADA Program Update

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total (0 if new)	Proposed Total	Difference	Description of Change (up to 200 characters)
22431	1	OR141/OR217 curb ramps	4.97	7.07		CN	ADA	SW ADA TRANSITION	\$ 4,662,297.00	\$ 7,518,278.00	\$ 2,855,981.00	Increase the Construction phase estimate
22432	1	US30BY curb ramps	1.28	14.74		CN	ADA	SW ADA TRANSITION	\$25,556,438.00	\$ 38,810,000.00	\$ 13,253,562.00	Increase the Construction phase estimate.
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.3	125		CN	ADA	SW ADA TRANSITION	\$12,063,225.00	\$19,149,070.00	\$ 7,085,845.00	Increase the Construction phase estimate.
22435	2	OR47/OR8/US30 curb ramps	17.88	90.59		CN	ADA	SW ADA TRANSITION	\$ 9,075,262.00	\$14,566,171.00	\$ 5,490,909.00	Increase the Construction phase estimate.
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 8,066,607.00	\$13,435,375.00	\$ 5,368,768.00	Increase the Construction phase estimate.
22611	3	OR540 curb ramps: Coos Bay city limits - Boat Basin Rd	4.89	8.49		CN	ADA	SW ADA TRANSITION	\$ -	\$ 1,800,000.00	\$ 1,800,000.00	Add a new child project of K22437.



2021-2026 MTIP Formal Amendment - Exhibit A

November 2022 Formal Amendment for FFY 2023 - Amendment Number NV23-03-NOV

Summary Reason for Change: The formal amendment adds OTC approved funding to address serious funding shortfalls across the project



Metro 2021-26 Metropolitan Transportation Improvement Program (MTIP) PROJECT AMENDMENT DETAIL WORKSHEET

MTIP Formal Amendment COST INCREASE

Add PE, UR, and Cons funding
based on updated cost estimate

Lead Agency: Metro Portland (Portland Parks)		Project Type:	Trail	ODOT Key:	18832
Project Name:	6	Fiscal Constraint Cat:	Capital	MTIP ID:	70774
Willamette Greenway Trail: Columbia Blvd Bridge		ODOT Type	BikePed	Status:	4
		Performance Goal:	Congest	Comp Date:	12/31/2028
		Capacity Enhancing:	No	RTP ID:	11640
Project Status:		Conformity Exempt:	Yes	CMP:	Yes
4 = (PS&E) Planning Specifications, & Estimates (final design 30%, 60%,90% design activities initiated).		30 Day Notice Begin:	11/1/2022	TCM:	No
		30 Day Notice End:	12/1/2022	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
		Funding Type:	St STBG	RFFA ID:	N/A
		State Highway Route	N/A	RFFA Cycle:	No
		Mile Post Begin:	N/A	UPWP:	No
		Mile Post End:	N/A	UPWP Cycle:	N/A
		Length:	N/A	Past Amend:	5
Short Description:		Flex Transfer to FTA	No	Council Appr:	Yes
Construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.		FTA Conversion Code:	N/A	Council Date:	12/8/2022
		1st Year Program'd:	2015	OTC Approval:	Yes
		Years Active:	9	OTC Date	11/17/2022
		STIP Amend #: 21-24-2796		MTIP Amnd #:	NV23-03-NOV

Detailed Description: None ADD --> In northern Portland at Columbia Blvd and Chimney Park, design and construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough (ODOT original funding to Metro Parks)

STIP Description: Construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.

Last Amendment of Modification: Administrative - November 2022 - AM22-03-NOV1 - Cancel ROW phase and shift funds back to PE

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
State STBG	M240	2015	-	\$ 448,650				\$ -
State STBG	Z240	2015		\$ 866,102				\$ 866,102
STP-U	M23E	2015		\$ 191,235				\$ 191,235
TAP-U	M3E1	2015		\$ 275,361				\$ 275,361
State STBG	Z240	2024				\$ 265,706		\$ 265,706
State STBG	M240	2024					\$ 1,131,861	\$ -
							Federal Totals:	\$ 1,598,404
State Funds								
								\$ -
							State Total:	\$ -
Local Funds								
Local	Match	2015	-	\$ 51,350				\$ -
Local (State)	Match	2015		\$ 99,129				\$ 99,129
Local (STP)	Match	2015		\$ 21,888				\$ 21,888
Local (TAP)	Match	2015		\$ 31,516				\$ 31,516
Other	OTH0	2015		\$ 20,000				\$ -
Local (State)	Match	2024				\$ 30,411		\$ 30,411
Other	OTH0	2024				\$ 9,208		\$ 9,208
Local	Match	2024					\$ 129,547	\$ -
Other	OTH0	2025					\$ 830,973	\$ -
Other	OTH0	2025					\$ 5,872,256	\$ 5,872,256
Other funds = local overmatch contribution							Local Total	\$ 6,064,408
Phase Totals Before Amend:			\$ -	\$ 520,000	\$ -	\$ -	\$ 2,092,381	\$ 2,612,381
Phase Totals After Amend:			\$ -	\$ 1,485,231	\$ -	\$ 305,325	\$ 5,872,256	\$ 7,662,812
Total Project Cost Estimate (all phases):							\$	7,662,812
Year of Expenditure Cost Amount:							\$	7,662,812

Programming Summary Details

Is the project is short programmed: Possibly. The project is one of three Willamette Greenway segment trail improvement projects. The Columbia Blvd to Cathedral Park segment received a 2025-27 RFFA which a portion may be transferred and applied to this project if needed. The amendment actions enable the PE to be completed. The project costs for this and the two other segments will then be updated. Through the new 2024-27 MTIP and STIP, required revisions and updates to the project phase costs will then occur.

Phase Change Amount:	\$ -	\$ 965,231	\$ -	\$ 305,325	\$ 3,779,875	\$ 5,050,431
Phase Change Percent:	0%	185.6%	0%	100%	180.6%	193.3%
Revised Match Federal:	\$ -	\$ 152,533	\$ -	\$ 30,411	\$ -	\$ 182,944
Revised Match Percent:	N/A	10.27%	N/A	10.27%	0%	10.27%

Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:		\$ 1,485,231				Federal Aid ID
Federal Funds Obligated:		\$ 1,332,698				0000(255)
Initial Obligation Date:		9/15/2016				Other Notes
EA Number:		PE002725				Three total Greenway segments: 1. Columbia Bridge 2. Columbia to Cathedral Park 3. Kelly Pt to North Slough
EA Start Date:		9/15/2016				
EA End Date:		12/31/2025				
Known Expenditures:		Not Available				

MTIP Programming Consistency Check Details and Glossary

General Areas

- 1 Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
- 2 Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
- 3 This amendment to the MTIP completes what action: The formal amendment adds required funding to address serious funding shortfalls to PE, UR, and Construction. The additional funds required OTC approval which occurred during their November 2022 meeting. The Willamette Greenway-Columbia Bridge segment is one of 3 Greenway trail segments that will be completed by Metro Parks and Portland Parks. The current amendment enables the PE phase to continue and be completed without additional delays. The Columbia Blvd to Cathedral Park segment received a RFFA award through the recent 2025-27 RFFA project funding call. Depending on the outcome of the PE phases for the Columbia Bridge and Columbia to Cathedral Park segment, a portion of the Columbia/Cathedral Park RFFA funding may be transferred to the Columbia Bridge segment if needed. Further programming updates will occur through the new 2024-27 MTIP once approved. The lead agency for the project also is being changed from Metro Parks to Portland Parks.

4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, Project Change Request, project location maps, RFFA funded segment description, pus draft OTC staff report.
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? 11/1/2022 to 12/1/2022
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? Any applicable or significant comments will be sent onto to Metro Communications staff for their review, evaluation, and response.
6	Added clarifying notes: The amendment is proceeding concurrent with the OTC action. No OTC approval issues are expected.

Fiscal Constraint Consistency Check Areas

1	Will Performance Measurements Apply? Yes, Congestion Reduction and potentially Climate
2A	Does the amendment include fiscal updates? Yes, ODOT is committing additional funding to the project as well as Metro Parks
2B	What is the funding source for the project? ODOT and metro Parks funds
2C	Was the Proof-of Funding requirement satisfied and how? Approval by OTC
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas

1A	RTP ID and Name: ID# 11640 - North Portland Greenway Segment 1
1B	RTP Project Description: Construct the North Slough Bridge to fill the last remaining gap in Segment 1 of the N Portland Greenway Trail.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, Table 2
2B	What is the exception category per the regulation: Table 2 - Air Quality - Bicycle and pedestrian facilities.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete require air conformity analysis and transportation demand modeling through the RTP Update or via an RTP amendment? Not applicable
4	What RTP Goal does the project support? Goal #3 - Transportation Choices, Objective 3.2 Active Transportation System Completion – Complete all gaps in regional bicycle and pedestrian networks
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant) No. The project is not capacity enhancing and greater than \$100 million cost.

UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: No
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Not Applicable
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Not applicable

Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? No
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? Yes - Ped and Bicycle networks
	What is the Metro modeling designation?
	- Bicycle = Yes: Bicycle Parkway
2B	- Pedestrian Model = Yes: Pedestrian Parkway
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

Fund Type Codes References	
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects
STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process
TA-U or TAP-U	Federal Transportation Alternatives funds. TA funds are appropriated to ODOT and then under a formula allocated to the MPOs. The funds are a subset of STBG and designed for eligible transportation enhancements such as median landscaping, construction of commuter trails, etc.

Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	M23E	STP-URBANIZED>200K MAP-21 EXT		14.35%	213,122.26	89.73%	191,234.60	0.00%	0.00	10.27%	21,887.66
	M3E1	TAP >200K MAP-21 EXT		20.66%	306,877.74	89.73%	275,361.40	0.00%	0.00	10.27%	31,516.34
	Z240	SURFACE TRANSP BLOCK GRTS-FLEX		64.99%	965,231.00	89.73%	866,101.78	0.00%	0.00	10.27%	99,129.22
	PE Totals				100.00%	1,485,231.00		1,332,697.78		0.00	
RW	OTH0	OTHER THAN STATE OR		0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	RW Totals				0.00%	0.00		0.00		0.00	0.00
UR	OTH0	OTHER THAN STATE OR		3.02%	9,208.00	0.00%	0.00	0.00%	0.00	100.00%	9,208.00
	Z240	SURFACE TRANSP BLOCK GRTS-FLEX		96.98%	296,117.00	89.73%	265,705.78	0.00%	0.00	10.27%	30,411.22
	UR Totals				100.00%	305,325.00		265,705.78		0.00	
CN	OTH0	OTHER THAN STATE OR		100.00%	5,872,256.00	0.00%	0.00	0.00%	0.00	100.00%	5,872,256.00
	Z240	SURFACE TRANSP BLOCK GRTS-FLEX		0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	CN Totals				100.00%	5,872,256.00		0.00		0.00	
	Grand Totals				7,662,812.00		1,598,403.56		0.00		6,064,408.44

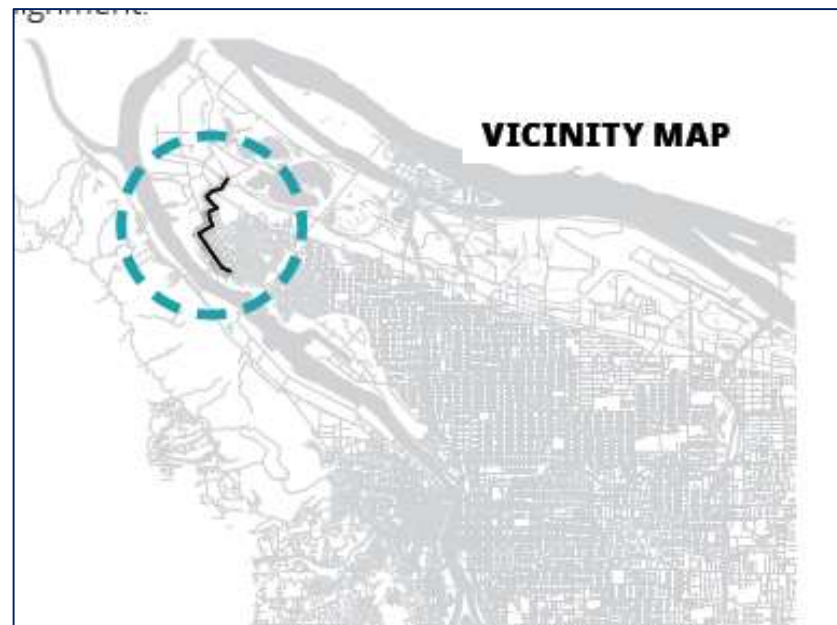


Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette Greenway Trail: Columbia Blvd Bridge project from \$2,612,381 to \$7,662,812 for a total increase of \$5,010,431. The increase will be paid for using City of Portland Parks and Rec and Metro Parks funding.

Project to increase funding:

Willamette Greenway Trail: Columbia Blvd Bridge (K18832)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2016	\$520,000	\$1,485,231
Utility Relocation	2024	\$0	\$305,325
Construction	2024	\$2,092,381	\$5,872,256
TOTAL		\$2,612,381	7,662,812



Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: October 27, 2022
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: November FFY 2023 MTIP Formal Amendment & Resolution 22-5291 Approval Request

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

FOR THE PURPOSE OF ADDING THREE NEW AND AMENDING THREE EXISTING PROJECTS IN THE 2021-26 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM TO MEET REQUIRED FEDERAL HIGHWAYS ADMINISTRATION OBLIGATION OR DELIVERY APPROVAL STEPS

BACKGROUND

What This Is:

The November FFY 2023 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle continues the effort to add required new projects, position projects for fall obligations, and complete necessary updates enabling the next federal approval step to occur. The November amendment bundle contains a total of six projects. They include:

- Adding two new ODOT projects that will begin the deployment of the National Electric Vehicle Infrastructure (NEVI) fast charging stations in Oregon along I-205 from I-5 to the Abernathy Bridge
- Adding ODOT's new American Disabilities Act (ADA) curb and ramp design project, phase 1 for FFY 2024-27.
- Completing a scope adjustment adding site locations as part of the project to ODOT's Willamette Stormwater Source Control Improvements project
- Adding funding to address cost increases to ODOT's OR141 ADA Curb and Ramp improvement project and Metro Parks/Portland Parks Willamette Greenway Columbia Blvd Bridge project

What is the requested action?

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 22-5291 consisting of six amended projects enabling federal reviews and fund obligations to then occur.

A summary of the projects and amendment actions within the bundle are shown on the next pages.

November#1 FFY 2023 Formal Transition Amendment Bundle Contents Amendment Type: Formal/Full Amendment #: NV23-03-NOV Total Number of Projects: 6				
Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # 22738 MTIP ID NEW-TBD (New Project)	ODOT	I-205: From I-5 to the Abernathy Bridge	Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations along I-205 from I-5 to the Abernathy Bridge, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon	<u>ADD NEW PROJECT:</u> Add the new OTC approved National Electric Vehicle Infrastructure (NEVI) funded project from the Infrastructure Investment and Jobs Act (IIJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure
(#2) ODOT Key # 22740 MTIP ID NEW-TBD (New Project)	ODOT	I-84: From I-5 to the Idaho Border	Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations every 50 miles along US 97 from I-5 to the Idaho border, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon	<u>ADD NEW PROJECT:</u> Add the new OTC approved National Electric Vehicle Infrastructure (NEVI) funded project from the Infrastructure Investment and Jobs Act (IIJA) supporting and incentivize the build out of America's electric vehicle charging infrastructure
(#3) ODOT Key # 22978 MTIP ID NEW - TBD (New Project)	ODOT	Portland Metro Area 2024-2027 ADA Curb Ramp Design, Phase 1	Design for future construction of curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards.	<u>ADD NEW PROJECT:</u> The formal amendment adds ODOT's new ADA Design project covering planned ADA cur and ramp improvements during FFY 2024-2027
(#4) ODOT Key # 22552 MTIP ID: 71265	ODOT	Willamette River: Stormwater Source Control Improvements	Complete the design and ROW actions of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St.	<u>SCOPE CHANGE:</u> The formal amendment provides approved funding for the 30 added site locations along US30 that will be included now in the project. Approved

			Johns Bridge including surrounding areas	funding is from the Bridge program.
(#5) ODOT Key # 22431 MTIP ID: 71247	ODOT	OR141/OR217 Curb Ramps	At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.	<u>COST INCREASE:</u> The formal amendment addresses a construction phase funding shortfall by adding OTC approved IIJA funds.
(#6) ODOT Key # 18832 MTIP ID: 71191	Metro (Metro Parks) Portland (Portland Parks)	Willamette Greenway Trail: Columbia Blvd Bridge	Construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.	<u>COST INCREASE:</u> The formal amendment adds funding to address significant phase funding shortfalls to PE, UR, and Construction


AMENDMENT BUNDLE SUMMARY:

A total of six projects are included in the November FFY 2023 MTIP Formal Amendment bundle. The amendment bundle is proceeding under amendment number NV23-03-NOV. All projects completed a 30-day public notification/opportunity to comment period consistent with Metro's Public Participation Plan. The public comment period opened on November 1, 2022 and closed on December 1, 2022.

Required project changes may occur two ways: As administrative modifications, or as formal/full MTIP amendments. FHWA, FTA, ODOT, and the MPOs have develop an approved Amendment Matrix that provides the thresholds for administrative changes. When the project change exceeds the administrative threshold, a formal/full is required. The projects included in the November MTIP Formal Amendment bundle require a formal/full amendment due to the following reasons:

- The change resulted in adding the project to the MTIP. Adding a new project to the MTIP automatically requires the completion of a formal/full amendment. This requirement applied to three projects in the bundle.
- The change updated project costs. The net change to the project cost resulted in the following:
 - Were above the 30% cost change threshold limit for transit projects.
 - Were above the 30% cost change threshold for roadway/capital improvement projects with a total project cost between \$1 and 5 million dollars.
 - Were above the 20% cost change threshold for roadway/capital improvement projects with a total project cost above \$5 million.
- The required changes significantly impact the existing project's scope and limits which triggered the need for the formal/full amendment and a review that the project is still consistent with the RTP.

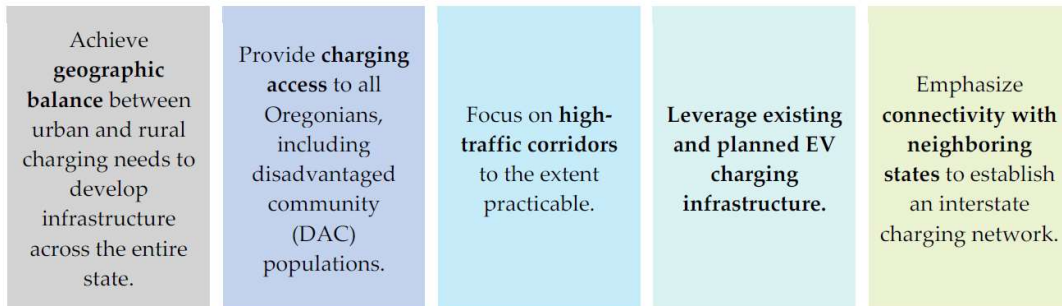
A more detailed overview of each project amendment in the bundle begins below.

Project #1 Key 22738	I-205: From I-5 to the Abernethy Bridge (Add New Project) Lead Agency: ODOT
<p><u>Project Description:</u> Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations along I-205 from I-5 to the Abernethy Bridge, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon</p> <p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • Lead Agency: ODOT • ODOT Key Number: 22738 • MTIP ID#: TBD – New Project • RTP ID: 11584 • Proof-of Funding/Fiscal Constraint Demonstrated: Yes • Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements • OTC approval required: Yes. Approval occurred during their September 2022 meeting which committed IIJA funds for the project. A total of \$1,936,000 is approved for the project. • Performance Measurements applicable: Yes, Climate. • Special Amendment Performance Assessment Required: No • Were overall RTP Consistency checks achieved and satisfactory: Yes • Can the required changes be made, or can the project be added to the MTIP without issues: Yes 	
<p><u>Description of Changes</u></p> <p>Key 22738 is a new ODOT projects which will initiate the deployment of National Electric Vehicle Infrastructure (NEVI) along I-205 (from I-5 to the Abernethy Bridge) which includes the construction of fast chargers for electric vehicle drivers. The project is one segment of multiple segments to the larger NEVI deployment effort occurring on other state highways.</p>  <p>Per the OTC Staff Report item: “ODOT is the convening state agency on transportation electrification and leads electric vehicle charging infrastructure work. Following the IIJA investment in EV charging infrastructure nationwide, the OTC committed to \$100 million for EV charging infrastructure across the state. This allows ODOT to execute findings from the Transportation Electrification Infrastructure Needs Assessment (TEINA, June 2021) and its deployment strategy.</p> <p>ODOT submitted Oregon’s NEVI Plan in late July, and it is currently under review by the federal Joint Office of Energy and Transportation. Once approved, ODOT will receive \$52 million in NEVI funding over five years that must be deployed on Oregon’s eleven EV Alternative Fuel Corridors (see map). Funding match requirements (20 percent) for these dollars bring the investment total to \$65 million.</p> <p>Oregon was required to develop a five-year EV charging statewide plan (the NEVI state plan) by working with state agencies, the public, businesses, rural communities, tribes, utilities, and</p>	

others to receive NEVI federal funds (due August 1st, submitted July 15th). Oregon's NEVI Plan includes the vision and goals for the expenditure of these funds; overall deployment strategy including contracting, corridors and funding; equitable engagement and delivery; and implementation plans".

Guiding Principles

ODOT's charging infrastructure deployment strategy is based on several guiding principles, which align with the goals articulated in both TEINA and the NEVI program. With NEVI funding, ODOT aims to:



See attachment 1 for further discussion within the OTC Staff Report item. Additional NEVI program details can be found on ODOT's website at the following:

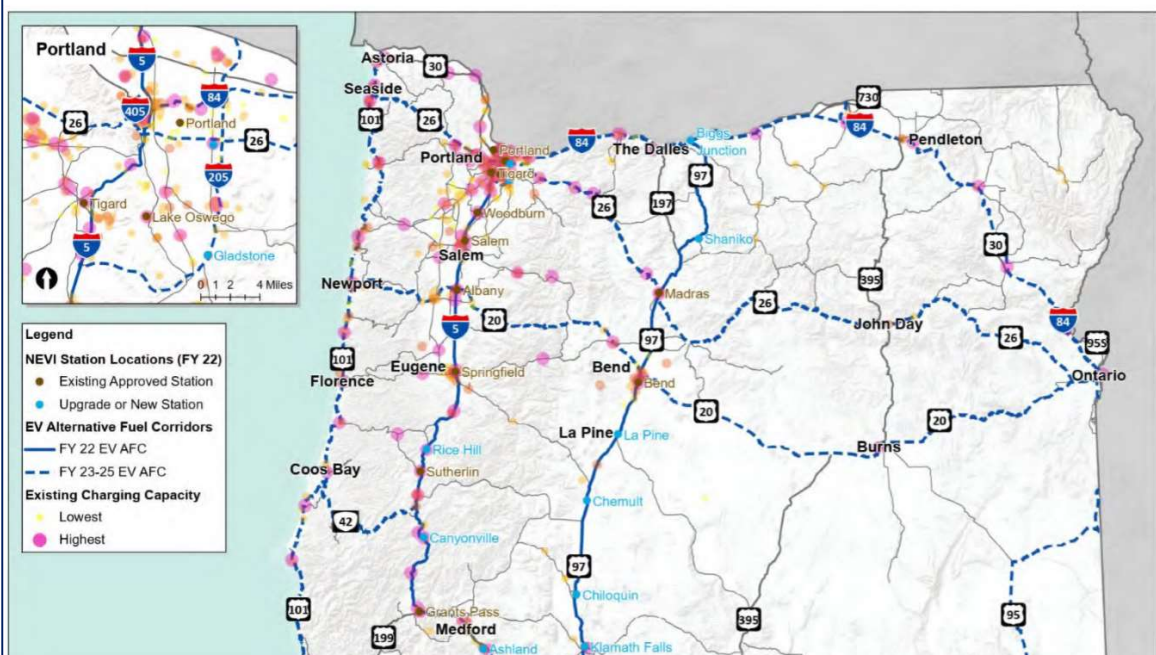
<https://www.oregon.gov/odot/climate/pages/nevi.aspx>

2 Attachments included:

1. OTC Staff Report – NEVI Update
2. NEVI Plan Executive Summary

Support Item(s): Location Maps

Figure 26: Existing Charging Capacity and Planned NEVI Stations



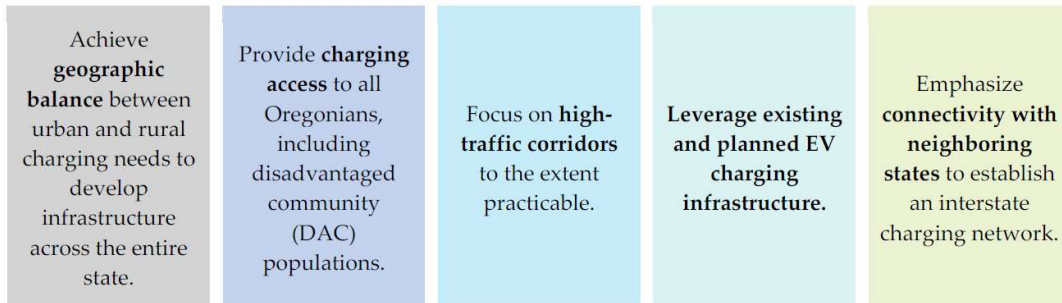
Project #2 Key 22740	I-84: From I-5 to the Idaho Border (Add New Project) Lead Agency: ODOT
<p><u>Project Description:</u> Establish National Electric Vehicle Infrastructure (NEVI) fast charging stations every 50 miles along US 97 from I-5 to the Idaho border, to provide electric vehicle drivers with reliable, fast charging along major corridors in Oregon</p>	
<p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • Lead Agency: ODOT • ODOT Key Number: 22740 • MTIP ID#: TBD – New Project • RTP ID: 11584 • Proof-of Funding/Fiscal Constraint Demonstrated: Yes • Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements • OTC approval required: Yes. Approval occurred during their September 2022 meeting which committed IIJA funds for the project. A total of \$5,382,000 is approved for the project. • Performance Measurements applicable: Yes, Climate. • Special Amendment Performance Assessment Required: No • Were overall RTP Consistency checks achieved and satisfactory: Yes • Can the required changes be made, or can the project be added to the MTIP without issues: Yes 	
<p><u>Description of Changes</u></p> <p>Key 22740 is a new ODOT projects which will initiate the deployment of National Electric Vehicle Infrastructure (NEVI) along the I-84 which includes the construction of fast chargers for electric vehicle drivers. The project is one segment of multiple segments to the larger NEVI deployment effort occurring on other state highways.</p> <p>Per the OTC Staff Report item:</p> <p>“ODOT is the convening state agency on transportation electrification and leads electric vehicle charging infrastructure work. Following the IIJA investment in EV charging infrastructure nationwide, the OTC committed to \$100 million for EV charging infrastructure across the state. This allows ODOT to execute findings from the Transportation Electrification Infrastructure Needs Assessment (TEINA, June 2021) and its deployment strategy.</p> <p>ODOT submitted Oregon’s NEVI Plan in late July, and it is currently under review by the federal Joint Office of Energy and Transportation. Once approved, ODOT will receive \$52 million in NEVI funding over five years that must be deployed on Oregon’s eleven EV Alternative Fuel Corridors (see map). Funding match requirements (20 percent) for these dollars bring the investment total to \$65 million.</p> <p>Oregon was required to develop a five-year EV charging statewide plan (the NEVI state plan) by working with state agencies, the public, businesses, rural communities, tribes, utilities, and others to receive NEVI federal funds (due August 1st, submitted July 15th). Oregon’s NEVI Plan includes the vision and goals for the expenditure of these funds; overall deployment</p>	



strategy including contracting, corridors and funding; equitable engagement and delivery; and implementation plans”.

Guiding Principles

ODOT's charging infrastructure deployment strategy is based on several guiding principles, which align with the goals articulated in both TEINA and the NEVI program. With NEVI funding, ODOT aims to:



See attachment 1 for further discussion within the OTC Staff Report item. Additional NEVI program details can be found on ODOT's website at the following:

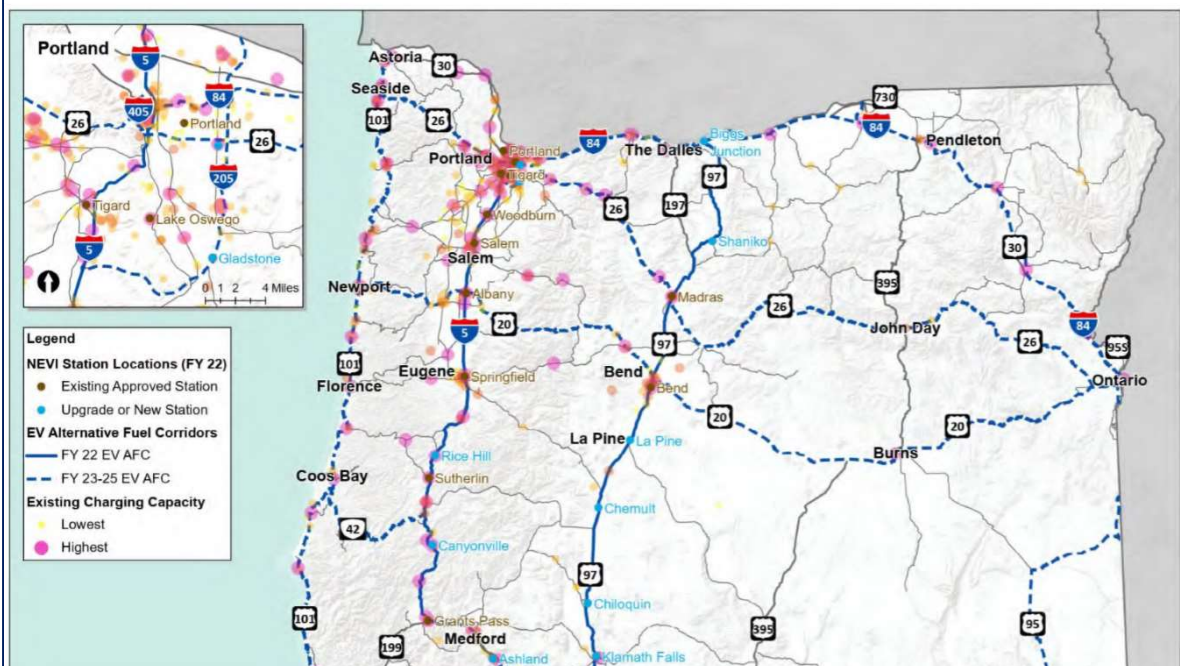
<https://www.oregon.gov/odot/climate/pages/nevi.aspx>

2 Attachments included:

3. OTC Staff Report – NEVI Update
4. NEVI Plan Executive Summary

Support Item(s): Location Maps

Figure 26: Existing Charging Capacity and Planned NEVI Stations



Project #3 Key 22978	Portland Metro Area 2024-2027 ADA Curb Ramp Design, Phase 1 (Add New Project) Lead Agency: ODOT
<p><u>Project Description:</u> Across the Portland Metro region on Routes OR8, OR47, OR10, OR 43, OR99W, OR99E, OR213, US30, US26, I-5, I-84, I-205, and I-405, complete PE design requirements for future selected ADA compliant curb and ramp upgrade site locations</p> <p>Identifications/Key Consistency Check Areas:</p> <ul style="list-style-type: none"> • Lead Agency: ODOT • ODOT Key Number: 22978 • MTIP ID#: New - TBD • RTP ID: 12095 • Proof-of Funding/Fiscal Constraint Demonstrated: Yes • Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements • OTC approval required: Yes. Approval occurred at their September 2022 meeting. A total of \$19,600,000 has been approved for the project. • Performance Measurements applicable: Indirectly, Safety • Special Amendment Performance Assessment Required: No • Were overall RTP Consistency checks achieved and satisfactory: Yes • Can the required changes be made, or can the project be added to the MTIP without issues: Yes 	
<p><u>Description of Changes</u></p> <p>The November FFY 2023 Formal MTIP Amendment adds the new ADA design phase project to the MTIP. The project will cover ADA Preliminary Engineering/design requirement for future projects to be implemented between during 2025 and 2026.</p> <p>Form the OTC Staff Report Item: ADA Update:</p> <p>“To achieve ODOT’s goal of providing better, more equitable pedestrian access, ODOT developed an ADA Ramp Plan with a defined schedule for upgrading noncompliant ramps to be ADA compliant. ODOT also created the ADA Program Unit (Program) to focus the agency efforts on the ADA Ramp Plan, comply with the Settlement Agreement, and meet the intent of the Federal ADA legislation. The Program manages the funding of multiple STIP projects in each STIP cycle to replace or modify ADA ramps throughout the state, primarily through outsourced design and contracted construction.</p> <p>The Program is scheduled to replace or modify over 25,000 curb ramps on or along the state highway system between 2017 and 2032. This effort is further divided into three 5-year time periods. In the first 5 years of the Ramp Plan, the Program created and funded projects intended to achieve 30% of the inventory (7,779 ramps) by December 2022. Each subsequent 5-year period has its own ramp target as shown: 11,956 additional ramps (cumulative of 75%) by 2027 and the final set of 6,642 ramps (complete at 100%) by 2032.”</p> <p>Only preliminary engineering is being added to the MIP through Key 22978 at this time. Additional details can be found in the OTC Staff Report in Attachment 3.</p>	

Support Item(s): Design Locations

Route	Highway	Begin MP	End MP	Ramps
OR8	029 Tualatin Valley	0.27	17.88	2760
OR47	029 Tualatin Valley	18.02	19.96	
OR10	040 Beaverton - Hillsdale	0.97	3.40	
OR10	142 Farmington	5.88	7.37	
OR99W	091 Pacific Highway West	1.31	16.67	
US30	092 Lower Columbia River	0.56	18.37	
OR213	068 Cascade Hwy North	0.06	9.40	
US30	100 Historic Columbia River	30.41	31.28	
		49.07	50.98	
		2.55	6.77	
US26	026 Mt. Hood	-0.13	73.97	
US26	047 Sunset	1.40	74.05	
OR281	281 Hood River	16.77	16.92	
OR282	282 Odell	2.05	2.64	
OR43	003 Oswego	0.01	11.55	
OR99E	081 Pacific Hwy East	1.45	13.64	
I-5	001 Pacific	282.71	308.31	
I-405	061 Stadium Freeway	0.98	4.26	
I-205	064 East Portland Freeway	3.25	25.79	
I-84	002 Columbia River	0.41	64.02	

Project #4 Key 22552	Willamette River: Stormwater Source Control Improvements (Scope Change) Lead Agency: ODOT
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Project Description:

Complete the design and ROW actions of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas

Identifications/Key Consistency Check Areas:

- Lead Agency: ODOT
- ODOT Key Number: **22552**
- MTIP ID#: 71265
- RTP ID: 12092
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval Yes – as of November 17, 2022. The amendment is progressing under the concurrent approval format. This assumes OTC will approve the scope change and funding adjustments without issues.
- Performance Measurements applicable: Yes – Climate
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes

- Can the required changes be made, or can the project be added to the MTIP without issues:
Yes

Description of Changes

From the draft OTC Staff Report Item:

“The purpose of the Willamette River: Stormwater source control improvements project is to complete the design and construction of select Source Control Measures (SCMs) to prevent toxics transported by stormwater from entering the Willamette River which is located in the Columbia River Basin. The project will improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas of Highway 30 limiting ODOT’s exposure to recontamination claims within the Portland Harbor.

In the spring of 2021, ODOT submitted a Feasibility Study (FS) to DEQ which covered the entirety of the project footprint, including runoff from the Fremont and St Johns bridges and Highway 30, contributing stormwater to the Portland Harbor Superfund site. In the summer of 2021, ODOT conducted an Advanced Investigation (AI) to confirm the results and SCM selection described in the Feasibility Study. The results of the AI validated the FS’s conclusions related to the bridge locations only; however the AI results also indicated that the proposed improvements along Highway 30 would cost significantly more than the FS estimated. As a result, a Supplemental FS was completed to review and re-evaluate the proposed SCMs along Highway 30. The Supplemental FS was submitted to DEQ in June 2022 and approved in August 2022.”

As a result of the scope change to include the added site locations, the project cost increases from \$4,400,000 to \$11,962,600. OTC approval is expected to occur during their November 2022 meeting.

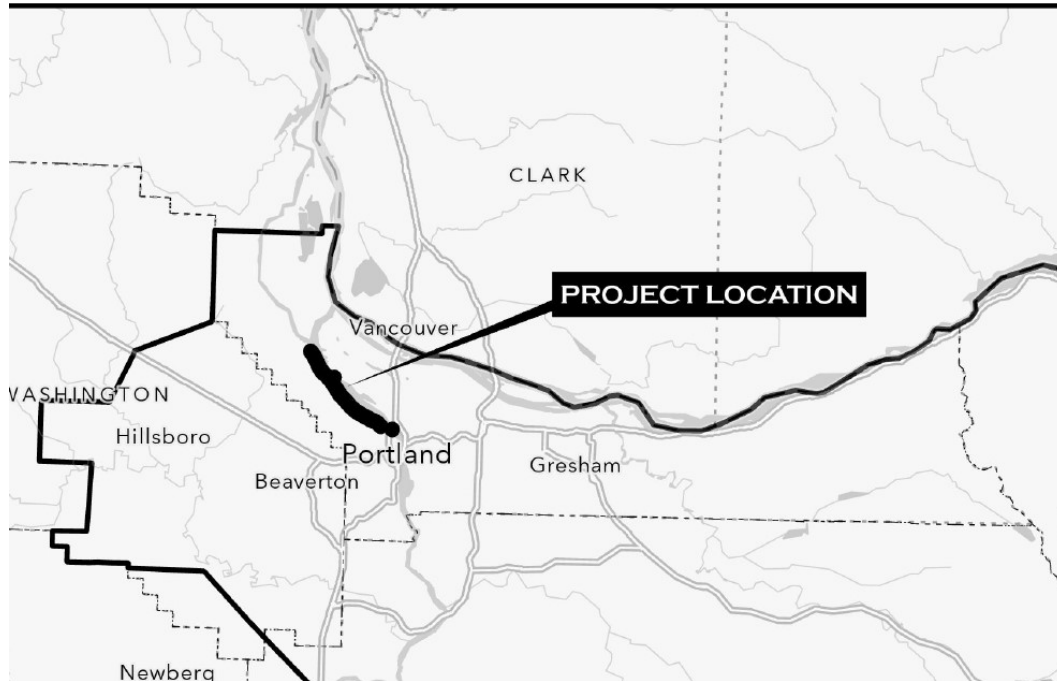
Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette River: Stormwater source control improvements project from \$4,400,000 to \$11,962,600 for a total increase of \$7,562,600. The increase will be paid for using Portland Harbor funding which is being administered through the Bridge financial plan.

Project to increase funding:

Willamette River: Stormwater source control improvements (K22552)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2022	\$2,400,000.00	\$6,450,030
Right of Way	2023	\$2,000,000	\$5,512,570
Utility Relocation	N/A	\$0	\$0
Other	N/A	\$0	\$0
Construction	N/A	\$0	\$0
TOTAL		\$4,400,000	\$11,962,600

Additional details can be found in the draft Staff Report Item included as Attachment 4.

Support Item(s): Project Location Map

Project #5 Key 22431	OR141/OR217 Curb Ramps (Cost Increase) Lead Agency: ODOT
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Project Description:

At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps.

Identifications/Key Consistency Check Areas:

- Lead Agency: ODOT
- ODOT Key Number: **22431**
- MTIP ID#: 71247
- RTP ID: 12095
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval Yes, OTC approval was required and occurred during their September, 2022 meeting. OTC approved a total of \$7,518,278 for the project.
- Performance Measurements applicable: Yes – Safety
- Special Amendment Performance Assessment Required: No
- Were overall RTP Consistency checks achieved and satisfactory: Yes

- Can the required changes be made, or can the project be added to the MTIP without issues:
Yes

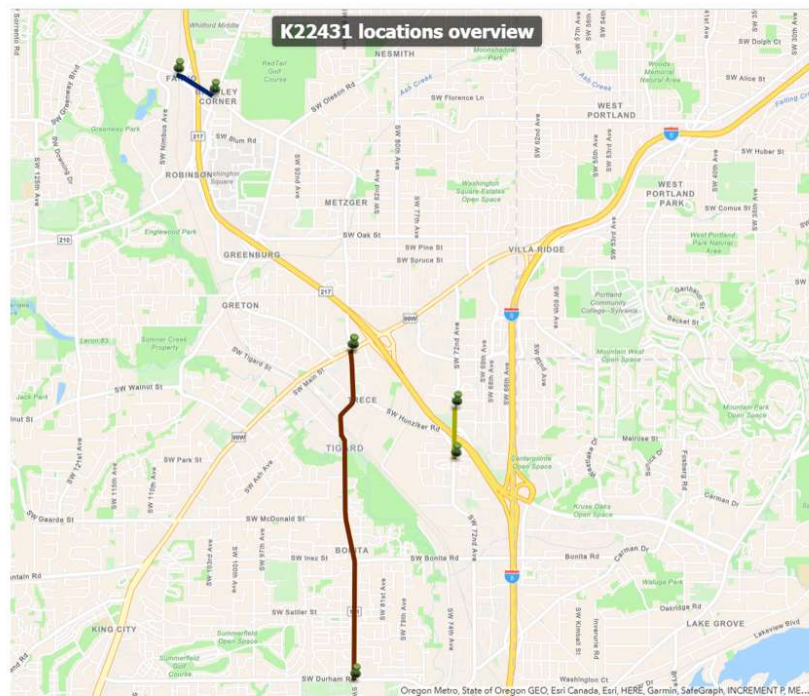
Description of Changes

The cost increase for the project is similar to other ODOT ADA improvement projects where inflation is impacting the overall project cost. ODOT ADA ramp project costs increased significantly over the last three years. ODOT believes this is due, in part, to increased ramp construction volumes, supply chain issues, and inflation. The average price of curb ramps (total project cost/ramps in the project) doubled from 2017 to 2021, and tripled by 2022 amendment.

The cost increase is being addressed by a commitment of IJA for the project. See additional details in OTC Staff Report Item in Attachment 3.

Support Item(s):

Project Location Map



Agenda Item F: Attachment 02

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total (0 if new)	Proposed Total	Difference
22431	1	OR141/OR217 curb ramps	4.97	7.07		CN	ADA	SW ADA TRANSITION	\$ 4,662,297.00	\$ 7,518,278.00	\$ 2,855,981.00
22432	1	US30BY curb ramps	1.28	14.74		CN	ADA	SW ADA TRANSITION	\$25,556,438.00	\$ 38,810,000.00	\$ 13,253,562.00
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.3	125		CN	ADA	SW ADA TRANSITION	\$12,063,225.00	\$19,149,070.00	\$ 7,085,845.00
22435	2	OR47/OR8/US30 curb ramps	17.88	90.59		CN	ADA	SW ADA TRANSITION	\$ 9,075,262.00	\$14,566,171.00	\$ 5,490,909.00
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 8,066,607.00	\$13,435,375.00	\$ 5,368,768.00
22611	3	OR540 curb ramps: Coos Bay city limits -	4.89	8.49		CN	ADA	SW ADA TRANSITION	\$ -	\$ 1,800,000.00	\$ 1,800,000.00

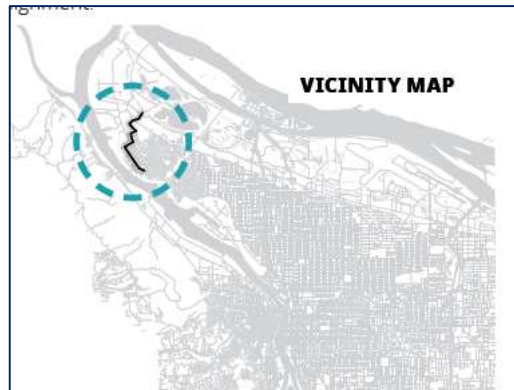
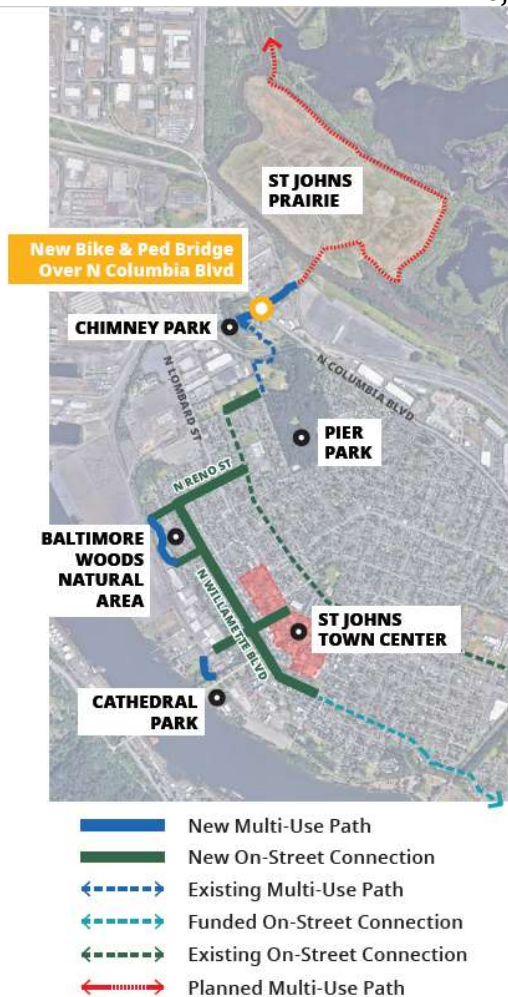
Project #6 Key 18832	Willamette Greenway Trail: Columbia Blvd Bridge (Cost Increase) Lead Agency: Metro Parks Portland Parks
<u>Project Description:</u> Construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.	
Identifications/Key Consistency Check Areas: <ul style="list-style-type: none"> • Lead Agency: Metro Parks being changed to Portland Parks • ODOT Key Number: 18832 • MTIP ID#: 70774 • RTP ID: 11640 • Proof-of Funding/Fiscal Constraint Demonstrated: Yes • Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements • OTC approval: Yes. OTC approval is required to commit the added needed funding and will occur during their November 2022 meeting. The amendment is progressing concurrently with the expectation OTC will approve the added funding for the project without issues. OTC actin will increase the project funding from \$2.6 million to over\$ 7.6 million. Metro Parks and Portland Parks are adding the increase using their local funds. The lead agency is also being changed to be Portland Parks. • Performance Measurements applicable: Yes – Congestion Reduction and Climate • Special Amendment Performance Assessment Required: No – The project is not capacity enhancing or exceeds \$100 million dollars • Were overall RTP Consistency checks achieved and satisfactory: Yes • Can the required changes be made, or can the project be added to the MTIP without issues: Yes 	
<u>Description of Changes</u> The project includes ODOT managed funding with the original award dating back to 2015. Early in design, the project identified as short all required funding. Metro Parks and Portland Parks have been working with ODOT to develop an acceptable funding plan to cover the funding shortfall. As of October 2022, the proposed funding plan was deemed acceptable. However, the cost increase is significant and exceeds \$5 million dollars. As a result, OTC approval also is required. The formal amendment adds required funding to address significant funding shortfalls to PE, UR, and Construction. The Willamette Greenway-Columbia Bridge segment is one of three Greenway trail segments that will be completed by Metro Parks and Portland Parks. The current amendment enables the PE phase to continue and be completed without additional delays. The Columbia Blvd to Cathedral Park segment received a RFFA award through the recent 2025-27 RFFA project funding call. Depending on the outcome of the PE phases for the Columbia Bridge and Columbia to Cathedral Park segment, a portion of the Columbia/Cathedral Park RFFA funding may be transferred to the Columbia Bridge segment if needed. Further programming updates may be needed and will occur through the new 2024-27 MTIP after it is approved.	

Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette Greenway Trail: Columbia Blvd Bridge project from \$2,612,381 to \$7,662,812 for a total increase of \$5,010,431. The increase will be paid for using City of Portland Parks and Rec and Metro Parks funding.

Project to increase funding:

Willamette Greenway Trail: Columbia Blvd Bridge (K18832)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2016	\$520,000	\$1,485,231
Utility Relocation	2024	\$0	\$305,325
Construction	2024	\$2,092,381	\$5,872,256
TOTAL		\$2,612,381	7,662,812

Support Items:**Project Location Maps**

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. The programming factors include:

- Verification and eligible to be programmed in the MTIP.
- Passes fiscal constraint verification.
- Passes the RTP consistency review. Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
- Consistent with RTP project costs when compared with programming amounts in the MTIP
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and has completed required air conformity analysis and transportation demand modeling
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP.
- If not directly identified in the RTP's constrained project list, the project is verified to be part of the MPO's annual Unified Planning Work Program (UPWP) if federally funded and a regionally significant planning study that addresses RTP goals and strategies and/or will contribute or impact RTP performance measure targets.
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
- Does not violate supplemental directive guidance from FHWA/FTA's approved Amendment Matrix.
- Reviewed and determined that Performance Measurement will or will not apply.
- Completion of the required 30 day Public Notification period:
- Meets MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

APPROVAL STEPS AND TIMING

Metro's approval process for formal amendment includes multiple steps. The required approvals for the October FFY 2023 Formal MTIP amendment (OC23-02-OCT) will include the following:

<u>Action</u>	<u>Target Date</u>
• TPAC Agenda mail-out.....	October 28, 2022
• Initiate the required 30-day public notification process.....	November 1, 2022
• TPAC notification and approval recommendation.....	November 4, 2022
• JPACT approval and recommendation to Council.....	November 17, 2022
• Completion of public notification process.....	December 1, 2022
• Metro Council approval.....	December 8, 2022

Notes:

* The above dates are estimates. JPACT and Council meeting dates could change.

** If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

USDOT Approval Steps (The below time line is an estimation only):

<u>Action</u>	<u>Target Date</u>
• Final amendment package submission to ODOT & USDOT.....	December 14, 2022
• USDOT clarification and final amendment approval.....	Early to mid-January, 2023

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:**
 - a. Amends the 2021-24 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 20-5110 on July 23, 2020 (FOR THE PURPOSE OF ADOPTING THE 2021-2024 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA).
 - b. Oregon Governor approval of the 2021-24 MTIP: July 23, 2020
 - c. 2021-2024 Statewide Transportation Improvement Program (STIP) Approval and 2021 Federal Planning Finding: September 30, 2020
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds, or obtain the next required federal approval step as part of the federal transportation delivery process.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

Staff is providing TPAC their official notification and requests they provide JPACT an approval recommendation of Resolution 22-5291 consisting of six amended projects enabling federal reviews and fund obligations to then occur.

5 Attachments:

1. Attachment 1: OTC Staff Report – NEVI Update
2. Attachment 2: NEVI Plan Executive Summary
3. Attachment 3: OTC Staff Report – ADA Program Update
4. Attachment 4: Draft OTC Staff Report Item – Willamette River Stormwater Source Control
5. Attachment 5: Draft OTC Staff Report Item – Willamette Greenway Tr/Columbia Blvd Bridge Cost Increase



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022

TO: Oregon Transportation Commission

Kristopher W. Strickler

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item L – NEVI Update

Requested Action:

Receive an update from the Policy Data and Analysis Division Administrator Amanda Pietz and ODOT Climate Office on the OTC's \$100 million commitment to electric vehicle (EV) charging, with a focus on Oregon's Plan for the federal Infrastructure Investments and Jobs Act (IIJA) National Electric Vehicle Infrastructure (NEVI) program.

Background:

ODOT is the convening state agency on transportation electrification and leads electric vehicle charging infrastructure work. Following the IIJA investment in EV charging infrastructure nationwide, the OTC committed to \$100 million for EV charging infrastructure across the state. This allows ODOT to execute findings from the Transportation Electrification Infrastructure Needs Assessment (TEINA, June 2021) and its deployment strategy.

National Electric Vehicle Infrastructure (NEVI)

ODOT submitted Oregon's NEVI Plan in late July, and it is currently under review by the federal Joint Office of Energy and Transportation. Approval of the Plan is expected later this month.

Once approved, ODOT will receive \$52 million in NEVI funding over five years that must be deployed on Oregon's eleven EV Alternative Fuel Corridors (see map). Funding match requirements (20 percent) for these dollars bring the investment total to \$65 million.

Oregon was required to develop a five-year EV charging statewide plan (the NEVI state plan) by working with state agencies, the public, businesses, rural communities, tribes, utilities, and others to receive NEVI federal funds (due August 1st, submitted July 15th). Oregon's NEVI Plan includes the vision and goals for the expenditure of these funds; overall deployment strategy including contracting, corridors and funding; equitable engagement and delivery; and implementation plans. Building on foundational work such as TEINA and engagement to date, Oregon's NEVI plan includes these principal elements:

- 1) Focus on Light-duty EV Charging: In line with the program requirements for NEVI, ODOT will prioritize a statewide EV charging network for light-duty vehicles
- 2) Future Proof Sites: Oregon has an aspirational goal to exceed Federal standards by designing stations with four DC fast chargers – three with a 150 kW power level, plus one higher power charger up to 350 kW – and to future-proof stations so that up to two additional 350 kW chargers could be added. Higher-powered chargers will better enable NEVI stations to serve power capabilities of future light-duty EVs as well as some Medium-duty EVs.
- 3) Partner with the Private Sector: ODOT will work through public-private partnerships – similar to the West Coast Electric Highway – to engage private sector companies to install, upgrade, operate and maintain charging stations. ODOT will manage the distribution of funds, sequence corridor development and upgrades, and assure that the infrastructure is built out.
- 4) Design Competitive Requests for Proposals (RFP): ODOT intends to design competitive RFPs for corridors, balancing development of rural and underserved routes across the state with contractual elements that will attract private sector interest.
- 5) Upgrade Existing Stations: ODOT aims to leverage investments already made in fast charging stations by fostering upgrades at appropriately-sited stations on select routes, over time (~ 10% of Oregon’s existing charging stations meet NEVI standards).
- 6) Target Reliability and Equity: ODOT will focus on funding partners with a proven track record for building, operating, and maintaining charging stations, with high levels of reliability and staying power in the market. ODOT will ensure our private sector partners work with us to engage with communities and achieve Justice40 goals through regional workshops as each corridor is built out, ensuring broad stakeholder engagement.¹
- 7) Expand Coverage: ODOT will build out the current eleven EV Alternative Fuel Corridors in the first three years of the NEVI program, to create a backbone network, and will propose additional corridors to enhance geographic coverage and connectivity, as funding allows. (In addition to the 7 EV Alternative Fuel Corridors that the FHWA approved through 2021, four additional corridors were proposed and approved this year: I 205, I 405, US 95, and OR 42.)
- 8) Center Equity and Engage with Stakeholders: ODOT will work with community members, stakeholders and EV charging partners to ensure program delivery fulfills the intent of the Justice40 Initiative (40% of all program benefits to accrue to disadvantaged communities), including regional workshops along each corridor prior to build out.

There are additional federal requirements of the NEVI funds that will direct the spacing of sites, number of chargers, payment mechanisms, interoperability, reliability, and support workforce development. All of these pieces will help to ensure a complete charging network that meets Oregon’s needs and connects across state lines. With the \$65 million dedicated to NEVI, ODOT’s preliminary analyses indicates the

¹ [Justice 40](#) is a federal initiative created through President Biden’s Executive Order 14008 (2021) to deliver 40 percent of the overall benefits of federal investments in climate and clean energy, including sustainable transportation, to disadvantaged communities.

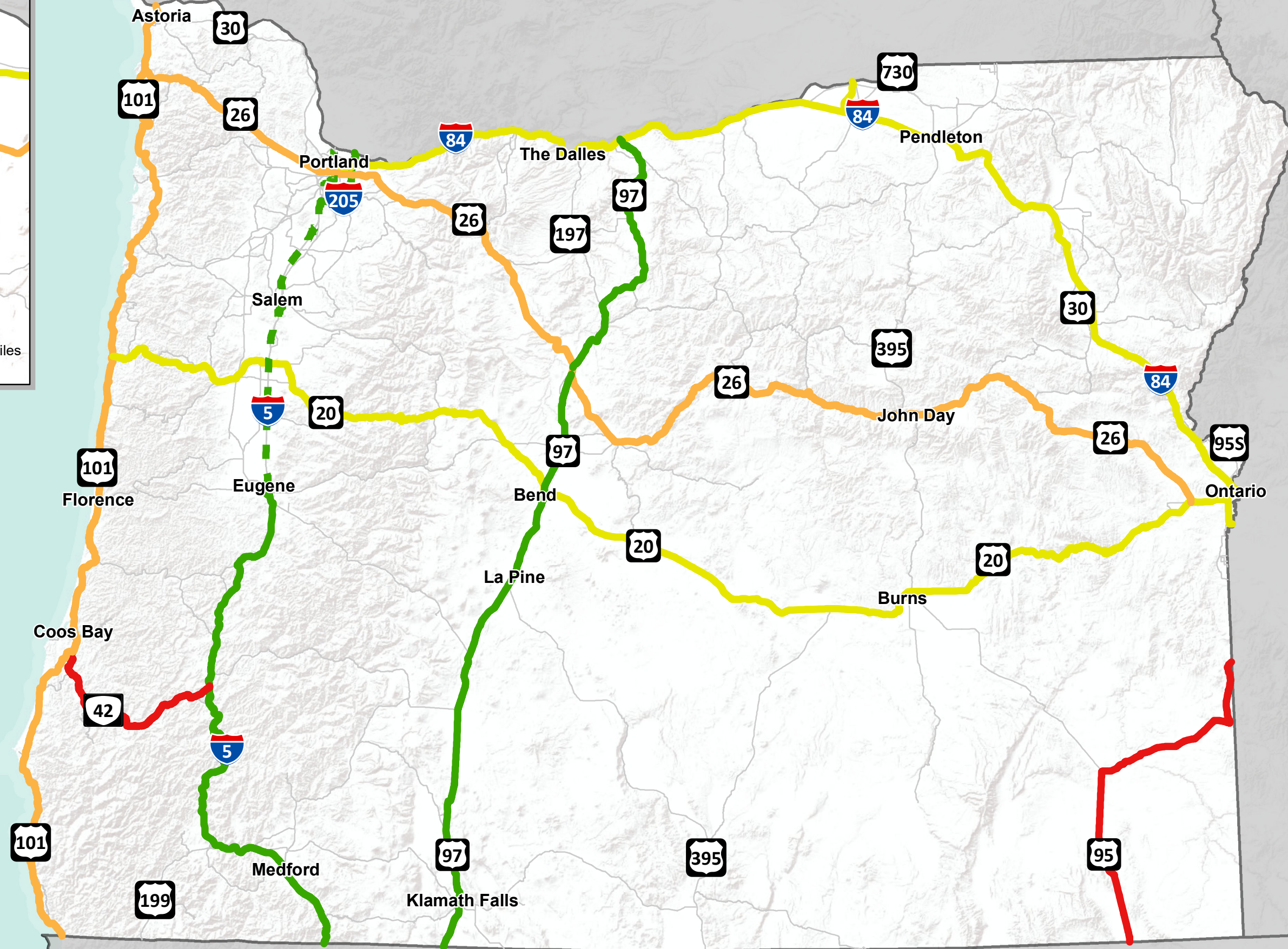
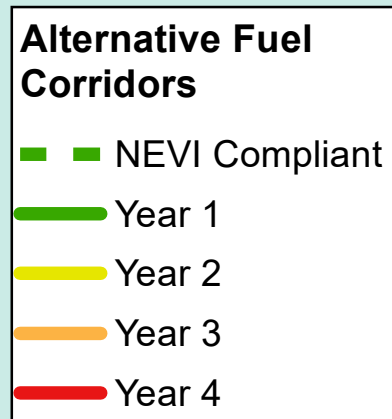
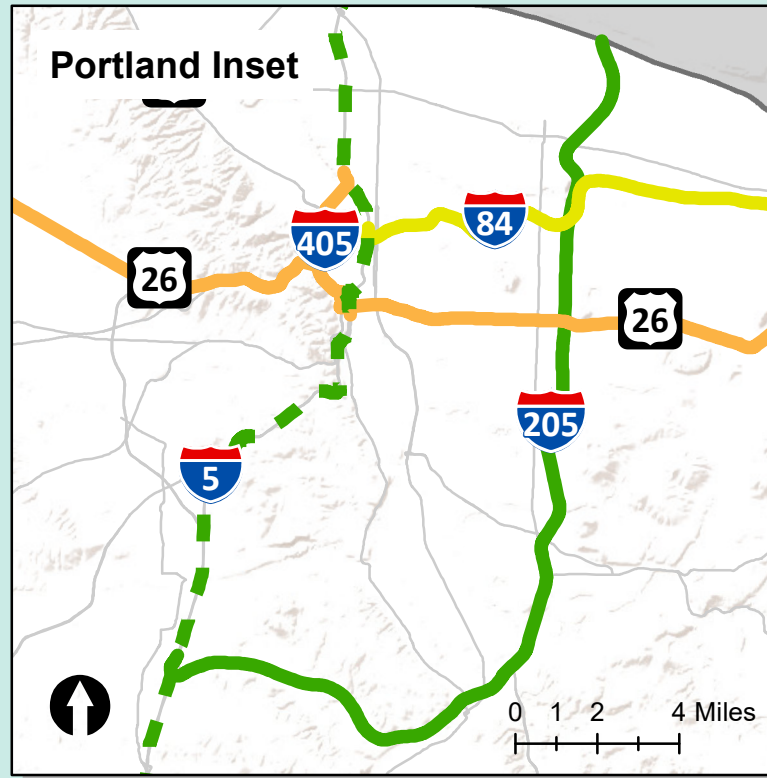
funding is sufficient to build out all eleven corridors to federal standards, and potentially add a few new corridors for greater coverage and connectivity across the state.

The remaining \$35 million committed by the OTC will go a long way in addressing needs outside of major corridors, with a focus on charging in rural and urban areas, underserved communities, and apartment complexes. In addition to the \$100 million commitment, ODOT will also support and pursue federal grants to bring even more money to Oregon to meet the significant charging needs identified in TEINA.

Leverage the private sectors' investment in EV charging infrastructure.

Attachment:

- Attachment 1 – Map of EV Alternative Fuel Corridors





Oregon National Electric Vehicle Infrastructure Plan

July 2022



Executive Summary

The Oregon Department of Transportation (ODOT) is pleased to submit this State EV Infrastructure Deployment Plan (State Plan or Plan) to the Joint Office of Energy and Transportation (JOET). This Plan, developed collaboratively by ODOT and the Oregon Department of Energy (ODOE), addresses each of the requirements set forth by JOET to secure Oregon's portion of the funding allocated to states through the National EV Infrastructure (NEVI) program, which was created under the Infrastructure Investment and Jobs Act (IIJA) in November 2021.

Oregon is all in on transportation electrification and is supporting a rapid scale-up of EV charging infrastructure in the state. ODOT is committed to charging infrastructure over and above the NEVI funds-plus-match, providing over \$100 million total toward EV charging infrastructure. Oregon is well-positioned to build out charging infrastructure and target the highest-need locations because of its recent Transportation Electrification Infrastructure Needs Analysis (TEINA) report, submitted to Governor Kate Brown in July 2021. The NEVI funding for public fast-charging stations along alternative fuel corridors is an important next step to meeting identified needs, and ODOT looks forward to working with JOET to complete its planning and begin implementation of this program.

Vision

Create a backbone network of high-powered EV charging stations along major corridors, to significantly increase Oregonians' confidence that EV charging will be as ubiquitous and convenient as fueling with gasoline.

Plan Summary

ODOT's vision for the NEVI program is to create a backbone network of high-powered EV charging stations along major corridors to significantly increase Oregonians' confidence that EV charging will be as ubiquitous and convenient as fueling with gasoline.

This Plan lays out how ODOT will use NEVI funding to achieve the above vision. It addresses each of the requirements set forth by JOET and describes ODOT's guiding principles; deployment strategy; the envisioned contracting mechanisms; key elements of the deployment approach; and ODOT's past, ongoing, and planned public outreach efforts, including how it will engage with diverse stakeholders and ensure a minimum of 40% of the NEVI benefits accrue to disadvantaged communities.

Overarching Strategy

With FY22 funding ODOT aims to build out I-5, US 97, and I-205. I-5 is one of the most critical, high-traffic routes in the state, and US 97 is a key route through central Oregon that carries high traffic volumes and serves both urban and rural areas. I-205 serves high traffic volumes in the Portland metropolitan area and travels through or adjacent to numerous disadvantaged communities (DACs).

FY23 funding will focus on I-84, I-82, and US 20, all of which are high volume routes that provide for east-west travel. I-84 provides service to numerous DACs and accommodates a high proportion of long-distance trips. I-82 connects directly with I-84 and enhances Oregon's connectivity with Washington. US 20 is a route of strategic statewide importance and a freight corridor that will provide additional rural EV charging coverage across the central part of Oregon.

With FY24 funding Oregon anticipates build out of US 26, US 101, and I-405. Build out of US 26 and US 101 will represent completion of the remaining seven designated Alternative Fuel Corridors (AFCs) approved during Rounds 1 – 5. US 26 will add additional coverage to Central Oregon, and completion of US 101 will bolster the existing DC Fast Charging (DCFC) infrastructure along Oregon's coast. Completion of I-405 will support the high traffic volumes and DAC populations it serves in the Portland metropolitan area.

ODOT envisions using FY25 and FY26 funding for completion of US 95 and OR 42, both of which are approved EV AFCs from Round 6. More broadly, ODOT intends to reserve funding for these later years to either develop additional EV AFCs that have yet to be proposed, and/or to build redundancy in charging stations along the other AFCs to strengthen the overall network and accommodate increasing EV traffic in the coming years.

Over the course of the five-year NEVI program, ODOT anticipates using the \$65 million in total funding (Federal funds and 20% non-Federal match) to develop and/or upgrade approximately 65 DCFC stations across Oregon's roadways, totaling a minimum of 260 DCFC ports (doubling Oregon's public DCFC ports).

Envisioned Contracting Mechanisms

ODOT has broad authority to use the Oregon Innovative Partnerships Program (OIPP) to develop public-private partnerships (P3s) for a full range of transportation projects. OIPP procurements offer many benefits over traditional contracting, including the ability to select projects based on best value rather than lowest cost, the ability to customize Requests for Proposals (RFPs) to meet the needs of a particular project, and maximum flexibility to change an agreement to accommodate unanticipated events. Therefore, ODOT plans to enter into P3s with one or more EV Service Providers (EVSPs) to both develop and operate fast charging stations funded through NEVI.

Figure 2: Process for Developing DCFC Along Alternative Fuel Corridors



Deployment Approach

ODOT's deployment strategy is expected to evolve and adapt throughout the five-year NEVI program in response to experience gained and lessons learned during the program's early years. ODOT's deployment approach will be consistently grounded in the following five overarching objectives:



Partner with private sector.

ODOT will not own, install, maintain, or operate any of the EV charging stations deployed with NEVI funds while leveraging private sector expertise.



Target reliability. Public confidence in the reliability of EV charging infrastructure is one of the most significant factors in accelerating EV adoption. NEVI requires achievement of 97% uptime.



Develop/design competitive corridor RFPs. ODOT intends to issue corridor-specific competitive RFPs in concert with the strategy described above.



Expand coverage. ODOT is committed to prioritizing equity while transitioning the state's transportation system to be powered by electricity. Through NEVI and complementary state programs, access to EV charging will expand across socioeconomic and geographic areas throughout the state, potentially adding new EV AFCs. ODOT will also work with the private sector to intentionally develop sites that serve both highway traffic and local EV charging needs, maximizing utilization and economic development opportunities, where practical.



Build new *and* upgrade existing. ODOT will maximize the benefits of the five-year NEVI program funding by building new charging infrastructure where needed and upgrading existing infrastructure facilities to meet NEVI standards where practical.

Public Outreach

Stakeholder engagement was a key part of the earlier TEINA study process and included a diverse 17-member Advisory Group; four public Advisory Group meetings; 12 Stakeholder listening sessions; and a project-dedicated web page. ODOT has used this extensive input as the starting point for an expanded and more comprehensive stakeholder engagement effort that is already supporting the five-year NEVI program. Combined with lessons learned from FY22 deployment activities, this public process will help ODOT to refine future (annual) updates of this plan through the duration of the NEVI program.

Added elements of the expanded stakeholder engagement process for the NEVI program include:

- Introductory and follow-up webinars providing both background material and updates.
- A NEVI-specific web page that includes detailed responses to frequently asked questions in previous public interactions.
- Public opinions and insights obtained from four surveys conducted via the web page, supplemented by an interactive map displaying the public's selected charging locations.
- Stakeholder engagement sessions with five targeted groups – EV drivers; EV charging companies; cities and counties; utilities; and environmental justice and advocacy groups.
- Planned Regional Workshops in advance of building out NEVI-funded fast chargers along the electric AFCs. These workshops will include discussion with local communities to explore priority benefits and appropriate metrics to ensure Justice40 goals are met or exceeded.

Stakeholder input has already been incorporated into the State Plan; this Plan is a living document, and new input will continually be integrated as outreach to new groups takes place and additional perspective is heard.

Figure 3: Stakeholder Outreach Opportunities

Key Activities

- Regional Workshops in communities
 - Engage with communities prior to each year's Corridor build out
 - First year build out: communities along I-5, US 97, and I-205
 - Listen to learn EV community goals, prioritize desired benefits
 - Work with EV charging providers to match goals with opportunities along corridors
- Webinars
- Guest speaking engagements
- Targeted Information Sessions
 - Specific outreach to voices who haven't yet been heard
- Reporting back – What we hear and how it impacts activities



The NEVI funding for public DCFC stations is an important next step in helping Oregon achieve its ambitious zero emission vehicle adoption goals, providing funding to develop a critical backbone of DCFC stations along key highway corridors. ODOT, and its partner agency the ODOE, look forward to working with JOET as ODOT completes its planning and begins implementation of the NEVI program.



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: September 1, 2022**TO:** Oregon Transportation Commission**FROM:** Kristopher W. Strickler
Director**SUBJECT:** **Agenda Item F** – Americans with Disabilities Act (ADA) Program Update and Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to allocate ADA STIP Program funds to projects.**Requested Action:**

Receive an update on efforts to deliver compliant ADA curb ramps on or along the ODOT Highway system, current challenges, and the program funding plan. Request approval to amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to add and modify projects by advancing funding from the 2024-2027 STIP.

Background:*ODOT ADA Obligations*

The American with Disabilities Act (ADA) of 1990, as amended by the ADA Amendments of 2008, requires ODOT to provide people with disabilities an equal opportunity to participate in and benefit from ODOT programs, services, and activities. In 2017, ODOT completed an update of the State's inventory of ADA-compliant curb ramps on or along our state highway system consistent with ODOT and Association of Oregon Centers for Independent Living (AOCIL) Settlement Agreement. Data gathered in this effort indicated that a substantial number of the existing ADA ramps built over the last 50 years do not meet all of the ODOT ramp standards. To achieve our ultimate goal of providing better, more equitable pedestrian access, ODOT developed an ADA Ramp Plan with a defined schedule for upgrading noncompliant ramps to be ADA compliant. ODOT also created the ADA Program Unit (Program) to focus the Agency efforts on the ADA Ramp Plan, comply with the Settlement Agreement, and meet the intent of the Federal ADA legislation. The Program manages the funding of multiple STIP projects in each STIP cycle to replace or modify ADA ramps throughout the state, primarily through outsourced design and contracted construction.

Targets for Ramp Numbers

The Program is scheduled to replace or modify over 25,000 curb ramps on or along the state highway system between 2017 and 2032. This effort is further divided into three 5-year time periods. In the first 5 years of the Ramp Plan, the Program created and funded projects intended to achieve 30% of the inventory (7,779 ramps) by December 2022. Each subsequent 5-year period has its own ramp target as shown: 11,956 additional ramps (cumulative of 75%) by 2027 and the final set of 6,642 ramps (complete at 100%) by 2032.

Capacity of Concrete Construction Industry

ODOT launched the ADA Program with an implementation strategy focused on a lower production rate between 2017 and 2020, and increasing production in the final years of 2021-2022, to provide adequate time for the concrete construction industry to adjust to the sudden increase in demand. To meet its second 5-year target (75% completion), ODOT set an expected production rate of 2,500 ramps per year between 2023 and 2027 (an increase of 1,000 ramps per year). During initial program planning, ODOT anticipated the concrete construction industry's ability to accommodate this increased level of work. However, the increased production volume, appears to have placed stress on the concrete construction industry, likely contributing to increased prices and several failed solicitations.

Overview of ODOT Construction Contracting Practices

ODOT hires private construction firms to build the ADA ramps. By the end of 2022, ODOT anticipates its ADA ramp construction contracts will stretch Oregon's concrete construction firms that have a history with ODOT ADA projects beyond their current capacity. For example, five of the fifteen 2022 ADA ramp projects are multi-year and have a contract completion date in 2023. Most construction firms will complete a majority of the ramps during the 2022 construction period. However, due to delay associated with a failed bid, one ADA Ramp project will not require a set number of ramps in 2022, due in part to the short construction window in the eastern part of Oregon before winter weather prevents construction.

Each contractor sets their construction schedule and delivers ramps based on resources available and the contractor's competing commitments. Currently, ODOT does not have a high level of confidence in the industry's ability to complete the number of ramps required in ODOT's contracts before December 2022. If a contractor does not meet the completion timeline for their 2022 ramps, they will be charged liquidated damages (a financial penalty). This provision encourages the contractor to prioritize the completion of their ODOT project, but it does not guarantee timely construction completion.

Increases in Bid Costs Practices

ODOT ADA ramp project costs increased significantly over the last three years. We believe this is due, in part, to increased ramp construction volumes, supply chain issues, and inflation. The average price of curb ramps (total project cost/ramps in the project) doubled from 2017 to 2021, and tripled by 2022.

Program staff are confident ODOT can develop the design packages for bidding to meet the increased ramp rate required over the next 5 years. However, the increasing bid prices have caused significant budget challenges. In response, the Program is developing strategies to attract more bidders and to increase construction capacity for the required volume of ADA ramp projects.

The need for ADA Program Improvements

During the creation of the ADA Ramp Plan in 2017, a number of assumptions and decisions occurred concerning funding, designing, and constructing the volume of curb ramps required. As part of ODOT's efforts for continuous improvement, the Program began a Refinement Study to evaluate its progress and key obstacles in the past five years to determine necessary program improvements. This effort, involving teams of subject matter experts from ODOT and across the transportation industry, will identify what is working well and prioritize needed program modifications going forward for the next 10 years. We are seeking input from across ODOT and external stakeholders including design consultants and construction contractors to prioritize improvements that will have the greatest impact.

Continuous Improvement Advisory Committee Recommendations

The Program presented an update at the Continuous Improvement Advisory Committee (CIAC) meeting on June 15, 2022. CIAC members provided their perspectives on the Program, including several areas for potential Program prioritization or improvements.

- The Program is unlike others in ODOT's portfolio and success will require considerable resources to meet the program timelines. As a unique program, ODOT should consider modifying the project delivery processes for the Program and not treat this work as "business as usual."
- Replacing or rebuilding ramps in an urban area is very difficult from a construction perspective in comparison to new ramp construction. Managing and sharing the risk between ODOT and the Contractors working on complex projects in these environments will be critical.
- The Program will gain from cooperation and collaboration with the contracting community in terms of process improvements and risk management.
- An established funding strategy and a protected program budget to fund the Program will be key to meeting the ADA Ramp Plan.
- Consider how the Project Delivery Model can benefit from utilizing the private sector to deliver this work – including an Outsourced Program Manager Model which would be a modified ADA version of the OTIA Bridge Program.

- Given the nature of the work, alternative delivery methods could be beneficial and should be explored, including:
 - CMGC: Construction Manager – General Contractor
 - IDIQ: Indefinite Delivery – Indefinite Quantity
 - Design Build

ADA Program Funding Plan

The Delivery and Operations Division in cooperation with the Finance and Budget Division have developed an ADA Ramp Program Funding Plan to provide timely funding for the necessary STIP projects. The ADA program developed a cost model for the ADA Ramp Program through 2032 when the current ADA Agreement ends based on the cost of ADA Ramp projects bid and constructed so far.

The cost-per-ramp increased significantly over the last three years and this estimated budget may vary significantly in future years based on changes to the ADA delivery model, use of Alternative Delivery contracting, and capacity of the Concrete Industry.

Using today's market prices, the total cost projection of the ADA Ramp Program is approximately \$1.4 – \$1.5 billion. Due to the significant variables highlighted throughout this letter, the budget is expressed as a range. The current ADA Program funding level is just under \$427 million spent and/or programmed through 2024. Based on all of this, approximately \$1 billion in additional funding is needed to complete the ADA curb ramp program by December 31, 2032.

Based on the delivery of projects over several different STIP cycles and anticipated funding levels, the following funding strategy is proposed:

- \$700 million in additional funding through 2027.
- \$300 million in the next two STIP cycles from 2028 through 2032.

The \$700 million needed through 2027 would be provided from two sources.

- FHWA annual redistribution funds. In July 2022 the OTC approved dedicating up to \$100 million in federal funds for the program from 2022 through 2027 as part of the agency's strategy to allocate anticipated additional federal funds.
- Grant Anticipation Revenue Vehicles (GARVEE) Bonds would generate approximately \$600 million. GARVEE bonds are a federal program that permits the use of federal transportation funds for the debt service repayment. We anticipate 2-3 bond sales that will provide the needed funding at the appropriate time. GARVEE bonds typically require a 12-18 year repayment period, with annual debt service payments depending on interest rates and repayment period. Debt service will ramp up as each tranche of bonds are sold, reaching a maximum of approximately \$65 million per year in 2029, with the bonds paid off around 2040. ODOT intends to seek

legislative authorization for the first tranche of GARVEE bonds in 2023 so they can be sold in the 23-25 biennium. Debt service will start in 2025 and be paid from federal funds in the STIP.

The remaining \$300 million in the next two STIP cycles from 2028 through 2032 are anticipated to be paid for out of the STIP on an annual cash basis. This means the 27-30 STIP and 30-33 STIP will pay for both ADA program costs and the debt service on the GARVEE bonds.

Amending the current 2021-2024 STIP by modifying the funding for the projects identified in the attached list and advancing \$217 million in funding is the first step in implementing the funding plan as outlined above. ODOT will include the additional funding needed for the ADA program in the '24-'27 STIP when it is brought to the Commission for review and approval in 2023. ODOT will also build the required ADA funding into the STIP funding allocation for the '27-'30 and '30-33 STIPs when those are brought to the Commission. The Legislature and Commission will take separate action in the future to authorize each issuance of GARVEE bonds as ODOT determines the timing, amounts, and other details of its bond issuance plan.

Additional funding will be allocated to projects through future STIP actions.

Additional work to address push buttons at signalized intersections will be considered in the future. When an agreement, schedule, and cost estimate are completed, the push button improvements will be incorporated into the funding plan.

Outcomes:

With approval, ODOT will amend the 2021-2024 STIP to allocate funds to the identified projects and begin implementing the ADA Program Funding Plan.

Without approval, ODOT will not move the required curb ramp projects forward to meet the 15 year deadline and will need to reassess funding options for the OTC to consider.

Attachments:

- Attachment 1 – ADA Program Map
- Attachment 2 – September 2022 ADA STIP Amendment Project List

OREGON DEPARTMENT OF TRANSPORTATION

REGION MAP

Attachment 3 / ADA Program Update



LEGEND

- REGION OFFICE
- STATE HIGHWAY
- STATE HIGHWAY NUMBER
- COUNTY BOUNDARY
- REGION NUMBER
- ROUTE SHIELDS
- INTERSTATE
- U.S.
- OREGON

Region 2 Ramps
1009 Remediated as of 2021
8439 More required to be remediated

Region 1 Ramps
1170 Remediated as of 2021
6906 More required to be remediated

Region 3 Ramps
578 Remediated as of 2021
2887 More required to be remediated

Region 4 Ramps
290 Remediated as of 2021
1992 More required to be remediated

Region 5 Ramps
667 Remediated as of 2021
2937 More required to be remediated

Key Number (leave blank if new)	Region	Project Name	BMP	EMP	Bridge #	Phase	Primary Work Type	Funding Responsibility	Current Total (0 if new)	Proposed Total	Difference	Description of Change (up to 200 characters)
22431	1	OR141/OR217 curb ramps	4.97	7.07		CN	ADA	SW ADA TRANSITION	\$ 4,662,297.00	\$ 7,518,278.00	\$ 2,855,981.00	Increase the Construction phase estimate
22432	1	US30BY curb ramps	1.28	14.74		CN	ADA	SW ADA TRANSITION	\$25,556,438.00	\$ 38,810,000.00	\$ 13,253,562.00	Increase the Construction phase estimate.
22434	2	US101 curb ramps (Lincoln City/Lincoln Beach)	112.3	125		CN	ADA	SW ADA TRANSITION	\$12,063,225.00	\$19,149,070.00	\$ 7,085,845.00	Increase the Construction phase estimate.
22435	2	OR47/OR8/US30 curb ramps	17.88	90.59		CN	ADA	SW ADA TRANSITION	\$ 9,075,262.00	\$14,566,171.00	\$ 5,490,909.00	Increase the Construction phase estimate.
22437	3	US101/OR241/OR540 curb ramps (Coos Bay/North Bend)	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 8,066,607.00	\$13,435,375.00	\$ 5,368,768.00	Increase the Construction phase estimate.
22611	3	OR540 curb ramps: Coos Bay city limits - Boat Basin Rd	4.89	8.49		CN	ADA	SW ADA TRANSITION	\$ -	\$ 1,800,000.00	\$ 1,800,000.00	Add a new child project of K22437.
22438	3	Jackson County curb ramps, phase 2	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 8,476,501.00	\$10,729,128.00	\$ 2,252,627.00	Increase the Construction phase estimate.
22612	3	Jackson County curb ramps, phase 2A	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ -	\$ 3,600,000.00	\$ 3,600,000.00	Add a new child project of K22438.
22442	4	Sisters and Bend curb ramps	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 9,042,316.00	\$17,633,346.00	\$ 8,591,030.00	Increase the Construction phase estimate.
22445	5	Burns & Hines curb ramps	0	132.2		CN	ADA	SW ADA TRANSITION	\$ 7,261,783.00	\$10,936,935.00	\$ 3,675,152.00	Increase the Construction phase estimate.
22446	5	Grant County curb ramps	VAR	VAR		CN	ADA	SW ADA TRANSITION	\$ 6,279,410.00	\$ 9,359,492.00	\$ 3,080,082.00	Increase the Construction phase estimate.
22447	5	Jordan Valley/Ontario/Huntington/Adrian curb ramps	VAR	VAR		CN	ADA, BIKPED	SW ADA TRANSITION, FIX-IT SW SWIP BIKPE	\$ 5,750,309.00	\$ 9,832,725.00	\$ 4,082,416.00	Increase the Construction phase estimate.
22621	1	US30 curb ramps (Hood River)	49.07	50.98		RW, CN	ADA	SW ADA TRANSITION	\$ -	\$ 5,154,997.00	\$ 5,154,997.00	Add a new child project of K22204.
22554	2	OR99W/OR18 curb ramps (McMinnville)	34	47.38		RW, CN	ADA	SW ADA TRANSITION	\$ 5,780,000.00	\$21,528,875.00	\$ 15,748,875.00	Add the Right of Way and Construction phase estimates.
22555	2	OR223/OR99W curb ramps (Dallas/Rickreall)	0	57.81		RW, CN	ADA	SW ADA TRANSITION	\$ 3,676,700.00	\$13,694,852.00	\$ 10,018,152.00	Add the Right of Way and Construction phase estimates.
22556	2	OR18B curb ramps (Willamina/Sheridan)	2	7.7		RW, CN	ADA	SW ADA TRANSITION	\$ 2,165,500.00	\$ 8,066,022.00	\$ 5,900,522.00	Add the Right of Way and Construction phase estimates.
22570	3	US101/OR540 curb ramps (Coos Bay/North Bend), phase 2	0.05	238.98		RW, CN	ADA	SW ADA TRANSITION	\$ 4,876,400.00	\$20,165,433.00	\$ 15,289,033.00	Add the Right of Way and Construction phase estimates.
22571	3	Jackson and Josephine County curb ramps, phase 3	VAR	VAR		RW, CN	ADA	SW ADA TRANSITION	\$ 4,698,430.00	\$16,568,191.00	\$ 11,869,761.00	Add the Right of Way and Construction phase estimates.
22558	4	OR126 & US26 curb ramps (Redmond/Priveville)	18.01	111.97		RW, CN	ADA	SW ADA TRANSITION	\$ 4,642,700.00	\$20,787,608.00	\$ 16,144,908.00	Add the Right of Way and Construction phase estimates.

Attachment 3: ADA Program Update

22560	5	Umatilla County curb ramps (pendleton) Phase 2	-0.7	2.9		RW, CN	ADA	SW ADA TRANSITION, BIKE/PED, SWIP	\$ 3,741,200.00	\$10,995,000.00	\$ 7,253,800.00	Add the Right of Way and Construction phase estimates. New funding totals are \$7,995,000 ADA, \$2,500,000 Ped/Bike Strategic advanced from the 24-27 STIP, and \$500,000 SWIP.
22561	5	Umatilla/Morrow County curb ramps phase	0.04	184.2		RW, CN	ADA	SW ADA TRANSITION	\$ 6,153,900.00	\$21,237,040.00	\$ 15,083,140.00	Add the Right of Way and Construction phase estimates.
	1	Region 1 ADA curb ramps	VAR	VAR		PE	ADA	SW ADA TRANSITION	\$ -	\$19,600,000.00	\$ 19,600,000.00	Advance a portion of the Preliminary Engineering phase from the 24-27 STIP so design for ramps planned for 2025 and 2026 construction can begin early.
	2	Region 2 ADA curb ramps	VAR	VAR		PE	ADA	SW ADA TRANSITION	\$ -	\$22,000,000.00	\$ 22,000,000.00	Advance a portion of the Preliminary Engineering phase from the 24-27 STIP so design for ramps planned for 2025 and 2026 construction can begin early.
	3	Region 3 ADA curb ramps	VAR	VAR		PE	ADA	SW ADA TRANSITION	\$ -	\$ 7,000,000.00	\$ 7,000,000.00	Advance a portion of the Preliminary Engineering phase from the 24-27 STIP so design for ramps planned for 2025 and 2026 construction can begin early.
	5	Region 5 ADA curb ramps	VAR	VAR		PE	ADA	SW ADA TRANSITION	\$ -	\$12,165,000.00	\$ 12,165,000.00	Advance the Preliminary Engineering phase from the 24-27 STIP so design for ramps planned for 2025 and 2026 construction can begin early.
	3	US101/OR540 curb ramps (Coos Bay/North Bend), phase 3	0.05	238.98		PE, RW, CN	ADA	SW ADA TRANSITION	\$ -	\$36,830,000.00	\$ 36,830,000.00	Add a new design-build project.

\$261,194,560.00



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: October 11, 2022

TO: Oregon Transportation Commission

DRAFT

FROM: Kristopher W. Strickler
Director

Attachment 4: Draft OTC Staff Report
Item – Willamette River Stormwater
Source Control

SUBJECT: Agenda/Consent Item **XX** - Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to increase funding for *Willamette River: Stormwater source control improvements* project.

Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette River: Stormwater source control improvements project from \$4,400,000 to \$11,962,600 for a total increase of \$7,562,600. The increase will be paid for using Portland Harbor funding which is being administered through the Bridge financial plan.

Project to increase funding:

Willamette River: Stormwater source control improvements (K22552)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2022	\$2,400,000.00	\$6,450,030
Right of Way	2023	\$2,000,000	\$5,512,570
Utility Relocation	N/A	\$0	\$0
Other	N/A	\$0	\$0
Construction	N/A	\$0	\$0
TOTAL		\$4,400,000	\$11,962,600

Background:

The purpose of the Willamette River: Stormwater source control improvements project is to complete the design and construction of select Source Control Measures (SCMs) to prevent toxics transported by stormwater from entering the Willamette River which is located in the Columbia River Basin. The project will improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas of Highway 30 limiting ODOT's exposure to recontamination claims within the Portland Harbor.

In the spring of 2021, ODOT submitted a Feasibility Study (FS) to DEQ which covered the entirety of the project footprint, including runoff from the Fremont and St Johns bridges and Highway 30, contributing stormwater to the Portland Harbor Superfund site. In the summer of 2021, ODOT conducted an Advanced Investigation (AI) to confirm the results and SCM selection described in the Feasibility Study. The results of the AI validated the FS's conclusions related to the bridge locations only; however the AI results also indicated that the proposed improvements along Highway 30 would cost significantly more than the FS estimated. As a result, a Supplemental FS was completed to review and re-evaluate the proposed SCMs along Highway 30. The Supplemental FS was submitted to DEQ in June 2022 and approved in August 2022.

In October 2021, ODOT requested that an initial block of funding for PE and ROW be added to the STIP to allow the engineering design work to commence. As was noted in the October 15, 2021 OTC letter, the funding requested at that time covered only 6 bridge locations. Before requesting funding for the engineering design to address the remaining drainage areas along Highway 30, ODOT wanted confirmation from DEQ that the revised proposal for SCMs along Highway 30 would meet DEQ and EPA expectations. As stated earlier, this approval was provided to ODOT in August 2022.

At this time, the total anticipated costs for the engineering design portion of the project are known. This request is intended to add the remaining funds needed to complete the preliminary engineering (PE) and Right-of-Way (ROW) phases of the project. It is anticipated that Construction funding will be added to the 24-27 STIP.

Outcomes:

With approval, ODOT will proceed to fund, the remaining portions of the PE and ROW phases. With approval, the project can move forward into design.

Without approval, ODOT will not be able to complete the design of the approved SCMs included in the initial and supplemental Feasibility Studies or fulfill the agency's commitment to implement source control measures within the Portland Superfund site.

Attachments:

- Attachment 1 – Vicinity and Location Maps
- Approved CMR



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: October XX, 2022
TO: Oregon Transportation Commission

DRAFT

Attachment 5: OTC Staff Report Item –
Willamette Greenway Tr/Columbia Blvd
Bridge Cost Increase

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda/Consent Item XX - Amend the 2021-2024 Statewide Transportation Improvement Program (STIP) to increase funding for *Willamette Greenway Trail: Columbia Blvd Bridge* project.

Requested Action:

Approve amending the 2021-2024 Statewide Transportation Improvement Program (STIP) increase project funding for the Willamette Greenway Trail: Columbia Blvd Bridge project from \$2,612,381 to \$7,662,812 for a total increase of \$5,010,431. The increase will be paid for using City of Portland Parks and Rec and Metro Parks funding.

Project to increase funding:

Willamette Greenway Trail: Columbia Blvd Bridge (K18832)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2016	\$520,000	\$1,485,231
Utility Relocation	2024	\$0	\$305,325
Construction	2024	\$2,092,381	\$5,872,256
TOTAL		\$2,612,381	7,662,812

Background:

The purpose of the Willamette Greenway Trail: Columbia Blvd Bridge project is to design and construct a bicycle and pedestrian bridge over Columbia Boulevard and an extension of the Willamette Greenway Trail to provide a connection from the existing termini in Chimney Park to the south end of the landfill bridge over the south Columbia Slough.

The project completed DAP (30% Design) that clearly defined the scope and estimate for the project. DAP has been reviewed by ODOT and comments were addressed. DAP identified utility impacts and relocation work that are eligible for reimbursement by the project funds. The current proposed funding amounts are based on the studies and assessment done by DAP for all phases of the project and incorporates the reimbursable utility relocation work.

Currently City of Portland Parks & Rec. and Metro Parks and Nature have come forward with a funding plan and strategy for the project.

Outcomes:

With approval, ODOT will proceed with processing the STIP and MTIP amendments to document changing the lead Local Agency from Metro Parks and Nature, to City of Portland Parks & Rec., increase project estimate, program Utility Relocation (UR) phase and funding for the UR phase and, revise the funding plan showing the additional contribution from City of Portland Parks & Rec. and Metro Parks and Nature.

Without approval, ODOT will not be able to follow through with the STIP and MTIP amendments therefore the project will not be able to move forward.

Attachments:

- Attachment 1 – Vicinity and Location Maps
- Approved PCR



Memo

Date: October 28, 2022

To: Transportation Policy Alternatives Committee (TPAC) and interested parties

From: Kim Ellis, Metro Project Manager
Lidwien Rahman, ODOT Project Manager
Glen Bolen, ODOT Region 1

Subject: Regional Mobility Policy Update: Draft Policy, Measures and Action Plan for the 2023 Regional Transportation Plan – RECOMMENDATION TO JPACT REQUESTED

PURPOSE

This memo seeks TPAC's recommendation to the Joint Policy Advisory Committee on Transportation (JPACT) on the draft regional mobility policy, performance measures and implementation action plan in **Attachment 1**. Feedback received in October has been addressed in the draft policy and implementation action plan in Attachment 1. **Attachment 2** provides an overview of the draft policy, measures and targets, and how the measures work together in during system planning and plan amendment processes.

The “draft” regional mobility policy was informed by deep research and technical analysis and significant input received from policymakers, practitioners and other stakeholders throughout the process.¹ The draft measures and targets in the draft policy are recommended to be tested and refined, as needed, in 2023 as part of the update to the Regional Transportation Plan underway. JPACT and Metro Council will consider final action on the 2023 RTP (and a recommended mobility policy, measures and targets, and implementation action plan) in November 2023. Local implementation of the updated policy is anticipated to begin in 2025, pending completion of a number of state and regional actions described in the implementation action plan.

ACTION REQUESTED

Metro and ODOT staff recommend the draft policy, measures and targets be moved forward to test and refine as part of the 2023 RTP update. The action plan includes state, regional and local actions outside the scope of this project that are needed to finalize and help implement the new policy and measures. Several actions will be addressed as part of or concurrent with the 2023 RTP update. Other actions will be addressed following adoption of the 2023 RTP.

At the November 4 meeting, TPAC will be requested to recommend that JPACT accept the draft regional mobility policy, measures and targets, and implementation action plan and support moving forward to test and refine the draft measures and targets as part of the 2023 Regional Transportation Plan update.

- **Recommended TPAC motion:** Recommend JPACT accept the draft regional mobility policy, draft measures and targets, and draft implementation action plan, and support moving forward to test and refine the draft measures and targets as part of the 2023 Regional Transportation Plan update.

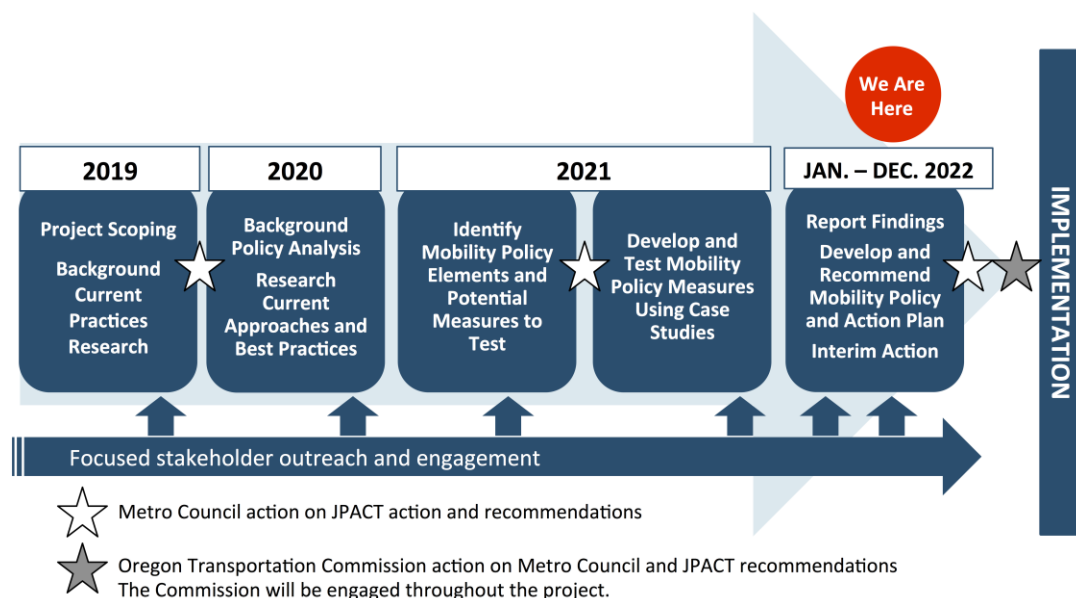
¹ The research, a project video and summary reports of the engagement activities are posted on the project website at www.oregonmetro.gov/mobility.

BACKGROUND

The regional mobility policy update was defined and adopted unanimously in Chapter 8 of the 2018 RTP by JPACT and Metro Council. The regional mobility policy helps the region make choices about transportation needs, where to focus resources and how to manage the transportation system today and into the future. For decades, the region's policy has relied on a vehicle-based measure of mobility. (The measure, also known as the v/c ratio, is the ratio of motor vehicle volume to motor vehicle capacity of a given roadway.)² The v/c measure alone does not measure other modes of travel or important elements of mobility. That is limiting for a transportation system that is far more complex. The updated mobility policy is a new way of thinking about mobility in greater Portland and it can help our region move toward a shared vision.

Shown in **Figure 1**, Metro and the Oregon Department of Transportation (ODOT) have been working together since 2019 to update how the region defines and measures desired mobility outcomes for people and goods traveling in the Portland area.

Figure 1. Project Timeline



The current mobility policy is contained in both the 2018 [Regional Transportation Plan](#) (RTP) and Policy 1F (Highway Mobility Policy) of the [Oregon Highway Plan](#) (OHP). The goal of this update has been to better align the policy and measures with shared regional values, goals, and desired outcomes identified in Metro's Regional Transportation Plan (RTP) and 2040 Growth Concept, as well as with local and state goals. To that end, the draft policy updates how the region defines and measures desired mobility outcomes for people, goods and services traveling in the Portland area to better support community plans and visions implementing the 2040 Growth Concept and meeting state and regional equity, climate and safety goals.

² For example, when the v/c ratio of a roadway equals 0.90, 90 percent of the roadway's vehicle capacity is being used. At 1.0, the vehicle capacity of the roadway is fully used.

EXPECTED OUTCOMES

When finalized, the updated mobility policy will guide the development of regional and local transportation plans and studies, and the evaluation of potential impacts of local comprehensive plan amendments and zoning changes on the transportation system. The updated policy will remove barriers and support the region in advancing desired outcomes for transportation and land use, including:

- Land use efficiency, with more housing, jobs, services and mixed use development in the region's centers.
- Roadways designed and built for people of all ages and abilities.
- Travel options and connectivity that allow people to reliably and safely walk, bike, drive, and take transit to get where they need to go.
- Safe, efficient and reliable travel speeds for people, goods and services.



Another key outcome of the regional mobility policy update is cross-agency coordination and collaboration to implement transportation plan updates and state land use rules in the Portland area.

WHAT HAS CHANGED SINCE TPAC LAST DISCUSSED THIS TOPIC

TPAC previously expressed broad support for the five policy statements listed on page 6 of Attachment 1. On October 7, TPAC reviewed and provided feedback on the proposed measures and targets (Table 2 on page 8) and the draft implementation action plan (pages 20-25) in the attachment. Specific TPAC feedback included:

- Expressed general support for further testing and refinement of the draft policy, measures and targets and implementation action plan through the 2023 RTP update pending further discussion in October.
- Expressed broad support for overall direction and the vehicle miles traveled (VMT) per capita and system completeness measures and actions identified to support implementation.
- Recommended further policy discussion of the hours of congestion reliability measure and target and policy implications of proposed thresholds.
- Requested updates to the timing for completion of guidance, methods and tools needed to support implementation to ensure the actions are aligned and coordinated to support local and regional implementation of this policy and new statewide policies and planning requirements. In particular ensure all the tools, guidance and methods need to be available to local governments by the time the Regional Transportation Functional Plan is amended.
- Requested development of a simplified timeline that shows the relationship of implementation of the updated regional mobility policy to regional and statewide planning efforts, including the 2023 RTP update, Oregon Transportation Plan update, Oregon Highway Plan update, implementation of the Climate-Friendly and Equitable Communities (CFEC) rules, and local TSP updates.

Also in October, Metro Council and JPACT reviewed and discussed the draft policy, measures and targets, and implementation action plan. No specific changes were recommended by Metro Council or JPACT. Policymakers appreciated that the policy is focused on building a complete transportation system. They acknowledged additional work is needed to test and refine the draft measures and targets as part of the 2023 Regional Transportation Plan update and to work out more of the details of implementation to understand the implications of the policy and use of the measures before final action on the RTP next year. There was a desire to better understand how the policy will advance the region's climate, equity, safety, mobility and economic development goals and help with local and regional implementation of the statewide Climate-Friendly and Equitable Communities (CFEC) rules.

Attachment 1 has since been updated (significant changes are highlighted in yellow) as follows:

- Made minor technical edits, clarifications and corrections.
- Added a draft target for non-expressway throughways designated in the RTP.
- Accelerated timing for development of congestion and travel speed forecasting guidance to occur as part of 2023 RTP update (in 2023).
- Clarified sections the Regional Transportation Functional Plan that would need to be reviewed and amended to implement the final policy, measures and targets (in 2024).

Metro and ODOT staff are working together to develop a simplified timeline that shows the relationship of this work to regional and statewide planning efforts, including the 2023 RTP update, Oregon Transportation Plan update, Oregon Highway Plan update, implementation of the CFEC rules, and local TSP updates. This timeline will be provided to TPAC when available.

NEXT STEPS

A schedule of the remaining steps in development of the draft policy and implementation action plan follows.

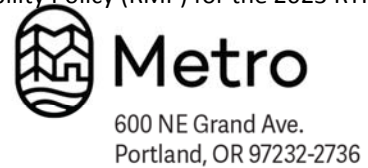
11/4/22	TPAC recommendation to JPACT on a final draft policy and measures to test and refine in the 2023 RTP update
11/17/22	JPACT considers action on TPAC recommendation
12/1/22	Metro Council considers action on JPACT recommendation
Jan. to Nov. 2023	Incorporate draft policy in 2023 RTP Test and refine draft measures and targets Implement activities defined in the action plan
November 2023	JPACT and Metro Council consider adoption of final policy, measures, targets and implementation action plan in 2023 Regional Transportation Plan
2024 and beyond	Implementation of activities defined in the implementation action plan, including request for Oregon Transportation Commission (OTC) consideration of the Regional Mobility Policy for the Portland metropolitan area in the updated Oregon Highway Plan to reflect the policy adopted in the 2023 Regional Transportation Plan

/Attachments

Attachment 1. Draft Regional Mobility Policy and Action Plan (10/28/22)

Attachment 2. Draft 2023 RTP Regional Mobility Policy (RMP) Overview (10/28/22)

Memo



Date: October 28, 2022

To: Kim Ellis, Metro, and Lidwien Rahman, ODOT

From: Susan Wright, PE, Kittelson & Associates, Inc.
Darci Rudzinski, MIG|APG

Project: Regional Mobility Policy Update

Subject: Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

Introduction

Since 2019, Metro and the Oregon Department of Transportation (ODOT) have been working together to update the regional mobility policy and related mobility measures for the Portland metropolitan area. The mobility policy guides the development of regional and local transportation plans and studies, and the evaluation of potential impacts of plan amendments and zoning changes on the transportation system. The goal of this update has been to better align the policy and measures with shared regional values, goals, and desired outcomes identified in Metro's Regional Transportation Plan (RTP) and 2040 Growth Concept, as well as with local and state goals. To that end, the draft policy updates how the region defines and measures desired mobility outcomes for people, goods and services traveling in the Portland area to better support community plans and visions implementing the 2040 Growth Concept and meeting state and regional equity, climate and safety goals.

This document builds upon the draft mobility definition and foundational elements integral to achieving the region's desired mobility outcomes supported by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council in 2021, and presents a "Draft" regional mobility policy that was informed by deep research and technical analysis and significant input received from policymakers, practitioners and other project stakeholders throughout the process, including a series of workshops and forums convened in 2022.¹ This draft policy will be further tested and refined in 2023 as part of the update to the RTP that is underway. JPACT and the Metro Council are anticipated to consider final action on the 2023 RTP (and the updated mobility policy) in November 2023. Local implementation of the updated policy is anticipated to begin in 2025, pending completion of a number of state and regional actions described in the implementation action plan.

Background and purpose

The determination that alternative mobility targets are necessary for the Portland metropolitan region was made through the 2018 Regional Transportation Plan (RTP) planning process. This determination was based on inability to implement the transportation projects needed to meet current targets given anticipated funding and estimated costs, and in some cases because the physical impacts of potential projects or the impacts on other modes were not acceptable considering other transportation policies and land use and environmental conditions in the affected locations. The adopted RTP Section 3.5, Regional Motor Vehicle Network Vision and Policies, includes the Interim Regional Mobility Policy; mobility targets therein correspond with the Oregon

¹ The research and summary reports of the workshops and forums are posted on the project website at www.oregonmetro.gov/mobility.

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

Highway Plan's Policy 1F, Highway Mobility Policy, Table 7. With this project, regional mobility policy will take its place in the overarching System Policies currently in the Chapter 3 (Section 3.2) of the RTP, alongside safety, equity, and climate. Mobility policies are intended to apply to arterials and throughways within the Metro's planning area. Policies and associated measures will also be forwarded to the Oregon Transportation Commission for consideration of amending Oregon Highway Plan Policy 1F, and if adopted would apply to state facilities within the Portland metropolitan area.

The draft mobility policy is intended to achieve the following mobility outcomes which are in alignment with ODOT and Metro strategic goals and priorities. They were identified by policymakers and stakeholders as critical to how we plan for, manage, and operate our transportation system.

Equity

- ***Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other marginalized and underserved communities experience equitable mobility.***

BIPOC and other marginalized communities have often experienced disproportionately negative impacts from transportation infrastructure as well as disparities in access to safe multimodal travel options. Addressing these disparities is a priority for ODOT and Metro.

The regional transportation system should support access to opportunities for everyone, not just people in motor vehicles. Equity can be enhanced through providing strong multimodal networks with priority provided to improvements benefitting historically marginalized and underserved communities.

Efficiency

- ***Land use and transportation decisions and investments contribute to more efficient use of the transportation system meaning that trips are shorter and can be completed by more travel modes, reducing space and resources dedicated to transportation.***

Efficiency in this context means that transportation requires less space and resources. Efficiency can be improved by shortening travel distances between destinations. Shorter travel distances to destinations enhance the viability of using other and more efficient modes of transportation than the automobile and preserves roadway capacity for transit, freight and goods movement by truck and for longer trips. Efficiently using land and planning for key destinations in proximity to the where people live and work, contributes to shorter trip lengths.

The transportation efficiency of existing and proposed land use patterns and transportation systems can be measured by looking at "vehicle miles traveled (VMT) per capita" for home-based trips² or "VMT per employee" for commute trips to/from work of an area.

² TSPs and comprehensive plans collectively can achieve reduced VMT/capita; however, the contributions of individual projects are challenging to measure and when considered individually or in a localized area may increase VMT/capita.

Access and Options

- ***People and businesses can conveniently and affordably reach the goods, services, places, and opportunities they need to thrive.***
- ***People and businesses can choose from a variety of seamless and well-connected travel modes and services that easily get them where they need to go.***

The viability of trips made by modes other than automobiles can be increased by investing in a connected, multimodal transportation system. Multimodal systems serve all people, not just those who have access to vehicles or the ability to drive them, and provide more route choices, increase safety and efficiency, and increase reliability.

Closing gaps in networks, particularly pedestrian and bicycle networks, and closing special and temporal gaps in transit networks, can change travel preferences, reducing VMT/capita. Progress towards well connected, multimodal networks can be measured by mode with “system completeness”.

Safety

- ***People are able to travel safely and comfortably, and feel welcome.***

Unsafe transportation facilities can result in injury and loss of life, and place a strain on emergency responders. Both unsafe conditions and perceived unsafe conditions can impact travel behavior, causing users to choose different routes or modes. Prioritizing investments that reduce the likelihood of future crashes and that improve safety and comfort for all users will increase mode choices and improve reliability. System completeness by travel mode is useful in identifying needs and investments that could enhance safety and comfort.

Reliability

- ***People and businesses can count on the transportation system to travel where they need to go reliably and in a reasonable amount of time.***

In a reliable transportation system, all users, including people in automobiles and using transit, can reasonably predict travel time to their destinations. Reliability is impacted by travel conditions, safety, street connectivity, congestion, and availability of travel options. Investments in safety, street connectivity, transit, transportation system management and operations (TSMO), and demand management can yield significant benefits for managing congestion and increasing reliability for all travelers. System completeness can be used as a measure of the availability of reliable travel options, including walking and biking. Average travel speed can be used as a measure to forecast areas of congestion including looking at the number of hours a facility is congested and the percentage of a facility that is congested for multiple hours per day. Average travel speed can also be used to look at total travel time between origin-destination pairs and identify bottlenecks that are most impacting reliability on key travel routes for vehicle modes, including freight and transit.

For Throughways, the essential function is throughput and mobility for motor vehicle travel, including transit and freight vehicles, to maximize movement of people and goods. Throughways serve interregional and interstate trips and travel times are an important factor in people and businesses being able to make long-distance trips to and through the region and access destinations of regional and statewide significance in a reasonable and reliable amount of time.

For most Arterials, depending upon the street design classification and freight network classification, the essential functions are transit, bicycle and pedestrian travel and access, while balancing motor vehicle travel and the many other functions of arterials in intensely developed

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

areas. Transit reliability on arterials can be improved with exclusive bus lanes, signal priority and other TSMO strategies. Improving automobile reliability through additional roadway capacity should follow the region's congestion management process and not come at the expense of non-motorized modes and achieving system completeness consistent with modal or design classifications in the RTP or achieving the VMT/capita target for the region or the jurisdiction.

Performance Measures

Regional mobility within the Portland metropolitan area is multi-faceted and requires more than one performance measure to assess adequacy and needs, and to monitor progress toward desired mobility outcomes. Through a process of research, case studies, applying evaluation criteria and soliciting stakeholder and practitioner input, an extensive list of potential measures was narrowed down to three measures. These measures, applied at different scales and to different facilities, are needed to assess overall system performance and whether the system of multi-modal networks is equitable, complete, safe, comfortable, and reliable.

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

Table 1: Draft Mobility Policy Performance Measures

Measure	Scale for Application	How it Would be Used	Expected Mobility Outcomes
VMT/Capita for home-based trips and VMT/Employee for commute trips to/from work	Plan Area (RTP, TSP, Plan Amendment)	Measured for the plan area to ensure that land use and transportation plan changes are working in tandem to achieve OAR 660 Division 44 (Metropolitan greenhouse Gas (GHG) Emissions Reduction rule) and OAR 660 Division 12 VMT/capita reduction targets and resulting in: <ul style="list-style-type: none"> reduced need to drive improved viability of using other and more efficient modes of transportation than the automobile and preserving roadway capacity for transit, freight and movement for goods and services. 	Land Use Efficiency Land use patterns that are more efficient to serve because they reduce the need to drive and are supportive of travel options.
System Completeness	Facility Level for Throughways and Regional Arterials in Plan Area (RTP, TSP, Plan Amendment)	Used to identify needs and define the complete multimodal system in regional and local TSPs, facility plans, corridor plans, and area plans. The planned system would be defined through system planning and include local, collector and arterial network connectivity, the future number of through lanes, type of bicycle facility, sidewalks, pedestrian crossings at designated spacing, transit service, transit priority treatments and other transit supportive infrastructure, and TSMO/TDM elements.	Complete Multi-Modal Networks Travel options and connectivity allow people to reliably and safely walk, bike, drive, and take transit to get where they need to go.
Hours of Congestion	Facility Level for Throughways (RTP, TSP, Plan Amendment)	Used to identify locations and the percentage of the RTP designated throughway system with poor reliability where due to recurring congestion, average travel speeds drop below an acceptable target for more than 4 hours per day. ³ Addressing motor vehicle congestion through additional throughway capacity should follow the RTP system sizing policy and congestion management process ⁴ and OHP Policy 1G ⁵ and should not come at the expense of achieving system completeness for non-motorized modes consistent with RTP modal or design classifications or achieving the VMT/capita target for the region or jurisdiction.	Reliability Safe, efficient and reliable travel speeds for people, goods and services.

³ When vehicle demand causes traffic speeds to drop below 35 mph on access controlled highways, traffic flows become unstable (more stop and go), the facility capacity drops, and the facility is able to move fewer cars per lane. Above 35 mph, traffic flows are more likely to be stable and capacity remains fairly consistent even as the speeds increase and greater distances are needed between vehicles.

⁴ RTP Chapter 3 (pages 3-71 and 3-72) and Appendix L to the RTP provides more detailed information. Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan further direct how cities and counties implement the CMP in the local system planning process.

⁵ Policy 1G (Major Improvements) has the purpose of maintaining highway performance and improving highway safety by improving system efficiency and management before adding capacity.

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

Draft Regional Mobility Policy for the 2023 Regional Transportation Plan

Within the Portland metropolitan area, the State of Oregon and Metro have a shared goal of providing mobility such that people and businesses can safely, affordably, and efficiently reach the goods, services, places, and opportunities they need to thrive by a variety of seamless and well-connected travel options and services that are welcoming, convenient, comfortable, and reliable.

To achieve these outcomes, it is the policy of the State of Oregon and Metro to:

- Mobility Policy 1 Ensure that land use decisions and investments in the transportation system enhance efficiency in how people and goods travel to where they need to go.
- Mobility Policy 2 Provide people and businesses a variety of seamless and well-connected travel modes and services that increase connectivity, increase choices and access to low carbon transportation options so that people and businesses can conveniently and affordably reach the goods, services, places and opportunities they need to thrive.
- Mobility Policy 3 Create a reliable transportation system that people and businesses can count on to reach destinations in a predictable and reasonable amount of time.
- Mobility Policy 4 Prioritize the safety and comfort of travelers by all modes when planning and implementing mobility solutions.
- Mobility Policy 5 Prioritize investments that ensure that Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other marginalized and underserved populations have equitable access to safe, reliable, affordable and convenient travel choices that connect to key destinations.
- Mobility Policy 6 Use mobility performance measures and targets for system planning and evaluating the impacts of plan amendments including Vehicle Miles Travelled (VMT) per capita for home-based trips and VMT/employee for commute trips to/from work, system completeness for all modes, and hours of congestion on the throughways.

These policies apply to:

- the state highway system within the Portland metropolitan area for
 - identifying state highway mobility performance expectations for planning and plan implementation; and
 - evaluating the impacts on state highways of amendments to transportation system plans, acknowledged comprehensive plans and land use regulations pursuant to the Transportation Planning Rule (OAR 660-12-0060).
- throughways and regional arterials designated in the Regional Transportation Plan, which include state and local jurisdiction facilities, for identifying mobility performance expectations for planning and plan implementation.

Regional Mobility Policy Reminder:

This policy is not meant for use during development review of applications for development that is permitted outright but does apply to plan amendments per the TPR.

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

Under this policy, Oregon Highway Plan volume-to-capacity ratio targets still guide operations decisions such as managing access and traffic control systems and can be used to identify intersection improvements that would help reduce delay, improve the corridor average travel speed, and improve safety. Local jurisdiction standards for their facilities still apply for evaluating impacts of amendments to transportation system plans, acknowledged comprehensive plans and land use regulations pursuant to the Transportation Planning Rule (OAR 660-12-0060) and guiding operations decisions.

Three performance measures as described in Table 2 will be used to assess the adequacy of mobility in the Portland metropolitan area for the regional networks based on the expectations for each facility type, location, and function. These measures will be the initial tools to identify mobility gaps and deficiencies (needs) and consider solutions to address identified mobility needs. The subsequent actions describe how to apply these measures to system planning consistent with OAR 660-012, Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan (RTFP) and OHP Policy 1.G and assessing plan amendment consistent with OAR 660-012-0060.

How do the measures work together?

VMT/capita will be a controlling measure in both system planning and plan amendments to ensure that the planned transportation system and changes to the system support reduced VMT/capita by providing travel options that are complete and connected and that changes to land use reduce the overall need to drive from a regional perspective and are supportive of travel options.

- For system planning, the final planned system must support OAR 660 Division 44 (Metropolitan Greenhouse Gas (GHG) Emissions Reduction rule) and OAR 660 Division 12 VMT reduction targets.
- For plan amendments, VMT/capita will be used to determine if the proposed plan amendment has a significant impact on regional VMT/capita that needs to be mitigated or not.

System completeness and hours of congestion on throughways are secondary measures that will be used to identify needs and inform the development of the planned system. The policy requires that TSPs define the planned system for each mode using a variety of guidance documents. Additional RTP and state policies also guide the development of individual modal systems. It is important to note that the Regional Mobility Policy is one of many policies that inform the development of the Regional Transportation Plan and local transportation system plans in the Portland region. The regional and local “planned” system may not achieve completeness for all modes but should identify future needs and expectations for all facilities given constraints and tradeoffs. Similarly, hours of congestion on throughways will inform state and regional needs of the throughway system, and the target articulates the desired level of reliability for the throughway system designated in the RTP and OHP. Identifying solutions for locations that do not meet the hours of congestion on throughways target shall follow the RTP congestion management process⁶ and OHP Policy 1G⁷, and should not come at the expense of achieving the VMT/capita target.

⁶ 2018 RTP Chapter 3 (pages 3-71 and 3-72) regarding RTP the Congestion Management Process state that “The RTP calls for implementing system and demand management strategies and other strategies prior to building new motor vehicle capacity, consistent with the Federal Congestion Management Process (CMP), Oregon Transportation Plan policies (including Oregon Highway Plan Policy 1G) and Section 3.08.220 of the Regional Transportation Functional Plan (RTFP). Appendix L to the RTP provides more detailed information. Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan further direct how cities and counties implement the CMP in the local system planning process.

⁷ Policy 1G (Major Improvements) has the purpose of maintaining highway performance and improving highway safety by improving system efficiency and management before adding capacity.

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Table 2: Draft Mobility Policy Performance Measure Targets

Measure	Application	Target	
VMT/Capita for home-based trips and VMT/Employee for commute trips to/from work	System Planning	OAR 660 Division 44 ((Metropolitan Greenhouse Gas (GHG) Emissions Reduction rule)) and OAR 660 Division 12 set VMT/capita reduction targets with which the 2023 RTP update and local TSPs will need to comply. The VMT/capita targets are: 20% reduction by 2035, 25% reduction by 2040, 30% reduction by 2045 and 35% reduction by 2050 (from 2005 levels). ⁶ The 2023 RTP and TSPs that meet this regional target will establish 2045 baseline VMT/capita and VMT/employee. All subsequent applications of this policy shall not increase VMT/capita or VMT/employee above the future baseline.	
	Plan Amendments ¹	The plan amendment will have equal to or lower forecast VMT/capita for home-based trips and equal to or lower forecast VMT/employee for commute trips to/from work than the District ² .	
System Completeness	System Planning	Complete networks and systems for walking, biking, transit, vehicles, freight, and implement strategies for managing the transportation system and travel demand (See Table 3 for guidance and Table 4 for completeness elements by facility type). (The planned system, Strategic and Financially Constrained, will be defined in local jurisdiction TSPs and may not achieve completeness for all modes to target levels but the local jurisdiction TSP should identify future intent for all facilities given constraints and tradeoffs.)	
	Plan Amendments	100% of planned system Or Reduced gaps and deficiencies (See Table 5 for guidance)	
Hours of Congestion		RTP Motor Vehicle Designation	Target⁵
	System Planning ³	Throughways - Expressways⁴ I-205 I-84 I-5 OR 217 US 26 (west of I-405) I-405 OR 213 from Beavercreek Road to I-205 OR 212-Sunrise Expressway	Average speed not below 35 mph for more than 4 hours per day
		Throughways - Non-Expressways⁴ OR 99W west of Sherwood OR 99E Portland to OR 212 OR 99E from south of Oregon City OR 213 south of Beavercreek Road US 30 OR 47 OR 224 OR 212 US 26 south of OR 212	Average speed not below 20 mph for more than 4 hours per day
	Plan Amendments	Same as system planning	Same as system planning

Table Notes:

¹ Plan amendments that meet this target shall be found to not have a significant impact pursuant to the Transportation Planning Rule (OAR 660-12-0060).

² Metro will establish VMT/capita "Districts" that identify TAZ groupings (subareas) with similar land use characteristics and forecast VMT/Capita. A spreadsheet or similar tool will be developed to help assess potential changes to VMT/capita and VMT/employee and potential mitigations to minimize the need for application of the regional travel demand model for all plan amendments.

³ Addressing motor vehicle congestion through additional throughway capacity should follow the RTP congestion management process, Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan and OHP Policy 1G, and should not come at the expense of achieving system completeness for non-

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motorized modes consistent with regional modal or design classifications or achieving the VMT/capita target for the region or jurisdiction.

⁴ Throughways are designated in the Regional Transportation Plan and generally correspond to Expressways designated in the Oregon Highway Plan. Some throughways designated in the RTP are not Expressways in the Oregon Highway Plan but serve an important statewide function.

⁵ The target is used to identify areas of poor reliability where due to recurring congestion, average travel speeds drop below specified speed and duration thresholds. It will be used as a target to identify needs (deficiencies) and to assess the percentage of the throughway that meets the target. It will not be applied as a standard that creates conflict with meeting OAR 660 Division 44 VMT per capita reduction targets. Solutions to address identified needs should follow the RTP congestion management process, Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan and OHP Policy 1G, and should not come at the expense of achieving system completeness for non-motorized modes consistent with regional modal or design classifications or achieving the VMT/capita target for the region or jurisdiction.

⁶ Meeting these targets sets the region on a trajectory to meet state goals adopted in 2007 to reduce total GHG emissions from all sources to 75% below 1990 levels by 2050

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Table 3: Guidance for Defining the Complete Planned System

Mode	System Completeness Element	Supporting guidance
Pedestrian	Plan for complete network	RTFP, DLSTG, BUD
	Plan for adequate crossing spacing	RTFP, DLSTG, BUD
	Plan for adequate crossing treatments, including curb ramps	NCHRP 562
	Plan for a low-stress walking network to transit and other key destinations ⁹	RTFP, APM, TriMet Pedestrian Plan
Bicycle	Plan for complete network	RTFP, DLSTG, BUD
	Plan for a low-stress bicycling network to transit and other key destinations	APM
	Plan for adequate bike parking at key destinations	RTFP, TriMet Bicycle Parking Guidelines
Transit	Plan for complete network	Regional Transportation Plan RTFP
	Plan for transit priority infrastructure (e.g., transit signal priority, queue jumps, semi-exclusive or exclusive bus lanes or transitways)	Regional Transit Strategy
	Plan for adequate bus stop amenities and other transit supportive facilities ¹⁰	TriMet Bus Stop Guidelines
Motor Vehicle	Plan for adequate local, collector and arterial street connectivity	RTP, RTFP
	Plan for number of through lanes within maximum guidance	RTP, RTFP, DLSTG
	Plan/policy for where turn lanes will be permitted/prohibited and maximum number of turn lanes considering safety for all modes and land use context	APM, DLSTG, BUD
TSMO	Plan for infrastructure and programs, and maintain system compatibility	RTFP ¹¹ Regional ITS Architecture Plan Regional TSMO Strategy
TDM	Plan for infrastructure and programs	RTFP Regional TDM guidance for TSPs ¹²

AMP – Analysis Procedures Manual (ODOT)
 BUD – Blueprint for Urban Design (ODOT)
 DLSTG – Designing Livable Streets and Trails
 Guide (Metro)

NCHRP – National Cooperative Highway Research Project
 RTFP – Regional Transportation Functional Plan (Metro)

⁹ Key destinations include but are not limited to: 2040 centers and main streets; major employers; transit stops and stations; grocery stores and farmers markets; childcare facilities, schools and colleges; medical or dental clinics and hospitals; government offices and other civic destinations; parks, recreation centers, trails, and open spaces; major sports or performance venues; and gyms and health clubs.

¹⁰ Transit supportive facilities includes stations, hubs, stops, shelters, signs, and ancillary features.

¹¹ The implementation action plan includes updates to the RTFP to further include TSMO and TDM considerations.

¹² This document will outline how jurisdictions may incorporate TDM into their planning processes, providing guidance for supporting or requiring TDM delivery at site level, setting targets and objectives, and monitoring success. The document will be based on FHWA-HOP-12-035 national guidance, adapted to align with state and regional context including the updated ECO Rules, CFEC Rulemaking, and regional goals. The implementation action plan includes the development of this guidance in 2023.

Table 4: System Completeness Elements by Facility Type

Facility	System Completeness (Elements)
Throughways	Planned TSMO/ITS ¹³ infrastructure and programs Planned TDM ¹⁴ infrastructure and programs Planned street connectivity Planned transit service routes and service frequency Planned transit priority treatments and other transit supportive infrastructure Planned pricing strategies Planned travel lanes Planned regional trails/multi-use paths
Arterials	Planned TSMO/ITS ¹⁵ infrastructure and programs Planned TDM infrastructure and programs Planned street connectivity Planned transit service routes and service frequency Planned transit priority treatments and other transit supportive infrastructure Planned sidewalks and pedestrian crossings Planned bikeways Planned travel lanes

¹³ Transportation System Management measures for throughways means techniques for increasing the efficiency, safety, capacity, or level of service of a transportation facility without increasing its size. Examples include, but are not limited to, access management, ramp metering, and restriping of high occupancy vehicle (HOV) lanes.

¹⁴ Demand management means actions which are designed to change travel behavior in order to improve performance of transportation facilities and to reduce need for additional road capacity. Methods may include, but are not limited to, the use of non-driving modes, individualized marketing programs, commuter programs, trip reduction strategy for large employers, ride-sharing and vanpool programs, trip-reduction ordinances, shifting to off-peak periods, and parking management, including reduced, times or paid parking.

¹⁵ Transportation System Management and Operations measures for arterials means techniques for increasing the efficiency, safety, capacity, or level of service of a transportation facility without increasing its size. Examples include, but are not limited to, traffic signal improvements, traffic control devices including installing medians and parking removal, channelization, access management, and restriping of high occupancy vehicle (HOV) lanes, including bus only lanes.

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System Planning Actions

A planned system that can be used to review system completeness is the primary outcome of system planning. VMT/capita and hours of congestion are applied to system planning to support the identification of the planned system. The Regional Mobility Policy does not dictate how Metro or local agencies conduct system planning. It is one tool to be used to identify needs and define the planned system. System planning includes updates to long-range transportation plans, including the Regional Transportation Plan and locally adopted transportation system plans. System planning also includes planning for the transportation system in smaller geographies through ODOT facility plans, corridor refinement plans as defined in the RTP and OAR 660-012-0190, and area plans, including concept plans for designated urban reserve areas. The following actions describe how each of the performance targets shall be used in tandem in system planning, which is supported by the flow chart in Figure 1.

1. Division 44 GHG Emissions Reduction Rule) and OAR 660 Division 12 (Transportation Planning Rule) set a VMT/capita reduction target for the Portland metropolitan area¹⁶. The 2023 RTP will identify the strategies needed to achieve this target and result in 2045 baseline VMT/capita for the region. This future baseline shall be used to estimate future VMT/capita for home-based trips and VMT/employee for commute trips to/from work at the TAZ level. The TAZ data shall be aggregated to develop “Districts”¹⁷ with similar land use and VMT characteristics by Metro through the 2023 RTP update and implementation process. The percent change in VMT/capita for the region must meet the reduction target in Division 44 (GHG Emissions Reduction Rule), but the percent change in VMT/capita for each district will vary.
2. For system planning at the sub-regional, local jurisdiction (TSPs), or subarea levels, VMT/capita for home-based trips and VMT/employee for commute trips to/from work shall be measured for the “Districts” covering the plan area to ensure that land use and transportation plan changes are working in tandem to achieve the region’s VMT/capita reduction target, resulting in reduced need to drive, improved viability of using other and more efficient modes of transportation than the automobile, and preserving roadway capacity for transit, freight and movement of goods and services. At the first major TSP update after this policy is implemented, system plans shall demonstrate that the planned transportation system achieves the regional OAR 660 Division 44 (GHG Emissions Reduction Rule) and OAR 660 Division 12 (Transportation Planning Rule) targets and that future system plan updates maintain or reduce aggregate VMT/capita for home-based trips and VMT/employee for commute trips to/from work for the “Districts” in the plan area compared to the 2045 baseline set in the 2023 RTP. Projections of VMT/capita must incorporate the best available science on latent and induced travel of additional roadway capacity consistent with OAR 660-012-0160.

¹⁶ The Division 44 VMT reduction targets cannot currently be measured using Metro’s Regional Travel Demand Model (RTDM); however, baselines for VMT/capita for home-based trips and VMT/employee for commute trips to/from work can be established from the RTDM for the RTP scenario that meet the Division 44 VMT reduction targets as measured via a different tool.

¹⁷ VMT/capita “Districts” will be established that identify TAZ groupings (subareas) with similar forecast VMT/capita, considering use of RTP mobility corridor geographies as a starting point.

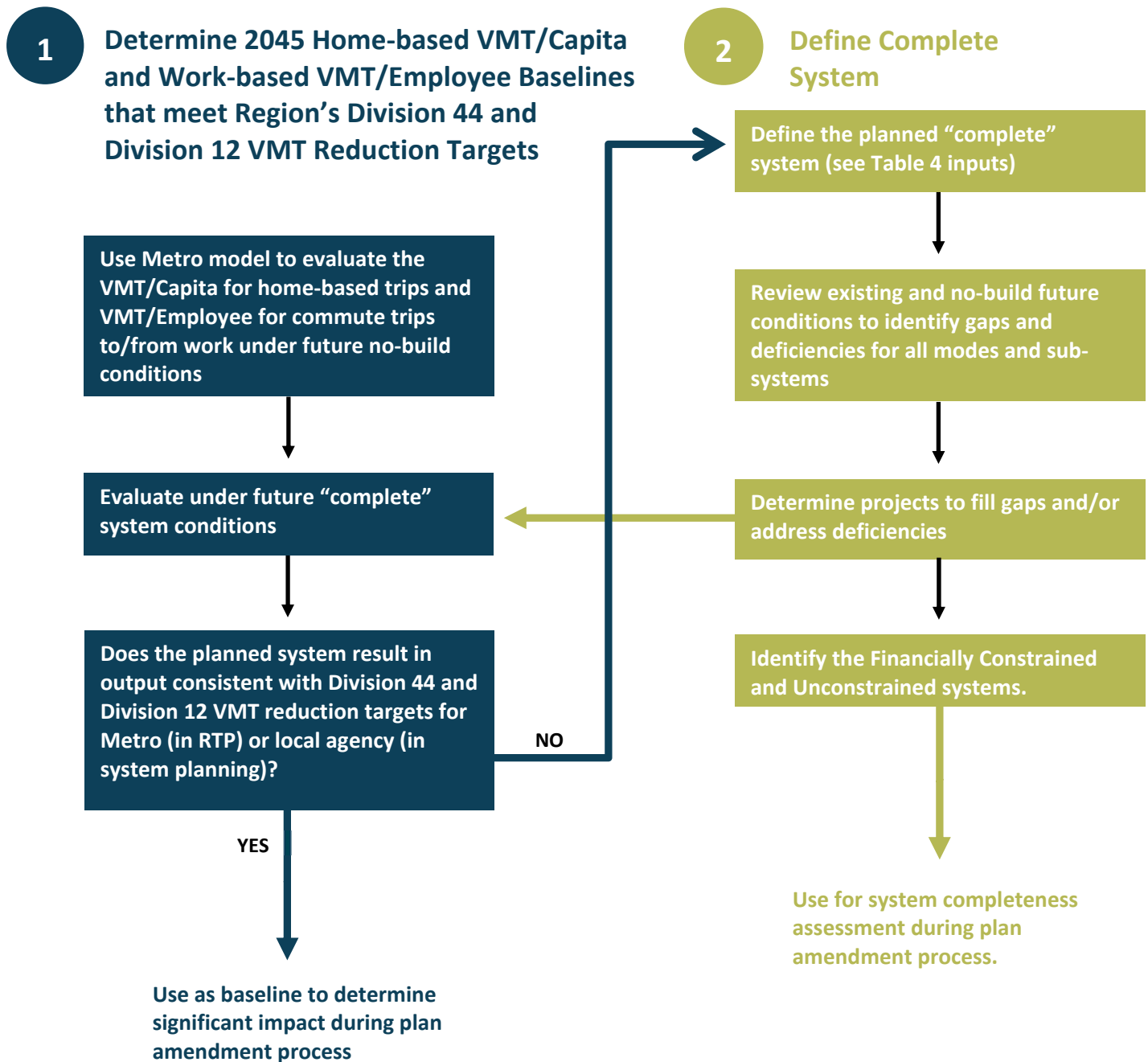
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3. System completeness definitions in guidance documents shall be used to identify needs and ensure that the planned transportation system is increasing connectivity and improving safety of the multimodal network. The planned system shall be established in local transportation system plans consistent with the RTP and RTFP for each facility and will vary based on the modal functional classification and design classification. Table 3 provides guidance for defining the planned system and Table 4 identifies the elements that must be identified for each facility or service type.
4. Hours of congestion for throughways based on average travel speed targets shall be used to assess performance of throughway facilities within the system planning study area for safe, efficient, and reliable speeds. Targets will include a target minimum average travel speed that shall be maintained for a specific number of hours per day, recognizing that the target average speed is not likely to be met during a number of peak hours, as described in Table 2. The percentage of the throughway system meeting the target may also be considered. These targets shall inform identification of transportation needs and consideration of system and demand management strategies and other strategies¹⁸ but shall not be used as standards at the expense of non-motorized modes and achieving system completeness for other modes consistent with regional modal or design classifications or achieving the VMT/capita target for the region or jurisdiction. Analysis segmentation of facilities within the study area will be determined based on the analysis software or modeling tool utilized.¹⁹ Projections of VMT/capita must incorporate the best available science on latent and induced travel of additional roadway capacity.
5. Interchanges shall be managed to maintain safe, efficient, and reliable operation of the mainline for longer trips of regional or statewide purpose through the interchange area. The main objective is to avoid the formation of traffic queues on off-ramps which back up into the portions of the ramps needed for safe deceleration from mainline speeds or onto the mainline itself. This is a significant traffic safety and operational concern as queues impact mainline operations and crashes affecting reliability. Deceleration space for vehicles exiting throughway mainlines can be improved by managing throughways for longer trips resulting in reducing off-ramp traffic volumes and by increasing capacity at the off-ramp terminal. Throughway off-ramp terminal intersection and deceleration needs shall be evaluated through system plans such as Interchange Area Management Plans, Corridor Plans, and Sub-area Plans.
6. In system plans, when identifying transportation needs and prioritizing investments and strategies, projects that create greater equity and reduce disparities between “Equity Focus Areas” and “Non-Equity Focus Areas” shall be prioritized. This action aims to improve equitable outcomes by burdening underserved populations less than and benefiting underserved populations as much or more as the study area population as a whole. Because the Equity Focus Areas as defined by the RTP are based on a regional average comparison, local governments shall conduct a more specific equity analysis at the local TSP scale consistent with OAR 660-012-0135.

¹⁸ The RTP system sizing policies, regional congestion management process and OHP Policy 1F will be followed to determine mitigations that support meeting the hours of congestion threshold.

¹⁹ Supporting documentation will be needed as part of implementation of the policy to define the segmentation methodologies based on analysis options.

Figure 1: System Planning Process Utilizing the Mobility Policy Measures



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Plan Amendment Evaluation Actions

All three of the mobility policy measures are applied to the evaluation of plan amendments. The following actions describe how each of the performance targets shall be used in tandem in evaluating plan amendments consistent with the Transportation Planning Rule (OAR 660-012-0060) and is supported by the flowchart in Figure 3.

1. Comprehensive plan amendments that do not surpass the trip generation thresholds in the Oregon Highway Plan Policy 1F will be found to have no significant impact and are not required to further evaluate VMT/capita, hours of congestion, or system completeness.
2. In a jurisdiction with a TSP that has demonstrated compliance with achieving the region's Division 44 and Division 12 VMT reduction targets, comprehensive plan amendments that are forecast to maintain or lower VMT/capita for home-based trips and VMT/employee for commute trips to/from work compared to their 2045 baseline that achieve Division 44 targets, shall be found to have no significant impact consistent with the Transportation Planning Rule (OAR 660-12-0060)
3. Comprehensive plan amendments that have a significant impact because they a) increase VMT/capita for home-based trips or VMT/employee for commute trips to/from work or b) the jurisdiction has not demonstrated compliance with OAR 660 Division 44 and Division 12 VMT reduction targets shall mitigate that impact by adjusting their land use plan, supporting VMT/capita reduction through enhancing non-vehicular modes beyond what's in the financially constrained transportation system plan, and/or committing to travel demand management. Enhancing non-vehicular modes means increasing system completeness for non-vehicular modes within the impact area of the plan amendment for those modes. Within the impact area, the system gaps will be identified based on the planned system in the TSP.
4. Large plan amendments will be obligated to develop a funding plan that will address the system gaps and bring additional projects that support VMT/capita reduction into the financially constrained transportation system plan and that help the district meet their VMT/capita target or mitigate the safety impacts of additional vehicle trips. In addition to addressing system completeness, a large plan amendment that is found have a significant impact on VMT/capita that cannot be mitigated will be required to review the impact of the plan amendment on meeting the hours of congestion on Throughways target and mitigate the impact. Addressing the hours of congestion target shall follow the RTP congestion management process, **Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan and OHP Policy 1G** and shall not come at the expense of achieving the VMT/capita target for the region.
5. Small scale plan amendments will need to demonstrate their proportionate impact on increased VMT/capita in the district and agree to conditions on the plan amendment or future conditions of development approval consistent with the local jurisdiction development code and project funding mechanisms to support reduced VMT/capita such as land use, travel demand management, and/or off-site mitigations to support VMT reduction or mitigate safety impacts of additional trips.
6. System completeness assessment of comprehensive plan amendments shall identify the needs to meet the planned system for each mode, as established in regional and/or local system plans. For each mode, the completeness impact area will be defined based on routing from the comprehensive plan amendment site for the specified distances in Table 5. Table 5 provides guidance for identifying the needs within each modal completeness impact

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area. For the comprehensive plan amendment, a proportional share of additional projects in the unconstrained transportation system plan, not included financially constrained transportation system plan, will be established based on additional daily trips for the plan amendment for both multi-modal trips as well as the vehicular trips for which the increased VMT/capita is being mitigated, as described in Figure 2.

7. Comprehensive plan amendments that demonstrate either of the following for analysis segments within the vehicular impact area shall be found to require mitigation, and a proportional share of the identified needs will be established for the comprehensive plan amendment based on additional daily trips
 - a) Degrades the hours of congestion of an existing or planned transportation facility such that it would not meet the performance target identified Table 2; or
 - b) Degrades the hours of congestion of an existing or planned transportation facility that is otherwise projected to not meet the performance standards identified in Table 2.
8. Interchanges within the vehicular impact area shall be assessed for off-ramp queuing to maintain safe, efficient and reliable operation of the mainline for longer trips of regional or statewide purpose through the interchange area under the forecast comprehensive plan amendment.

Figure 2: Guidance for Assessing Plan Amendment Impacts

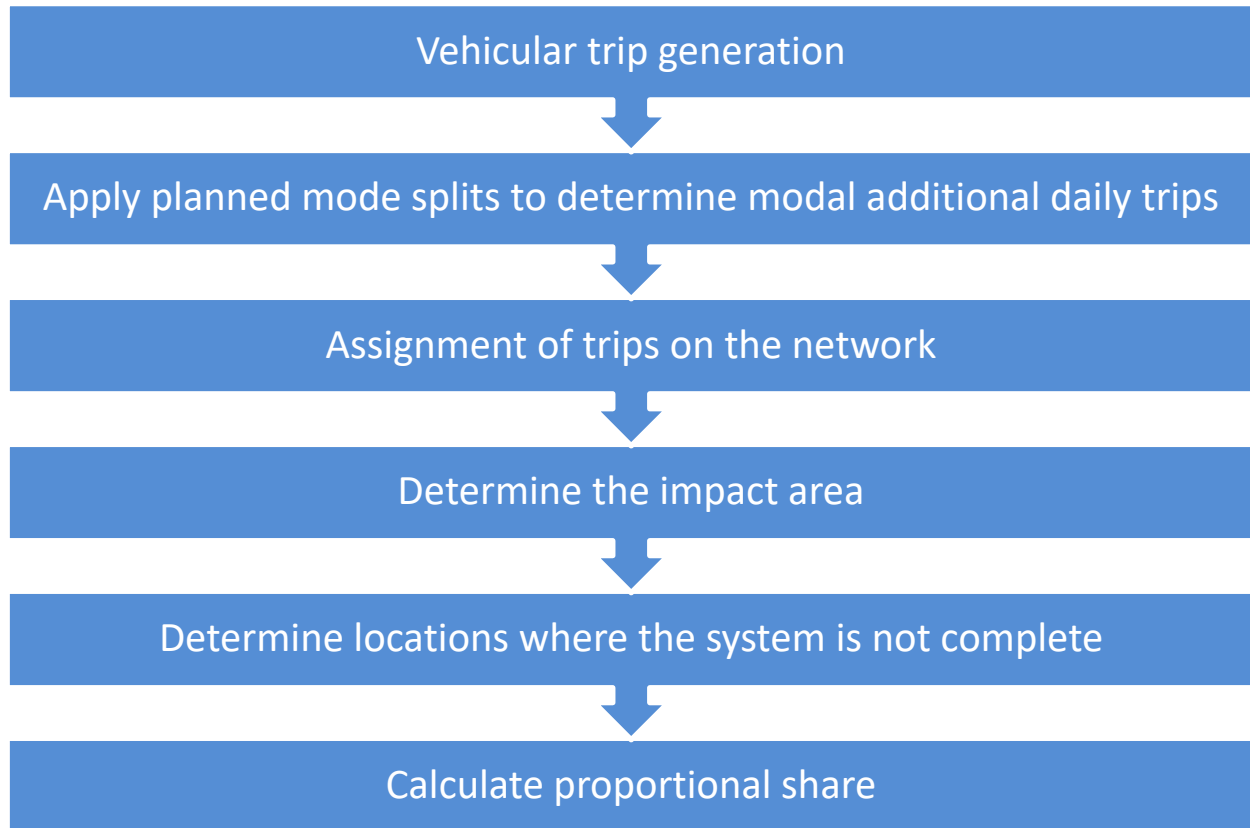
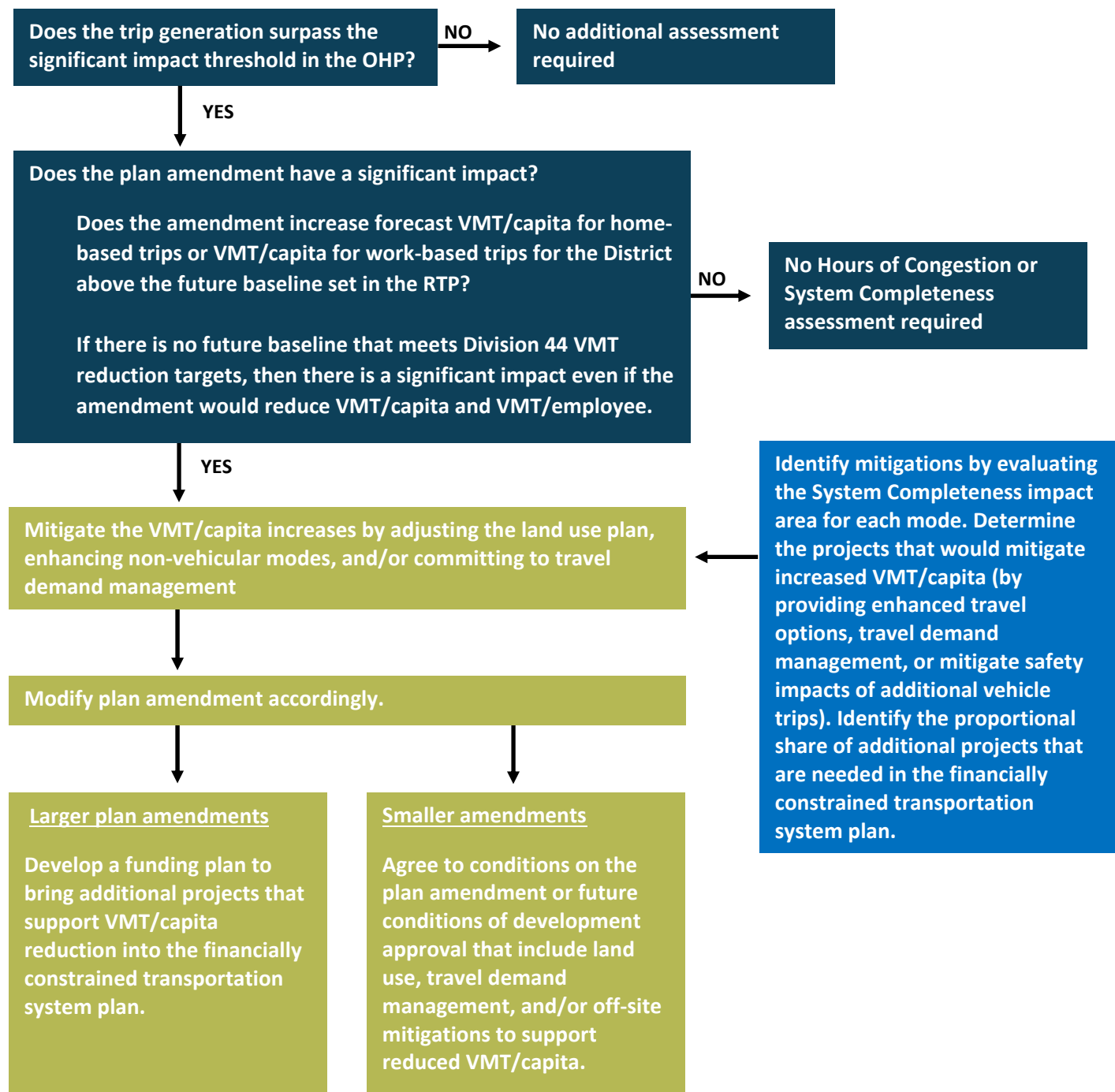


Figure Note: Vehicular trip generation with planned mode splits will be used until or unless mode specific trip generation resources become available.

Figure 3: Plan Amendment Process Utilizing the Mobility Policy Measures

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Table 5: Guidance for Assessing Plan Amendment Impacts to System Completeness

	Plan Amendment		
	1. Determine study area by selecting the specified distance along existing and planned facilities	2. Determine if the planned system should be updated to address needs of plan amendment (applies to larger plan amendments only)	3. Determine locations and quantity of gaps in the planned system within the study area
Pedestrian	Along facilities within 1/2-mile network routing from site in all directions	n/a	Missing pedestrian crossings
	Along facilities within 1/2-mile network routing from site in all directions	Review NCHRP 562	Missing pedestrian crossing treatments (islands, medians, pedestrian beacons or signals, pedestrian crossing timing, etc.)
	Along facilities within 1/2-mile network routing from site in all directions	n/a	Curb-miles of low-stress pedestrian facilities gaps
Bike	Along facilities within 1/2-mile network routing from site in all directions	n/a	Curb-miles of low-stress bicycle facilities gaps
	Along facilities within 1/2-mile network routing from site in all directions	n/a	Missing bicycle crossings, signals, or signal phases
	Along facilities within 1/2-mile network routing from site in all directions	Review TriMet Bicycle Parking Guidelines	Missing bike parking
Transit	Along facilities within 1/2-mile network routing from site in all directions	Review TriMet Bus Stop Guidelines	Missing bus stops amenities by amenity type
		Review TriMet Enhanced Transit Toolbox	Missing transit priority treatments (e.g., transit signal priority, queue jumps, bus-only lanes)
		n/a	Missing transit supportive infrastructure
Motor Vehicle	Along facilities within 1/2-mile network routing from site in all directions or 10% change in traffic volumes (whichever is greater)	n/a	Centerline-miles of roadway gaps
	Along facilities within 1/2-mile network routing from site in all directions	Review travel speeds, off-ramp queuing	Lane-miles of throughway lane gaps
TSMO	Along facilities within 1/2-mile network routing from site in all directions	n/a	Gaps in ITS infrastructure along TSMO 'Key Corridors' ²⁰ (per Regional TSMO Strategy and RTP); Missing ITS projects (per TSP)
TDM – Infrastructure	Along facilities within 1/2-mile network routing from site in all directions	n/a	Missing TDM projects (per TSP)
TDM - Programming	Site-based/within site boundaries	n/a	Agreement to fulfill required programming (per TSP)

Table Notes:

Distances apply to ODOT review of state highways for plan amendments. Local jurisdictions may define distances for review of their facilities in their codes related to plan amendments.

Off-site improvements required during either the plan amendment or development review process will continue to be relate to the impact of the development

²⁰ TSMO Key Corridors will be based on the 2018 RTP TSMO network map (figure 3.28). The implementation action plan includes further development of TSMO Key Corridors, to be defined and mapped for inclusion in the 2023 RTP.

Regional Mobility Policy for the Portland Metropolitan Area

Draft Implementation Action Plan

The following describes actions necessary to implement the proposed policy including steps to incorporate the policy into existing policy documents, guidance and procedures, and development of the data and tools needed for practitioners to implement the policy. The implementation actions are organized by these estimated time periods:

- **2023**
- **2024**
- **2025 and beyond**

A lead agency and timing for completion is identified for each action along with a brief description of the action. Lead agencies are Metro and ODOT. Partners include cities, counties, transit providers, Port districts and other partners in the greater Portland region.

These actions are draft and subject to further refinement in 2023 as the policy is tested and refined during the 2023 Regional Transportation Plan (RTP) update. These implementation actions will be completed as resources are available.

2023 Actions

- **Test and refine the draft Regional Mobility Policy through 2023 Regional Transportation Plan update.** An initial step of this work will be testing the draft measures and targets as part of the system performance analysis for the 2023 RTP. The results of this analysis will be used to further refine how the policy is applied in system planning. This work includes incorporating the regional mobility policy language in the in Chapter 3 (Section 3.2) of the RTP, alongside safety, equity, and climate policies. To be consistent with the format of the RTP, explanatory text for each of the six policy statements will be developed with specific actions to implement each. Other RTP policies may also need to be updated to reflect the regional mobility policy and how it is applied, including the RTP congestion management process. Chapter 2 of the RTP will be updated to incorporate the draft measures and targets and any refinements identified through testing. Chapter 8 of the RTP will be updated to incorporate the implementation action plan to support implementation of the regional mobility policy. Additional implementation actions may be identified through the 2023 RTP update and will be included. This work will be completed in coordination with ODOT and cities, counties, and other partners in the region.

Lead Agency: Metro

When: Winter-Spring 2023

- **Establish baseline VMT/capita for home-based trips and VMT/employee for commute trips to/from work in the 2023 RTP.** This work will be completed as part of the 2023 RTP update and includes defining “districts” within the regional modeling tools for which baseline VMT/capita for home-based trips and VMT/employee for commute trips to/from work will be established, considering the RTP mobility corridors geographies as a starting point. This work will be completed in coordination with ODOT and cities and counties in the region.

Lead Agency: Metro

When: Spring 2023

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- **Develop hours of congestion and travel speed forecasting guidance.** This work will be completed as part of the 2023 RTP update in coordination with ODOT. This work includes documentation of methods and development of guidance on calculating hourly average travel speed and hours of congestion on throughways based on the model used. If using output from the regional travel demand model, ensure a consistent approach to segment lengths, model hour(s) reviewed, and any calibration needed. This work may identify updates to ODOT's Analysis Procedures Manual and/or other procedures to reflect this guidance.

Lead Agencies: Metro and ODOT**When:** 2023

- **Further define and map TSMO "Key Corridors" for inclusion in 2023 RTP.** This action as called for in the 2021 Regional TSMO Strategy and will support implementation of the updated mobility policy. TSMO Key Corridors will be based on the 2018 RTP TSMO Network Map and will represent the network in which transportation systems management strategies are most essential. This work will be completed in coordination with ODOT and cities and counties in the region.

Lead Agency: Metro/TransPort**When:** Winter-Spring 2023

- **Update Multimodal System Inventories.** Update the Statewide Active Transportation Network Inventory in the Portland region in coordination and collaboration with Metro and local governments as a tool to support implementation of the updated Regional Mobility Policy and reporting for OAR 660-012 and OAR 660-044, building from local and regional (RLIS) system data. The Regional Land Information System (RLIS) Metro maintains and data collected by local governments and reported to Metro provide important information to support this action.

Lead Agency: ODOT**When:** 2023-24

- **Develop implementation guidance for TDM/TSMO to support the Regional Mobility Policy.** Guidance will identify expectations for system completeness for TDM/TSMO at a regional level, identify roles and responsibilities for Metro and its partners in implementation, include recommended processes for system planning and plan amendments for local jurisdictions, and provide TDM tools to support implementation. The TSMO guidance will likely include a checklist, using the existing Regional ITS Architecture Plan and ITS checklist as a starting point. The Regional ITS Architecture Plan allows a local agency to track how information flows among transportation operators to manage the multimodal system and assures the equipment they put into capital projects is effective and interoperable, satisfying requirements of the region, ODOT and FHWA. This work will be completed in coordination with ODOT, cities and counties and other partners in the region.

Lead Agency: Metro**When:** 2023-24

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- **Adopt the final Regional Mobility Policy in the 2023 Regional Transportation Plan.** The 2018 RTP Section 3.5, Regional Motor Vehicle Network Vision and Policies, includes the Interim Regional Mobility Policy; mobility targets therein correspond with the Oregon Highway Plan's Policy 1F, Highway Mobility Policy, Table 7.

Lead Agency: Metro**When:** Nov. 2023

2024 Actions

- **Request consideration of the Regional Mobility Policy for the Portland metropolitan area in the updated Oregon Highway Plan to reflect the regional mobility policy adopted in the 2023 Regional Transportation Plan.** An update of the Oregon Highway Plan is planned for 2023-24, following the adoption of the new Oregon Transportation Plan. The updated Regional Mobility Policy is anticipated to replace Table 7 in the current OHP Policy 1F. Request new OHP to integrate explanatory text, performance measure targets, and other state guidance for transportation system planning for state highways in the Portland metropolitan area, consistent with the updated policy. The requested new policy will include removal of the recommendation in the Oregon Highway Plan for local agencies to adopt ODOT mobility standards for development review purposes.

Lead Agencies: Metro and ODOT**When:** 2024

- **Amend Regional Transportation Functional Plan (RTFP), Title 3, Transportation Project Development, to reflect the Regional Mobility Policy.** Title 3 includes current mobility targets in Table 3.08-2; Sections 3.08.210 and 3.08.220 address identification of transportation needs and solutions; Section 3.08.230 defines performance targets and standards and requires Oregon Transportation Commission approval for local adoption of mobility standards for state highways that differ from those in Table 3.08-2. This work will develop guidance and methodologies for needs and solutions analysis to establish an evaluation and reporting process that an agency must follow to demonstrate that the RTP congestion management process was used and that other solutions were analyzed first before capacity-adding projects consistent with state and regional policies, OAR 660-012-0830 and Sections 3.08.210 and 3.08.220 of the RTFP. Other functional plan amendments may be needed to implement the final adopted policy. This work will be completed in coordination with ODOT, DLCD, transit providers, cities, counties and other partners in the region.

Lead Agency: Metro**When:** 2024

- **Develop a VMT-based tool to support evaluation of plan amendments.** The spreadsheet or similar tool will help assess potential changes to VMT/capita and VMT/employee for commute trips and potential mitigations to minimize the need for application of the regional travel demand model for all plan amendments. Before leading the tool development, ODOT would develop data and tool specifications, review relevant research, and conduct sensitivity testing in coordination with Metro and other MPOs. This tool is anticipated to support implementation of this policy and OAR 660-012 and OAR 660-044 statewide. The tool would have three main functions:

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- Provide the starting VMT/capita and VMT/employee starting values for projects to use. These starting values could be presented at the traffic analysis zone (TAZ) level or District level.
- Assess the direction and magnitude of change to VMT/capita and VMT/employee that would result from the proposed land use changes.

Evaluate the effectiveness of potential mitigation actions, including changes to planned land use and circulation, improved transit, bicycling, and walking facilities, and the implementation of travel demand management (TDM) programs.

Lead Agency: ODOT

When: 2024-25

- **Update Regional Transportation Functional Plan to encompass additional relevant TSMO and TDM system planning guidance.** Consider how the plan amendment and development review processes could support citywide and county-wide initiatives identified in TSPs such as ITS plans, wayfinding programs, and demand management programs. This work will be completed in coordination with ODOT, DLCD, DEQ, transit providers and cities and counties in the region.

Lead Agency: Metro

When: 2024

- **Update ODOT's Analysis Procedures Manual, development review procedures, and TSP guidelines to reference the updated Regional Mobility Policy.** The development review procedures will be updated to provide guidance on assessing impacts of plan amendments on ODOT facilities. The updates will build on updates planned to start in 2023 to support implementation of OAR 660-012 and OAR 660-044 and the new OHP when it is adopted.

Lead Agency: ODOT

When: 2024

- **Determine remaining needs for updates to the Oregon Highway Design Manual to acknowledge the adopted Portland Metro area mobility policy.** The updates will build on updates planned to start in 2023 to support implementation of OAR 660-012 and OAR 660-044.

Lead Agency: ODOT

When: 2024

- **Develop model codes and guidance to support local implementation.** Develop guidance to local jurisdictions (potentially in the RTFP) on how the RMP could be applied to their facilities for reviewing plan amendments and land development applications. Applying the RMP to local jurisdiction facilities requires amendments to local jurisdiction standards for their facilities through their TSPs and land development codes. This work will be completed in coordination with ODOT, DLCD, transit providers and cities and counties in the region.

Lead Agency: Metro

When: 2024

2025 and Beyond Actions

- **Implement Regional Mobility Policy through local TSP and comprehensive plan updates.** Local TSP and plan updates will apply the new mobility policy in their system planning and update local codes and ordinances to reflect the new policy in requirement for plan amendments and project development. This work includes incorporating regional performance targets that apply to plan amendments to ensure that the proposed changes are consistent with the planned function, capacity, and performance standards of state and regional facilities. Local jurisdictions that have adopted ODOT's OHP V/C targets as standards in their development codes, may also replace these v/c targets with the new mobility policy and performance targets. This work will be completed in coordination with ODOT and Metro.

Lead Agency: Cities and counties

When: 2025 and beyond

- **Incorporate Regional Mobility Policy Implementation Guidance for TDM into Metro's Regional Travel Options (RTO) Strategy Update.** RTO staff seeks to be responsive to new policy direction (including the Regional Mobility Policy Update, 2023 RTP Update, and the DEQ Employee Commute options Rules Update) as well as internal program direction (including the 2022 RTO Racial Equity Strategy, 2022 Commute Program Analysis, and updates to the RTO Grant Program). These inputs set the RTO Program on a revised trajectory of program and service delivery which will be reflected in an update to the 2018 RTO Strategy, the program's 10-year strategic plan. The RTO Strategy Update will articulate a regional vision for TDM, including a roadmap for Metro and partners in supporting this vision.

Lead Agency: Metro

When: 2025-2026

- **Update Transportation Analysis Zones (TAZs) to support local and regional planning needs.** Refine TAZ boundaries or establish additional TAZs to better align with jurisdictional, urban growth boundaries and other planning needs.

Lead Agency: Metro

When: 2026-28

- **Expand the region's Dynamic Traffic Assignment capabilities.** This work would expand the region's existing model(s) to calculate hourly average travel speeds for all throughways and other reliability measure outputs within a capacity constrained model. Guidance will be developed to consistently calculate hourly average travel speed using DTA model. This work will also determine if thresholds should be adjusted if analysis is adjusted to use the DTA model. This work will be completed in coordination with ODOT and other state and regional modeling collaboration efforts described below.

Lead Agency: Metro

When: TBD

Task 8.2: Draft Regional Mobility Policy for the 2023 Regional Transportation Plan (10/28/22)

- **State and Regional Modeling Collaboration.** Modify and create new regional modeling tools in coordination with the Oregon Modeling Statewide Collaborative (OMSC) to better account for all modes of travel, including light-duty commercial travel, in support of implementation of this policy and OAR 660-012 and OAR 660-044. This includes support for the statewide joint-estimation and regional deployment of ActivitySim and supporting tools, which will better integrate State and Regional modeling efforts, particularly where these models overlap and exchange data.

Lead Agency: Metro and ODOT

When: TBD



Draft 2023 RTP Regional Mobility Policy (RMP) Overview

The Regional Mobility Policy is a policy in Metro's Regional Transportation Plan (RTP) as well as ODOT's Oregon Highway Plan (OHP). It applies to system planning and plan amendment processes only within the Portland metropolitan area. The regional mobility policy is one of many policies that helps the region choose where to focus resources and how to manage the transportation system today and into the future. The goal of this updated policy is to better align the policy and measures with shared regional values, goals, and desired outcomes identified in RTP and 2040 Growth Concept, as well as with local and state goals. Specifically, the updated policy is intended to support mobility outcomes related to equity, efficiency, access and options, safety, and reliability. Six policies and three measures are included in the policy that have direct relationships to these desired mobility outcomes.

Draft Regional Mobility Policy for the 2023 Regional Transportation Plan

Mobility Policy 1	Ensure that land use decisions and investments in the transportation system enhance efficiency in how people and goods travel to where they need to go.
Mobility Policy 2	Provide people and businesses a variety of seamless and well-connected travel modes and services that increase connectivity, increase choices and access to low carbon transportation options so that people and businesses can conveniently and affordably reach the goods, services, places and opportunities they need to thrive.
Mobility Policy 3	Create a reliable transportation system that people and businesses can count on to reach destinations in a predictable and reasonable amount of time.
Mobility Policy 4	Prioritize the safety and comfort of travelers by all modes when planning and implementing mobility solutions.
Mobility Policy 5	Prioritize investments that ensure that Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other marginalized and underserved populations have equitable access to safe, reliable, affordable and convenient travel choices that connect to key destinations.
Mobility Policy 6	Use mobility performance measures and targets that have direct for system planning and evaluating the impacts of plan amendments including Vehicle Miles Travelled (VMT) per capita for home-based trips and VMT/employee for commute trips to/from work, system completeness, and hours of congestion on the throughways.

Draft Mobility Policy Performance Measures and Targets

Measure	Target	Expected Mobility Outcomes
VTM per Capita (VTM/Capita for home-based trips and VTM/Employee for commute trips to/from work)	Achieve reductions required by OAR 660 Division 44 (GHG Reduction Rule) and OAR 660 Division 12 of 20% reduction by 2035, 25% reduction by 2040, and 30% reduction by 2045 and 34% reduction by 2050 (from 2005 levels)	Land Use Efficiency Land use patterns that are more efficient to serve because they reduce the need to drive and are supportive of travel options.
System Completeness	Complete the “planned” network and system for walking, biking, transit, vehicles, freight and implement strategies for managing the transportation system and travel demand <i>Note: The “planned” system, Strategic and Financially Constrained, may not achieve completeness for all modes but should identify future intent for all facilities given constraints and tradeoffs.</i>	Complete Multi-Modal Networks Travel options and connectivity allow people to reliably and safely walk, bike, drive, and take transit to get where they need to go.
Hours of Congestion on Throughways	Increase miles of the throughway system that operate with 4 or fewer hours of congestion per day (based on a speed of 35 mph for expressways and 20 mph for throughways that are not expressways and have traffic signals). <i>Note: Congestion is currently defined by ODOT for their freeways as vehicle speeds below 75% of the posted speed. The mobility policy will clarify how congested conditions are defined for current and future forecast conditions. Speeds on freeways below 35 mph are typically considered congested.</i>	Reliability Safe, efficient and reliable travel speeds for people, goods and services.

How do the measures work together?

VMT/Capita will be a controlling measure in both system planning and plan amendments to ensure that the planned transportation system and changes to the system support reduced VMT/capita by providing travel options that are complete and connected and that changes to land use reduce the overall need to drive from a regional perspective and are supportive of travel options.

- For system planning, the final planned system must support OAR 660 Division 44 (Metropolitan Greenhouse Gas (GHG) Emissions Reduction rule) and OAR 660 Division 12.
- For plan amendments, VMT/capita for household-based trips and VMT/employee for commute trips will be used to determine if the proposed plan amendment has a significant impact on regional VMT/capita that needs to be mitigated or not.

System Completeness and **Hours of Congestion on Throughways** are secondary measures that will be used to identify needs and inform the development of the planned system. The policy requires that TSPs define the planned system for each mode using a variety of guidance documents. Additional RTP and state policies also guide the development of individual modal systems. It is important to note that the Regional Mobility Policy is one of many policies that inform the development of the Regional Transportation Plan and local transportation system plans in the Portland region. The regional and local “planned” system may not achieve completeness for all modes but should identify future needs and expectations for all facilities given constraints and tradeoffs. Similarly, Hours of Congestion on Throughways will inform state and regional needs of the throughway system, and the target articulates the desired level of reliability for the throughway system designated in the RTP and OHP. Identifying solutions for locations that do not meet the Hours of Congestion on Throughways target shall follow the RTP congestion management process,¹ Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan and OHP Policy 1G², and should not come at the expense of achieving the VMT/capita target.

Using the updated Regional Mobility Policy for system planning processes:

The Regional Mobility Policy does not dictate how Metro or local agencies conduct system planning. It is one tool to be used to identify needs and define the planned system.

Through the RTP, Metro will define districts to establish a future baseline for VMT/capita that meets OAR 660 Division 44 (Metropolitan GHG Emissions Reduction Rule). The percent change in VMT/capita for the region must meet the reduction target in Division 44 (GHG Emissions Reduction Rule), but the percent change in VMT/capita for each district may vary.

¹ RTP Chapter 3 (pages 3-71 and 3-72) and Appendix L to the RTP provides more detailed information. Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan further direct how cities and counties implement the CMP in the local system planning process.

² Policy 1G (Major Improvements) has the purpose of maintaining highway performance and improving highway safety by improving system efficiency and management before adding capacity.

At the local jurisdiction planning level, the planned system defined through the system planning processes must meet the RTP-set VMT/capita baseline for its impacted districts.

Through the planning process, Hours of Congestion on Throughways will be used as a target to inform the planned throughway system. The target is no more than 4 hours per day with average travel speeds below 35 mph for the expressways and 20 mph for the Throughways that are not expressways and have traffic signals. There will be instances where there is not funding or community desire to complete roadway projects that would meet the Hours of Congestion target; therefore, it will be used for guidance to identify needs and deficiencies instead of as a standard.

The planned system determined through system planning processes that meets the VMT/capita baseline will become the basis for review of system completeness during plan amendment processes.

Using the Regional Mobility Policy update for plan amendments processes:

Comprehensive plan amendments that do not surpass the trip generation thresholds in the Oregon Highway Plan Policy 1F will be found to have no significant impact and are not required to further evaluate VMT/capita, hours of congestion, or system completeness. Comprehensive plan amendments that exceed the trip generation thresholds in the Oregon Highway Plan Policy 1F need to determine if there is a significant impact based on changes to the VMT/capita for the impacted district(s).

Plan amendments that increase VMT/capita, causing the district to not meet its target, will be required to mitigate that impact by adjusting their land use plan, supporting VMT/capita reduction through enhancing non-vehicular modes, and/or committing to travel demand management. Enhancing non-vehicular modes means increasing system completeness for non-vehicular modes within the impact area of the plan amendment for those modes. Within the impact area, the system gaps will be identified based on the planned system in the TSP.

Large plan amendments will be obligated to develop a funding plan that will address the system gaps and bring additional projects that support VMT/capita reduction into the financially constrained transportation system plan and that help the district meet their VMT/capita target. In addition to addressing system completeness, a large plan amendment that is found to have a significant impact on VMT/capita that cannot be mitigated, will be required to review the impact of the plan amendment on meeting the Hours of Congestion on Throughways target and mitigate the impact. Addressing motor vehicle Hours of Congestion target shall follow the RTP congestion management process and OHP Policy 1G and shall not come at the expense of achieving the VMT/capita target for the region.

Smaller plan amendments will need to demonstrate their proportionate impact on increased VMT/capita in the district and agree to conditions on the plan amendment or future conditions of development approval consistent with the local jurisdiction development code and project funding mechanisms that will include land use, travel demand management, and/or off-site mitigations to support reduced VMT/capita.



Memo

Date: October 28, 2022

To: Transportation Policy Alternatives Committee (TPAC) and interested parties

From: Kim Ellis, Metro Project Manager
Lidwien Rahman, ODOT Project Manager
Glen Bolen, ODOT Region 1

Subject: Regional Mobility Policy Update: Draft Regional Mobility Policy Maps

PURPOSE

The purpose of this memo is to provide draft maps of the Portland area that illustrate two of the three performance measures:

- performance of the RTP throughways applying the draft travel speed-based reliability targets to the 2018 Regional Transportation Plan financially constrained system for the year 2040.
- Household-based vehicle miles traveled per capita for the 2020 base year being used in the 2023 Regional Transportation Plan update.

For the system completeness performance measure, 2023 RTP “planned” networks will include: Regional Motor Vehicle Network, Regional Freight Network, Regional Transit Network, Regional Pedestrian Network, Regional Bicycle Network and the Transportation System Management and Operations (TSMO) Network. Maps of these networks have been updated to reflect housekeeping edits identified by local, regional and state agencies. The updated network maps will be provided to TPAC when available.

ACTION REQUESTED

No action is requested. This is for informational purposes and intended to serve as a starting point for further testing the draft measures and targets in the 2023 Regional Transportation Plan next year.

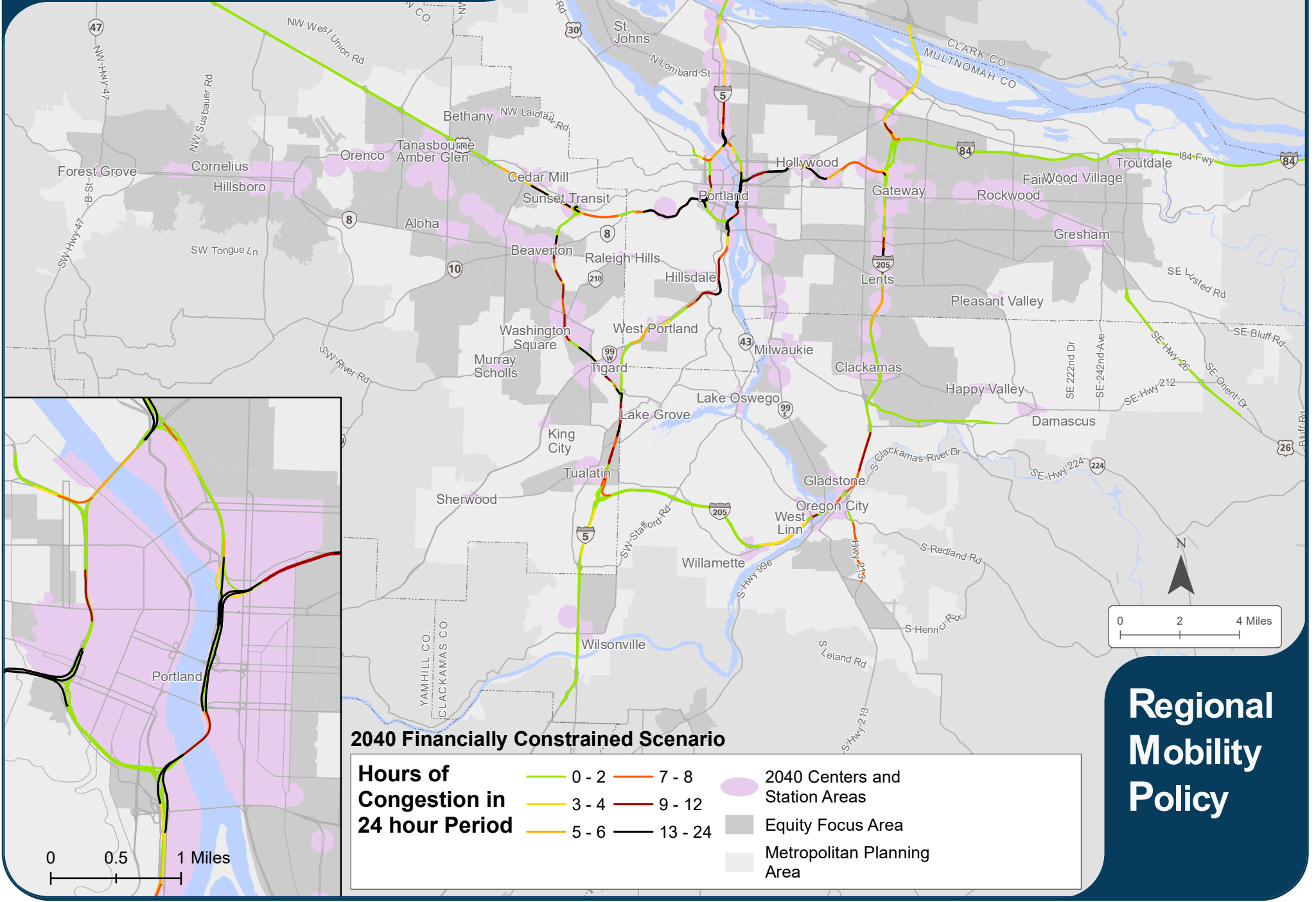
/Attachments

Attachment 1. Map of RTP Expressway Throughways: Hours of Congestion based on travel speed below 35 MPH (10/28/22)

Attachment 2. Map of RTP Non-Expressway Throughways: Hours of Congestion based on travel speed below 20 MPH (10/28/22)

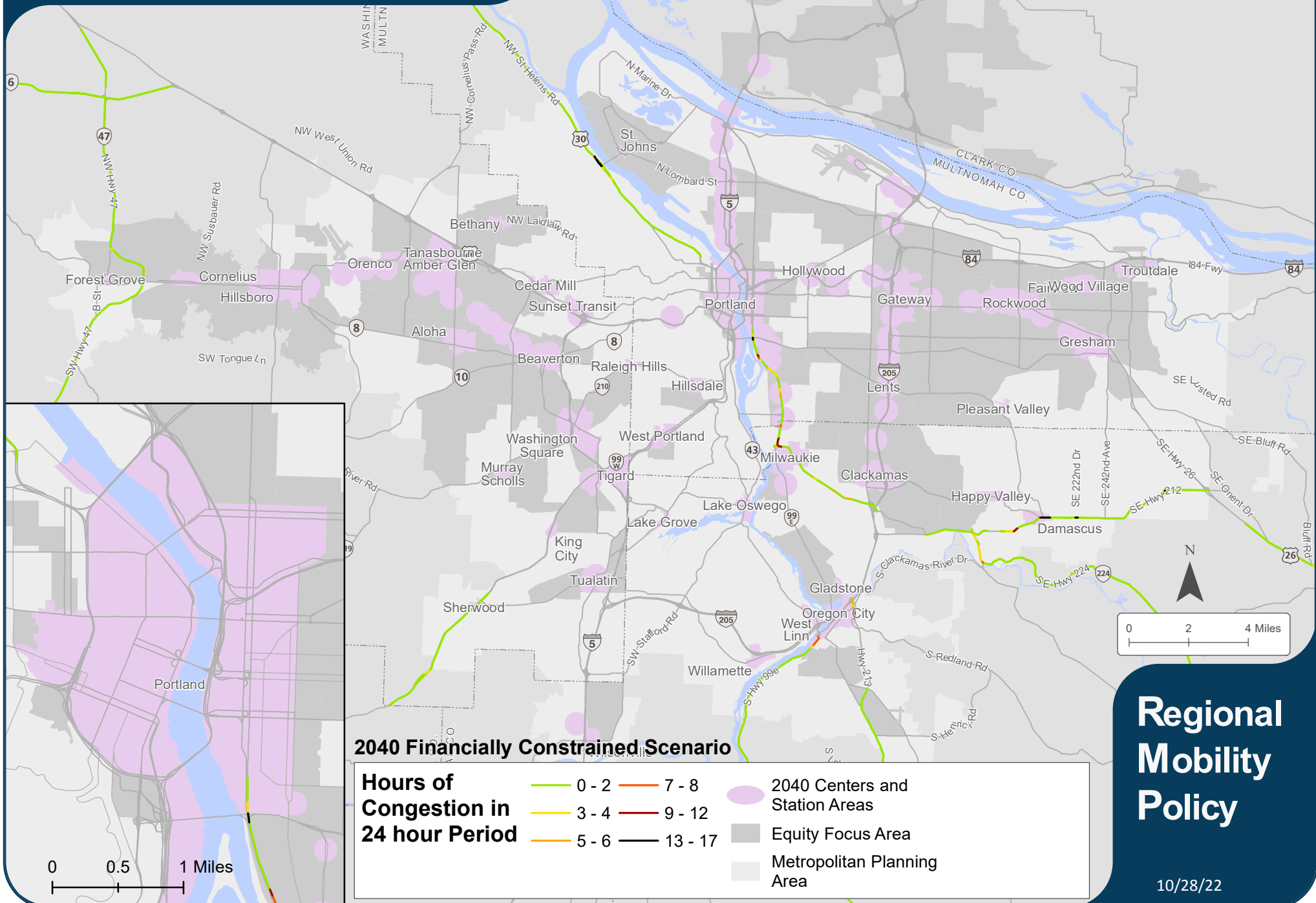
Attachment 3. Map of Vehicle Miles Traveled per Capita (2020) (10/17/22)

RTP Expressway Throughways Hours of Congestion Based on Travel Speed Below 35 MPH



RTP Non-Expressway Throughways Hours of Congestion Based on Travel Speed Below 20 MPH

Attachment 2



Vehicle Miles Traveled Per Capita (2020)

Attachment 3

Home-based VMT per capita

Significantly Below Average -- 400 tazz

Below Average -- 401 tazz

Average -- 379 tazz

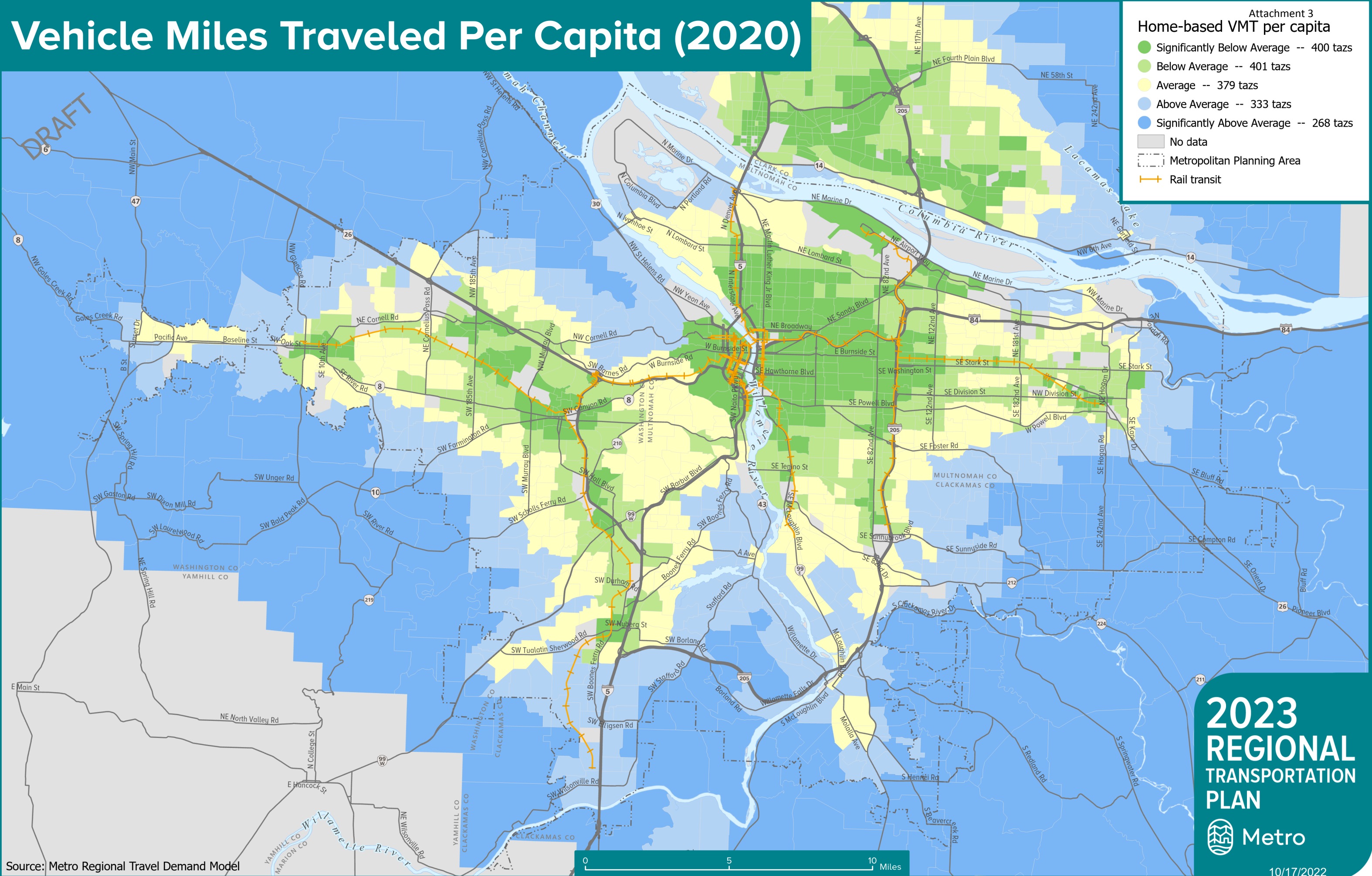
Above Average -- 333 tazz

Significantly Above Average -- 268 tazz

No data

Metropolitan Planning Area

Rail transit



Source: Metro Regional Travel Demand Model

2023
REGIONAL
TRANSPORTATION
PLAN



10/17/2022

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: October 28, 2022
To: Transportation Policy Alternatives Committee (TPAC) and interested parties
From: Kim Ellis, RTP Project Manager
Subject: 2023 Regional Transportation Plan: Overview of the Policy Framework and Draft Revenue Forecast for the RTP Call for Projects

PURPOSE

This memo provides an overview of the policy framework and draft revenue forecast for the 2023 RTP Call for Projects that will be shared with Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) later this month. The purpose of the Call for Projects is to update of the region's near-term and long-term investment priorities for the 2023 Regional Transportation Plan (RTP).

ACTION REQUESTED

Transportation Policy Alternatives Committee (TPAC) discussion and feedback on the following policy questions:

1. Does the policy framework described in this memo provide adequate direction and guidance to agency partners to update the RTP investment priorities?
2. Do you have comments on the measures described in Table 1?
3. Do you have comments or questions about the process for updating the RTP project and program priorities for the near-term (2023-2030) and long-term (2031-2045)?
4. Do you have comments or questions about development of the draft revenue forecast or cost targets?

At the November 4 meeting, TPAC will have an opportunity to review and discuss the policy framework and available revenue forecast information that will be used to update the investment priorities in the RTP. TPAC's feedback will help staff prepare recommendations and guidance to support updating the 2023 RTP list of projects and investment strategy.

In December, TPAC will be asked to make a recommendation to the Joint Policy Advisory Committee on Transportation (JPACT). TPAC's recommendation will include two parts:

- recommendation on the Policy Framework for the 2023 RTP Call for Projects
- recommendation on the Draft Revenue Forecast and Cost Targets for the 2023 RTP

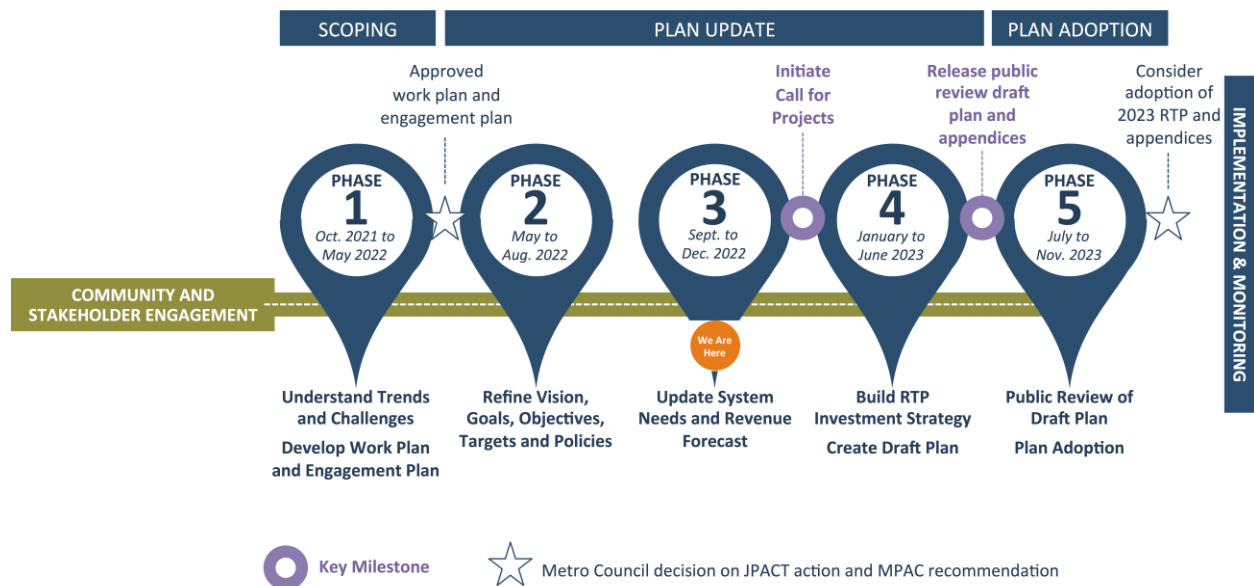
Pending JPACT action on recommendation from TPAC and Council action on recommendations from JPACT, Metro will issue a "Call for Projects to update the region's transportation near-term and long-term investment priorities to support regional goals for equity, safety, climate, mobility and economy. Metro will issue the Call for Projects on January 6, 2023. The deadline for project sponsors to submit recommended updates to RTP project and program priorities to Metro is February 17, 2023.

BACKGROUND

A major update to the Regional Transportation Plan (RTP) is underway. The RTP is the blueprint for transportation in our region and a key tool for implementing the region's [2040 Growth Concept](#) and [Climate Smart Strategy](#). Together, these plans will help ensure that greater Portland thrives by connecting people to their jobs, families, schools and other important destinations and by allowing business and industry to create jobs and move goods to market.

The timeline below shows where we are in the process

Timeline for 2023 Regional Transportation Plan Update



This memo describes the policy framework and approach for updating, assessing, and refining the list of projects and programs for the 2023 RTP. The policy framework reflects the culmination of more than two years of work by regional and community partners to identify transportation needs and develop a vision, goals, objectives, targets and a financial plan. The 2023 RTP call for projects responds to this direction as agency partners work together and with communities to update the investment priorities of the plan.

An outcomes-based approach

An outcomes-based approach means the RTP is guided by a vision and goals that describe what our communities want greater Portland to be in the future.

Measurable objectives and performance targets are used to evaluate performance over time of the investments recommended in the plan and to monitor how the transportation system is performing between scheduled plan updates, which occur every five years.

Figure 1 shows the elements of this outcomes-based approach.



Figure 1. 2023 RTP outcomes-based planning framework

Vision and goals

The people of greater Portland have said they want a better transportation future, no matter where they live, where they go each day, or how they get there. The vision and goals, shown in **Figure 2**, describe what people have said is most important to achieve with the updated RTP – more equitable transportation, a safer system, a focus on climate action and resilience, a thriving economy and options for mobility.

Dramatic changes have unfolded since the RTP was last updated five years ago, many documented in the 2018 RTP [Emerging Transportation Trends Study](#). As greater Portland continues to emerge from the disruptions of the pandemic and respond to other urgent trends and challenges, the 2023 Regional Transportation Plan allows all levels of government to work together to deliver a better transportation future.

Figure 2. 2023 RTP vision and goals



Policy Framework for the 2023 RTP Call for Projects

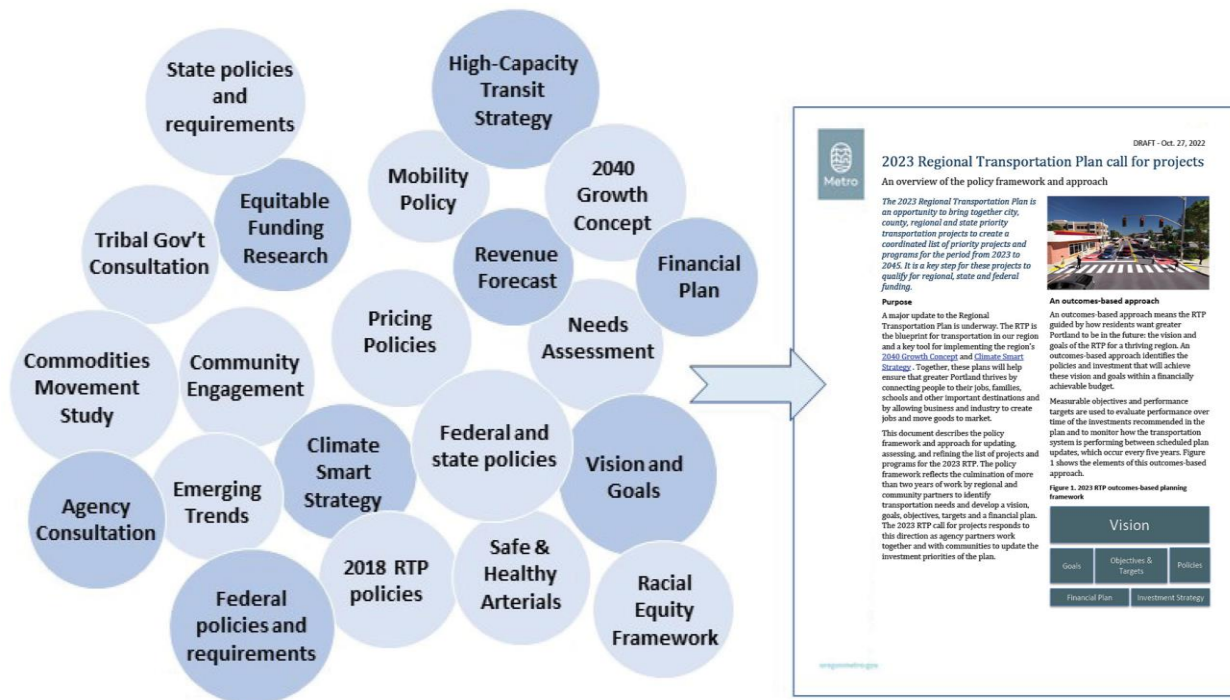
In addition to the vision and goals, the call for projects is informed by public engagement, adopted regional plans, strategies, policies, federal and state requirements, the RTP needs assessment, the revenue forecast, and other elements as illustrated in Figure 3. Many of these elements have been under development since the adoption of the 2018 RTP.

The policy framework for the Call for Projects includes:

- **RTP outcomes-based approach;**
- **Draft 2023 RTP vision and goals** developed by JPACT and the Metro Council for the 2023 RTP;
- **supporting objectives** that identify specific outcomes and measurable targets the region wants to achieve with investments in the transportation system to realize the plan's vision and goals; and
- **supporting policies** that include:

- **2040 Growth Concept map and supporting policies** that identify priority areas and investments to support current and planned land uses;
- **RTP transportation network maps and supporting RTP modal and design policies** that designate the regional system for transit, motor vehicle, freight, bicycle and pedestrian travel and priorities for investment;
- **Equity Focus Areas map and supporting RTP equity policies** that identify priority areas and investments to advance equity;
- **High Injury Corridors and Intersections map and supporting RTP safety policies** that identify priority corridors to improve safety;
- **High capacity transit network map (draft) and supporting RTP policies (draft)** that identify priority corridors ready for high capacity transit investment; these will continue to be reviewed and refined in 2023;
- **Congestion management network map and supporting RTP congestion management policies** that identifies priority corridors to comprehensively manage congestion consistent with congestion management process policies in Chapter 3 of the RTP;
- **Draft policies related to pricing and regional mobility** that will continue to be reviewed and refined in 2023; and
- **Other existing Chapter 3 policies** that will be reviewed and may be refined in 2023.

Figure 3. Elements informing the 2023 RTP call for projects



These elements come together to form the policy framework for the call for projects and provide additional information to guide how investments in roads, bridges, bikeways, sidewalks, transit service and other needs are addressed and prioritized. The elements contributing to the call for projects policy framework reflect extensive engagement with local elected officials, public agencies, Tribal governments, community-based organizations, business groups and the community at large.

Revenue forecast for the 2023 RTP financially constrained project list

Development of the draft revenue forecast and cost targets for the 2023 RTP Call for Projects is underway and will be finalized by the end of the year. The region has limited transportation funding, which must be used strategically to meet the extensive needs of the people who live and work here. The RTP revenue forecast is an important part of the call for projects process, providing an estimate of how much funding can be reasonably expected to be available during the life of the plan (2023-2045) both for capital projects and for maintaining and operating the existing transportation system.

The draft forecast reflects extensive consultation and coordination with local governments, the Oregon Department of Transportation (ODOT), TriMet and SMART staff that is still underway. Metro convened to two workshops with local agency staff and individual meetings with ODOT and TriMet staff to support this work. The forecast will include revenues raised at the federal, state, regional and local levels for transportation projects and programs to be included or accounted for in the 2023 RTP.

Forecasted local revenues came from local TSPs and capital improvement programs in consultation with local agencies. A summary of the methodology being used to develop local revenue estimates is provided in **Attachment 2**. The federal and state revenues were identified through a statewide funding working group convened by ODOT that included transit providers and MPOs. In addition, Metro is working with ODOT to estimate a range of potential tolling revenues that are reasonably expected to be available to fund ODOT capital projects (e.g., I-5 Interstate Bridge Replacement (IBR) Program, I-205/Abernethy Bridge, I-205 Widening).

Consistent with the adopted RTP work plan, three levels of investment will be defined for the 2023 RTP, with each level representing a statement of priority. The first and second levels, together, are known as the financially constrained project list under federal and state law. In order for projects to be eligible to receive federal and state funding, they must be on the *Constrained Priorities* project list. The Constrained Priorities will be prioritized into near-term (2023-2030) and long-term (2031-2045) priorities – based on the financially constrained revenue forecast and policy priorities of the RTP.

- The first level of priority, **the Near-term Constrained Priorities**, will represent the highest priority transportation project and program investments for near-term (2023-2030).
- The second level of priority, **the Long-term Constrained Priorities** will represent the highest priority transportation project and program investments for long-term (2031-2045).
- The third level of priority, **the Long-term Strategic Priorities**, will represent additional investments that advance RTP policy priorities or need further study but that do not fit within the financially constrained revenue forecast, but the region agrees to work together to complete remaining planning work and identify funding to advance these priorities in the 2031-2045 time period. As was done in the 2018 RTP, this investment level is recommended to be 1.5 times the financially constrained cost target.

The draft revenue forecast will be presented at the November 4 meeting. Table 1 is a placeholder to illustrate the revenue information that will be available for the call for projects. Project lead agencies will be given targets based on available funding for the constrained project list (projects

that can be funded with the revenues that are expected to be available in the region), the strategic project list (projects that can be funded with additional revenues should they become available), and for the first seven years of the constrained list, which typically includes high-priority projects meeting regional goals that are ready to be implemented.

Table 1: Draft 2023 RTP financially constrained revenue forecast (*under development*)

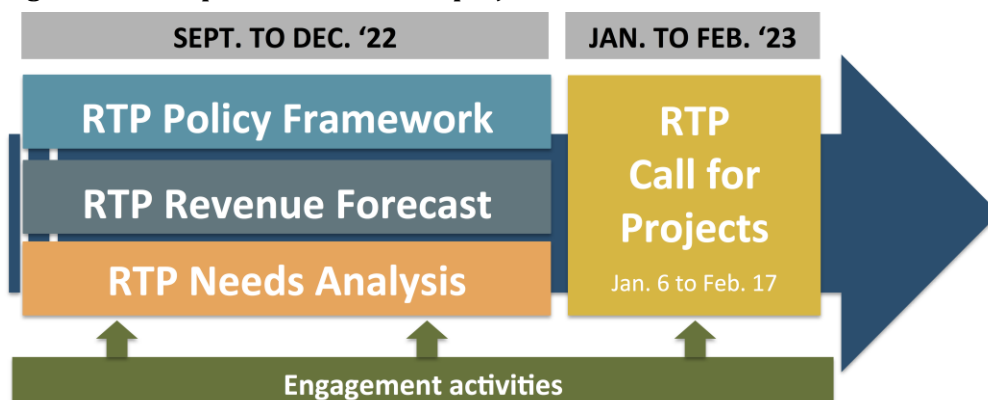
Agency/coordinating committee	Constrained List cost target for 2023-2030 (billions, 2023 dollars)	Constrained List cost target for 2031-2045 (billions, 2023 dollars)	Strategic List cost target for 2031-2045 (billions, 2023 dollars)	Total RTP List cost target for 2023-2045 (billions, 2023 dollars)
City of Portland	\$0.000	\$0.000	\$0.000	\$0.000
Clackamas County, Cities, & NCPRD	\$0.000	\$0.000	\$0.000	\$0.000
Multnomah County and Cities	\$0.000	\$0.000	\$0.000	\$0.000
Washington County, Cities & THPRD	\$0.000	\$0.000	\$0.000	\$0.000
Oregon Dept. of Transportation	\$0.000	\$0.000	\$0.000	\$0.000
TriMet & SMART (Transit Capital)	\$0.000	\$0.000	\$0.000	\$0.000
Metro	\$0.000	\$0.000	\$0.000	\$0.000
Port of Portland	\$0.000	\$0.000	\$0.000	\$0.000

2023 RTP CALL FOR PROJECTS WILL UPDATE THE REGION'S PROJECT AND PROGRAM PRIORITIES

The call for projects kicks off the window of time for transportation agencies to update existing projects and add new priority projects to the RTP. Updating the list of priority projects and programs in the RTP is more than just a housekeeping exercise; priorities in the RTP are updated to reflect changing transportation needs and trends – such as those documented in the 2023 RTP Emerging Transportation Trends Study and 2023 RTP needs assessment – and respond to the policy framework. The 2023 RTP is an opportunity advance new project priorities identified in planning efforts completed through a public process since December 2018¹ and incorporate more recent JPACT and Metro Council policy feedback through the RTP update.

Figure 4 shows the timeline and steps leading up to the call for projects.

Figure 4. Development of the call for projects



¹ Examples include projects identified through transportation system plan (TSP) updates, corridor and areas studies; development of the Metro's regional funding measure in 2020, TriMet's Forward Together Service Restoration Planning effort, and SMART's Master Plan update.

The list of projects and programs in the 2018 RTP is the starting place for the call for projects. Many of the projects and programs in the 2018 RTP will be carried forward, with updated costs and, sometimes, refinements to project details. Some projects may no longer be needed, while new projects identified in local transportation system plan updates and other public planning processes may be added.

Over many years of planning, local, regional and state partners have identified and refined projects to meet the transportation needs of the region. These projects are primarily identified in local transportation system plans, but also in transit service and master plans, park and trail plans, corridor plans, and other transportation studies. Engaging the public and affected communities is a core part of identifying transportation needs and developing the list of projects to address those needs.

Communities across the region contribute to the development of plans and studies from which RTP projects are drawn from. Cities, counties, transit agencies, park and trail providers, the Port of Portland, ODOT and other agencies are responsible for compiling and submitting the list of priority projects recommended for the RTP.

During the call for projects, transportation agencies are asked to update the projects and programs in the RTP that will implement the regional vision, advance regional goals, and address the transportation needs of the region. As in previous updates of the RTP, transportation agencies, including ODOT and TriMet, will work through county-level transportation coordinating committees and with the City of Portland, to coordinate across jurisdictional boundaries and recommend priority projects for the 2023 RTP. These meetings, as well as meetings of elected and appointed officials, provide opportunities for the public to learn about and provide input on the projects and programs being recommended.

A **2023 RTP Project Submission Guide** is being developed to support agencies that are updating the list of projects. Agencies will update and add projects in the RTP Project Hub, an online database. Agencies updating or submitting new projects to the RTP will provide information that will be used in the outcomes assessment, and system, equity, climate and environmental analysis of the draft project list. For projects already in the RTP Project Hub, much of the information will already be available. Some information will need to be updated, or added for new projects.

Key information requested in Call for Projects (definitions will be provided in the Project Submission Guide):

- **Agency information** identifying the nominating agency, agency partners and primary owner.
- **General project information** describing the project, location, features and design elements.

Project list updates and supporting information due February 17

The call for projects starts Jan. 6 and closes on Feb.17, 2023. Over the past two years, the update of the RTP has focused on understanding the region's transportation challenges and priorities for investment and updating the region's vision for the transportation system.

Now it is time to pull the pieces together in the call for projects to address these challenges, reflect public priorities and make progress toward our shared vision and goals for the future transportation system.

Project list endorsements due May 1

New for the 2023 RTP, agencies will be asked to submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP.

This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects.

- **Project status**, whether the project is has committed construction funding, and/or the project is new.
- **Estimated project cost** estimated in current cost (in 2023 dollars) and for the time period within which the project is recommended for completion (year of expenditure). Guidance for inflating current cost to expected year of expenditure cost will be provided.
- **Time period** for which the project is anticipated to be completed, 2023-2030 or 2031-2045 for purposes of the RTP performance analysis.
- **Project type and investment category:**
 - Active Transportation (Pedestrian, Bicycle, or Pedestrian & Bicycle)
 - Freight
 - Roads and Bridges
 - Roadway and Bridge Operations
 - Roadway and Bridge Maintenance and Preservation
 - Throughways
 - Transit (High Capacity, Better Bus, or Other)
 - Transit Operating Capital
 - Transit Service and Operations
 - Transit Maintenance
 - Transit-oriented Development
 - Transportation System Management (Technology)
 - Transportation Demand Management
 - Pricing Programs; and Regional Activities
- **Safety projects** identified as a safety project through a state or local process.
- **Modeling assumptions** describing the number and type of traffic lanes and signals (before and after the project), posted speed, signal timing/coordination, type of bicycle facility to be provided, and whether sidewalks are included.
- **GIS shapefiles** for location-specific projects for Metro to develop maps and conduct GIS analysis to determine which projects overlap with 2040 Growth areas, high injury corridors, Equity Focus Areas and other spatial data.
- **Drawings or more detailed maps** when needed to communicate the location or modeling assumptions for more complex projects.

What projects are eligible to be included in the 2023 RTP?

To be included in the RTP, projects and programs must meet certain eligibility requirements consistent with the policy framework. Projects must be located on the designated regional transportation system² and be inside the federally-recognized metropolitan planning area boundary, and:

1. Projects must help achieve regional vision, goals and policies for the transportation system.
2. Projects must cost at least \$2 million or be bundled with similar projects to meet the cost threshold.
3. Projects must come from adopted plans or strategies developed through a planning process that identified the project to address a transportation need on the regional transportation system.
4. Projects that were identified through a public planning process that met the appropriate requirements for public involvement, including having provided opportunities for public

² An on-line viewer of the 2018 RTP network maps, that also includes the urban growth boundary and the metropolitan planning area boundary, can be found at:
<https://drcmetro.maps.arcgis.com/apps/MapSeries/index.html?appid=9057331682354a188ecec2688071239f>
The draft 2023 RTP Network Maps will be posted in an on-line viewer for the Call for Projects.

comment, with specific efforts to engage communities of color, people with low-incomes and people with limited English proficiency.

Project list updates and supporting information is due February 17. For all projects submitted to the RTP, agencies will provide documentation of public engagement conducted during the planning and development of projects. New for the 2023 RTP, agencies will be asked to submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP. This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects. This engagement information may be provided after the projects have been submitted in the call for projects but must be submitted by May 1. Metro will use the information provided to describe the array of public engagement opportunities that contributed to the development of the 2023 RTP.

How will projects and the transportation system be evaluated to measure progress?

Once the Call for Projects closes, Metro will complete an outcomes-based technical analysis of how the draft project list advances the RTP vision, goals and policies. This analysis consists of two phases. The first phase is a high-level assessment of the individual projects based on information provided in the call for projects and the project's location. The assessment will be used to show how individual projects advance regional goals. In addition to reporting on the questions shown in **Table 2**, the high-level assessment will report on the share of funding prioritized for each of the investment categories.

The second phase is a system analysis of how the RTP performs with respect to performance measures and targets that reflect RTP goals. This analysis will be used to assess how the overall package of projects advance regional goals and make progress towards the regional performance targets. This phase includes detailed equity and climate analyses that are required by the federal and state regulations that govern the RTP. The system analysis uses Metro's travel model and other analytical tools, as well as the information from the high-level assessment. The system analysis accounts not only for the projects and policies in the RTP, but also for factors such as projected population and job growth.

Table 2 summarizes the key questions that the assessment and analysis will look to answer for each of the five RTP goals.



Draft 2023 RTP Goals

Table 2: Measuring progress towards RTP goals

RTP goal	High-level project assessment	System analysis
Equitable transportation: Transportation system disparities experienced by Black, Indigenous and other people of color and people with low incomes are eliminated. The disproportionate barriers people of color, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.	Is the project located in an Equity Focus Area?	Does the RTP benefit Equity Focus Areas at least as much, if not more, than other communities in the region?
Climate action and resilience: People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.	Does the project have a high or medium greenhouse gas reduction potential? ³ Is the project located in a designated center?	Does the RTP meet vehicle miles traveled per capita reduction targets? Does the RTP meet transit, bicycle and pedestrian mode share targets?
Safe system: Traffic deaths and serious crashes are eliminated, and all people are safe and secure when traveling in the region.	Is the project identified as safety project? ⁴ Is the safety project on a high injury corridor?	Does the RTP meet regional safety targets?
Mobility options: People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible and welcoming.	Does the project complete a gap in the region's pedestrian, bicycle or transit networks?	Does the RTP meet targets for completing the multimodal transportation system? Does the RTP meet vehicle miles traveled per capita reduction targets? Does the RTP meet targets for reliable travel on throughways? ⁵
Thriving economy: An economically vibrant greater Portland region includes centers, ports, industrial areas, employment areas and other regional destinations that are accessible through a variety of multimodal connections that help people, communities and businesses thrive and prosper.	Does the project improve access to destinations within centers and industrial and employment areas?	Does the RTP improve freight, transit, bicycle and pedestrian access that serve centers and industrial and employment areas? Does the RTP increase access by auto and transit to destinations?

³ As defined in the 2014 Climate Smart Strategy <https://www.oregonmetro.gov/climate-smart-strategy>

⁴ Identified as a safety project through a state or local process.

⁵ As defined in the draft Regional Mobility Policy developed to test and refine through the 2023 RTP update.

Refining project and program priorities for the 2023 RTP public review draft

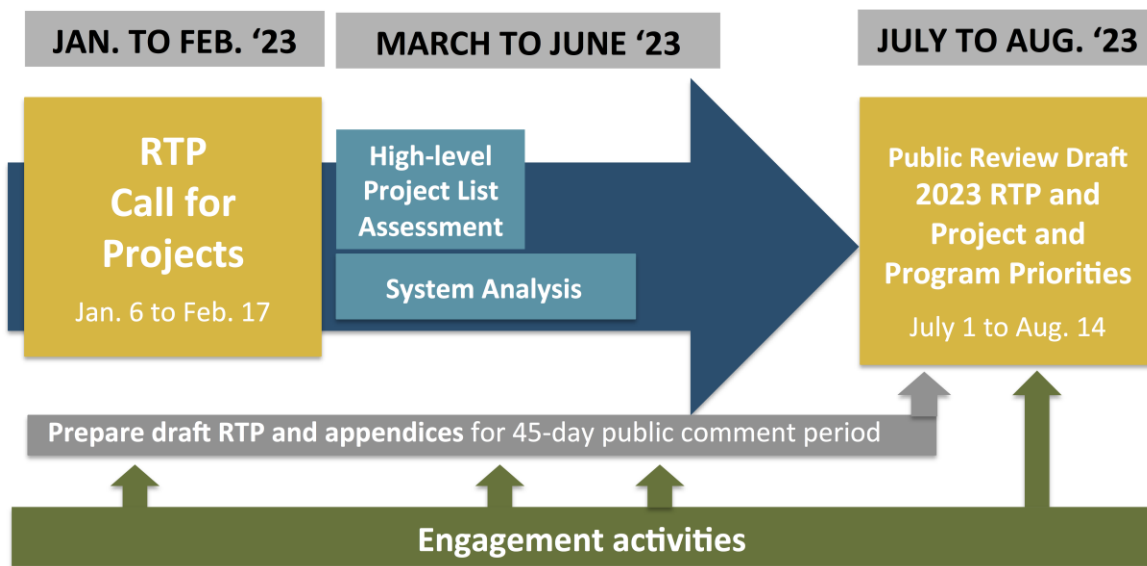
Stakeholders and policymakers will be asked to review and comment on draft priority projects and the high-level project assessment starting in April 2023. Metro is partnering with community-based organizations to engage communities of color and culturally specific communities from across the region. The process is designed to grow the capacity of the organizations that serve these communities to engage in regional and local transportation decisions more broadly, including future decisions beyond the 2023 RTP. Metro will also host an online survey that provides an opportunity for the public to provide input on the draft project list.

Input on the assessment of projects, along with public input on the system analyses findings will inform decision-makers and regional partners as they continue to work together to finalize the draft RTP and project and program priorities for public review in Summer 2023.

Figure 5 illustrates the timeline and process for the call for projects and the development of the public review draft of the RTP.

A 45-day comment period on the draft plan is planned from July 1 to Aug. 14, 2023. JPACT and the Metro Council will consider adoption of the 2023 RTP (and updated project and program priorities) in November 2023.

Figure 5. Call for projects timeline and process



Next steps

A schedule of the next steps leading the 2023 RTP Call for Projects follows.

11/9/22	MPAC discussion on RTP Needs Assessment Findings
11/16/22	MTAC discussion on Policy Framework for 2023 RTP Call for Projects
11/17/22	JPACT discussion on Policy Framework and Draft Revenue Forecast for 2023 RTP Call for Projects
	JPACT discussion on RTP Needs Assessment Findings
12/2/22	TPAC recommendation to JPACT on Policy Framework and Draft Revenue Forecast for 2023 RTP Call for Projects

12/6 and 12/7/22	Online RTP Hub Training for agency staff responsible for submitting new and updated project information as part of the Call for Projects in January 2023
12/14/22	MPAC discussion on Policy Framework for 2023 RTP Call for Projects
12/15/22	JPACT considers action on TPAC recommendation
12/15/22	Metro Council considers action on JPACT recommendation
1/6 to 2/17/23	2023 RTP Call for Projects
2/17/23	Project list updates and supporting information due
5/1/23	Governing body project list endorsements due May 1

/Attachments

- Attachment 1. 2023 RTP Call for Projects Overview of the Policy Framework and Approach
- Attachment 2. Draft 2023 RTP Local Revenues Estimate Report
- Attachment 3. Draft 2023 Regional Transportation Plan Vision and Goals
- Attachment 4. Examples of RTP Projects and Programs



2023 Regional Transportation Plan call for projects

An overview of the policy framework and approach

The 2023 Regional Transportation Plan is an opportunity to bring together city, county, regional and state priority transportation projects to create a coordinated list of priority projects and programs for the period from 2023 to 2045. It is a key step for these projects to qualify for regional, state and federal funding.

Purpose

A major update to the Regional Transportation Plan (RTP) is underway. The RTP is the blueprint for transportation in our region and a key tool for implementing the region's [2040 Growth Concept](#) and [Climate Smart Strategy](#). Together, these plans will help ensure that greater Portland thrives by connecting people to their jobs, families, schools and other important destinations and by allowing business and industry to create jobs and move goods to market.

This document describes the policy framework and approach for updating, assessing, and refining the list of projects and programs for the 2023 RTP. The policy framework reflects the culmination of more than two years of work by regional and community partners to identify transportation needs and develop a vision, goals, objectives, targets and a financial plan. The 2023 RTP call for projects responds to this direction as agency partners work together and with communities to update the investment priorities of the plan.



An outcomes-based approach

An outcomes-based approach means the RTP is guided by a vision and goals that describe what our communities want greater Portland to be in the future. This approach identifies policies and investments that will achieve the vision and goals within a financially achievable budget.

Measurable objectives and performance targets are used to evaluate performance over time of the investments recommended in the plan and to monitor how the transportation system is performing between scheduled plan updates, which occur every five years.

Figure 1 shows the elements of this outcomes-based approach.

Figure 1. 2023 RTP outcomes-based planning framework



Vision and goals

The people of greater Portland have said they want a better transportation future, no matter where they live, where they go each day, or how they get there. The vision and goals, shown in Figure 2, describe what people have said is most important to achieve with the updated RTP – more equitable transportation, a safer system, a focus on climate action and resilience, a thriving economy and options for mobility.

Dramatic changes have unfolded since the RTP was last updated five years ago, many documented in the 2018 RTP [Emerging Transportation Trends Study](#). As greater Portland continues to emerge from the disruptions of the pandemic and respond to other urgent trends and challenges, the 2023 Regional Transportation Plan allows all levels of government to work together to deliver a better transportation future.

Figure 2. 2023 RTP vision and goals



A policy framework for the call for projects

In addition to the vision and goals, the call for projects is informed by public engagement, adopted regional plans, strategies, policies, federal and state requirements, the RTP needs assessment, the revenue forecast, and other elements as illustrated in Figure 3.

Many of these elements have been under development since the adoption of the 2018 RTP.

Figure 3. Elements informing the 2023 RTP call for projects



These elements come together to form the policy framework for the call for projects and provide additional information to guide how investments in roads, bridges, bikeways, sidewalks, transit service and other needs are addressed and prioritized. The elements contributing to the call for projects policy framework reflect extensive engagement with local elected officials, public agencies, Tribal governments, community-based organizations, business groups and the community at large.

Revenue forecast for the 2023 RTP financially constrained project list

The region has limited transportation funding, which must be used strategically to meet the extensive needs of the people who live and work here. The RTP revenue forecast is an important part of the call for projects process, providing an estimate of how much funding can be reasonably expected to be available during the life of the plan (2023-2045) both for capital projects and for maintaining and operating the existing transportation system.

Financial assumptions for the RTP revenue forecast are developed in cooperation with transportation agencies. Development of the revenue forecast is underway and will be finalized by the end of the year. Table 1 is a placeholder to illustrate the revenue information that will be available for the call for projects. Project lead agencies will be given targets based on available funding for the constrained project list (projects that can be funded with the revenues that are expected to be available in the region), the strategic project list (projects that can be funded with additional revenues should they become available), and for the first seven years of the constrained list, which typically includes high-priority projects meeting regional goals that are ready to be implemented.

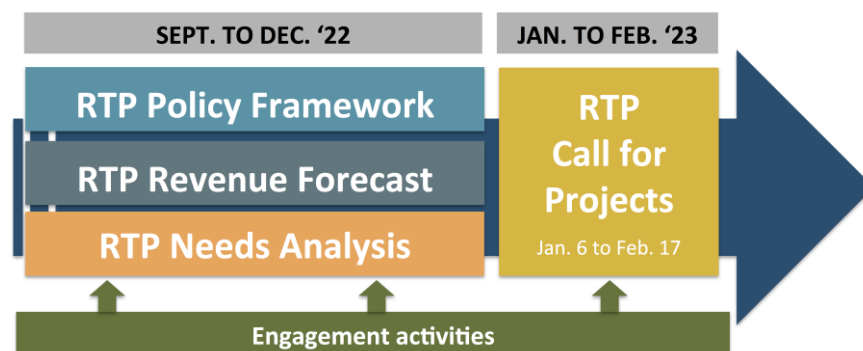
Table 1: Draft 2023 RTP financially constrained revenue forecast (*under development*)

Agency/coordinating committee	Constrained List cost target for 2023-2030 (billions, 2023 dollars)	Constrained List cost target for 2031-2045 (billions, 2023 dollars)	Strategic List cost target for 2031-2045 (billions, 2023 dollars)	Total RTP List cost target for 2023-2045 (billions, 2023 dollars)
City of Portland	\$0.000	\$0.000	\$0.000	\$0.000
Clackamas County, Cities, & NCPRD	\$0.000	\$0.000	\$0.000	\$0.000
Multnomah County and Cities	\$0.000	\$0.000	\$0.000	\$0.000
Washington County, Cities & THPRD	\$0.000	\$0.000	\$0.000	\$0.000
Oregon Dept. of Transportation	\$0.000	\$0.000	\$0.000	\$0.000
TriMet & SMART (Transit Capital)	\$0.000	\$0.000	\$0.000	\$0.000
Metro	\$0.000	\$0.000	\$0.000	\$0.000
Port of Portland	\$0.000	\$0.000	\$0.000	\$0.000

Call for projects

The call for projects kicks off the window of time for transportation agencies to update existing projects and add new priority projects to the RTP. Updating the list of priority projects and programs in the RTP is more than just a housekeeping exercise; priorities in the RTP are updated to reflect changing transportation needs and trends – such as those documented in the 2023 RTP Emerging Transportation Trends Study and 2023 RTP needs assessment – and respond to the policy framework. Figure 4 shows the timeline and steps leading up to the call for projects.

Figure 4. Development of the call for projects



The list of projects and programs in the 2018 RTP is the starting place for the call for projects. Many of the projects and programs in the 2018 RTP will be carried forward, with updated costs and, sometimes, refinements to project details. Some projects may no longer be needed, while new projects identified in local transportation system plan updates and other public planning processes may be added.

Over many years of planning, local, regional and state partners have identified and refined projects to meet the transportation needs of the region. These projects are primarily identified in local transportation system plans, but also in transit service and master plans, park and trail plans, corridor plans, and other transportation studies. Engaging the public and affected communities is a core part of identifying transportation needs and developing the list of projects to address those needs.

During the call for projects, transportation agencies are asked to update the projects and programs in the RTP that will implement the regional vision, advance regional goals, and address the transportation needs of the region.

Communities across the region contribute to the development of plans and studies from which RTP projects are drawn from. Cities, counties, transit agencies, park and trail providers, the Port of Portland, ODOT and other agencies are responsible for compiling and submitting the list of priority projects recommended for the RTP.

Agencies updating or submitting new projects to the RTP will provide information that will be used to organize, summarize and conduct analysis of the projects. Information collected will include:

- agency information
- general project information
- summary of public engagement
- estimated project cost in 2023 dollars
- time period for completion
- project type and investment category
- modeling assumptions
- spatial data.

Project list updates and supporting information is due February 17. For all projects submitted to the RTP, agencies will provide documentation of public engagement conducted during the planning and development of projects. Additionally, agencies must include a letter of endorsement from the agency's governing body. This engagement information may be provided after the projects have been submitted in the call for projects but must be submitted by May 1. Metro will use the information provided to describe the array of public engagement opportunities that contributed to the development of the 2023 RTP.

Project list updates and supporting information due February 17

The call for projects starts Jan. 6 and closes on Feb.17, 2023. Over the past two years, the update of the RTP has focused on understanding the region's transportation challenges and priorities for investment and updating the region's vision for the transportation system.

Now it is time to pull the pieces together in the call for projects to address these challenges, reflect public priorities and make progress toward our shared vision and goals for the future transportation system.

Project list endorsements due May 1

New for the 2023 RTP, agencies will be asked to submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP.

This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects.

Community led engagement in 2023

During the call for projects, decision-makers will have the opportunity to learn from and include perspectives of the region's diverse communities in shaping 2023 RTP policies and investment priorities.

Metro is partnering with community-based organizations to engage communities of color and culturally specific communities from across the region.

The process is designed to grow the capacity of the organizations that serve these communities to engage in regional and local transportation decisions more broadly, including future decisions beyond the 2023 RTP.

Metro will also host an online survey that provides an opportunity for the public to provide input on the draft project list.

Learn more about engagement for the 2023 RTP update, including business, community, and agency partner forums and surveys at oregonmetro.gov/rtp

Assessing the List of Projects and Programs

Metro will complete an outcomes-based technical analysis on how the draft project list advances the RTP vision, goals and policies. This analysis consists of two phases. The first phase is a high-level assessment of the individual projects based on information provided in the call for projects and the location of the project's location. The assessment will be used to show how individual projects advance regional goals. In addition to reporting on the questions shown in Table 2, the high-level assessment will report on the share of funding prioritized for each of the investment categories.

The second phase is a system analysis of how the RTP performs with respect to performance measures and targets that reflect RTP goals. This analysis will be used to assess how the overall package of projects advance regional goals and make progress towards the regional performance targets. This phase includes detailed equity and climate analyses that are required by the federal and state regulations that govern the RTP. The system analysis uses Metro's travel model and other analytical tools, as well as the information from the high-level assessment. The system analysis accounts not only for the projects and policies in the RTP, but also for factors such as projected population and job growth. Table 2 summarizes the key questions that the assessment and analysis will look to answer for each of the five RTP goals.

Table 2: Measuring progress towards RTP goals

RTP goal	High-level project assessment	System analysis
Equitable transportation: Transportation system disparities experienced by Black, Indigenous and other people of color and people with low incomes are eliminated. The disproportionate barriers people of color, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.	Is the project located in an Equity Focus Area?	Does the RTP benefit Equity Focus Areas at least as much, if not more, than other communities in the region?
Climate action and resilience: People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.	Does the project have a high or medium greenhouse gas reduction potential? ¹ Is the project located in a designated center?	Does the RTP meet vehicle miles traveled per capita reduction targets? Does the RTP meet transit, bicycle and pedestrian mode share targets?
Safe system: Traffic deaths and serious crashes are eliminated, and all people are safe and secure when traveling in the region.	Is the project identified as safety project? ² Is the safety project on a high injury corridor?	Does the RTP meet regional safety targets?
Mobility options: People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible and welcoming.	Does the project complete a gap in the region's pedestrian, bicycle or transit networks?	Does the RTP meet targets for completing the multimodal transportation system? Does the RTP meet vehicle miles traveled per capita reduction targets? Does the RTP meet targets for reliable travel on throughways? ³
Thriving economy: An economically vibrant greater Portland region includes centers, ports, industrial areas, employment areas and other regional destinations that are accessible through a variety of multimodal connections that help people, communities and businesses thrive and prosper.	Does the project improve access to destinations within centers and industrial and employment areas?	Does the RTP improve freight, transit, bicycle and pedestrian access that serve centers and industrial and employment areas? Does the RTP increase access by auto and transit to destinations?

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² Identified as a safety project through a state or local process.

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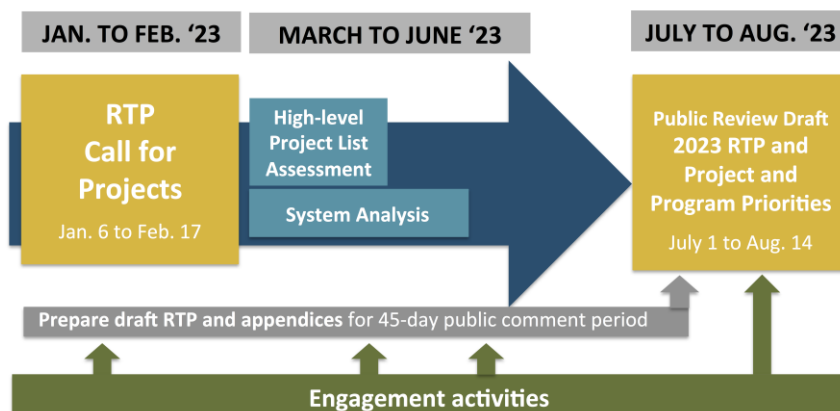
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Stakeholders and policymakers will be asked to review and comment on draft priority projects and the high-level project assessment starting in April 2023. Input on the assessment of projects, along with public input on the system analyses findings will inform decision-makers and regional partners as they continue to work together to finalize the draft RTP and project and program priorities for public review in Summer 2023.

Figure 5 illustrates the timeline and process for the call for projects and the development of the public review draft of the RTP.

A 45-day comment period on the draft plan is planned from July 1 to Aug. 14, 2023. JPACT and the Metro Council will consider adoption of the 2023 RTP (and updated project and program priorities) in November 2023.

Figure 5. Call for projects timeline and process





2023 Regional Transportation Plan Local Revenue Estimates

October 24, 2022

*Prepared for Metro
by DKS Associates*



Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance.

If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit oregonmetro.gov/civilrights or call 503-797-1536.

Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at trimet.org.

Metro is the federally mandated metropolitan planning organization designated by the governor to develop an overall transportation plan and to allocate federal funds for the region.

The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council. The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds. JPACT serves as the MPO board for the region in a unique partnership that requires joint action with the Metro Council on all MPO decisions.

Project web site: oregonmetro.gov/rtp

The preparation of this report was financed in part by the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration. The opinions, findings and conclusions expressed in this report are not necessarily those of the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration

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PURPOSE AND BACKGROUND

Regional Transportation Plan (RTP)

A RTP is a federally required planning document, that must be multi-modal (i.e. cover various aspects of the transportation system), and long-range (i.e. >20 years). As the federally recognized metropolitan planning organization (MPO), Metro plays a leading role in coordinating the effort to update the RTP every 5 years. This 2023 update to the 2018 RTP will cover FY 2023-FY 2045.

The RTP must meet federal air-quality standards and fiscal guidelines. This document is part of the larger effort to provide clarity on regional revenues and expenditures. An infographic on the process of this RTP update is shown in Figure 1.



Find out more about the 2023 Regional Transportation Plan Update: <https://www.oregonmetro.gov/public-projects/2023-regional-transportation-plan>

This report summarizes the initial local revenue estimates furnished by local jurisdictions within the Portland Metro area. All jurisdictions that generate revenue used on regionally significant transportation infrastructure are included; this includes cities, counties, the Port of Portland, transit agencies, and parks districts. The full list of jurisdictions is presented in Table 1.

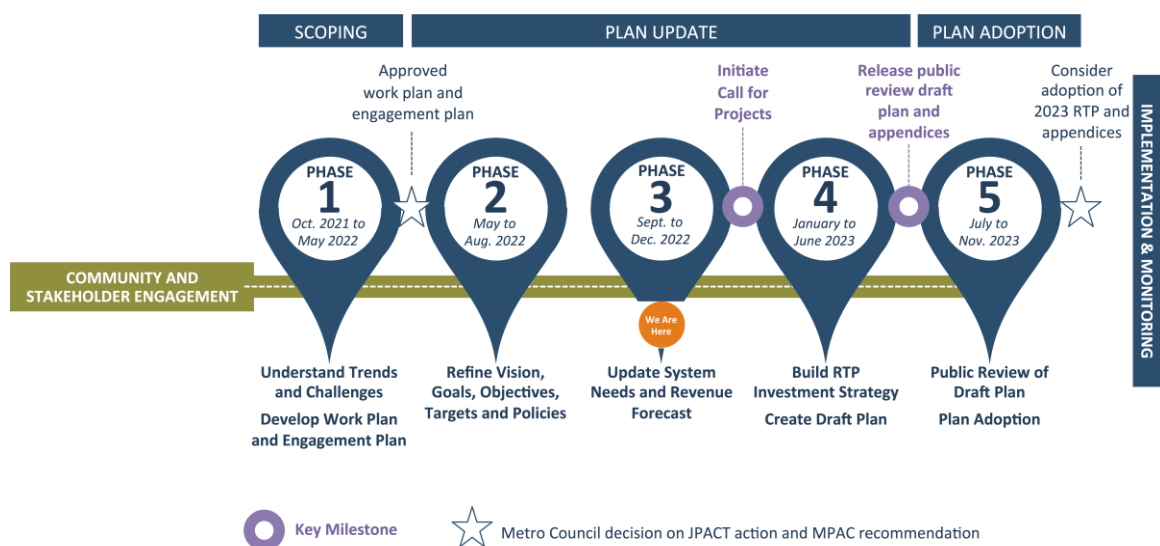


Figure 1: 2023 RTP Timeline

Table 1. Local Agencies within the Metro Region

Clackamas County	
Gladstone	Happy Valley
Johnson City	Lake Oswego ^a
Milwaukie ^a	Oregon City
Rivergrove ^a	West Linn
Wilsonville ^a	North Clackamas Parks and Recreation District
Multnomah County	
Fairview	Gresham
Maywood Park	Portland ^a
Troutdale	Wood Village
Port of Portland	
Washington County	
Beaverton	Cornelius
Durham	Forest Grove
Hillsboro	King City
Sherwood	Tigard
Tualatin	Tualatin Hills Parks and Recreation District
Transit Agencies	
TriMet	SMART
State Agency	
ODOT	

^a This city may have portions in other counties. However, for the purposes of this RTP, it is included as part of the county in which the city predominantly lies.

This document includes a methodology section, the summary table for local revenues, and some comments about the local funding sources. Due to the nature of the summary documents received, and to ensure this document is not prohibitively long, those documents will be made available at a later date.

Note that, due to the nature of these estimates, certain agencies are excluded. This estimate includes the cities, counties, parks districts, and SMART. ODOT, the Port of Portland, and TriMet will not be included. These estimates only include locally generated funds and exclude State and Federal funds that may be awarded to local agencies, other than state gas tax funds that are required to be passed through to local agencies by state law.

METHODOLOGY

The Federal Highway Administration (FHWA) requires that the RTP use “reasonably available” funds to forecast that regional transportation improvements are prudent and reasonably financed. Reasonably available funds are forecast to the best knowledge of staff and may not be indicative of actual funding levels in a future year. Values reflect current trends and are used to forecast “likely” project timelines for the region, not, for example, commitment that a project will be built in 20 years’ time. Reasonably available fund estimates are therefore not like budget estimates and are likely to reflect a higher value than local budget documents which are typically restricted to existing revenue sources and tax rates.

At this initial stage, cities, counties, and agencies were asked only for local funds, i.e., funds under their direct control. Common categories of funds considered local funds include utility fees, street development charges, or regional levies that go towards the regional transportation system.

Agencies received their 2018 narrative documents describing their local revenues, as well as their 2018 submitted funding spreadsheet. They were asked to update these documents to reflect any changes since 2018.

The methodology for this cycle is updated from the methodology used in 2018. In this cycle, year of earning/expenditure dollar (YOE) is used. To estimate the YOE value of a given fund, local agencies were asked to use historical values and local factors and estimate a growth rate for the fund out to the 2045 horizon year.

All items are reported as received from the local agencies. It is important to note that due to the nature of the estimates, there are likely to be changes before the final value is determined for the call for projects in January.

Example Worksheet

All cities were asked to update their 2018 worksheets with local revenue. An example table, which has been modified to fit the theme of this report, from hypothetical jurisdiction Example City, is shown as Table 2.

Table 2: City of Example City Revenue Sheet

City of Example City Local Revenues							
FYE	Transportation Utility Fee	Growth Rate	Service Development Charge	Growth Rate	Local Fund Transfer	Growth Rate	Total
2023	\$ 2,580,000.00	2.20%	\$ 1,368,000.00	3%	\$ 150,000.00	0%	\$ 4,098,000.00
2024	\$ 2,636,760.00	2.20%	\$ 1,409,040.00	3%	\$ 150,000.00	0%	\$ 4,195,800.00
2025	\$ 2,694,768.72	2.20%	\$ 1,451,311.20	3%	\$ 150,000.00	0%	\$ 4,296,079.92
2026	\$ 2,754,053.63	2.20%	\$ 1,494,850.54	3%	\$ 150,000.00	0%	\$ 4,398,904.17
2027	\$ 2,814,642.81	2.20%	\$ 1,539,696.05	3%	\$ 150,000.00	0%	\$ 4,504,338.86
2028	\$ 2,876,564.95	2.20%	\$ 1,585,886.93	3%	\$ 150,000.00	0%	\$ 4,612,451.89
2029	\$ 2,939,849.38	2.20%	\$ 1,633,463.54	3%	\$ 150,000.00	0%	\$ 4,723,312.92
2030	\$ 3,004,526.07	2.20%	\$ 1,682,467.45	3%	\$ 150,000.00	0%	\$ 4,836,993.52
2031	\$ 3,070,625.64	2.20%	\$ 1,732,941.47	2.50%		-100%	\$ 4,803,567.11
2032	\$ 3,138,179.41	2.20%	\$ 1,776,265.01	2.50%			\$ 4,914,444.41
2033	\$ 3,207,219.35	2.20%	\$ 1,820,671.63	2.50%			\$ 5,027,890.99
2034	\$ 3,277,778.18	2.20%	\$ 1,866,188.42	2.50%			\$ 5,143,966.60
2035	\$ 3,349,889.30	2.20%	\$ 1,912,843.13	2.50%			\$ 5,262,732.43
2036	\$ 3,423,586.86	2.20%	\$ 1,960,664.21	2.50%			\$ 5,384,251.08
2037	\$ 3,498,905.77	2.20%	\$ 2,009,680.82	2.50%			\$ 5,508,586.59
2038	\$ 3,575,881.70	2.20%	\$ 2,059,922.84	2.50%			\$ 5,635,804.54
2039	\$ 3,654,551.10	2.20%	\$ 2,111,420.91	2.50%			\$ 5,765,972.01
2040	\$ 3,734,951.22	2.20%	\$ 2,164,206.43	2.50%			\$ 5,899,157.66
2041	\$ 3,817,120.15	2.20%	\$ 2,218,311.59	2%			\$ 6,035,431.74
2042	\$ 3,901,096.79	2.20%	\$ 2,262,677.83	2%			\$ 6,163,774.62
2043	\$ 3,986,920.92	2.20%	\$ 2,307,931.38	2%			\$ 6,294,852.31
2044	\$ 4,074,633.18	2.20%	\$ 2,354,090.01	2%			\$ 6,428,723.19
2045	\$ 4,164,275.11	2.20%	\$ 2,401,171.81	2%			\$ 6,565,446.92
Total: 2024-2030			\$35,665,881.28	Total: 2031-2045			\$84,834,602.21
				Total: 2024-2045			\$120,500,483.49

Growth rates were generally left to the city to determine; cities usually opted to extrapolate from historic rates of growth. Cities were allowed to change the growth rate if future conditions were expected to change, input negative growth rates, or to terminate a revenue source if for some reason it was to sunset.

The preliminary picture for revenues in the Metro region is still in extremely draft form. However, local revenues are expected to start at roughly \$675 million and grow to about \$1 billion regionwide. These numbers are still likely to change. The average estimated annual intake will be roughly \$800 million, which is unevenly distributed throughout this 22-year period.

Despite these revenues, jurisdictions are worried that the cost of operations and maintenance may outstrip the ability of the region to raise funds to enhance the regional transportation network.

Common Local Revenue Sources

The following fund sources are common among jurisdictions in the region. These funds all contribute either to capital improvements for the regional roadway network or give an idea of the cost of maintaining the regional roadway network.

Franchise Fees

Franchise fees, utility fees, or right-of-way fees are charged to entities, such as companies or the city themselves, to use the city's streets, roads, or infrastructure. While not all franchise fees are spent on transportation infrastructure, cities generally do fund road projects using these fees.

Local Gas Tax

Oregon allows local governments to assess a gas tax for gasoline sold within their boundaries. These revenues are required to be spent on roadway infrastructure.

Miscellaneous Fee Revenues

Cities occasionally have some smaller funds dedicated to specific parts of their roadway network or take on specific, revenue producing tasks. These can produce a small but steady revenue stream that can be used on roadway projects.

System Development Charges (SDC)

SDCs are one-time fees paid as part of the development process. These fees help jurisdictions pay for improvements to the roadway network that offset traffic growth from new development. These charges may apply to an entire city, or a sub-area of a city.

Transportation Development Tax (TDT)

Washington County jurisdictions elected to adopt a transportation development tax in addition to local system development charges. This tax, assessed on

development and redevelopment within Washington County, pays for multimodal transportation improvements in the jurisdiction where the project is located.

Vehicle Registration Fees (VRF)

Counties in the Metro region assess vehicle registration fees in addition to what the State charges. These by law must be paying for certain regional transportation improvements.

NEXT STEPS IN THE RTP PROCESS

As illustrated in **Error! Reference source not found.**, receiving local revenues is only the start in the process of gaining a full picture of regional revenues.

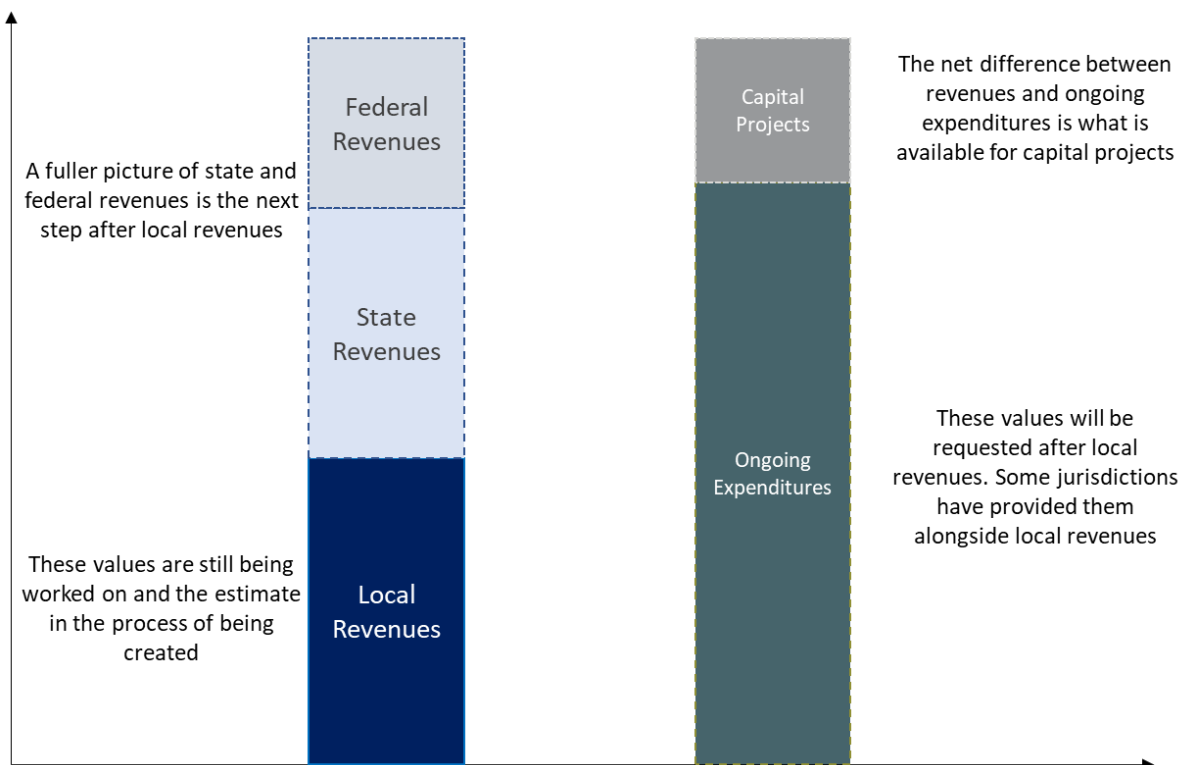


Figure 2: RTP Revenue Elements

For a project to receive federal funding, it must appear on the financially constrained list of a regional transportation plan.

Metro is working with ODOT and other partners to receive a fuller picture of state and federal funding that flows into the region. In parallel to this process, jurisdictions that have not yet provided their ongoing expenditures, including operations and maintenance, ongoing roadway rehabilitation, or funds prescribed for uses unavailable for capital projects, will be taken out of the regional revenue picture. The remaining fund value will be used for the call for projects in January to build the regional Class I (financially constrained) project list.

Metro recognizes that this may not be without challenges. The ongoing inflation crisis has driven up project costs dramatically. As a result, project cost growth is expected to outstrip revenue growth. Some projects may have to be moved back or moved to the Class II (strategic) project list. Ongoing conversations in the region about transportation priorities will be important to building a better regional transportation network.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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Oct 24, 2022



Draft Vision and Goals for the 2023 Regional Transportation Plan

October 27, 2022

The Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council discussed the draft vision and goals for the 2023 Regional Transportation Plan at a joint workshop on June 30 and during subsequent meetings on Sept. 15 and Oct. 6, respectively. The recommended vision and goals for the 2023 RTP are shown below.

Vision

Everyone in the greater Portland region will have safe, reliable, affordable, efficient, and climate-friendly travel options that allow people to choose to drive less and support equitable, resilient, healthy and economically vibrant communities and region.

Goals

Equitable Transportation

Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.

Climate Action and Resilience

People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.

Thriving Economy

An economically vibrant greater Portland region includes centers, ports, industrial areas, employment areas, and other regional destinations that are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.

Safe System

Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.

Mobility Options

People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming.

Examples of RTP Projects and Programs

Examples of the types of investments identified to address regional transportation challenges

Projects



Bridge and road maintenance

Bridge and road pavement resurfacing, preventive maintenance, preservation and rehabilitation



Bus and rail vehicle maintenance and replacement

Preventive maintenance for fleet and facilities, transit vehicle replacement, etc. to keep system in good repair



Complete streets for all users

Modernize street and intersection designs to reduce conflicts and better serve all modes and users



Freight access to industry and ports

Road and railroad crossing upgrades, port and intermodal terminal access improvements, rail yard and rail track upgrades



Throughway expansion

Interchange fixes, strategic widening, auxiliary lane additions in areas of consistent bottlenecks



Main street retrofits

Retrofit streetscapes in areas with shopping, restaurants and local services to include street trees, improved lighting, street furniture, such as benches, garbage bins, wider sidewalks, bike parking, etc.



Seismic upgrades

Retrofit roads and bridges to increase resiliency to earthquakes, particularly major river crossings



Street connections and expansion

New arterial and collector street connections, strategic widening, highway overcrossings, etc.



Transit service enhancement and expansion

Increased bus service coverage, speed and frequency, MAX and streetcar extensions, expanded WES commuter rail service, employee and community shuttles, separate travel lanes for buses, etc.



Walking and biking connections

Protected and/or separated bike lanes, sidewalks, crosswalks and curb ramps on major streets, off-street trails, etc.

Programs



Affordable transit pass program

Provide affordable transit passes to students, seniors and low-income riders



Programs and incentives to reduce vehicle trips

Regional travel options programs, paid and timed parking in centers, encourage walking, biking, use of transit, carpooling, carsharing, ridesharing, telecommuting, etc.



Smart technology and traffic management

Traffic signal and transit priority coordination, vehicle charging stations, clearing crashes quickly, etc.



Transit amenities

Bus shelters and benches, passenger boarding areas, transit stop and station access, lighting at stops, etc.



Transit oriented development

Policy and market incentives to encourage building higher-density, mixed-use projects in centers and along corridors served by high capacity and frequent transit



Transportation safety and education programs

Improved and expanded Safe Routes to Schools programs, speed enforcement, Safe Routes to Transit programs, etc.



Transportation services for older adults and people with disabilities

On-call paratransit services, door-to-door pick up, etc.

Other tools that could be supported by policies



Emerging market-based technologies

Freight movement technology, self-driving vehicles, shared mobility services (e.g., Uber and Lyft), etc.



High occupancy vehicle/tolled lanes, express lanes/congestion pricing

High occupancy vehicle (HOV) lanes, high occupancy tolled (HOT) lanes, tolling, managed lanes, congestion pricing

Materials following this page were distributed at the meeting.

Monthly fatal traffic crash report for Clackamas, Multnomah and Washington counties *

**ODOT preliminary
fatal crash report
as of 10/17/22,
police and news
reports*

Unidentified person, bicycling, Tualatin-Valley Highway/SW 1st Ave, Hillsboro, Washington, 10/31

Unidentified person, walking, N Interstate Ave. and N Russell , Multnomah, 10/26

Unidentified person, driving, Northeast Marine Drive, Multnomah, 10/20

Robert Iuhasz, 29, motorcycling, SE Orient Drive and SE 282nd Ave, Multnomah, 10/20

Herman A. Neal IV, 31, walking Hwy 26, east of Sandy, Clackamas, 10/17

Unidentified person, walking, SE Stark and SE 146th Ave. , Multnomah, 10/17

Unidentified person, driving, SE 282nd Ave, south of SE Division Dr., Gresham, Multnomah, 10/16

Gabriel Gilberto Silva Duarte, 21, driving, SE Orient Dr & SE Bluff Rd., Multnomah 10/13





Metro

Equitable Transportation Funding Research Report

Analysis and recommendations developed in support of the 2023 Regional
Transportation Plan update

Final: October 27, 2022

Prepared by:
Nelson\Nygaard Consulting Associates



Acknowledgements

This study was led by the following **Metro** staff:

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Executive Summary

Portland Metro and its jurisdictional partners recognize that there are disparities in access to transportation and opportunities in the greater Portland region and are committed to an ongoing effort to advance transportation equity to those most disproportionately impacted by historical transportation decisions.

Transportation planning and funding practices disproportionately burden and harm low-income households, Black, Indigenous, and people of color (BIPOC) communities, and people with disabilities. Transportation funding can lead to different outcomes for different communities; therefore, it is critical for regional partners to examine the varying impacts and implications of existing and future funding strategies prior to implementation.

The key questions being asked are:

Who does revenue collection burden and benefit the most?

How can the revenue collection and disbursement be balanced to address inequities?

Metro and its partners strive to advance the quality of transportation through prioritizing investments that will provide the most benefit while avoiding, minimizing, or mitigating negative impacts. The purpose of this report is to analyze existing, emerging, and potential revenue sources through an income and racial equity lens and recommend strategies to equitably transform transportation funding while increasing revenues.

This research report will update *Chapter 5: Our Transportation Funding Outlook* of the 2023 Regional Transportation Plan and is intended to inform discussions as agencies consider potential new revenues and update transportation funding strategies. The report draws from the existing literature on a diverse range of transportation funding sources and provides a robust equity evaluation. This resource can then aid and inform policy design and decision making as we reconsider the way transportation systems are funded.

Recommendations to Improve Equity Outcomes

Transportation needs in the greater Portland region exceed existing revenue capacity. This report uses an equity lens to explore the benefits and costs of the funding sources that the greater Portland region relies on; it considered how revenues are collected and who pays, and how revenues are distributed and who benefits. We have identified several recommendations that we believe will be helpful to policy makers and transportation providers. These recommendations are directed at the state, regional and local transportation

agencies responsible for collecting and distributing revenues in the greater Portland region, and are intended to be applied in a variety of ways and contexts by the relevant policy and decision makers. Furthermore, they are also intended to be used as a tool by community-based organizations with an interest in advancing equity. They are not directed at any one plan or process; rather, they serve as background considerations to inform processes where needed. For example, the following approaches can be referenced when new revenue sources are being considered, or when the allocation of existing revenues are being decided in state, regional and local plans and programs, or when funding programs are being created and refined.

Laying a Foundation to Advance Equity Outcomes

There are a few general tenets that serve as a foundation for all our recommendations when it comes to more equitable outcomes in the area of transportation funding. These are:

- **No one solution.** Equitable transportation funding is not one solution that can be achieved immediately, so it should be broken down into numerous smaller, tenable goals, which contribute to achieving the overall goal of improving equitable outcomes in transportation funding.
- **Transparency is key.** Publishing the goals of transportation agencies so that they are viewable by the public in an easily accessible location is crucial to positive public perception, accountability, and building strong community and regional partnerships.
- **Elevate community voices.** Continuing to strengthen existing partnerships with local community organizations can provide more individuals with voices that may not have had the platform to be heard. This can be beneficial when establishing goals and receiving meaningful input during the early planning phases of policy initiatives or developments.
- **Put it into policy.** Policies in state, regional and local transportation and capital improvement plans, legislation, and other areas, helps to determine how revenues are collected and what they can be spent on; policy can be used to achieve more equitable outcomes. Adopting a policy stating that future revenue collection and disbursement should lead to more equitable outcomes is a central recommendation to this work and establishing standards for revenue collection that does not disproportionately burden marginalized and low-income groups is one of the key starting points to equitable revenue collection.

Offering Fair and Accessible Opportunities for Meaningful Public Engagement and Input

Offering ample opportunities for meaningful public engagement and input¹ is critical to hearing diverse perspectives on equity-based goals, projects, and policies. Several recommendations related to public engagement include:

- Opportunities should be offered in-person and online, at a variety of locations and times, and available for individuals of varying English proficiency and non-English speakers. Participants should also be compensated for their time.
- Public outreach and involvement must be meaningful and intentional. Working with the community organizations that the agency has relations with will impact trust and participation.
 - Include a broad array of community members before, and during, the early planning phase; this builds trust and ensures that more voices are heard.
 - Utilize the relationships that the agency has with community-based organizations, groups, and trusted figures.
 - Hire trusted community members to do engagement work. Make sure to recruit several community members who are active in different areas.
- Communities affected by specific policies, funding efforts, or developments must be key contributors to the planning process. This results in an inclusive and iterative process where the communities affected by and benefiting from initiatives—like congestion pricing—are helping shape the program.

¹ The Climate Friendly and Equitable Communities Rules, adopted in July 2022, provide updated rules and add new rules for public engagement focused on advancing equity. These are located at https://www.oregon.gov/lcd/LAR/Documents/CFEC_NoticeFilingTrackedChanges.pdf. The rules define traditionally underserved populations to include Black and African American people, Indigenous people, People of Color, people with limited English proficiency, people with disabilities, low-income Oregonians, youth and seniors, and more. They require mapping of traditionally underserved populations, local consideration of a set of anti-displacement actions should decisions contribute toward displacement, centering the voices of underserved populations in decision-making, and regular reporting on efforts to engage traditionally underserved populations." (accessed at: <https://www.oregon.gov/lcd/CL/Documents/SixPageOverview.pdf>). The updated rules pertinent to engagement are: OAR 660-012-0120 (Transportation System Planning Engagement), OAR 660-012-0125 (Underserved Populations), OAR 660-012-0130 (Decision-making with Underserved Populations), and OAR 660-012-0135 (Equity Analysis).

Equitable Revenue Collection

The systems currently in place to raise revenues for transportation have been built over decades of policy decisions. These decisions have disproportionately placed a large burden on the most vulnerable people. Revenue collecting for existing, emerging, and new sources should be restructured to be more equitable. This can take many forms and should not end after one change. Several restructuring revenue collection suggestions are listed below:

- Restructuring fines so they are non-compounding and do not impact credit scores or employment eligibility.
- Prorating (based on income or item value) payment structures for parking, license and registration fees, violation fines, and tolling and congestion charges.
- Providing alternate options to paying fines, including in lieu of programs and split-payment plans.
- Continuing the line of good work being done by TriMet² and others to restructure diversion programs for fare evasion to be more lenient.
- Consider eliminating fare evasion programs to avoid severely impacting those with the least ability to pay.
- Allowing license and registration renewal for people with unpaid fines.
 - Removing remaining barriers to acquiring reduced or free transit fares can make it possible for individuals with limited access to documents, identification, or internet able to receive these benefits.³

² In 2017, HB2777 gave TriMet the authority to resolve fare citations outside of the court system <https://news.trimet.org/2017/06/new-law-gives-trimet-authority-to-offer-some-fare-evaders-a-second-chance-to-stay-out-of-court-system/>. In 2018 the TriMet Board approved changes to fare evasion penalty charges <https://news.trimet.org/2018/02/trimet-board-of-directors-approves-fare-evasion-penalty-changes/>, and separately approved a revision to TriMet fare code to make fare evasion a non-criminal offense <https://news.trimet.org/2018/11/trimet-board-approves-revision-to-trimet-code-to-clarify-proof-of-payment-required-to-ride/>.

³ As an example, currently obtaining a TriMet Honored Citizen Fare Card requires proof of income and government-issued ID to be uploaded to an online portal for the card to be mailed to them upon approval (see <https://trimet.org/income/index.htm>). Alternatively, enrollment locations are available for on-the-spot visits and the applicant can receive a card at that time, but these locations are only open during business hours on weekdays. For someone who may not have a valid license, or works throughout those hours, and/or someone with limited internet access, this card may be difficult to obtain.

- Reduce reliance on regressive tax strategies and encourage more progressive taxes and fees, such as TNC fees to ease the burden on transit users.
- Adjust the gas tax according to inflation.
- Explore financial assistance programs for low-income households that could be applied to costs of fees and transportation services. For example, the City of Portland is currently running a Transportation Wallet Affordable Housing Pilot, offering a package of free transportation options (transit passes, bike-share credits, taxi ride credits, etc.) for residents of selected affordable housing sites. ⁴

Equitable Revenue Disbursement

Inequities in revenue collection may be mitigated by how the revenues are spent. For example, a revenue source that is rated poorly in Appendix A, may mitigate or minimize some of the inequities created in the collection through policies and programs that advance equity outcomes.

- Allocate revenues from pricing to safety, transit, and active transportation projects in equity focus areas.
- Major transportation investment can lead to an increase in cost of living and rent rates. Incorporate anti-displacement policies in plans and programs to mitigate the potential for displacement.
- Explore using revenues from any new transportation funding sources to offset transportation taxes and fees for low-income households. Covering taxes and fees would reduce a portion of the cost of living for low-income households, ultimately allowing them greater financial flexibility.
- Encourage and incentive environmentally friendly investments in mid- and low-income households to provide financial benefits for the household and reduce the overall carbon footprint. Examples of this could include: Offer discounts and rebates to households that want to invest in electric vehicles, in solar panels, or transit passes.

⁴ [City of Portland Bureau of Transportation. \(2022\). "Transportation Wallet Affordable Housing Pilot".](#)

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List of Abbreviations

FHWA	Federal Highway Administration
FTA	Federal Transit Administration
HTF	Federal Highway Trust Fund
ODOT	Oregon Department of Transportation
PBOT	Portland Bureau of Transportation
PGE	Portland General Electric
POEM	Pricing Options for Equitable Mobility (an Oregon Metro Task Force Report)
PPB	Portland Police Bureau
ROW	Right-of-Way
RTP	Regional Transportation Plan (cited as the Oregon Metro Regional Transportation Plan)
TDM	Transportation Demand Management
TDT	Transportation Development Tax
TNC	Transportation Network Company
TriMet	Tri-County Metropolitan Transportation District of Oregon
TSDC	Transportation System Development Charge
VMT	Vehicle Miles Traveled

Purpose and Overview

Portland Metro and its jurisdictional partners recognize that there are disparities in access to transportation and opportunities in the greater Portland region and are committed to an ongoing effort to advance transportation equity to those most disproportionately impacted by historical transportation decisions.

Transportation planning and funding practices disproportionately burden and harm low-income households, Black, Indigenous, and people of color (BIPOC) communities, and people with disabilities. The most vulnerable people in the community, including those that are houseless, have been incarcerated, or are experiencing mental or physical health crises are much more likely to bear the brunt of inequitable systems. Therefore, it is crucial for regional partners to consider the breadth of impacts and implications of existing and future funding strategies prior to implementation.

The key questions being asked are:

Who does revenue collection burden and benefit the most?

How can the revenue collection and disbursement be balanced to address inequities?

Metro and its partners strive to advance the quality of transportation through prioritizing investments that will provide the most benefit while avoiding, minimizing, or mitigating negative impacts. The purpose of this report is to analyze existing, emerging, and potential revenue sources through an income and racial equity lens and recommend strategies to equitably transform transportation funding while increasing revenues.

This research report will update *Chapter 5: Our Transportation Funding Outlook* of the 2023 Regional Transportation Plan and is intended to inform discussions as agencies consider potential new revenues and update transportation funding strategies. The report draws from the existing literature on a diverse range of transportation funding sources and provides a robust equity evaluation. This resource can then aid and inform policy design and decision making as we reconsider the way transportation systems are funded.

How We Talk About Equity and Project Goals

Transportation equity is generally understood to be the elimination of barriers and disparities relating to transportation. Addressing inequities in access to safe, affordable, convenient, and reliable transportation and opportunities requires listening to and working with the communities that pay the highest share of their income for transportation but typically receive the least benefit, and typically suffer the most from penalties and costs. It also means committing to future equitable actions, to provide thoughtful, accommodating, and sensible support to these groups to achieve fairer outcomes.

Equitable transportation funding considers the collection and disbursement of revenues in relation to a larger community context with goals of addressing past harms and avoiding further burdens for people with lower income and improving mobility options for all. Leading with race recognizes that racism is the foremost, deeply pervasive factor contributing to unequal access, opportunities, and health outcomes that persist today.⁵

Recognizing and empowering these communities paves the way for them to thrive. The State of Oregon defines these concepts in their *Equity Framework in COVID-19 Response and Recovery*.⁶ Metro's *Strategic Plan to Advance Racial Equity, Diversity, and Inclusion* supports the same objectives and identifies racial equity as the highlighted strategic direction, as people of color experience the greatest inequities.⁷

Defining Equity as a Metric for Transportation Funding

Appendix A: Equity Assessment of Revenue Sources evaluates the ways we currently and can potentially fund our transportation system, to identify the varying impacts on low-income households and people of color. Six measures were developed to evaluate revenue sources that fund and could fund the Regional Transportation Plan, with a focus on sources that collect revenue from individuals, businesses, and commercial operations.

Equity Assessment Measures for Revenue Sources

- **Share:** Do lower-income households pay a higher share of their income?
- **Burden:** Does the source provide subsidies or exemptions to alleviate unfair burdens?
- **Tiered:** Is the fee or tax graduated based on the value of the item?
- **Benefits:** Are low-income households and people of color directly benefiting?
- **Payment:** Are unbanked or underbanked individuals unfairly penalized?
- **Penalties:** Do unpaid fines, fees, or taxes trigger penalties and legal repercussions?

⁵ [City of Portland. \(2021\). "Pricing Options for Equitable Mobility."](#)

⁶ [State of Oregon. \(2020\). "State of Oregon Equity Framework in COVID-19 Response and Recovery."](#)

⁷ [Oregon Metro. \(2016\). "Strategic plan to Advance Racial Equity, Diversity and Inclusion."](#)

Report Organization

This report is comprised of five main sections.

01 Outcomes of Discriminatory Planning: The sociocultural and historical contexts in which transportation agencies plan, highlighting the pervasive issues that inhibit equity in communities.

02 Foundation of Current Work: An overview of foundational plans and policies that led to, and supports, the creation of this report.

03 Funding the Transportation System: The technical side of fees, fines, and fares; explaining the processes that differentiate revenue sources from funding allocations.

04 Key Findings and Equity Challenges: The equity impacts of both revenue collection and funding allocations on people of color and lower income households.

05 Recommendations to Improve Equity Outcomes: The wide array of emerging and potential future revenue sources, including a set of recommendations to improve equity in the way Metro manages transportation funding.

01 Outcomes of Discriminatory Planning

The greater Portland region has been shaped by historical national and local planning and population trends. Discriminatory planning practices were enacted in the region, like much of the country, and shaped how and where people of color were able to live, travel, purchase property, or make a living. The region experienced a World War II population boom, as did much of the west coast, as workers flocked to industrial and manufacturing jobs to support the war effort. Many of these jobs restricted Black workers from skilled labor jobs and union protections.⁸ The post-war federal support for national highway expansion along with decisions made by local planners destroyed Albina, a Black neighborhood in Portland, and changed the way funding and transportation investments were made. This is the regional context in which today's transportation planning and funding decisions are made.

History of Discriminatory Planning in the Greater Portland Region

The history of the Portland region's discriminatory planning is rooted in the 1844 Black Exclusion Law, excluding Black people from living legally in Oregon. People of color and low-income households have historically been impacted by planning decisions that targeted struggling areas for development. Major roads and freeways were often built on top of already disadvantaged communities to avoid affecting wealthy, white neighborhoods. Decisions like this split neighborhoods, displaced families, permanently damaged communities, and even led to higher rates of air pollution and chronic illness.⁹ Figure 1 provides a visual timeline of discriminatory planning in the greater Portland region from the late 19th century to the present. In the graphic, gold circles reflect the shift away from discrimination and the beginnings of a path towards equity.

Exclusionary zoning, which excluded Black, Indigenous, and other people of color from owning property and growing wealth, was common practice in the greater Portland region.¹⁰ Single-family zoning, racially restrictive covenants, and other discriminatory planning and lending tactics were used to restrict multi-family developments in white neighborhoods, forcing multi-family development into segregated neighborhoods.¹¹ The 1930s, 1940s, and 1950s saw a boom in single family zoning, and by the end of this period, multi-family zones accounted for only 5% of residential development. These trends clustered together minority

⁸ [Linder, John. \(2019\). "Liberty Ships and Jim Crow Shipyards." OHQ 120:4.](#)

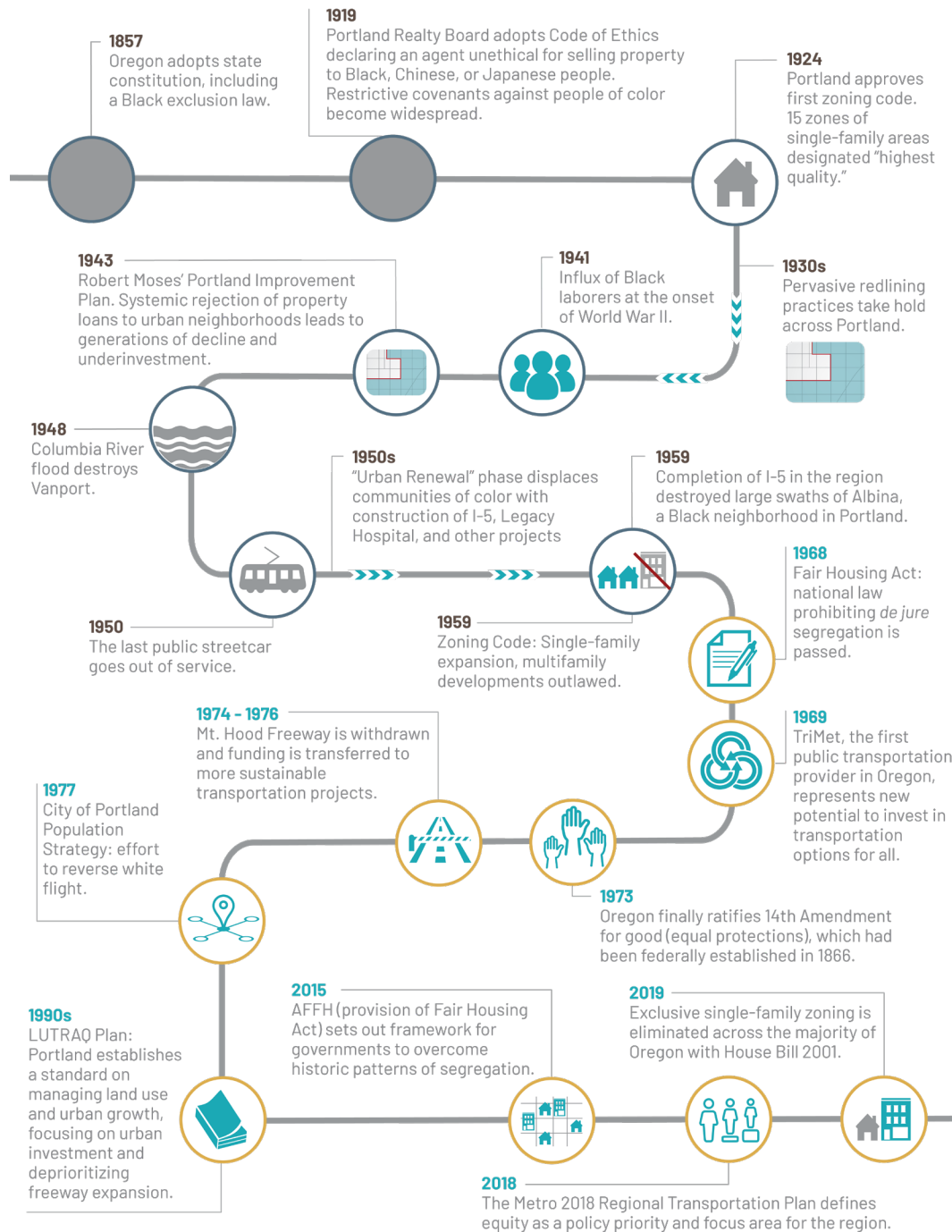
⁹ [Oregon Metro. \(2022\). "2023 Regional Transportation Plan Update: Work Plan."](#)

¹⁰ https://www.oregonencyclopedia.org/articles/blacks_in_oregon/#.Y0mqhXbMJPY

¹¹ [Department of Land Conservation and Development. \(2022\). "Housing Choices \(House Bill 2001\)."](#)

and low-income households, creating neighborhoods that were vulnerable to disinvestment, industrial uses, infrastructure development, and urban renewal plans.¹²

Figure 1: Timeline of Discriminatory Planning and Advancements in Equity in the greater Portland region



¹² [Hughes, Jena. \(2019\). "Historical Context of Racist Planning." Bureau of Planning and Sustainability.](#)

Urban renewal, a way for governments to exploit 'blighted' areas in their jurisdictions, swept across the United States in the mid-twentieth century. Fundamentally, this gave localities the power to implement sweeping redevelopments in marginalized, often Black, communities without consulting them. This took on many forms: transportation infrastructure, large-scale multi-family housing, event centers, parks, office buildings, etc. When this occurred, those living in the neighborhood were systematically displaced, and the owners of any property were bought out for a fraction of their property's value. Portland, like many other cities across the U.S., has a long history of urban renewal practices.¹³

Portland's Albina neighborhood developed into a thriving business district after the population boom throughout World War II and became a haven and area of opportunity for Black people living in the city. This sudden population growth also led to the development of Vanport in North Portland, which was initially built to provide temporary housing for shipyard workers. Many of these workers were African American and were unable to find other suitable nearby housing. In 1948, Vanport was destroyed by a flood, taking numerous lives and forcing residents to relocate, many of whom moved to Albina. In the 1950s, planners decided to build the Interstate 5 freeway through Albina, destroying homes and businesses, forcing displacement, and tearing the fabric of the neighborhood apart.

Events like these shaped the context of transportation and land use planning in the region. Exclusionary zoning and racial segregation still influence where people live and work today. Exclusive single-family zoning was eliminated in the majority of Oregon through the passing of House Bill 2001. As of June 2022, cities with a population over 25,000 and cities in the greater Portland region must allow duplexes, triplexes, quadplexes, cottage clusters, and townhouses in residential areas. Yet much still needs to be done to untangle the legacy of displacement and damage inflicted in years past. Even with the progress made since the late 1960s, the disproportionate impact of lack of transportation access to opportunities for people of color and people with low-income persists. Gentrification, population growth, and increasing demands on housing continue to threaten to further destabilize people of color and low-income communities. Implementing the recommendations in this report and continuing efforts to advance racial and income equity in future RTPs, plans, and programs, are critical to righting the wrongs of the past.¹⁴

¹³ Killen, John. (2015). "Throwback Thursday: 60 years ago, Portland began urban renewal plan for South Auditorium district." [Oregon Live](#).

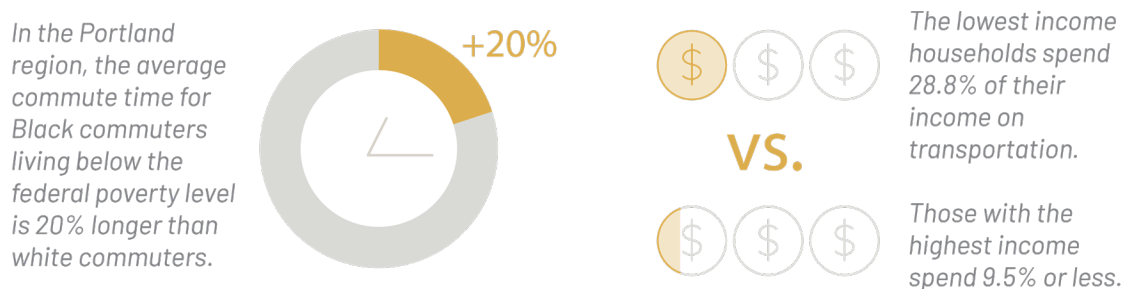
¹⁴ Much of the existing academic literature and subsequent discussions are around the City of Portland, however the patterns of exclusion and discrimination are well established to have been rampant across the country, Oregon, and the greater Portland region.

Regional Demographics Today

The greater Portland region is growing. By 2040, 600,000 new residents are expected to move into the region, and the BIPOC population is growing at an even faster rate. In 2015, 10% of people living in the average Census tract were people of color¹⁵ and that number grew to 12% in 2020.¹⁶ Population growth puts new pressures on housing and infrastructure. New development and gentrification can lead to displacement, of which people of color and low-income households are disproportionately affected by. As housing and transportation costs increase, households are being forced to move to areas with less transit service and other transportation options.¹⁷

The transportation cost burden in the greater Portland region differs across race and income levels. In 2019, Black commuters living below 100% of the federal poverty level had commutes that were 20% longer than their white counterparts at equivalent income levels.¹⁸ Furthermore, analysis from the U.S. Bureau of Transportation Statistics reveals that the lowest 20% of income earners spend 28.8% of their after-tax income on transportation, almost 20% more than the proportion which the wealthiest Americans pay. The direct and recurring costs of car ownership comprise a sizeable portion of spending, which suggests that living in areas with less viable transportation options severely impacts financial outlooks, social mobility, jobs access, and other opportunities.¹⁹ Figure 1 summarizes these findings:

Figure 2: Transportation Cost Burden and Commute Times



¹⁵ American Community Survey. (2022). "2011-2015 American Community Survey 5-year estimates."; [Oregon Metro. \(2018\). "2018 Regional Transportation Plan."](#)

¹⁶ American Community Survey. (2022). "2016-2020 American Community Survey 5-year estimates."; [Oregon Metro. \(2022\). "2023 Regional Transportation Plan Update: Work Plan."](#)

¹⁷ [Rose, Eliot. \(2022\). "Memo to TPAC: Proposed approach to the 2018 regional transportation needs assessment." July 13th, 2022.](#)

¹⁸ [National Equity Atlas. \(2019\). "Commute time: All workers should have reasonable commutes."](#)

¹⁹ [Bureau of Transportation Statistics. \(2020\). "Household Spending on Transportation." U.S. Department of Transportation.](#)

Moreover, it is well established that proximity to heavily auto-centric infrastructure is correlated with worsened health outcomes; the National Equity Atlas rated Black households in the greater Portland region with an air pollution exposure index of 73, six points higher than white households at 67. This index indicates the exposure risk to both carcinogenic and non-cancerous air pollutants, and Black households here in Portland face a higher risk than 73% of census tracts nationwide.²⁰ One can only imagine the 'hidden' cost burden of transportation that results from this exposure, in the form of medical bills and chronic illness treatments. The way the transportation system is funded can play a key role in reshaping how infrastructure and its associated upkeep can help narrow this disparity in health outcomes.

²⁰ [National Equity Atlas. \(2019\). "Air pollution: Healthy neighborhoods are free of pollution and toxins that undermine safety, health, and well-being."](#)

02 Foundation of Current Work

Development of this report drew from regional and local documents and plans. This section provides a brief description of each of these documents and how they relate to this report.

Regional Desired Outcomes

In 2008, the Metro Council and the Metro Policy Advisory Committee adopted six desired outcomes for the greater Portland region. These outcomes are equity, vibrant communities, economic prosperity, safe and reliable transportation, clean air and water, and climate leadership. The 2018 Regional Transportation Plan (RTP) identifies the next steps to continue working towards achieving these desired outcomes. The 2023 update to the RTP will build upon this. The desired outcomes particularly focus on equity for current and future residents and how people's lives are impacted by transportation planning decisions. They create an outcomes-based framework for Metro's work and set the stage for forthcoming plans and research, including prioritizing equitable transportation system funding.

Metro's Strategic Plan

Metro's 2016 Strategic Plan²¹ demonstrates an ongoing and future commitment to advancing racial equity, diversity, and inclusion in their projects. Metro set a framework for equitable transportation funding, through identifying which communities have faced and continue to face greater barriers to access. This report builds on the Strategic Plan principles to purposefully engage and account for historic and current disadvantaged populations. Like the Strategic Plan, equitable transportation funding will achieve their objectives by leading with race, targeted universalism, building infrastructure, generating support, partnering with communities of color, and measuring progress. The Metro Planning & Development Department's Strategic Action Plan, updated in 2018, supports the continuous work in equity and in addressing projects through a racial equity lens.

2023 Regional Transportation Plan (RTP) Update

The RTP was adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro in 2018 and equity was a core priority, with goals of 44% of total transportation projects to take place in Metro's Equity Focus Areas by 2040.²² The RTP is the blueprint that guides investments for all forms of travel – driving, transit, biking and walking – and the movement of goods and services throughout greater Portland. It identifies urgent and long-term transportation needs, investments to meet those needs, and the funds the region

²¹ [Oregon Metro. \(2016\). "Strategic plan to advance racial equity, diversity and inclusion."](#)

²² [Oregon Metro. \(2019\). "Advancing racial equity, diversity and inclusion in regional planning."](#)

expects to have available over the next 20 years. The plan is updated every five years with input from community members, business and community leaders and governments. The next update is expected by December 2023.

2023 RTP Financial Plan

To develop the equitable transportation funding report, RTP finance plans, planned projects, projected revenues, and other relevant sources were reviewed to understand where and how the transportation system is funded and what the equity implications are as a result. This report will help inform the development of the 2023 RTP financial plan and can be used by decision makers to inform future funding discussions on the mechanisms, revenue sources, and strategies to increase the equitable funding of transportation.

Pricing Policy Work

As part of the 2023 RTP, Metro and its jurisdictional partners identified six pricing policies to advance the region's mobility, climate change, and equity goals. These policies address mobility, equity, safety, diversion, climate and air quality, and technology and user experience. Each policy has a set of action items to guide implementation of pricing programs and projects.

Findings from Public Outreach

Metro has conducted extensive public outreach since the 2018 RTP update.²³ The focus has been on people of color, people with low incomes, and other groups that have historically been excluded from public engagement.²⁴ This outreach has informed the 2020 regional transportation funding measure, the Regional Mobility Policy update, and other processes. The work has consistently found that these groups desire safer and more accessible transportation options. Some of the community themes that rose to the top include:

- Focus on people and address racial, social, and economic disparities and historic disinvestment and transportation decisions that have harmed communities.
- Travel options, including a variety of modes, and a well-connected, integrated, and seamless system.

²³ [Oregon Metro. \(2020\). "Regional Mobility Policy.": Oregon Metro. \(2022\). "2023 Regional Transportation Plan: Public Input."](#)

²⁴ Groups who have been denied access and/or suffered past institutional discrimination in the United States. This includes people who are Black, Indigenous, multi-racial, and people of color, people who may speak a language other than English, people with low-income, youth, older adults, and people with disabilities, who may face challenges accessing employment and other services ([Oregon Metro. \(2018\). "2018 Regional Transportation Plan."](#)).

- Quality transit service that is fast, frequent, reliable, and serves all types of trips (including off-peak travel times).
- Affordable transportation options, especially more affordable transit that connects people to the places and things they need to thrive.
- Investments in communities underserved by the current transportation system while protecting against involuntary displacement. And investments that are context sensitive and contribute to a sense of place and community identity.

These themes and priorities directly relate to how the transportation system is funded, both in how the revenue is generated and is disbursed. Revenue generation that does not overburden community members with the lowest incomes and investments that provide more affordable transportation options are vital to creating a more equitable system.

Regional Congestion Pricing Study

In 2021, Metro completed the Regional Congestion Pricing Study (RCPS). Directed by JPACT and the Metro Council in the 2018 RTP, the study evaluated a variety of pricing strategies to understand if the region could benefit from pricing. Results from the study demonstrated that pricing can be an effective strategy for reducing drive-alone trips and overall VMT, but its impacts can vary widely by geography and demographics, as well as by what specific strategy is implemented and how it is implemented. The RCPS helped illustrate the limitations and risks to people with low-income if pricing programs and projects are implemented without considerations of equity from the outset.

Pricing Options for Equitable Mobility (POEM) Task Force Final Report

Portland Bureau of Transportation's Pricing Options for Equitable Mobility (POEM) explored if and how new pricing strategies could be used in the City of Portland to improve mobility, address the climate crisis, and advance equity for people historically underserved by the transportation system. In October 2021, Portland City Council accepted the POEM Task Force final recommendation report.²⁵ This recommendation report includes principles of pricing for equitable mobility, nearer-term pricing strategies, longer-term pricing recommendations, and a suite of complementary strategies to advance alongside pricing. POEM provided guidance to understanding equitable pricing strategies to be used in the Portland area.²⁶

²⁵ [City of Portland, Oregon. \(2021\). "Task Force Recommendations and Next Steps."](#)

²⁶ [City of Portland, Oregon. \(2022\). "Pricing Options for Equitable Mobility \(POEM\)."](#)

Equity and Mobility Advisory Committee (EMAC) Shaping an Equitable Toll Program

The Oregon Department of Transportation (ODOT)'s Equity and Mobility Advisory Committee (EMAC) was created to directly advise the Oregon Transportation Commission (OTC) and ODOT on how tolls on Interstate 205 (I-205) and Interstate 5 (I-5), in combination with other demand-management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects. The purpose of the committee is to address four equity pillars: full participation of impacted populations and communities, affordability, access to opportunity, and community health. EMAC goals specify that equity and mobility strategies must go beyond pricing revenue and show reinvestments into better functioning transportation infrastructure and a decrease in personal car usage. These goals directly align with the goals of equitable transportation funding.²⁷

²⁷ [Oregon Department of Transportation. \(2022\). "Equity and Mobility Advisory Committee: Shaping an Equitable Toll Program."](#)

03 Funding the Transportation System

Transportation involves multiple levels of government, each of which has separate revenue collection and distribution methods. Revenues flow through a variety of programs, redistributions, and formulae before being invested in the greater Portland region's local and regional transportation networks. The diagram below (Figure 3) illustrates annual revenue flows for the Regional Transportation Plan.

The **left side of Figure 3** shows the different types of funding sources that comprise local, state, and federal revenues for transportation. For example, the gray box denoting "Federal Sources \$57 billion" describes the total revenues that are collected at the federal level (such as federal income taxes and gas taxes). These funds are not typically directly allocated by the federal government, but instead are disbursed to state and local governments who then prioritize the projects for funding in the 2018 Regional Transportation Plan.

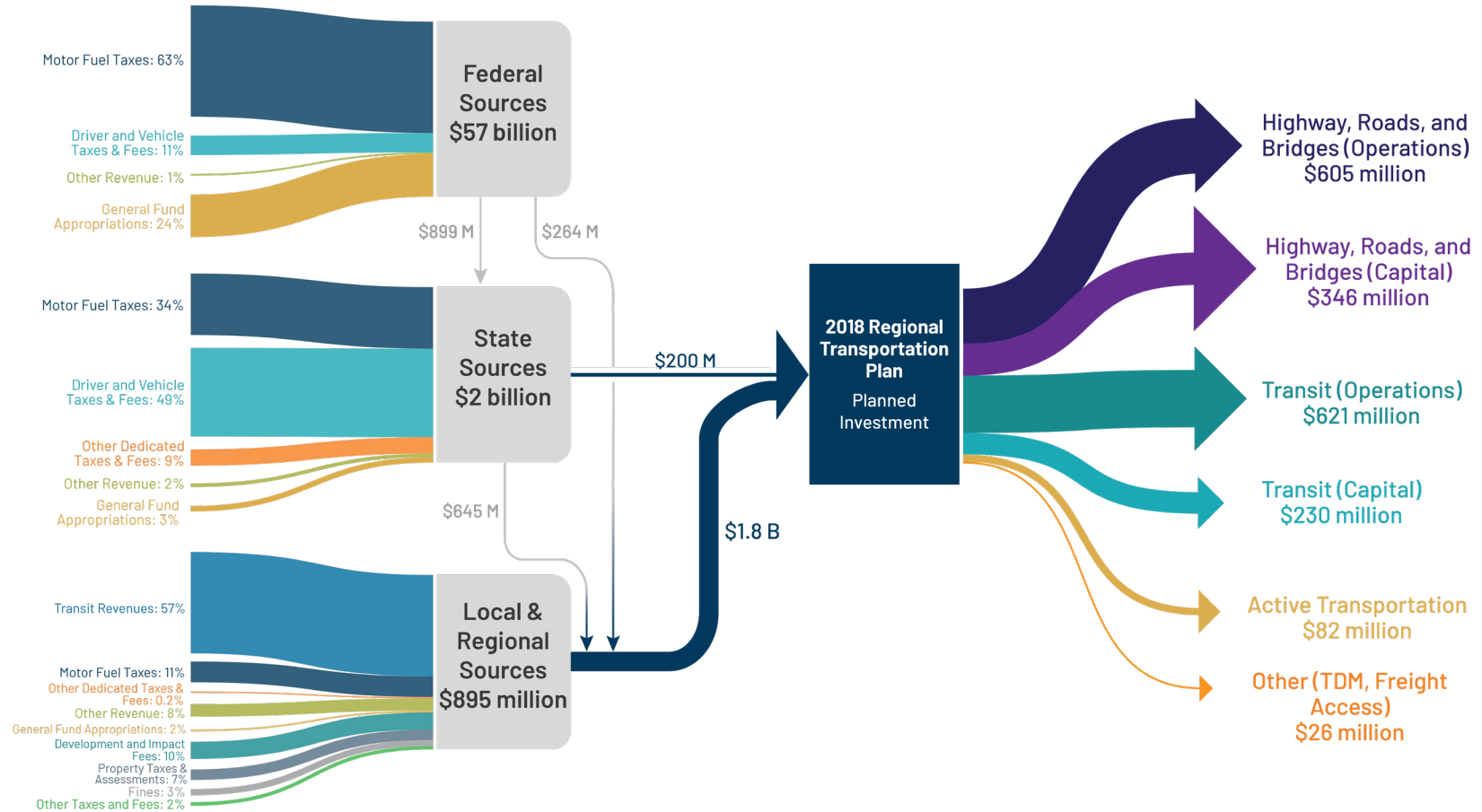
The **gray arrows** illustrate transfer of funds between federal, state, and local levels, also known as intergovernmental transfers, or suballocations. Transfers are combined with local and regional own-source revenues to fund the programmed projects, as shown with **blue arrows**.

Finally, the **right side of the chart** shows the types of projects that are proposed for funding in the Regional Transportation Plan.

Transportation revenues can be classified along two main categories:

1. **User Fees:** costs that are levied on users of goods and services, such as motor fuel taxes (paid by users of motor fuels) and weight-mile taxes (paid by heavy vehicle owners).
2. **General Taxes:** paid to the government as a blanket levy without clear explanation of where the money is distributed. Income taxes, property taxes, and sales taxes can all contribute in some part to transportation funding, but they are subject to extensive policymaking and decisions before allocations are determined.

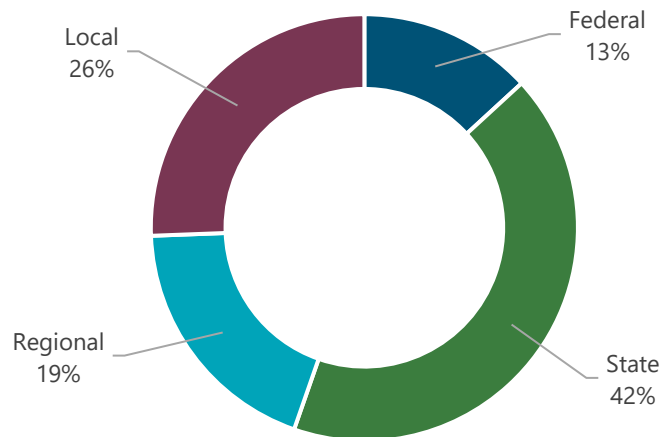
Figure 3: Annual Transportation Revenue Flow to the 2018 RTP Projects and Programs²⁸



²⁸ [Tax Policy Center. \(2021\). "Briefing Book: A citizen's guide to the fascinating \(though often complex\) elements of the federal Tax System.";](#) [Oregon Department of Transportation. \(2021\). "2021-2023 Legislatively Adopted Budget report.";](#) Oregon Metro and other agencies. (2018). Local Revenue Summary Reports and 2018 Revenue Projections.; [TriMet. \(2022\). "Adopted Budget 2022-2023.";](#) [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)

The following figures summarize revenue sources by the government level that originally collects the revenue, before any suballocations are made to other entities. Figure 4 breaks down the total pool of funding that went into the 2018 RTP by level of government at the time of collection, prior to any regional suballocations.

Figure 4: Revenue Sources to 2018 RTP Projects and Programs by Government Level²⁹

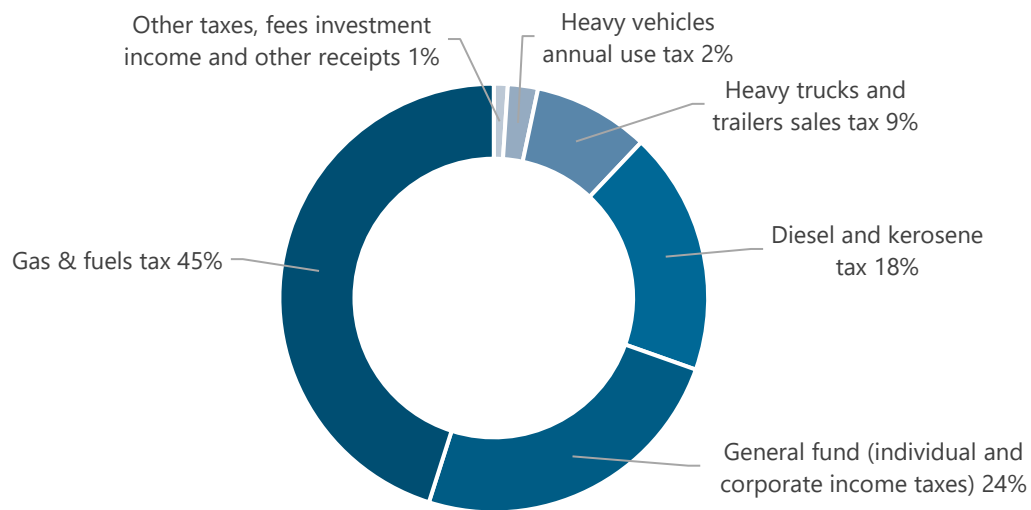


Thirteen (13) percent of the revenues in the RTP financial plan are collected at the federal level. The funds are primarily comprised of:

- Funds disbursed by the Federal Highway Administration (FHWA) Highway Trust Fund (HTF) for roadway capital and maintenance efforts
- Funds disbursed by the Federal Transit Administration (FTA) for transit capital and maintenance efforts
- Funds disbursed through the Oregon Department of Transportation (ODOT) for capital projects and improvements
- Funds disbursed through ODOT for roadway maintenance and operations

²⁹ [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)

Figure 5: Federal Transportation Revenue Sources³⁰



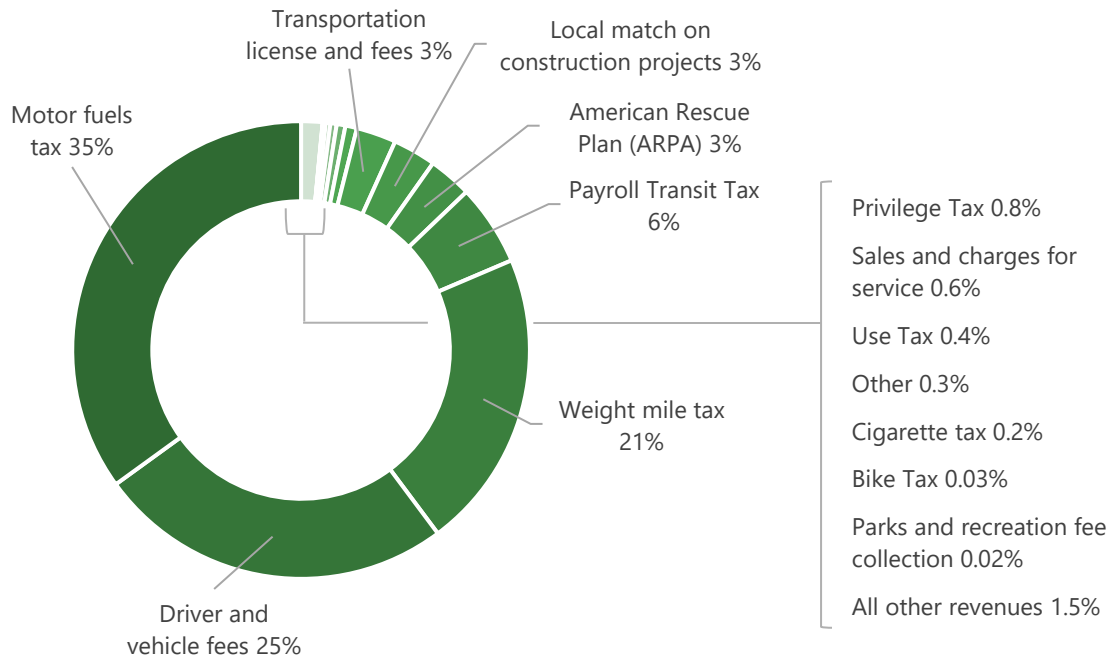
The Federal Highway Trust Fund (HTF) is funded primarily by the federal gas tax, a key revenue source that has seen decreasing returns in recent years. Between changing travel behaviors, inflation, and the rising demand for infrastructure, the HTF has increasingly relied on general revenue transfers to cover its deficit. A portion of this revenue goes to states specifically to maintain federal roadways—Interstate Highways and U.S. Highways—and the remainder is further distributed to various states and localities for their local transportation needs, through formula and grant programs. Figure 5 above provides a breakdown of the revenue sources that make up the Highway Trust Fund.

State funds comprise 42% of the Regional Transportation Plan’s financial plan. These revenues fund transit, roadway capital and maintenance projects. Figure 6 shows the breakdown of revenue sources collected at the state level that contribute to ODOT’s budget. Roughly 28% of ODOT transportation revenues are from driver, vehicle, and other transportation license fees. ODOT also levies a weight-mile tax on commercial vehicles with a gross weight over 26,000 pounds, to account for their heavier toll on road conditions.³¹

³⁰ [Tax Policy Center. \(2020\). “Briefing Book: A citizen’s guide to the fascinating \(though often complex\) elements of the federal Tax System.”](#)

³¹ [Oregon Department of Transportation. \(2022\). “Report Your Taxes.”](#)

Figure 6: State Transportation Revenue Sources, Oregon³²



Regional transit sources represent 19% of transportation revenues in the Regional Transportation Plan. Figure 7 shows the composition of regional transit revenues, which are generated by TriMet and SMART. Most of these revenues (85%) come from TriMet via payroll taxes, while 13% is generated by operating revenues from transit service.

About one quarter (26%) of transportation revenues in the Regional Transportation Plan are collected from local sources, such as property taxes, parking fees and fines, and local gas taxes. The prevalence of local revenue sources reflects how local funding can play a significant role in influencing equitable outcomes.

Figure 8 illustrates local own-source revenues, which were drawn from local budget documents. It should be noted that each jurisdiction within the greater Portland region experiences a different proportional breakdown. For example, the City of Portland's Bureau of Transportation (PBOT) brings in roughly \$31 million each year in parking fees and fines, which account for a noticeably greater portion of its transportation revenues than other municipalities with lower density and parking demand. As such, parking fee policies in the City of Portland carry more weight in the equity discussion than would similar strategies deployed in less populous areas of the greater Portland region.

³² [Oregon Department of Transportation, \(2021\). "2021-2023 Legislatively Adopted Budget."](#)

Figure 7: Regional Transportation Revenue Sources, TriMet and SMART ³³

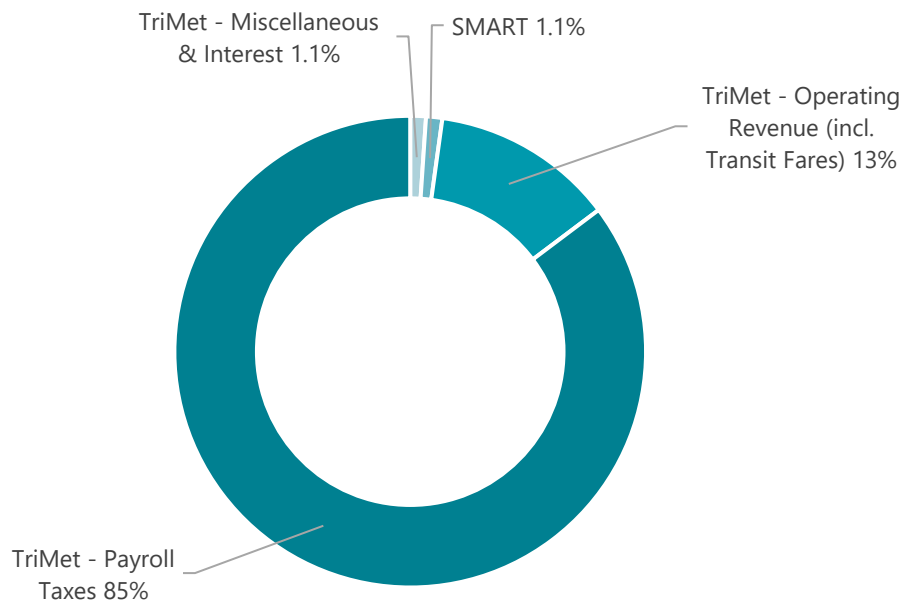
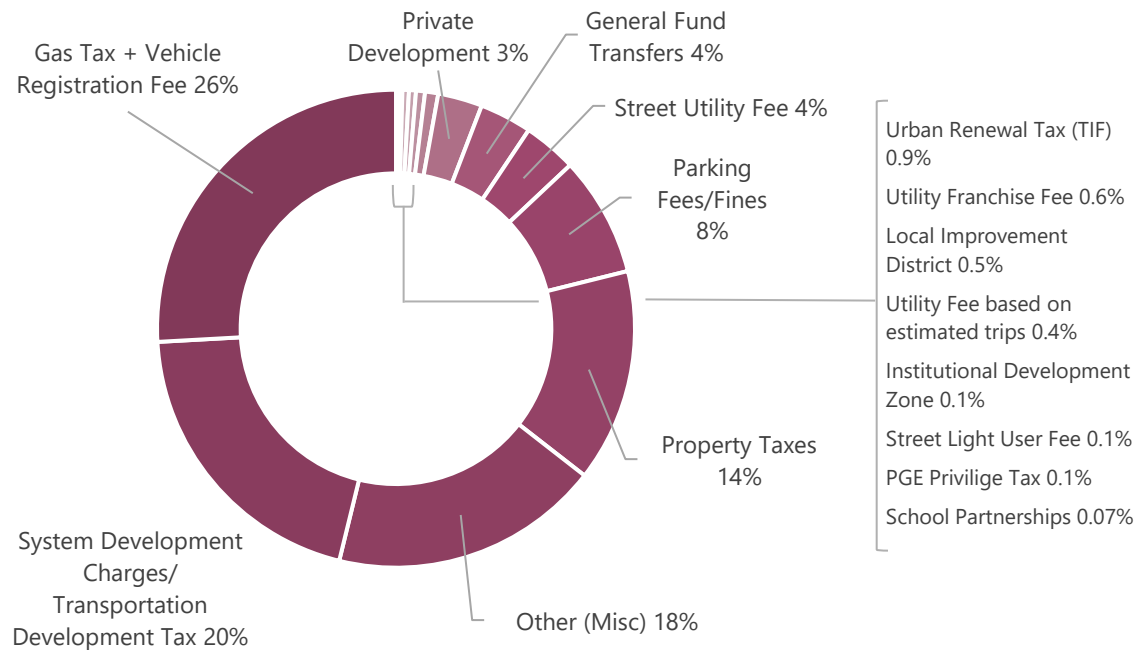


Figure 8: Local Transportation Revenue Sources, greater Portland region³⁴



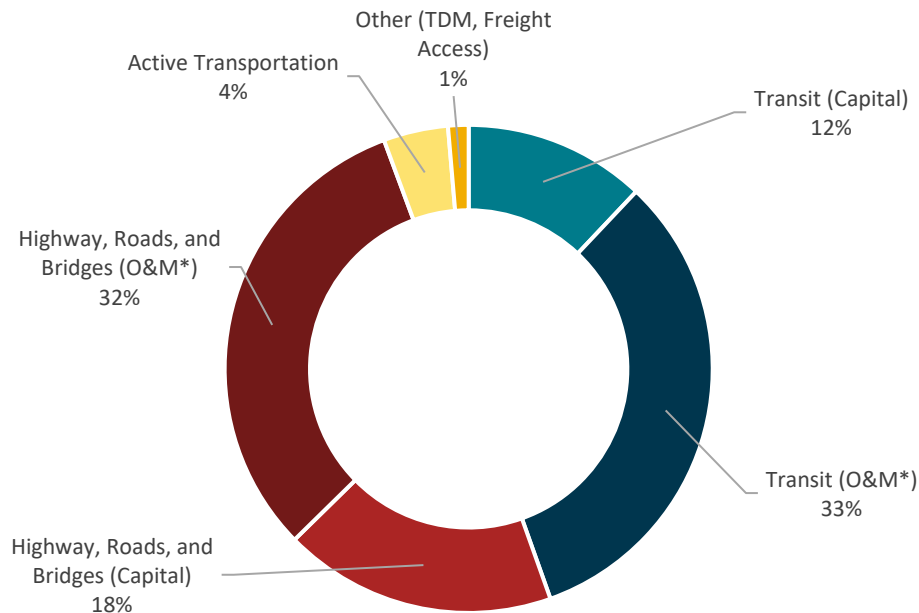
³³ [TriMet. \(2022\). "Adopted 2022-2023 Budget."](#)

³⁴ Oregon Metro and other agencies. (2018). Local Revenue Summary Reports and 2018 Revenue Projections.

Revenue Allocation

Depending on the jurisdiction, legal constraints are placed on the usage of certain funding sources. In Oregon, revenue generated from motor vehicles is constitutionally limited for exclusive use on roadway projects. This means state motor fuel taxes and heavy vehicle fees, which are two of the most prominent funding sources at the state and local level, cannot be allocated for public transit or separated bicycle trails, as examples. Federal gas taxes are not subject to similar constraints. Figure 9 provides an overview of how transportation revenues identified for the 2018 RTP are allocated.

Figure 9: Planned Transportation Funding Allocations within the Greater Portland Region (2018-2040) ³⁵



**O&M stands for Operations and Maintenance.*

³⁵ [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)

04 Key Findings and Equity Challenges

The region's transportation system is funded through a variety of revenue sources and financing mechanisms, each originating at different jurisdictional levels. There are many societal benefits to funding the ongoing maintenance, operations, and continued improvement of the transportation system. The goal of the Equity Assessment (Appendix A) is to evaluate the present funding of the greater Portland region's transportation system and how it impacts low-income households and people of color, informing recommendations on how to make the transportation funding processes more equitable.

The sources of funding and how and where that funding is invested play a key role in the equity of the region's transportation system. The Equity Assessment evaluates revenue sources for six different measures of equity.³⁶ Each measure looks at the impacts of equity from a different perspective: the cost burden of the source, whether it is tiered, whether people with lower-income and people of color are likely to see greater benefits, if the payment methods create barriers for under or unbanked households, and the potential for penalties that can lead to debt and legal repercussions.

Equity Assessment Measures for Revenue Sources

- **Share:** Do lower-income households pay a higher share of their income?
- **Burden:** Does the source provide subsidies or exemptions to alleviate unfair burdens?
- **Tiered:** Is the fee or tax graduated based on the value of the item?
- **Benefits:** Are low-income households and people of color directly benefiting?
- **Payment:** Are unbanked or underbanked individuals unfairly penalized?
- **Penalties:** Do unpaid fines, fees, or taxes trigger penalties and legal repercussions?

The revenue sources are organized by government levels, broken down by status (existing, emerging, future), and rated on a scale of Good, Fair, or Poor, based on the five key metrics. The findings from this work, and an explanation of the rating scale, are provided in full in Appendix A.

³⁶ The Equity Assessment (Appendix A) includes many, but not all, of the existing revenue sources at the federal, state, and local levels. The focus of the assessment is on sources which collect revenue from individuals, businesses, or commercial operations. It does not include revenue that is gathered from financing mechanisms like bonds or from passive revenue sources like transit advertising, rent, loan repayment, land use planning fees or other similar sources. The last section of the Equity Assessment lists identified revenue sources which were excluded from this analysis.

Of the 30 existing sources that were assessed:

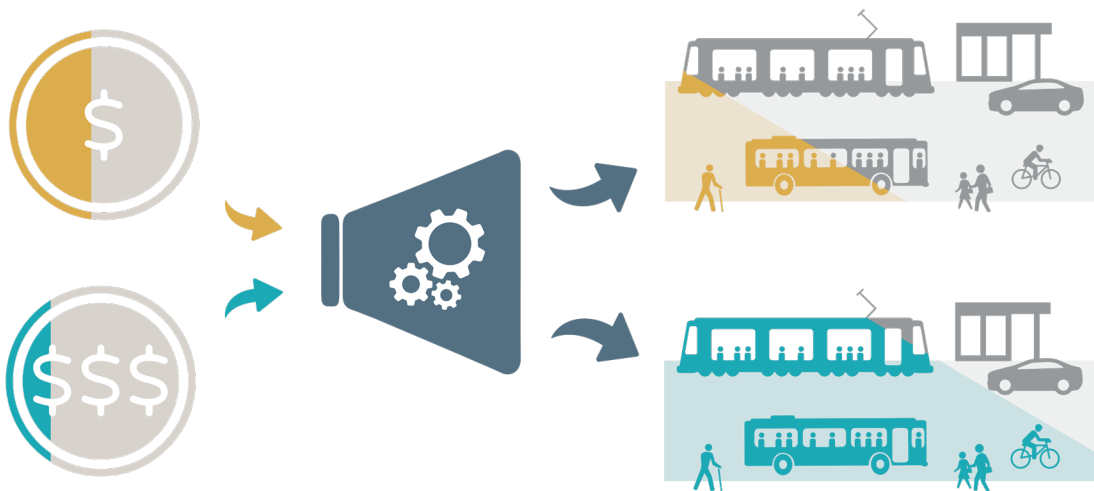
- 9 were rated 'Good,' 5 were 'Fair,' and 16 were 'Poor' for how equitable the **share** of costs are across income levels;
- 6 were rated 'Good,' 7 were 'Fair,' and 17 were 'Poor' for the extent of measures that could alleviate these unfair cost **burdens**.

This disparity highlights how lower income individuals and households in the greater Portland region face larger cost burdens for their transportation needs under the status quo. There are twice as many regressive revenue sources than those with costs equitably distributed. While certain programmatic elements (such as how a tax or fee is tiered and scaled) can alleviate and subsidize how low-income households experience these costs, not all of what they pay goes directly into transportation infrastructure that benefits them. For example, fines for traffic violations and parking penalties that are collected on roadways are disproportionately levied on people of color but are typically not reinvested into the transportation system.

Figure 10: Disparity in Burden of Transportation Costs versus Benefits from Transportation Investment

People with **lower incomes** spend more of their income on transportation costs than people with **higher incomes**...

...but lower-income communities are **less likely** to benefit from spending on transportation projects.



The following section highlights and explores some of the key trends identified during the equity-oriented analysis of transportation revenue sources. These discussions factor in key statistics relevant to the region, illuminating some of the reasoning behind how ratings were reached in the equity assessment.

The Disproportionate Burden and Worsening Inequities for Low-Income Households

As shown in Figures 5 through 8, some revenue sources play larger roles in funding the transportation system than others, confirming that these sources likely have significant cost burdens and negative impacts on equity. Motor fuel taxes, transportation system development charges, property taxes, and cannabis and alcohol taxes are key funding streams that have compounding and regressive impacts on lower-income communities. These implications are explored below.

Motor Fuel Taxes

Transportation revenue sources that are most relied upon often disproportionately burden low-income and marginalized households, exacerbating existing inequities. As previously discussed, motor fuel taxes comprise a significant proportion of transportation revenue collected at every level of government. Motor fuel taxes are a form of excise tax; a sales tax targeted on specific products determined by quantity purchased rather than a consumer's ability to pay. In the case of transportation, which is relatively inelastic, access to mobility options is often needed regardless of one's income (e.g., for school, work, errands etc.). This means that the out-of-pocket cost to low-income individuals and households inevitably consume a bigger proportion of their income.

Motor Fuels Taxes Equity Snapshot	
Share:	Poor
Burden:	Poor
Tiers:	Poor
Benefits:	Fair
Payment:	Good
Penalties:	Good

The necessity to own, drive, and maintain a personal vehicle exacerbates this burden. Residents of the greater Portland region spend more on transportation than any other household expenditures besides housing; in 2020, residents spent more than \$10,000 on transportation expenses per person.³⁷ Data from the U.S. Bureau of Labor Statistics reveals that nationally, the top 20% of income earners on average spend less than 2% of their after-tax income on motor fuel, contrasted with the lowest 20% who spend 8.2%. In periods of inflation (as seen at the time of this writing), this proportion can inflate to as much as 12%, although the tax-specific burden largely remains unchanged.³⁸

³⁷ [U.S. Bureau of Labor Statistics. \(2022\). "Portland Area Economic Summary." United States Department of Labor.](#)

³⁸ [Peck, Emily. \(2022\). "Percentage of after-tax income spent on gas, by income bracket." Axios.](#)

Figure 11: Share of Individual Income Spent on Motor Fuel in the United States, 2019³⁹



The per-unit cost of the gas tax particularly penalizes low mileage efficiency vehicles, which are also heavily represented amongst low-income and rural populations. Where more affluent households increasingly transition to electric or newer more fuel-efficient vehicles, diminishing the tax base, the transportation system's continued reliance on motor fuel taxes for revenue thus falls heavier upon financially vulnerable and low-income communities. The Federal Highway Trust Fund (HTF) has not fully funded the nation's surface transportation needs since 2001, and the revenue deficit has only continued to worsen.⁴⁰ Discussions surrounding increasing the tax rate to “fix” this revenue source are problematic from an equity perspective, as the incidence would fall heavily upon long distance commuters and low-income populations. These complexities are thus reflected as “Poor” ratings under the “Share” and “Burden” categories in Appendix A, especially as there are no quick or obvious fixes to the inequity of motor fuel taxes. To tackle the declining efficacy of motor fuel revenues equitably and holistically, other revenue sources will need to be taken into consideration.

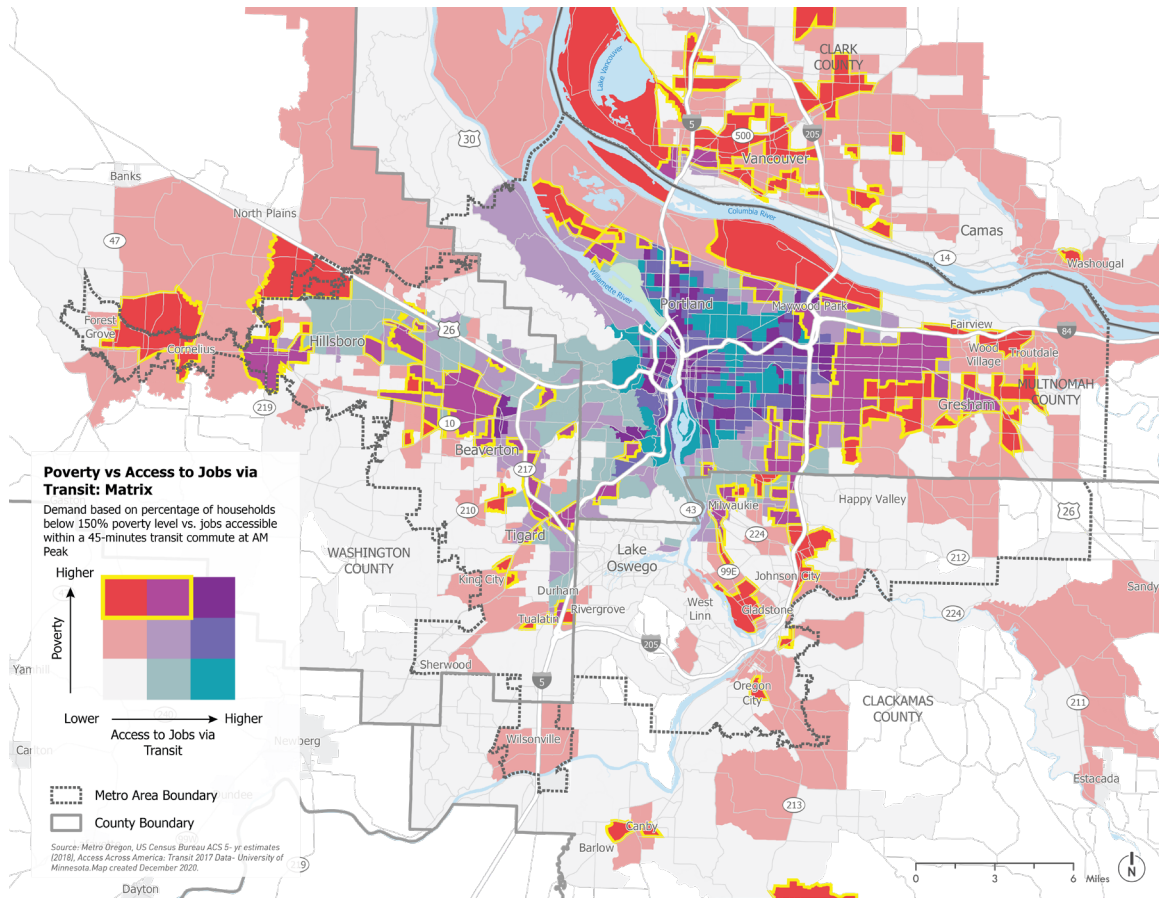
Oregon has in recent years explored the feasibility of expanding Road User Charges (RUCs), as an emerging alternative to declining motor fuel tax revenues. RUCs are charged by the mile for use of the state's public roads and highway network, and depending on program design can treat different types of vehicles equally (i.e. EVs, combustion engine, hybrid). Oregon's OReGO is the nation's first RUC program, having begun operations in 2015. The existing program was found by ODOT to still impose a disproportionate burden on lower-income households, however the RUC program design has greater flexibility and potential for targeted exemptions that could mitigate this outsized burden.⁴¹

³⁹ [Peck, Emily. \(2022\). “Percentage of after-tax income spent on gas, by income bracket.” *Axios*.](#)

⁴⁰ [Congressional Research Service. \(2020\). “Funding and Financing Highways and Public Transportation.”](#)

⁴¹ [Oregon Department of Transportation. \(2022\). “Road Usage Charging: Vehicle Ownership & Socioeconomic Equity”.](#)

Figure 12: Communities with High Levels of Poverty and Limited Access to Jobs via Transit⁴²



Another possible means of alleviating the motor fuel tax burden is through the provision of alternative methods of transportation, namely public transit and active transportation. The greater Portland region has made substantial investments into public transit and street design over the past two decades; the availability of these alternatives has allowed Portland to enjoy 25% fewer vehicle miles driven per year than other US metropolitan areas.⁴³ These investments have been predominantly concentrated in central urban areas, and issues of regional coverage and service frequency due to available funding are a limitation to growing transit use. Figure 12 illustrates the lingering disparities in access to employment opportunities via public transportation.

⁴² [Oregon Metro. \(2021\). "Regional Congestion Pricing Study."](#) ; data sourced from US Census Bureau ACS 5-Year Estimates (2018) and University of Minnesota "Access Across America: Transit 2017 Data". TriMet has since made service changes since the creation of this map. An assessment of TriMet service and future network concepts can be found at <https://trimet.org/forward/>.

⁴³ [Small, Rebecca. \(2016\). "You are here: A snapshot of how the Portland region gets around." Metro News.](#)

While more transit services are needed, the most significant funding sources do not incentivize transit investment. For example, the federal gas tax rate is currently 18.3 cents-per-gallon, of which only 2.86 cents-per-gallon goes towards the mass transit account.⁴⁴ The Oregon state constitution dictates the exclusive use of motor vehicle-related revenues for the upkeep of highway rights-of-way (ROW).

Figure 13: The Equity of Transportation Spending Allocations⁴⁵



Transportation System Development Charges (TSDCs)

Transportation System Development Charges (TSDCs) are a popular means of financing infrastructure improvements at the local level, and account for 20% of locally collected transportation revenues, the second largest source of local revenue. These charges, also commonly known as Transportation Development Taxes, are one-time fees levied on new development such as buildings to cover the cost of new public infrastructure capacity needed to service said development. Eligible projects can include new bicycle lanes, transit infrastructure, and roadway improvements, all of which are explicitly stated to meet the anticipated capacity needs of the area after property development is completed. TSDCs are an upfront cost to most developers, which are compounded by other System Development Charges (SDCs) such as stormwater and sewage SDCs.

TSDC/TDTs	
Equity Snapshot	
Share:	Poor
Burden:	Fair
Tiers:	Poor
Benefits:	Poor
Payment:	Good
Penalties:	Good

⁴⁴ [United States Department of Transportation Federal Highway Administration. \(2017\). "FAST Act Fact Sheets – Highway Trust Fund and Taxes".](#)

⁴⁵ [Oregon Metro. \(2021\). "Regional Congestion Pricing Study."](#)

The equity and cost burden of TSDCs vary significantly by programmatic design, and policies often differ by municipality. Many cities in the greater Portland region utilize uniform or flat tax rates with some differentiation by use type such as residential or commercial. The City of Portland offers tax subsidies for projects with affordable housing components, and dollar-for-dollar credit for projects that incorporate infrastructure improvements on the city's project list.⁴⁶

Studies have shown that holistic assessment methodologies are needed to better estimate a new building's per unit infrastructural impacts, factoring density and availability of transportation demand management (TDM) programs, among other factors, to ensure the right incentives are put in place.⁴⁷ On the other hand, TSDC rates that are set too low can hinder a city's ability to complete the necessary requisite infrastructure projects. The City of Portland's TSDC model generally only covers 30% of projected project costs; this informs the "Poor" rating assessed to the Benefits Received criteria in the Equity Framework (see Appendix A).⁴⁸

Furthermore, TSDCs are taxes on the supply-side of an economy, which means that the tax incidence can be shifted onto consumers. In this case, the higher cost of development can lead to higher rents, and renters will suffer the costs of worsened housing affordability. As low-income individuals and households are more likely to be renters, the cascading cost burdens on financially vulnerable communities are highly inequitable. To offset or alleviate the share of these costs, a reevaluation of TSDCs should be conducted to better understand if a programmatic redesign or fundamental policy change is needed.⁴⁹

Property Taxes

Property taxes can be regressive and vary based on the assessed value of each property, even though on the surface property tax rates are flat. The tax becomes regressive when lower-value homes are valued at higher effective rates. In Oregon, the 1997 state ballot Measure 50 locked property values at 1995 rates, with annual increases capped at 3%. Actual property values have risen much more than 3%, and the greater Portland region has seen actual home values triple since 1995.⁵⁰ This linear tax model results in an effective tax rate that can vary

⁴⁶ [City of Portland, Oregon. \(2022\). "Transportation System Development Charges."](#)

⁴⁷ [Oregon Metro. \(2007\). "System Development Charges."](#)

⁴⁸ [City of Portland, Oregon. \(2022\). "Transportation System Development Charges."](#)

⁴⁹ [League of Oregon Cities. \(2020\). "System Development Charges Survey Report." Pages 12, 125;](#) [Portland Housing Bureau. \(2022\). "HOU-3.03 – System Development Charge \(SDC\) Exemption Home Ownership Program." City of Portland, Oregon.](#)

⁵⁰ [Nius, Elliot. \(2018\) "Property tax rates in Oregon's 36 counties, ranked". *The Oregonian*.](#)

significantly between similar properties depending on their time of sale, creating equity concerns.

As property tax rates and revenues become more detached from real home values, lower-income homeowners may end up paying a higher proportion of their real value in taxes due to overvalued property. On the other side, higher-value properties may be undervalued, allowing for wealthier individuals to pay a lower proportion of their real value in taxes. A University of Chicago study on nationwide property value assessment disparities found that in Multnomah County, 82% of the lowest value homes are over-valued compared with only 35% of the highest value homes. From 2007 to 2019, the study determined the least expensive homes to have had an effective tax rate 1.63 times the rate applied to the most expensive homes.⁵¹ This property tax burden falls disproportionately on Black and Latinx communities, due to the cumulative effects of discriminatory planning practices, including redlining, that have stagnated property values while tax rates inflate. Despite living in the same location and having the same tax rates, these populations were reported to face a 10-13% higher tax burden than other households.⁵²

Property Taxes Equity Snapshot	
Share:	Fair
Burden:	Poor
Tiers:	Good
Benefits:	Good
Payment:	Fair
Penalties:	Poor

Property taxes are not scaled by a homeowner's financial situation (such as their income). Equity disparity arises in circumstances where low-income earners are living in high-value properties. The correlation between household income and assessed property values is not direct, as they are separately influenced by factors such as inequitable value assessments and the labor market. The penalties for those who struggle to pay the taxes out of pocket are severe, ranging from additional fines to foreclosure of the property. The negative equity implications of property taxes might be mitigated through alternative assessment approaches or changing the process of determining tax rates.

Cannabis and Alcohol Taxes (Excise Taxes)

The cannabis tax, like most sales taxes, is fundamentally regressive and thus rated 'Poor' for its share of cost in the Equity Assessment (Appendix A). Therefore, addressing inequities in the allocation of the tax is especially important.

⁵¹ [Berry, Christopher. \(2022\). "An Evaluation of Property Tax Regressivity in Multnomah County, Oregon." *The University of Chicago - Center for Municipal Finance*.](#)

⁵² [Avenancio-León, Carlos and Troup Howard, \(2020\). "The Assessment Gap: Racial Inequalities in Property Taxation", *Washington Center for Equitable Growth*.](#)

The relationship between revenues from taxing alcohol and cannabis and transportation safety leads to fascinating discourse from an equity perspective. Most tax revenues from the sales of cannabis and alcohol are not used for transportation infrastructure or program purposes. However, nearly 40% of fatal crashes involve drugs and/or alcohol. A portion of tax revenues from alcohol and cannabis are spent on policing, recovery and public health programs; uses that impact the safety of the transportation system. While minimizing driving under the influence through public health interventions is an upstream approach to public safety, funding police with these taxes can exacerbate racial and income inequities. Since 2014, the State of Oregon has levied a 17% excise tax on recreational cannabis, and municipalities in Oregon can voluntarily elect to levy an additional 3% tax at the point of sale. The state and municipal legislatures respectively determine how these revenues are allocated for spending. For example, the City of Portland dedicated nearly half of the cannabis tax revenue (over \$3 million) to its Vision Zero safety program in FY 2017-2019, recognizing the relationship of drugs and traffic crashes.⁵³

Long-Term Community Impacts of Fines and Penalties

Fines and penalties have the potential to be major sources of debt, especially when citations are paid late or not at all. Of the revenue sources evaluated on their penalties in the Equity Assessment, (Appendix A), 10 had 'Poor' and 6 had 'Fair' ratings. Poor or Fair ratings were given for sources that had potential to bring in sizable revenue, but could lead to significant penalties, legal repercussions, or snowballing debt if left unpaid or paid late. Examples of these revenue sources include parking fines, income taxes, property taxes amongst others. Revenue sources with the lowest or no chance of penalties (thus rated 'Good') are those that collect at the point of sale (excise taxes). These include items like gas taxes or vehicle or bicycle purchase taxes, which do not offer options to defer payment of the tax. Using penalties to hold businesses or commercial operations accountable was also found to be more equitable.

The System of Penalties

In Portland, parking citations issued by the Portland Bureau of Transportation (PBOT) must be paid within 30 days. If left unpaid, the citation becomes delinquent. At a minimum, the dollar amount of a delinquent citation will double. A court may also decide to issue a warrant for immobilization or impoundment of the vehicle, enter a judgement and impose a fine up to the maximum allowed by law, or send the citation to collections.⁵⁴ Debts in collections will

⁵³ [Portland City Auditor, City of Portland. \(2019\). "Recreational Cannabis Tax: Greater transparency and accountability needed" and 2023 RTP Transportation Needs Assessment and analysis of 2016-2020 ODOT crash data.](#)

⁵⁴ [City of Portland, Oregon. \(2022\). "Pay and/or contest a parking ticket."](#)

see added fees and may harm a person's credit score. Credit scores impact an individual's ability to access financing and resources or obtain a job. Accounts in collections, or other negative marks from late payments, will generally stay on a credit report for seven years.⁵⁵

In Oregon, the State can seize debt from tax returns for unpaid citations or court-imposed fees, and these debts stay on the books for 20 years. Low-income households are more likely to be burdened by citations and often rely on tax refunds to make ends meet. In Multnomah County, from 2019 to 2021, 61% of tax refunds seized on behalf of state courts occurred in ZIP codes with household incomes below the county's overall median household income, and 33% of these seized refunds occurred in five ZIP codes that have some of the lowest median household incomes and highest portions of people of color in the county.⁵⁶

Racial Disparities in Enforcement and Penalties

Parking tickets, traffic citations, and fare evasion fines are levied on Black individuals at a higher rate than white individuals.⁵⁷ In Multnomah County, Black individuals are charged three to thirty times more often than white residents for the same violations. Individual citations are also given at skewed rates. Black individuals are charged fifteen times more often for failing to cross the street at a right angle, eight and a half for jaywalking, three for failing to use vehicle lights, six for disabled vehicle parking violations, and five and a half for walking in the road. While not all of these violations are related to revenue sources that fund transportation, it in no uncertain terms highlights the pervasiveness of racial inequity.⁵⁸

There is also a gap in the fines levied against Blacks than their white counterparts. Default judgements may be to blame, which occur when the defendant does not perform a court-ordered action—typically appearing at court for a hearing—and the judge by default rules in the plaintiff's favor.⁵⁹ The gap in fines between Black and white people in Multnomah County are as follows:⁶⁰

- Jaywalking: \$379 compared to \$280
- Disabled parking: \$317 compared to \$183
- Failure to wear a seatbelt: \$142 compared to \$106

⁵⁵ [Pyles, Sean. \(2021\). "How do Collections Accounts Affect your Credit?" Nerd Wallet.](#)

⁵⁶ [Iboshi, Kyle. \(2022\). "Oregon garnishes millions in tax refunds to collect old, unpaid parking tickets and court fees." KGW8.](#)

⁵⁷ US Commission on Civil Rights. (2017). "Targeted Fines and Fees against Communities of Color – Civil Rights & Constitutional Implications." While this research was conducted at the national level, the trends and patterns of prejudice are undoubtedly echoed throughout local regions.

⁵⁸ [Budnick, Nick \(2017\), "The High Costs of Disparities for People of Color in Multnomah County"](#)

⁵⁹ [Legal Information Institute. \(2022\). "Default Judgment." Cornell Law School.](#)

⁶⁰ [Budnick, Nick \(2017\), "The High Costs of Disparities for People of Color in Multnomah County"](#)

- TriMet fare violations: \$384 compared to \$225
- Speeding: \$190 compared to \$162

The Criminal Justice System and Compounding Impacts of Fines

A majority of transportation related fines do not directly fund the transportation system despite their occurrence on the public right-of-way. In the region, only parking tickets and TriMet fare evasion fines are put back into the transportation system. All other motor vehicle, pedestrian, and cycling related fines typically go to general funds, policing, and the criminal justice system. The City of Portland's fixed-speed camera program is an exception, dedicating any remaining revenue not used for maintaining the program to traffic safety. However, since the program began in 2016, there has yet to be excess revenue.

People with low-income and people of color disproportionately bear the burden of policing and suffer from well-documented racial bias in police forces around the country, including the greater Portland region.⁶¹ Fines are not applied based on a person's ability to pay. This means that people with low-income receive a harsher punishment than those with high income, for the same violation. Moreover, fines can compound which leads to debt and cyclic consequences for those least able to pay or navigate the system. Such systemic incidents where individuals face disproportionate and compounding consequences over minor offences, have seen recent documentation and analysis in the media.⁶²

Fines, especially those collected for minor offences, are not only an inequitable source of government revenue, but they are inefficient. Research has demonstrated that the costs of court activities, collecting and enforcing payments, and jailing those unable to pay can use 70% to 115% of the revenue raised through such efforts.⁶³ This system has a cascading impact throughout society. It creates and ingrains patterns of racialized indebtedness and cycles of poverty, extracts financial resources from the community, undercuts the ability to build intergenerational wealth, supports predatory lending and other exploitative financial practices, and reproduces systems of inequality for individuals and communities.⁶⁴

The City of Portland is developing an in-depth report on the current state and impact of this system, titled *Fines, fees, and traffic-camera enforcement in Portland, Oregon*. The report

⁶¹ [Griggs, Taylor. \(2022\). "Despite police directive, Portlanders of color still overrepresented in traffic stops." *Bike Portland*. Greene, Emily \(2018\). "The poorer you are the more you owe <https://www.streetroots.org/news/2018/11/09/unpaid-fine-poorer-you-are-more-you-owe>." *Street Roots*.](#)

⁶² [Ramakrishnan, Jayati. \(2022\). "She skipped a \\$2.50 TriMet fare. She spent 183 days in custody." *The Oregonian*.](#)

⁶³ [Menendez, Matthew. Lauren-Brooke Eisen, Noah Atchison, and Michael Crowley. \(2019\). "The Steep Costs of Criminal Justice Fees and Fines." *Brennan Center for Justice*.](#)

⁶⁴ Fines, fees, and traffic-camera enforcement in Portland, Oregon – work not yet published

provides recommendations for Portland's fixed speed-camera program and the system of fines and fees in general. The recommendations provide level of effort and estimated impacts for each recommendation. The recommendations include better instructions that accompany traffic camera tickets, reducing minimum fine rates, creating ability-to-pay parameters in Oregon state law to guide payment plan decisions, eliminating credit reporting for accounts referred to collections, and many other similar recommendations to make Oregon's fine and fee system more equitable.⁶⁵

The Burden of Being Underbanked or Unbanked

As shown in Appendix A, 18 sources were ranked 'Good' for the accessibility of their payment methods, 8 were 'Fair,' and 4 were 'Poor.' This means that most existing revenue collection methods do not overwhelmingly burden those without access to banking or digital payment services. Many revenue sources are collected at the point of sale or are levied from businesses and industries that already have the financial means. However, this should not overshadow the potential equity implications for individuals who are unbanked (those without access to a bank account with an insured institution) and/or underbanked (those who do not have the ability to use a bank account).⁶⁶ An FDIC study in 2019 reported a 2.5% Unbanked Rate across the Portland-Vancouver-Hillsboro Metropolitan Statistical Area (MSA).⁶⁷ They remain a vulnerable demographic as payment collection methods shift towards digital platforms.

Parking fees and fines are a significant sector of transportation revenue that can heavily burden the unbanked. Parking fees can be paid at meters and pay stations using a mobile app, credit card, or coins. However, cash payments must be exact since change is not offered. The Oregon Judicial Department (OJD) requires all parking citations to be paid using checks, money orders, or credit cards, either online or by phone. The only way to pay with cash is to visit the court in person, which is a heavier burden to bear by way of commute time and costs.⁶⁸ Some jurisdictions across the nation have sought different strategies to alleviate this burden; in 2020, Arizona

Parking Fees and Fines Equity Snapshot	
Share:	Poor
Burden:	Poor
Tiers:	Good
Benefits:	Fair
Payment:	Poor
Penalties:	Poor

⁶⁵ Fines, fees, and traffic-camera enforcement in Portland, Oregon – work not yet published

⁶⁶ [Chicago Metropolitan Agency for Planning. \(2021\). "Equity in Transportation Fees, Fines, and Fares."](#)

⁶⁷ [Federal Deposit Insurance Corporation. \(2019\). "How America Banks: Household Use of Banking and Financial Services."](#)

⁶⁸ [Oregon Judicial Department. \(2022\). "Parking Citations."](#)

partnered with retail chains such as 7-Eleven to provide a "PayNearMe" service, where residents can pay traffic and parking fines at their local store.

Collecting transit fares can also create accessibility challenges especially for people who are unbanked, as many systems embrace contactless payment systems. TriMet most recently reported that their Hop Fastpass digital fare system accounted for 83.5% of fares collected on fixed route services, which means the remaining 16.5% relied on cash payments on buses and trains.⁶⁹ Moreover, a 2022 review of transit rider surveys found that 37% of those aged 55+ in Portland/Gresham did not have a smartphone, and another 30% did not have a mobile data plan for their phones; 20% of riders aged 35 and below were unbanked, which is the highest amongst all age groups.⁷⁰ Although these statistics reflect only the circumstances of a portion of the region's ridership, and TriMet has taken steps to make the system more accessible for them, it still serves as a critical reminder that technological innovations in fare collection systems cannot, and do not, solve all equity issues for transit riders. TriMet does maintain some options to serve riders who rely on paying for rides with cash. For example, riders can purchase and reload a Hop card at close to 400 retail locations in the region by cash.⁷¹

Transit Fares Equity Snapshot	
Share:	Good
Burden:	Fair
Tiers:	Good
Benefits:	Good
Payment:	Fair
Penalties:	Fair

Revenue Allocation Constraints

Funding constraints determine where and how revenue can be spent and are applied at the revenue source, fund, or program level. Appendix B lists the various revenue sources evaluated and their allocation constraints as applied in Oregon. State and local motor fuel taxes all are subject to the constitutional requirement for exclusive spending on roadways, prohibiting the use of those funds for capital transit investments. While motor fuel tax funds and other motor vehicle revenue sources are collected by users of roadways, restricting these

⁶⁹ [TriMet. \(2021\). "Business Plan: FY2022 – FY2026."](#)

⁷⁰ [Aaron Golub et al. \(2022\). "Equity and exclusion issues in cashless fare payment systems for public transportation." *Transportation Research Interdisciplinary Perspectives*.](#)

⁷¹ [Hop Fastpass. \(2022\) "Home"](#). TriMet has implemented various measures to make purchasing tickets more accessible. Riders can: use cash to purchase a paper ticket on all buses and use cash to purchase a Hop ticket at light rail stations; purchase and reload a Hop card using cash at retail locations. Additionally, TriMet partners with CBOs to issue grant-funded free fares to riders and to sign up those who qualify for the Honored Citizen Program.

funds to pay for further roadway improvements raises equity issues.⁷² These restrictions encourage further use and funding of roadway networks that require access and ability to use a personally owned vehicle. The cost of owning and maintaining a personal vehicle is \$9,500 dollars annually,⁷³ while the cost of an adult, unlimited TriMet transit pass is \$1,200 dollars per year, with one month free if you pay in advance.⁷⁴ Personal vehicles also require the physical ability to drive, which can be a barrier for those of old age, severe illness, or disability.

⁷² State and local vehicle registration and driver's license fees are included, See Appendix B for more information about constraints and allocation per revenue source.

⁷³ [Bureau of Transportation Statistics. \(2022\). "Average Cost of Owning and Operating an Automobile."](#)

⁷⁴ [TriMet. \(2022\). "Fares."; Trimet. \(2022\). "1-Year Pass"](#). TriMet's 1-Year Pass is only \$308 per year for Honored Citizens and Youth.

05 Recommendations to Improve Equity Outcomes

Transportation needs in the greater Portland region exceed existing revenue capacity. This report uses an equity lens to explore the benefits and costs of the funding sources that the greater Portland region relies on; it considered how revenues are collected and who pays, and how revenues are distributed and who benefits. We have identified several recommendations that we believe will be helpful to policy makers and transportation providers. These recommendations are directed at the state, regional and local transportation agencies responsible for collecting and distributing revenues in the greater Portland region, and are intended to be applied in a variety of ways and contexts by the relevant policy and decision makers. Furthermore, they are also intended to be used as a tool by community-based organizations with an interest in advancing equity. They are not directed at any one plan or process; rather, they serve as background considerations to inform processes where needed. For example, the following approaches can be referenced when new revenue sources are being considered, or when the allocation of existing revenues are being decided in state, regional and local plans and programs, or when funding programs are being created and refined.

Laying a Foundation to Advance Equity Outcomes

There are a few general tenets that serve as a foundation for all our recommendations when it comes to more equitable outcomes in the area of transportation funding. These are:

- **No one solution.** Equitable transportation funding is not one solution that can be achieved immediately, so it should be broken down into numerous smaller, tenable goals, which contribute to achieving the overall goal of improving equitable outcomes in transportation funding.
- **Transparency is key.** Publishing the goals of transportation agencies so that they are viewable by the public in an easily accessible location is crucial to positive public perception, accountability, and building strong community and regional partnerships.
- **Elevate community voices.** Continuing to strengthen existing partnerships with local community organizations can provide more individuals with voices that may not have had the platform to be heard. This can be beneficial when establishing goals and receiving meaningful input during the early planning phases of policy initiatives or developments.
- **Put it into policy.** Policies in state, regional and local transportation and capital improvement plans, legislation, and other areas, helps to determine how revenues are collected and what they can be spent on; policy can be used to achieve more

equitable outcomes. Adopting a policy stating that future revenue collection and disbursement should lead to more equitable outcomes is a central recommendation to this work and establishing standards for revenue collection that does not disproportionately burden marginalized and low-income groups is one of the key starting points to equitable revenue collection.

Offering Fair and Accessible Opportunities for Meaningful Public Engagement and Input

Offering ample opportunities for meaningful public engagement and input⁷⁵ is critical to hearing diverse perspectives on equity-based goals, projects, and policies. Several recommendations related to public engagement include:

- Opportunities should be offered in-person and online, at a variety of locations and times, and available for individuals of varying English proficiency and non-English speakers. Participants should also be compensated for their time.
- Public outreach and involvement must be meaningful and intentional. Working with the community organizations that the agency has relations with will impact trust and participation.
 - Include a broad array of community members before, and during, the early planning phase; this builds trust and ensures that more voices are heard.
 - Utilize the relationships that the agency has with community-based organizations, groups, and trusted figures.
 - Hire trusted community members to do engagement work. Make sure to recruit several community members who are active in different areas.

⁷⁵ The Climate Friendly and Equitable Communities Rules, adopted in July 2022, provide updated rules and add new rules for public engagement focused on advancing equity. These are located at https://www.oregon.gov/lcd/LAR/Documents/CFEC_NoticeFilingTrackedChanges.pdf. The rules define traditionally underserved populations to include "Black and African American people, Indigenous people, People of Color, people with limited English proficiency, people with disabilities, low-income Oregonians, youth and seniors, and more. They require mapping of traditionally underserved populations, local consideration of a set of anti-displacement actions should decisions contribute toward displacement, centering the voices of underserved populations in decision-making, and regular reporting on efforts to engage traditionally underserved populations." (<https://www.oregon.gov/lcd/CL/Documents/SixPageOverview.pdf>). The updated rules pertinent to engagement are: OAR 660-012-0120 (Transportation System Planning Engagement), OAR 660-012-0125 (Underserved Populations), OAR 660-012-0130 (Decision-making with Underserved Populations), and OAR 660-012-0135 (Equity Analysis).

- Communities affected by specific policies, funding efforts, or developments must be key contributors to the planning process. This results in an inclusive and iterative process where the communities affected by and benefiting from initiatives—like congestion pricing—are helping shape the program.

Equitable Revenue Collection

The systems currently in place to raise revenues for transportation have been built over decades of policy decisions. These decisions have disproportionately placed a large burden on the most vulnerable people. Revenue collecting for existing, emerging, and new sources should be restructured to be more equitable. This can take many forms and should not end after one change. Several restructuring revenue collection suggestions are listed below:

- Restructuring fines so they are non-compounding and do not impact credit scores or employment eligibility.
- Prorating (based on income or item value) payment structures for parking, license and registration fees, violation fines, and tolling and congestion charges.
- Providing alternate options to paying fines, including in lieu of programs and split-payment plans.
- Continuing the line of good work being done by TriMet⁷⁶ and others to restructure diversion programs for fare evasion to be more lenient.
- Consider eliminating fare evasion programs to avoid severely impacting those with the least ability to pay.
- Allowing license and registration renewal for people with unpaid fines.

⁷⁶ In 2017, HB2777 gave TriMet the authority to resolve fare citations outside of the court system <https://news.trimet.org/2017/06/new-law-gives-trimet-authority-to-offer-some-fare-evaders-a-second-chance-to-stay-out-of-court-system/>. In 2018 the TriMet Board approved changes to fare evasion penalty charges <https://news.trimet.org/2018/02/trimet-board-of-directors-approves-fare-evasion-penalty-changes/>, and separately approved a revision to TriMet fare code to make fare evasion a non-criminal offense <https://news.trimet.org/2018/11/trimet-board-approves-revision-to-trimet-code-to-clarify-proof-of-payment-required-to-ride/>.

- Removing remaining barriers to acquiring reduced or free transit fares can make it possible for individuals with limited access to documents, identification, or internet able to receive these benefits.⁷⁷
- Reduce reliance on regressive tax strategies and encourage more progressive taxes and fees, such as TNC fees to ease the burden on transit users.
- Adjust the gas tax according to inflation.
- Explore financial assistance programs for low-income households that could be applied to costs of fees and transportation services. For example, the City of Portland is currently running a Transportation Wallet Affordable Housing Pilot, offering a package of free transportation options (transit passes, bike-share credits, taxi ride credits, etc.) for residents of selected affordable housing sites.⁷⁸

Equitable Revenue Disbursement

Inequities in revenue collection may be mitigated by how the revenues are spent. For example, a revenue source that is rated poorly in Appendix A, may mitigate or minimize some of the inequities created in the collection through policies and programs that advance equity outcomes.

- Allocate revenues from pricing to safety, transit, and active transportation projects in equity focus areas.
- Major transportation investment can lead to an increase in cost of living and rent rates. Incorporate anti-displacement policies in plans and programs to mitigate the potential for displacement.
- Explore using revenues from any new transportation funding sources to offset transportation taxes and fees for low-income households. Covering taxes and fees would reduce a portion of the cost of living for low-income households, ultimately allowing them greater financial flexibility.
- Encourage and incentive environmentally friendly investments in mid- and low-income households to provide financial benefits for the household and reduce the

⁷⁷ As an example, currently obtaining a TriMet Honored Citizen Fare Card requires proof of income and government-issued ID to be uploaded to an online portal for the card to be mailed to them upon approval (see <https://trimet.org/income/index.htm>). Alternatively, enrollment locations are available for on-the-spot visits and the applicant can receive a card at that time, but these locations are only open during business hours on weekdays. For someone who may not have a valid license, or works throughout those hours, and/or someone with limited internet access, this card may be difficult to obtain.

⁷⁸ [City of Portland. \(2022\). "Transportation Wallet Affordable Housing Pilot".](#)

overall carbon footprint. Examples of this could include: Offer discounts and rebates to households that want to invest in electric vehicles, in solar panels, or transit passes.

Next Steps

Improving equity in transportation is a key concern in the greater Portland region. Inequities in transportation funding are wide-ranging and systemic. Leaders around the region may use the findings from this study to inform policies, including the development of the 2023 RTP and future RTPs and support transportation providers as they discuss current and future funding programs.

Glossary

BIPOC	Black, Indigenous, and People of Color. Those who identify as Black, Native American and Alaska Native, Native Hawaiian and Pacific Islander, Central and South American Indigenous, Asian, Hispanic/Latinx/a/o, and/or one or more non-white races or marginalized ethnic groups.
Direct Spending	Project spending led by agencies at each level.
Diversion Program	An alternative pathway for individuals in the criminal justice pipeline to exit from the system and resolve their outstanding penalties without incurring a criminal record.
Equity Lens	A critical thinking approach to undoing racial and economic disparities by evaluating burdens, benefits, and outcomes to underserved communities.
Funding Program	The requirements and conditions that dictate how revenues are spent. Federal, state, regional and local governments establish criteria and guidelines that define the eligibility, purpose of the program, desired outcomes, etcetera. Revenues from different sources may be combined into one program; one revenue source may also be spent through a variety of programs.
Inequities	A particular kind of disparity that is not only of concern for being potentially unfair, but which is believed to reflect injustice.
Intergovernmental Transfers	The funds that agencies at the federal, state, and local levels are sending to other levels of government for use on their respective projects.
Low Income	Persons or households with incomes 150% below the federal poverty level.
Older Adults	Individuals 65 years old or older.
Own-Source Revenue Flows	The funds raised by transportation agencies themselves at the federal, state, and local levels.
People Living with Disabilities	People who have a physical or mental impairment that substantially limits one or more major life activities, people who have a history or record of such an impairment, or a person who is perceived by others as having such an impairment.
Race	The social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (particularly color),

ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic and political needs of a society at a given period of time. Racial categories subsume ethnic groups.

Regressivity/ Regressive Tax	Refers to programs or tax policy designs that do not account for people's ability to pay, thus imposing a heavier cost burden upon those with lower incomes.
Revenue	A government organization's annual income from which public expenses are met.
Revenue Collection	The processes by which a government body gathers its income from public or private sources, via payments, sales, or other methods.
Revenue Disbursement	The processes that government bodies use to allocate revenues after collection, either in reallocation to other government organizations or for direct spending.
Split Payment Plans	A payment option to settle a single amount of payment via multiple different transactions and payment methods
Systemic Racism	The system of interrelated policies, practices, and procedures that work to advantage and position white people and communities over people of color. It can result in discrimination in criminal justice, employment, housing, health care, political power, and education, among other issues.
Transportation Network Company (TNC)	Also known as ride-hail or ridesharing companies; a transportation service model where passengers pay a fee to prearrange a trip through an online, network-enabled platform.
Unbanked	Households where no member has access to a checking or savings account.
Underbanked	Households that have a checking or savings account with an insured institution, but do not have the ability to use the account or have used alternative financial services in the past 12 months such as money orders, payday loans, pawn shop loans, check cashing, etcetera.
Underserved	The people and places that historically and currently have not had equitable resources or access to infrastructure, healthy environments, housing choice, etc. Disparities may be recognized in both services and in outcomes.

Appendices

Appendix A: Equity Assessment Framework for Transportation Revenue Sources

EQUITY ASSESSMENT OF REVENUE SOURCES

The transportation system in the region is funded through a variety of revenue sources and financing mechanisms, each originating at different jurisdictional levels. There are many societal benefits to funding the ongoing maintenance, operations, and continued improvement of our transportation system. The goal of this assessment is to evaluate the impacts of the way the system is currently funded on low-income households and people of color in order to inform recommendations to improve equity in our funding processes.

The sources of funding and how and where that funding is invested play a key role in the equity of the region's transportation system. This assessment aims to evaluate revenue sources for six different measures of equity. Each measure looks at the impacts of equity from a different perspective: the cost burden of the source, whether it is tiered, whether people with lower-income and people of color are likely to see greater benefits, if the payment methods create barriers for under or unbanked households, and the potential for penalties that can lead to debt and legal repercussions.

The first table below details the equity assessment for existing sources of revenue. These sources were drawn from the revenue forecast data developed for the 2018 Regional Transportation Plan, federal, state, and local budget documents, and other sources. Specific sources are noted in the footnotes.

The second table includes an assessment of emerging and potential future revenue sources. These sources are drawn from the Regional Congestion Pricing Study, the One Oregon report and other sources. The list is intended to be illustrative. The equity assessment for many of these sources are listed as variable. More information about each source and what types of program design may lead a potential future source to be more or less equitable is included in the rating details tables which follow the summary tables. Information about potential future sources will help guide recommendations for a more equitable funding system.

This assessment includes many, but not all, of the existing revenue sources at the federal, state, and local levels. The focus of this assessment is on sources which collect revenue from individuals, businesses, or commercial operations. It does not include revenue that is gathered from financing mechanisms like bonds or from passive revenue sources like transit advertising, rent, loan repayment, land use planning fees or other similar sources. The last section of this report lists identified revenue sources which were excluded from this analysis.

Equity Ratings

Variable: Equity impacts dependent on program design and guiding policies

Poor: Negative impact on people with lower income or people of color

Fair: Some negative impact on people with lower income or people of color, balanced by benefits provided

Good: Does not negatively impact people with lower income or people of color

Equity Evaluation of Existing and Emerging Revenue Sources
Metro

Existing Revenue Sources – Summary Table¹

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Federal							
Fuels tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Heavy trucks and trailers sales tax	Good	Good	Good	Good	Fair	Good	Good
Heavy vehicles annual use tax	Good	Good	Good	Good	Fair	Good	Good
Individual income taxes, corporate income taxes (General Fund transfer)	Fair	Good	Fair	Fair	Fair	Poor	Poor
State							
Motor Fuels Tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Weight Mile Tax	Good	Good	Good	Good	Fair	Good	Good
Driver and Vehicle Fees	Poor	Poor	Poor	Fair	Poor	Good	Fair
Transportation License and Fees	Good	Good	Good	Good	Fair	Good	Good
Cigarette Tax	Fair	Poor	Poor	Fair	Good	Good	Good
Bike Tax	Poor	Poor	Poor	Fair	Good	Fair	Fair
Privilege Tax	Fair	Fair	Poor	Good	Good	Good	Good
Statewide Transit Tax (employee paid)	Fair	Fair	Poor	Fair	Good	Fair	Poor
Income Tax (General Fund Transfer)	Poor	Poor	Fair	Fair	Fair	Poor	Poor
Lottery Revenues	Fair	Poor	Poor	Fair	Good	Good	Good
Local (differs by municipality)							
Transit Payroll Tax (employer paid)	Good	Good	Good	Good	Good	Fair	Fair
Transit Fares (Passenger Revenues)	Good	Good	Fair	Good	Good	Fair	Fair

¹ The revenue sources represented in this table are not an exhaustive list of all sources of funding in the region. See the Revenue Sources Not Included in Assessment section of this document for more details.

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Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Gas Tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Vehicle Registration Fees	Poor	Poor	Poor	Poor	Fair	Good	Fair
Transportation System Development Charges	Fair	Poor	Fair	Poor	Poor	Good	Good
Trip-Based Utility Fees	Fair	Fair	Fair	Good	Good	Fair	Poor
Franchise Fees	Fair	Fair	Fair	Poor	Fair	Good	Good
PGE Privilege Tax	Poor	Poor	Poor	Poor	Fair	Good	Poor
Parking Fees and Fines	Poor	Poor	Poor	Good	Fair	Poor	Poor
Urban Renewal	Poor	Poor	Poor	Good	Good	Fair	Poor
Street Light User Fee	Poor	Poor	Poor	Good	Fair	Good	Poor
Property Taxes	Fair	Fair	Poor	Good	Good	Fair	Poor
TNC Fee	Fair	Good	Poor	Good	Good	Poor	Fair
Local Improvement District Tax	Poor	Poor	Poor	Fair	Poor	Fair	Poor
Heavy Vehicle Use Tax	Good	Good	Good	Fair	Fair	Good	Good
Cannabis Tax	Fair	Poor	Fair	Fair	Fair	Good	Good
Total: 30							

Emerging and Potential Future Revenue Sources – Summary Table

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Emerging							
Freeway Tolling	Variable	Variable	Variable	Variable	Variable	Poor	Variable
Vehicle Miles Traveled Fee/Road User Charges	Variable	Poor	Variable	Variable	Variable	Poor	Variable
Cordon Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable
Roadway Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable

Equity Evaluation of Existing and Emerging Revenue Sources
Metro

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Parking Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable
Potential Future							
Carbon Fee	Variable	Variable	Variable	Poor	Variable	Variable	Variable
Regional Gas Tax	Fair	Poor	Poor	Poor	Good	Good	Good
Gas Tax Indexing	Fair	Poor	Poor	Poor	Poor	Good	Good
Studded Tire Fee	Variable	Fair	Variable	Poor	Variable	Variable	Good
Regional Vehicle Registration Fee / Electric Vehicle Fee	Variable	Variable	Variable	Variable	Fair	Fair	Fair
First-time Title Fee on New Vehicles	Variable	Fair	Variable	Fair	Fair	Fair	Fair
General Sales Tax	Variable	Poor	Poor	Poor	Variable	Poor	Good
Targeted Sales Tax	Variable	Variable	Variable	Variable	Variable	Variable	Good
Business Income Tax	Variable	Variable	Variable	Variable	Variable	Poor	Fair
Corporate Activities Tax	Variable	Good	Fair	Good	Fair	Fair	Fair
Zero-Emission Zone (ZEZ) / Low Emission Zone (LEZ)	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Curb Use Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
First/Last Mile Delivery Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Vehicle Rental Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Traffic Fines	Poor	Poor	Poor	Poor	Poor	Poor	Poor
Public-Private Partnerships	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Naming Rights or Sponsorships	Variable	Good	Good	N/A	Variable	N/A	N/A
Allowance of Use of ROW for Rest Areas/Privatization	Variable	Good	Good	N/A	Variable	N/A	N/A
Overweight Truck and SUV Personal Tax	Variable	Fair	Fair	Fair	Fair	Variable	Variable

Measures and Methods Defined

This assessment relies on six measures, defined below. These measures aim to target different attributes about a given revenue source that impact equity. This ranges from whether low-income households pay a higher share of their income to whether the source has the potential, if unpaid or paid late, to cause additional penalties or legal repercussions. The measures were developed through research and literature review, including the One Oregon report², Chicago’s Improving equity in transportation fees, fines, and fares report³, and Metro’s Regional Congestion Pricing Study⁴.

This is a qualitative assessment. The methods for assigning ratings (poor, fair, good) to each measure for each revenue source are based on research of available information online, information known to Metro, and review of local budget documents. Researchers searched for indications of exemptions and penalties, for example, and based the ratings on the degree to which these items would appear to impact low-income households negatively or positively. Therefore, this assessment has some gray area and users of this report are urged to read the details of each revenue source in the rating details tables.

Measures

- **Share:** Do lower-income⁵ households pay a higher share of their income?
- **Burden:** Does the source provide targeted exemptions or subsidies to avoid an unfair burden for households below an income threshold? If yes, does obtaining the targeted exemption of subsidy place substantial burden of proof on applicants?
- **Tiered:** Is the fee or tax tiered based on the value of the priced item, like vehicles?
- **Benefits Received:** Are low-income households and people of color directly benefitting?
- **Payment Methods:** Does the payment method of the fee or tax provide options for unbanked and underbanked individuals? Is the payment method burdensome?
- **Penalties:** Do unpaid fines, fees, or taxes trigger penalties or legal repercussions? Can the fines or penalties compound to become a major source of debt for people with lower income?

Overall Rating Methodology

While each measure is important for describing the potential for equity impacts, an overall rating per revenue source was useful for summarizing the information. Though the assessment is qualitative, the simplest way to create an overall rating while remaining objective was to take a quantitative approach. The approach is described below. Numerical

² [State of Oregon Transportation Vision Panel. \(2016\). “One Oregon: A Vision for Oregon’s Transportation System.”](#)

³ [Chicago Metropolitan Agency for Planning. \(2021\). “Improving equity in transportation fees, fines, and fares.”](#)

⁴ [Oregon Metro and Nelson\Nygaard. \(2021\). “Metro Regional Congestion Pricing Study.”](#)

⁵ Lower-income households are defined by Metro as 150% of the federal poverty level.

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points were assigned to each rating, and the overall sum of available points, were used to organize the information and are meant to be relative to one another. The ratings for the Share and Burden measures were weighted times three. This weight was given to reflect the importance of these measures and their outsized impacts on equity. If a revenue source is scaled based on household income and offers appropriate exemptions and subsidies, the impact of the other measures is lessened.

For example: The impact of penalties is diminished if a revenue source is based on an individual's ability to pay. This would greatly reduce the number of people which find themselves unable to afford to pay in the first place, mitigating the possibility of them being drawn into the criminal justice system. Hence the Share metric is weighted more strongly.

Steps to create the overall rating:

- Step 1: Poor = 1, Fair = 2, Good = 3
- Step 2: Share and Burden are weighted times 3
- Step 3: Sum all of the points achieved for each revenue source.
- Step 4: Find the percentage of the points achieved compared to the total available points. For example, if the revenue source gets 15 weighted points, and the total available is 30, the revenue source is achieving 50% of its available points. Total available points is the sum of points across measures if each measure received a good rating.
- Step 5: Assign the overall rating based on thresholds for point percentage achieved.
 - Poor = 50% or less
 - Fair = 75% or less
 - Good = greater than 75%

REVENUE SOURCES RATING DETAILS

Federal

Fuels Tax

Fuels tax includes gasoline, diesel, and kerosene. Gasoline for motor vehicles is taxed at \$0.184 per gallon. Diesel is taxed at \$0.244 per gallon. Flat tax on a per gallon rate rather than as a general fuel sales tax limits the impact of inflation and price adjustments on the tax burden.

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commute times to work but may drive less for leisure activities. ⁶ However, lower income households still pay a greater percentage of their income than a higher income household. ⁷
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. ⁸
Benefits Received	Fair	Road users are paying the tax which supports the Highway Trust Fund. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. ⁹ The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. More people with low income and people of color rely on transit. ¹⁰ The majority of the Highway Trust Fund supports roadways. A higher percentage of the gas tax supporting transit would provide a more positive impact for the people with the greatest needs.

⁶ [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

⁷ [Axios. \(2022\). "High gas prices hit low-income Americans the hardest."](#)

⁸ [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

⁹ [Congressional Research Service. \(2021\). "Federal-Aid Highway Program \(FAHP\): In Brief."](#)

¹⁰ [U.S. Department of Transportation Federal Highway Administration. \(2017\). "Highway Trust Fund and Taxes."](#)

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		The federal gas tax has not kept pace with inflation and has not been increased since 1993. It has also seen declining revenues due to electric vehicles. Since 2008, revenues in the Highway Trust Fund have not been enough to cover the costs of surface transportation spending. ¹¹
Payment Methods	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
Penalties	Good	Payment is collected at point of sale.

¹¹ [Congressional Research Service. \(2020\). “Funding and Financing Highways and Public Transportation.”](#)

Heavy Trucks and Trailers Sales Tax

A 12% tax is applied to the sale of automobile truck chassis and bodies, truck trailer and semitrailer chassis and bodies, and tractors of the kind chiefly used for highway transportation in combination with a trailer or semitrailer.¹² The tax only applies to vehicles which have a gross vehicle weight (GVW) over 33,000 pounds and trailers with a GVW over 26,000. Vehicles of this weight are typically commercial vehicles.

Share	Good	Tax rates are not based on household income; however, the tax is for commercial operations and is less likely to impact low-income households.
Burden	Good	No targeted exemptions or subsidies provided; however, the tax is for commercial operations and is less likely to impact low-income households.
Tiered	Good	The sales tax is 12%, higher cost vehicles pay more in tax.
Benefits Received	Fair	The tax supports roadway maintenance and improvements through the Highway Trust Fund ¹³ and is levied on heavy vehicles that do the most damage. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
Payment Methods	Good	Payment is collected at point of sale. The sales tax is included in the price of the vehicle and an individual without the ability to purchase an eligible vehicle would not be impacted. Additionally, the tax is only eligible for commercial operations and therefore is less likely to impact unbanked individuals.
Penalties	Good	Payment is collected at point of sale.

¹² [Cornell Law School Legal Information Institute. \(2000\). "Imposition of tax on heavy trucks and trailers sold at retail."](#)

¹³ [United States Environmental Protection Agency. \(2022\). "Learn About Federal Excise Tax Exemption."](#)

Heavy Vehicles Annual Use Tax

An annual fee is levied on heavy vehicles operating on public highways, with exemptions for specific groups or types of vehicles such as mass transit authorities. Heavy vehicles are defined as exceeding 55,000 pounds.¹⁴ The maximum tax is \$550 per year.

Share	Good	Everyone pays the same tax regardless of income. However, this tax generally applies to commercial vehicles or companies and is less likely to impact individual household incomes.
Burden	Good	The tax provides exemptions for several groups and vehicle categories, including public transit authorities, the American Red Cross, nonprofit volunteer fire departments, ambulance associations, or rescue squads, Indian tribal governments for vehicles used in essential tribal government functions. This tax is more relevant for commercial vehicles or companies; however, these exemptions include a number of nonprofits and historically marginalized communities. ¹⁵
Tiered	Good	The tax is tiered based on two weight categories. This ties directly to the damage higher weight vehicles do to roadways.
Benefits Received	Fair	The tax supports roadway maintenance and improvements through the Highway Trust Fund ¹⁶ and is levied on heavy vehicles that do the most damage. However, research has shown that the heaviest vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. ¹⁷ Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
Payment Methods	Good	Payments are made through submission of IRS Form 2290 along with payment via credit or debit card, electronic funds withdrawal, or via the Electronic Federal Tax Payment System. ¹⁸ This tax generally applies to commercial vehicles or companies and is less likely to impact unbanked individuals.
Penalties	Good	Penalties for non-compliance can be high and states also suspend the registration of vehicles that have not produced proof of payment. For those actively evading the tax, penalties can include fines and incarceration. While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

¹⁴ [U.S. Department of Transportation Federal Highway Administration. \(2020\). "Heavy Vehicle Use Tax."](#)

¹⁵ [Congressional Research Service. \(2020\). "Funding and Financing Highways and Public Transportation."](#)

¹⁶ [U.S. Department of Transportation Federal Highway Administration. \(2016\). "The Heavy Vehicle Use Tax."](#)

¹⁷ The U.S. Department of Transportation in its most recent Highway Cost Allocation Study estimated that light single-unit trucks, operating at less than 25,000 pounds, pay 150 percent of their road costs while the heaviest tractor-trailer combination trucks, weighing over 100,000 pounds, pay only 50 percent of their road costs. [FHWA. The Heavy Vehicle Use Tax.](#) and [The Hill. \(2017\). "Feds could pay for road improvements by charging big trucks by the mile."](#)

¹⁸ [IRS. \(2022\). "About Form 2290, Heavy Highway Vehicle Use Tax Return."](#)

Individual income taxes, corporate income taxes (General Fund transfer)

To maintain solvency of the Highway Trust Fund, transfers from the General Fund have been authorized by Congress every year since FY 2008. In total \$114.7 billion has been transferred to the Highway Account and \$28.9 billion to the Mass Transit Account. The General Fund collects revenue from personal income tax and corporate income tax, among other sources.

Share	Good	Personal income tax brackets increase the tax rate progressively as incomes increase. Low-income households pay a smaller percentage on taxable income than higher income households. The corporate income tax is progressive. The majority of its burden is carried by high-income households via taxes on income from dividends, capital gains, and other forms of capital income. ¹⁹
Burden	Fair	The IRS offers a number of deductions and credits for personal income tax. ²⁰
Tiered	Fair	Personal income and corporate income taxes are based on the amount of income. However, income is grouped into brackets which can have a wide range.
Benefits Received	Fair	The personal income tax is paid by most Americans who also benefit from the transportation system. Corporations also rely on the transportation system to do business. While there is not a direct connection between the personal and corporate income tax and the transportation system, the ability to access jobs, goods, and services relies on the transportation system. The General Fund supports the Highway Trust Fund which funds roadways, transit, and bike and pedestrian infrastructure. Transit and bike and pedestrian projects help to support people with the greatest needs.
Payment Methods	Poor	Filing taxes can be an onerous process and often requires access to the internet or the time and money to research and access forms or to hire a tax preparer. It is possible to pay in cash but can only be done so via an authorized Cash Processing Company. ²¹
Penalties	Poor	The IRS charges penalties for late filings, incorrect payment, and incorrect returns. The penalties can be eliminated if there is a “reasonable” cause which puts the burden on lower-income households. Black and lower-income households are more likely to be audited than high-income households, resulting in more penalties. ²²

¹⁹ [Tax Policy Center. \(2020\). “Are federal taxes progressive?”](#)

²⁰ [USAGov. \(2022\). “Tax Credits and Deductions.”](#)

²¹ [IRS. \(2022\). “Pay with Cash at a Retail Partner.”](#)

²² [Inequality.org. \(2022\). “Whither the Wealth Squad?”](#)

State Transportation Revenues

Motor Fuels Tax

The motor fuels tax category includes the state gas tax and aviation fuel taxes. Gasoline for motor vehicles is taxed at \$0.38 per gallon as of 2022.²³ A portion of revenues are from fuel purchases for non-automotive purposes (such as fuel purchased for boats, lawn mowers, etc.); these gas tax revenues are not bound by the constitutional restriction that they be used on road projects. A portion of these funds are allocated to the State Transportation Improvement Fund program for transit.

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. ²⁴ However, lower income households still pay a greater percentage of their income than a higher income household. ²⁵
Burden	Poor	There are no targeted exemptions or subsidies available. Oregon state law provides for motor fuels tax refunds for the purchase of gasoline for uses other than travel on public roadways. Refunds are not based on income and require burden of proof. ²⁶ House Bill 3055, passed in 2021, provides an exemption for federally recognized Indian tribes, tribal entities, and tribal member owned entities. However, the new law requires that the tribal entities levy a tax on motor vehicle fuels at the same rate as the Oregon state motor vehicle fuels tax. ²⁷
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. ²⁸
Benefits Received	Fair	Gas tax revenue is deposited into the State Highway Fund. Under state law, the Highway Fund must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.

²³ [Oregon.gov. \(2022\). "Current Fuel Tax Rates."](#)

²⁴ [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

²⁵ [Axios. \(2019\). "Percentage of after-tax income spent on gas, by income bracket."](#)

²⁶ [OregonLaws. \(2021\). "Motor Vehicle and Aircraft Fuel Taxes."](#)

²⁷ [Oregon.gov. \(2022\). "Indian Tribal Exemption."](#)

²⁸ [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

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		Fuel tax revenue is not always used in the same geographic location as collected. State statute dictates that 40% of the State Highway Fund, which includes the motor fuels tax as a major source of revenue, must be distributed to cities and counties. ²⁹
Payment Methods	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
Penalties	Good	Payment is collected at point of sale.

²⁹ [Oregon.gov. \(2022\). "Transportation Funding in Oregon."](#)

Weight Mile Tax

A tax per mile driven in Oregon for motor carriers operating vehicles in commercial operations on public roads with a gross weight over 26,000 pounds.³⁰

Share	Good	Tax rates are not based on household income; however, the tax is for commercial operations and is less likely to impact low-income households.
Burden	Good	The tax provides limited exemptions for government, charitable, private, or off-road operations. The tax is for commercial operations and is less likely to impact low-income households.
Tiered	Good	The tax is tiered based on weight of vehicle and miles driven within Oregon. ³¹
Benefits Received	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the tax funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
Payment Methods	Good	The tax is only eligible for commercial operations and is therefore less likely to impact unbanked individuals.
Penalties	Good	ODOT may suspend an operator's account if they fail to file, do not pay the tax, do not pay on time, or fail to file or comply with other rules. Suspension results in all OR DOT plates and tax-enrolled vehicles to be invalid which makes operating illegal and can result in further citations, fines, and penalties. While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

³⁰ [Oregon Department of Transportation. \(2020\). "Motor Carrier Educational Manual – Weight-Mile Tax."](#)

³¹ [Oregon Department of Transportation. \(2022\). "Mileage Tax Rates."](#)

Driver and Vehicle Fees

Includes driver license fees, vehicle registrations, title fees for passenger vehicles, buses, trailers, motorcycles, and others. This category contains many fees for various areas from snowmobile titles to specialty license plates. This analysis will focus on driver license, vehicle registration, and title fees.

Share	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set at a flat rate.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Fair	Driver license fees for non-commercial operations are the same regardless of personal vehicle owned. Vehicle registration and title fees are tiered based on the age of the vehicle. Electric vehicles do not have age-tiered fees and are currently required to pay \$192 while the maximum non-electric vehicle fee is \$116. ³² Electric vehicles are charged a higher fee because they do not contribute to funding the transportation system via revenues gained through the gas tax. People with lower income are less likely to own an electric vehicle due to their relative higher cost and more likely to drive an older vehicle which would be subject to lower fees.
Benefits Received	Poor	Drivers and owners of vehicles pay the fees; however, the amount of the fees is not based on the amount that a driver operates a vehicle or the number of miles a particular vehicle is driven. Driver license and vehicle fees are deposited into the State Highway Fund. Under state law, the Highway Fund must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.
Payment Methods	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. ³³
Penalties	Fair	Driver license and vehicle registration and title fees must be paid to receive the license or registration. Penalties may be incurred for driving without a license or for operating an unregistered vehicle. ³⁴ People of color are more likely to be charged. In Multnomah County, Black people are charged three to 30 times more often than white people for the same violations. Black people also pay higher fines for the same violations. ³⁵

³² [Oregon.gov. \(2022\). "Vehicle Title, Registration & Permit Fees."](#)

³³ [Oregon.gov. \(2022\). "DMV Fees."](#)

³⁴ [Oregon Judicial Department. \(2021\). "Schedule of Fines on Violations."](#)

³⁵ [Investigate West. \(2017\). "The High Costs of Disparities for People of Color in Multnomah County."](#)

Transportation License and Fees

Includes heavy vehicle registrations, vehicle and Sno-Park permits. This analysis will focus on the heavy vehicle registration fee. Heavy vehicle registration fees are tiered based on the weight category of the vehicle and generally begin at 8,000 pounds.³⁶

Share	Good	Everyone pays the same fee regardless of income. However, this fee generally applies to heavy commercial vehicles and is less likely to impact low-income households.
Burden	Good	No targeted exemptions or subsidies provided. However, this fee generally applies to heavy commercial vehicles and is less likely to impact low-income households.
Tiered	Good	The fee is tiered based on weight of vehicle.
Benefits Received	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the fee funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
Payment Methods	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. ³⁷ The fee generally applies to commercial operations and is therefore less likely to impact unbanked individuals.
Penalties	Good	The fee must be paid in order to receive the registration. Penalties may be incurred for operating an unregistered vehicle. ³⁸ While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

³⁶ [Oregon Driver and Motor Vehicle Services. \(2022\). Fee Schedule – Heavy Motor Vehicles and Buses.](#)

³⁷ [Oregon Driver & Motor Vehicle Services. \(2022\). “DMV Fees.”](#)

³⁸ [Oregon Judicial Department. \(2021\). “Schedule of Fines on Violations.”](#)

Cigarette Tax

The cigarette tax is \$3.33 per stamp. Every pack of cigarettes sold in Oregon must have a stamp.³⁹

Share	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. Cigarette taxes are generally regarded as regressive. ⁴⁰ Some smokers may change their behavior, but many will not or cannot and cigarette smoking disproportionately impacts people with low-income. ⁴¹
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Fair	The tax is the same regardless of the cost of an individual pack of cigarettes, but the amount paid is based on the price.
Benefits Received	Good	The costs are paid by smokers regardless of their use of the transportation system and the revenue source does not have a direct connection to transportation. However, a portion of the revenue is dedicated to transit services for seniors and disabled people which has a positive equity component. ⁴² Seniors and disabled people are more likely to live in low-income households.
Payment Methods	Good	Payment is collected at point of sale. Payment options vary by vendor, but many locations accept cash as a form of payment.
Penalties	Good	Payment is collected at point of sale.

³⁹ [Oregon.gov. \(2022\). "Cigarette Tax Overview."](#)

⁴⁰ [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

⁴¹ [National Library of Medicine. \(2004\). "Poor Smokers, Poor Quitters, and Cigarette Tax Regressivity."](#)

⁴² [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

Bike Tax

The Oregon Bicycle Excise tax is a flat tax of \$15 that is levied on bicycles purchased for \$200 or more.⁴³

Share	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. While the tax is only applied to new bicycles, the threshold of \$200 is quite low compared to current new bicycle costs.
Burden	Poor	There are no targeted exemptions or subsidies. Nonprofits and state agencies are not exempt, federal agencies are exempt. While the tax is only applied to new bicycles, the threshold of \$200 is quite low compared to current new bicycle costs.
Tiered	Fair	The fee is not tiered but bicycles costing less than \$200 are not taxed.
Benefits Received	Good	The tax is paid by people buying bicycles and is intended to provide funding for bike and pedestrian projects. Supporting bike and pedestrian infrastructure can have a positive equity impact.
Payment Methods	Fair	Payment is generally collected at point of sale. However, if a consumer is not charged the tax they must pay separately later and are provided with an online option for payment.
Penalties	Fair	Payment is generally collected at point of sale. However, if not and the consumer is responsible, there is a 5 percent late penalty and a 20 percent penalty if not filed within 30 days of due date. Interest is added to any unpaid tax.

⁴³ [Oregon Department of Revenue. \(2022\). "Bicycle Excise Tax."](#)

Privilege Tax

The vehicle privilege tax is a tax for the privilege of selling vehicles in Oregon. The tax is .005 percent on the retail price of any taxable vehicle. Taxable vehicles are those that are purchased from a dealer in Oregon, have been driven less than 7,500 miles, and are less than 26,000 pounds.⁴⁴

Share	Fair	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. However, taxes on new vehicles are generally considered to be less regressive than other revenue sources. ⁴⁵
Burden	Poor	There are no targeted exemptions or subsidies.
Tiered	Good	The tax is based on the sale price of the vehicle.
Benefits Received	Good	The tax is paid by vehicle owners. The funds are deposited into Connect Oregon. Connect Oregon is restricted to projects outside the road right-of-way but funds active transportation, rail projects, and the Zero-Emission Incentive Fund which have a positive equity component. ⁴⁶
Payment Methods	Good	Payment is collected at point of sale.
Penalties	Good	Payment is collected at point of sale.

⁴⁴ [Oregon Department of Revenue. \(2022\). "Vehicle privilege and use taxes."](#)

⁴⁵ [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

⁴⁶ [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

Statewide Transit Tax

The statewide transit tax is imposed on the wages of each employee. The tax is .001% from wages of Oregon residents or non-residents who perform services in Oregon.⁴⁷

Share	Fair	The tax is a percentage based on wages, so low-income earners do not pay the same amount as high-income earners. However, they are considered to be more regressive than employer payroll taxes. ⁴⁸
Burden	Poor	Employees who aren't subject to regular income tax withholding due to high exemptions, wages below the threshold for income tax withholding, or other factors are still subject to statewide transit tax withholding, impacting low wage earners.
Tiered	Fair	The tax is calculated based on the employee's wages.
Benefits Received	Good	There is no direct connection to revenue source and use because employees working and living in areas without transit or good transit will pay but not directly benefit. The tax is deposited into the Statewide Transportation Improvement Fund and is limited to investments and improvements in public transportation services, except for those involving light rail. Funding transit has a positive equity component.
Payment Methods	Fair	Payments can be made by cash, check, money order, or EFT. However, if an employee's employer does not withhold the tax, the burden is on the employee to file the appropriate paperwork and pay the tax.
Penalties	Poor	If an employee does not file or pay on time, they may be subject to penalties and interest.

⁴⁷ [Oregon Department of Revenue. \(2022\). "Statewide transit tax."](#)

⁴⁸ [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

Income Tax (General Fund Transfer)

The Oregon General Fund is primarily made up of state personal and corporate income taxes. Personal income tax is the largest share of revenue at 86% of projected revenue for the 2019-2021 adopted budget.⁴⁹ This analysis focuses on the personal income tax in Oregon.

Share	Poor	Oregon's personal income tax is progressive, with high-income earners paying a higher portion of their annual income than low-income earners. ⁵⁰ However, the tax rate begins at 4.75% and tops out at 9.9%. The gap between the brackets for the lower rates is small. A couple filing together that makes \$18,400 will pay the same tax rate as a couple earning \$200,000. ⁵¹
Burden	Fair	Oregon provides a refundable Earned Income Tax Credit.
Tiered	Fair	The amount of tax owed is based on the amount of wages earned. However, as stated above, the brackets can include a wide range of income.
Benefits Received	Fair	While there is not a direct connection between the personal income tax (which is paid by most Oregonians) and the transportation system, the ability to access jobs, goods, and services relies on the transportation system.
Payment Methods	Poor	Filing taxes can be an onerous process and often requires access to the internet or the time and money to research and access forms or to hire a tax preparer. Oregon accepts online payments, checks, or money orders. ⁵²
Penalties	Poor	Oregon does not allow an extension to pay taxes. Late payments incur a 5% penalty. Payments more than three months late receive a 20% late-filing penalty. There are additional penalties for not filing at all or other types of tax avoidance. ⁵³

⁴⁹ [Oregon Secretary of State Shemia Fagan. \(2022\). "Government Finance: State Government."](#)

⁵⁰ [Institute on Taxation and Economic Policy. \(2018\). "Who Pays? A Distributional Analysis of the Tax Systems in All 500 States."](#)

⁵¹ [Oregon Center for Public Policy. \(2021\). "8 things to know about Oregon's tax system."](#)

⁵² [Oregon Department of Revenue. \(2022\). "Payments."](#)

⁵³ [Oregon Department of Revenue. \(2022\). "Penalties and interest for personal income tax."](#)

Lottery Revenues

A portion of funds from the Oregon Lottery are deposited into Connect Oregon.

Share	Poor	Participating in the lottery will cost the same across income groups and is generally regarded as regressive. ⁵⁴ Research has found that low-income people disproportionately participate in the lottery and that lottery retailers are more highly concentrated in minority and low-income neighborhoods. ⁵⁵
Burden	Poor	No exemptions or subsidies for discounted lottery tickets or games are provided.
Tiered	Fair	The cost of the lottery is dependent on how much one participates and what games or tickets are purchased.
Benefits Received	Good	Lottery revenue is deposited into fund rebates for electric vehicles and Connect Oregon which funds active transportation, rail projects, and the Zero-Emission Incentive Fund which have a positive equity component. ⁵⁶
Payment Methods	Good	There is a wide array of options to pay for lottery tickets or games.
Penalties	Good	Payment for lottery service is due at point of sale.

⁵⁴ [State of Oregon Transportation Vision Panel. \(2016\). “One Oregon: A Vision for Oregon’s Transportation System.”](#)

⁵⁵ [CBS News. \(2022\). “State lotteries transfer wealth out of needy communities, investigation finds.”](#)

⁵⁶ [Oregon.gov. \(2022\). “Connect Oregon.”](#)

Local Transportation Revenues

Transit Payroll Tax (Employer paid)

The mass-transit tax is a tax on the wages earned by employees and the net earnings from self-employment for services performed within specified transit district boundaries. It is a tax on employers, not employees, based on the amount of payroll and includes all salaries, commissions, bonuses, fees, payment to a deferred compensation plan, or other items of value.⁵⁷ The TriMet District Boundary has a tax of 0.7837%⁵⁸ and the Wilsonville Transit District, which funds SMART, has a tax of 0.005%.⁵⁹

Share	Good	The tax is a percentage based on wages, so low-income earners do not pay the same amount as high-income earners. The tax is paid by the employer.
Burden	Good	There are no targeted exemptions or subsidies, but it is a tax paid by employers. Nonprofits are still subject to the tax.
Tiered	Good	The tax is calculated based on the employee's wages.
Benefits Received	Good	Only employers with employees working in the TriMet district pay the tax. The tax helps fund mass transportation in the TriMet district. ⁶⁰ Some people may have better access to transit than others. However, funding transit has a positive equity component.
Payment Methods	Fair	Filings can be online or through paper forms. ⁶¹
Penalties	Fair	If an employer does not file or pay on time, they are subject to penalties and interest.

⁵⁷ [Oregon Department of Revenue. \(2022\). "Oregon Transit Payroll Taxes for Employers."](#)

⁵⁸ [TriMet. \(2022\). "Payroll and Self-Employment Tax Information."](#)

⁵⁹ [Wilsonville Oregon. \(2022\). "Transit Payroll Tax Information."](#)

⁶⁰ [Oregon Department of Revenue. \(2021\). "TriMet Self-Employment Tax."](#)

⁶¹ [Oregon Department of Revenue \(2022\). "Payroll tax basics."](#)

Transit Fares (Passenger Revenues)

Fares are charged by TriMet for each passenger. The fares make up 7% of TriMet’s FY2023 Budget.⁶²

Share	Good	Fares are a flat rate and low-income households would pay a larger share of their income, however, TriMet offers discounted fares to youth, elders, and people with low income. Additionally, TriMet’s Fare Relief Program provides reduced fares to people that do not meet the requirements for the income-based fare Honored Citizen program, or those who are in need of immediate assistance. ⁶³ TriMet is also one of the few agencies in the country to adopt fare capping. With fare capping, riders who pay per ride are not charged additional fares once they incur the equivalent cost of an unlimited transit pass. This ensures that riders who can’t afford the upfront cost of a weekly or monthly pass no longer pay more than riders who can.
Burden	Fair	TriMet offers an Honored Citizen Fare and a Youth Fare, which are half the price of a full adult fare, to Seniors 65+, people on Medicare, with disabilities, with qualifying incomes, youth ages 7-17, and students in high school or pursuing a GED. Qualifying incomes include people enrolled in the Oregon Health Plan, SNAP, or TANF and people with household income less than double the federal poverty level. ⁶⁴ The Honored Citizen Fare requires proof of eligibility and a valid photo ID. Both may be barriers for qualified people. ⁶⁵ The Youth Fare does not require advance application, but riders must carry proof of age or student status when riding TriMet, which may also be a barrier. ⁶⁶
Tiered	Good	Tiered fares for transit are not desirable. Distance-based fares make prices difficult to discern and are inequitable for people with lower income that need to travel longer distances. Transfer fees, which could be considered a type of tiering, are also inequitable for similar reasons, where lower-income long distance commuters are disproportionately disadvantaged. ⁶⁷ TriMet has a flat-rate, easy to understand system and no charge for transfers.
Benefits Received	Good	Fares are paid by riders and the funds go directly back to the transit system. Funding transit has a positive equity component.
Payment Methods	Fair	TriMet accepts cash, tickets, or electronic payment. To pay with cash for the MAX, tickets must be pre-purchased, which serves as a barrier especially for those who are trying to make unplanned trips. ⁶⁸

⁶² [TriMet. \(2022\). “Adopted Budget 2022-2023.”](#) Page 44, passenger revenue % of TriMet FY2023 budget

⁶³ [TriMet. \(2022\). “Access Transit: Fare Relief Program”](#)

⁶⁴ [TriMet. \(2022\). “Honored Citizen Fare.”](#)

⁶⁵ [TriMet. \(2022\). “Reduced Fare for Riders Who Qualify Based on Income.”](#)

⁶⁶ [TriMet. \(2022\). “Youth Fare.”](#)

⁶⁷ [TransitCenter. \(2019\). “A Fare Framework: How transit agencies can set fare policy based on strategic goals.”](#)

⁶⁸ [TriMet. \(2022\). “Using cash on buses and MAX.”](#)

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Penalties	Fair	TriMet has worked with the state legislature to resolve fares directly with riders, omitting police involvement. Fare evasion can result in financial penalties or community service. Penalties may be waived if a person accused of fare evasion is qualified for and enrolls in the Honored Citizen Fare. While these penalties are an improvement over resolving fare evasion through the court system, the penalty for the first offense is \$75. ⁶⁹ For people with low or no income, that could represent a significant burden. Additionally, progressive changes to fare evasion penalties only apply for adults over 18. ⁷⁰
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⁶⁹ [TriMet. \(2022\). “Fares and Fare Enforcement on TriMet.”](#)

⁷⁰ For youth under 18 a fare evasion citation must still be resolved in court. The presumptive fine will be \$175 and the maximum fine will be \$250. For more, see <https://citation.trimet.org/hc/en-us>

Gas Tax

Motor Vehicle Fuels Tax in counties and cities in the Portland region.⁷¹

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. ⁷² However, lower income households still pay a greater percentage of their income than a higher income household. ⁷³
Burden	Poor	There are no targeted exemptions or subsidies available. Oregon state law provides for motor fuels tax refunds for the purchase of gasoline for uses other than travel on public roadways. Refunds are not based on income and require burden of proof. ⁷⁴
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to drive older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. ⁷⁵
Benefits Received	Fair	Under state law, gas tax revenue must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs. In Portland, heavy vehicles (over 26,000 lbs.) are exempt from the tax but are levied the Heavy Vehicle Use Tax in replacement. ⁷⁶
Payment Methods	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
Penalties	Good	Payment is collected at point of sale.

⁷¹ [Oregon.gov. \(2022\). "Current Fuel Tax Rates."](#)

⁷² [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

⁷³ [Axios. \(2019\). "Percentage of after-tax income spent on gas, by income bracket."](#)

⁷⁴ [OregonLaws. \(2021\). "Motor Vehicle and Aircraft Fuel Taxes."](#)

⁷⁵ [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

⁷⁶ [City of Portland Bureau of Transportation. \(2022\). "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)

Vehicle Registration Fee

A vehicle registration fee that is collected by the state for local jurisdictions. Fee amount varies by municipality

Share	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set as a flat rate.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	The fee is not tiered based on age or value of vehicle.
Benefits Received	Fair	Under state law, motor vehicle fee or tax revenue must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.
Payment Methods	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. ⁷⁷
Penalties	Fair	Vehicle registration fees must be paid in order to receive the registration. Penalties may be incurred for operating an unregistered vehicle. ⁷⁸

⁷⁷ [Oregon Driver & Motor Vehicle Services. \(2022\). “DMV Fees.”](#)

⁷⁸ [Oregon Judicial Department. \(2021\). “Schedule of Fines on Violations.”](#)

Transportation System Development Charges

The majority of the region’s cities and counties have transportation system development charges (TSDCs). TSDCs are one-time fees levied on new development, usually at the time a building permit is issued, that are meant to recoup a fair share of the cost of additional infrastructure capacity required to serve the development.⁷⁹ In Oregon, state law requires that revenue only be spent on capital projects.⁸⁰ Local municipalities may have additional requirements on use of revenue.

Share	Poor	The fee is levied on developers; however, the cost may be passed on to residents. As mentioned in the “nexus” and “tiered” measures, biases in assessing the amount of TSDCs owed by developments may reduce the amount of development of dense and more affordable housing.
Burden	Fair	Portland offers exemptions and reductions of TSDCs for developers building affordable housing. ⁸¹ Policies differ by municipality.
Tiered	Poor	Most infrastructure impact/finance methodologies fail to account for variations in the characteristics of a unit and its impact on the overall infrastructure system. Middle housing has a lesser per unit impact on infrastructure systems in comparison to single-family detached dwellings, yet most infrastructure planning and finance methodologies assume similar per unit impacts, regardless of the characteristics of the unit or local context of development, both of which significantly affect the actual infrastructure impact of a particular development. ⁸²
Benefits Received	Poor	The developer, and potential residents, paying the fee will benefit from improved infrastructure. The fee is levied to cover the costs of additional infrastructure capacity required by the development. However, this dynamic biases TSDC estimates against smaller and higher-density developments, precludes housing development where the demand is greatest, and decreases the affordability of housing. ⁸³
Payment Methods	Good	The fee is paid by the developer who is unlikely to be unbanked. Portland allows for payment by cash, check, money order, or credit card. ⁸⁴
Penalties	Good	The fee is paid by the developer, typically at the time the City issues the building permit.

⁷⁹ [Metro. \(2007\). “System Development Charges.”](#)

⁸⁰ [Oregon Legislature. \(2021\). “Local Improvements and Works Generally.”](#)

⁸¹ [Portland Housing Bureau. \(2022\). “System Development Charge \(SDC\) Exemption Program.”](#)

⁸² [National Housing Conference. \(2022\). “NHC Housing policy Guide, Common Revisions to Impact Fees.”](#)

⁸³ [National Housing Conference. \(2022\). “NHC Housing policy Guide, Common Revisions to Impact Fees.”](#)

⁸⁴ [Portland.gov. \(2022\). “Systems Development Charges \(SDCs\).”](#)

Trip-Based Utility Fees

Several local jurisdictions levy a trip-based utility fee that funds transportation.^{85 86 87 88 89}

Share	Fair	Dependent on the jurisdiction. Everyone pays the same fee regardless of income. But some jurisdictions offer qualified low-income households the opportunity to waive the fee, which does help balance the higher proportion of income that low-income households would have to pay.
Burden	Fair	Dependent on the jurisdiction. Utility assistance programs are available but may have limited funds and may only cover assistance once annually.
Tiered	Good	Dependent on the jurisdiction. In some locations rates are tiered based on property type, the benefit a property will receive from improvements, and the estimated number of trips a property generates.
Benefits Received	Good	Dependent on the jurisdiction. Rates are partially set based on the estimated number of trips a property generates. Properties that will receive a greater benefit pay a higher rate. Fees are generally spent locally on street maintenance, active transportation projects, or ADA improvements.
Payment Methods	Fair	Dependent on the jurisdiction. Payments options are available with cash, check, money order, online payment, or credit/debit card. In-person cash payments may be limited depending on the location or fee that must be paid.
Penalties	Poor	Dependent on the jurisdiction. Late payments may result in fees or penalties. Non-payment may result in termination of utility services.

⁸⁵ [Milwaukie, Oregon. \(2022\). "Transportation Utility Rates."](#)

⁸⁶ [City of Sherwood Oregon. \(2022\). "Current Service Rates."](#)

⁸⁷ [City of Tualatin Oregon. \(2022\). "Usage Rates."](#)

⁸⁸ [City of Sherwood Oregon. \(2022\). "Low Income/Hardship Assistance."](#)

⁸⁹ [City of Milwaukie. \(2022\). "Other Ways to Pay."](#)

Franchise Fees

Utility franchise fees that fund transportation are collected in Beaverton, Milwaukie, and West Linn. Utility franchise fees are paid by utility providers, such as NW Natural Gas, to the municipality for use of the right-of-way. In Beaverton, the tax is 5% of gross revenue.⁹⁰

Share	Fair	Fees paid by utility companies. Fees may be passed on to consumers.
Burden	Fair	No targeted exemptions or subsidies provided.
Tiered	Poor	The tax is a set percentage regardless of the value of the service.
Benefits Received	Fair	The companies paying the fees benefit from the use of the right-of-way. Collection is based on use of the right-of-way and funds return to the transportation system.
Payment Methods	Good	Payment is through utility providers who are not unbanked.
Penalties	Good	Right-of-way permits will not be granted without payment of the fee.

⁹⁰ [Beaverton Oregon. \(2022\). “Rights of Way.”](#)

PGE Privilege Tax

Portland General Electric (PGE) privilege tax is collected in Milwaukie. It is a 1.5% tax on total PGE revenues in the city. The tax is passed to customers of PGE as an itemized charge on electricity bills.^{91 92}

Share	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
Burden	Poor	There are targeted exemptions or subsidies available to qualified customers, but funding is limited and there is no guarantee that assistance will be granted. ⁹³
Tiered	Poor	The tax is the same regardless of energy consumption per person.
Benefits Received	Fair	All consumers of electricity pay the tax regardless of their use of the transportation system, but funds are spent locally on street repair and maintenance.
Payment Methods	Good	PGE accepts cash, account transfer, and credit or debit card as payment for services. ⁹⁴
Penalties	Poor	Late-payment charges may be applied if a bill is not paid in full. ⁹⁵

⁹¹ [City of Milwaukie. \(2006\). "Street Surface Maintenance Program."](#)

⁹² [City of Milwaukie. \(2013\). "Milwaukie PGE Privilege Tax."](#)

⁹³ [Portland General Electric. \(2022\). "Energy Assistance Programs \(OEAP, LIHEAP Oregon & More\)."](#)

⁹⁴ [Portland General Electric. \(2022\). "Billing & Payment Options."](#)

⁹⁵ [Portland General Electric. \(2022\). "Understanding My Bill."](#)

Parking Fees and Fines

Portland charges for parking in a set of districts across the city, including Downtown and the Lloyd District, amongst others. Parking costs vary from \$1 to \$2 per hour depending on the district. Parking is generally charged a fee during the day on weekdays with some districts offering free parking on one or both weekend days.⁹⁶

Share	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set as a flat rate.
Burden	Poor	No targeted exemptions or subsidies available.
Tiered	Good	Parking fees are based on time of day and location, approximating the value of the parking space.
Benefits Received	Fair	The funds return to the transportation system but do not always fund parking or vehicle-related improvements; Parking fee revenue is general discretionary transportation revenue at PBOT. ⁹⁷
Payment Methods	Poor	Parking is paid for via app or at a meter via credit or debit card. Citations may be paid with check, money order, online, or credit or debit card.
Penalties	Poor	Drivers may receive a citation if they do not pay to park or stay past the paid period. Penalties may occur for unpaid or paid late citations. ⁹⁸

⁹⁶ [Portland Bureau of Transportation. \(2022\). "Public parking in Portland."](#)

⁹⁷ [Portland Bureau of Transportation. \(2021\). "Adopted Budget FY 2021-2022, Volume 1 City Summaries & Bureau Budgets."](#) On-street parking meter revenues comprises one of the largest portions of discretionary (unrestricted) revenues at PBOT. Pg. 522.

⁹⁸ [Portland Bureau of Transportation. \(2022\). "Common Parking Violations and Bail Schedule."](#)

Urban Renewal Tax

Urban renewal areas, also known as Tax Increment Financing (TIF) districts, receive funding in two different ways: the Urban Renewal Division of Tax and the Urban Renewal Special Levy. Division of tax funds are a portion of existing property taxes that are dedicated to a given TIF district, they are not an additional tax on residents. Special levies are additional taxes that are used to pay bonded indebtedness in special districts that receive a limited amount of “divide-the-tax” revenue. In Portland, there are three districts that receive special levy funds, all of which are set for repayment by 2025.⁹⁹ Portland taxes are collected through Multnomah County. Clackamas County has urban renewal districts but only relies on TIF funds that are generated through existing property taxes, not special levy funds.¹⁰⁰

Share	Fair	Property taxes are based on the assessed value of a property, not the owner’s ability to pay. Lower income households may pay a greater percentage of their income than a higher income household. However, property taxes are less regressive than many other types of transportation revenue sources.
Burden	Poor	Multnomah County offers a limited tax exemption based on qualifying income and property. Exemptions and deferrals are also offered for senior citizens, disable citizens, active-duty military, and veterans. ¹⁰¹ Clackamas County does not appear to offer any income-based exemptions or subsidies.
Tiered	Good	Tax amounts are based on assessed value of the property. Higher-income earners typically, but not always, live in higher-valued homes.
Benefits Received	Good	Taxes are paid by all homeowners in a jurisdiction and revenue is spent on local transportation projects within specified districts. TIF districts can be used to fund improvements in historically underserved communities, including transportation projects and supporting transit and active transportation, which have a positive equity component.
Payment Methods	Fair	Payments can be made with direct transfer, credit or debit, or by check. Property taxes only impact property owners, which are less likely to be unbanked. ^{102 103}
Penalties	Poor	Interest accrues on past due payments at a rate of 16% annually. Property with three years of delinquent taxes may be subject to foreclosure. ^{104 105}

⁹⁹ [Prosper Portland. \(2021\). “Your property tax bill and urban renewal.”](#)

¹⁰⁰ [Clackamas County. \(2011\). “Urban Renewal in Clackamas County.”](#)

¹⁰¹ [Multnomah County. \(2022\). “DART Special Programs.”](#)

¹⁰² [Multnomah County. \(2022\). “Pay Property Taxes.”](#)

¹⁰³ [Clackamas County. \(2022\). “Payment Options.”](#)

¹⁰⁴ [Multnomah County. \(2022\) “Property Tax Payment FAQs.”](#)

¹⁰⁵ [Clackamas County. \(2022\). “Foreclosures.”](#)

Street Light User Fee

Wilsonville charges a Street Light User Fee. The fee is based on the cost of street lighting and takes into consideration the type of pole and light fixture. The fee is included in the municipal utility bill.^{106 107}

Share	Poor	Everyone pays the same fee regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
Burden	Poor	The City provides an annual grant to Wilsonville Community Sharing (WCS), a local community social-services agency. WCS provides assistance with utility bills for individuals that qualify based on income. Access to information about WCS is not apparent on the government’s utility billing website. ¹⁰⁸
Tiered	Good	The fee amount is based on the type of fixture in the surrounding area.
Benefits Received	Fair	All units are charged a Street Light fee regardless of lighting for the location of service. Fees are used to exclusively fund the installment and maintenance of streetlights. ¹⁰⁹
Payment Methods	Good	The City accepts cash, check, Visa, Mastercard, or Discover for utility billing payments.
Penalties	Poor	Late fees for utility bills are 9% Per Annum or a Minimum of \$5.00 whichever is greater

¹⁰⁶ [Wilsonville Oregon. \(2022\). “Utility Billing Rates & Fees.”](#)
¹⁰⁷ [Wilsonville Oregon. \(2022\). “City of Wilsonville Utility Billing.”](#)
¹⁰⁸ [Wilsonville Community Sharing. \(2022\). “Utilizing our Services.”](#)
¹⁰⁹ [Wilsonville Code of Ordinances. \(2022\). “Street Lighting Fund.”](#)

Property Taxes

Washington County partially funds their Major Streets Transportation Improvement Program (MSTIP) and Urban Road Maintenance District with property taxes.¹¹⁰

Share	Fair	Property taxes are based on the assessed value of a property, not the owner's ability to pay. Lower income households may pay a greater percentage of their income than a higher income household. However, property taxes are less regressive than many other types of transportation revenue sources. ¹¹¹
Burden	Poor	There are no targeted exemptions or subsidies available based on ability to pay. Exemptions and deferrals are offered for senior citizens, citizens with disabilities, and veterans.
Tiered	Good	Tax amounts are based on assessed value of the property. Higher-income earners typically, but not always, live in higher-valued homes.
Benefits Received	Good	Taxes are paid by property owners and revenue is spent on local transportation projects through the Major Streets Transportation Improvement Program (MSTIP). MSTIP funding improves the transportation system for bicyclists, pedestrians, drivers, and transit passengers. Funding transit and active transportation has a positive equity component.
Payment Methods	Fair	Payments can be made with direct transfer, credit or debit, or by check. Property taxes only impact property owners, which are less likely to be unbanked. ¹¹²
Penalties	Poor	Interest accrues on past due payments at a rate of 16% annually. Property with three years of delinquent taxes may be subject to foreclosure.

¹¹⁰ [Washington County Oregon. \(2022\). "Major Streets Transportation Improvement Program \(MSTIP\)."; "FAQ – Assessment and Taxation."; "Urban Road Maintenance District."](#)

¹¹¹ [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

¹¹² [Washington County Oregon. \(2022\). "Washington County Assessment and Taxation."](#)

TNC Fee

Fees can be charged on trips provided by transportation network companies (TNCs) such as Uber and Lyft. Beginning in 2018, the City of Portland charges a \$.50 fee per TNC ride that the Portland Bureau of Transportation uses to fund programs like PDX WAV¹¹³ to support on-demand transportation for users who require a wheelchair accessible vehicle. Airports also commonly charge a fee to TNCs. In October 2021, the Pricing for Equitable Mobility final report was released to modify the existing fee structure.¹¹⁴

Share	Good	All riders pay the same \$0.50 fee regardless of length of trip or household income. This could be beneficial for low-income riders who use the service from out of town.
Burden	Poor	Could impact the cost of TNCs which could impact people with lower income.
Tiered	Good	Typically, a flat fee.
Benefits Received	Good	This fee funds programs that help remove barriers to mobility. Program examples include Wheelchair-Accessible Vehicle program, Safe Ride Home Program, Taxi business incubator, and Transportation Wallet Initiative. In the POEM new recommendations, fees will also enhance driver working conditions. ^{115 116}
Payment Methods	Poor	TNCs do not typically take cash payment or not smart-phone ride requests.
Penalties	Fair	Riders would need to pay the fee to use the TNC. However, SB 1558 went into effect in June 2022, which could create inequitable debt for drivers.

¹¹³ [BikePortland. \(2022\). "Ridesharing bill would preempt Portland plans for driving fees."](#)

¹¹⁴ [City of Portland. \(2021\). "Pricing Options for Equitable Mobility."](#)

¹¹⁵ [Portland Bureau of Transportation. \(2022\). "Private For-Hire Transportation & Regulations."](#)

¹¹⁶ [Portland Bureau of Transportation. \(2019\). "City program offers discounted travel options for holiday revelers this Saturday, March 16."](#)

Local Improvement District Tax

A Local Improvement District (LID) is a mechanism for neighboring property owners to share the cost of improvements to infrastructure, where property owners agree to tax themselves (typically at least 51% of the property owners must be in favor). For transportation, it is often used to pave unimproved streets or build sidewalks. Typically, a government agency manages the design and construction of the project and often pays the indirect costs of the work. Property owners pay the direct costs, such as engineering, financing, and the payments to the contractor. Financing may be used, and individual property owners can select 5-, 10-, or 20-year financing terms. Most jurisdictions can create LIDs. Portland is the only jurisdiction in the region that included LIDs revenues in the RTP financial assumptions.¹¹⁷

Share	Poor	Assessed values for improvements are not based on income. Lower income households pay a greater percentage of their income than a higher income household. Portland only requires 51% of benefitting homeowners to be in support of a LID but all homeowners are required to share in the cost.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Fair	The cost is based on the cost of the project, but it is not typically tiered based on property values.
Benefits Received	Poor	The cost is based on actual project design and construction costs. Property owners paying the cost are directly benefiting.
Payment Methods	Fair	Property owners make payments over time. LIDs only impact property owners, which are less likely to be unbanked.
Penalties	Poor	Non-payment may result in late interest based on the amount of past due installments, penalties equal to 5% of delinquent installments, and collection charges. If unpaid after a year, the city may enforce its property lien and foreclose and sell the property to collect the outstanding loan balance, this could exacerbate inequities for low-income property owners. ¹¹⁸

¹¹⁷ [Portland.gov. \(2022\). "Local Improvement District Projects."](#)

¹¹⁸ [Portland.gov. \(2019\). "Assessment Loan Program Policy."](#)

Heavy Vehicle Use Tax

The Portland Heavy Vehicle Use Tax (HVT) applies to individuals or businesses that operate one or more heavy vehicles on streets owned or maintained by the City of Portland. A heavy vehicle is considered any vehicle that is subject to the Oregon Weight-Mile Tax (over 26,000 lbs.). For 2020-2023 the tax is 3% of the taxpayer's total Oregon Weight-Mile Tax.¹¹⁹ Heavy Vehicles pay this in lieu of the Portland local gas tax.¹²⁰

Share	Good	Tax rates are not based on household income, however, the tax is for commercial operations and is less likely to impact low-income households.
Burden	Good	No targeted exemptions or subsidies provided, however, the tax is for commercial operations and is less likely to impact low-income households.
Tiered	Fair	The tax is not tiered based on weight of vehicle or miles driven within Portland. A tiered tax would more directly tie to the damage higher weight vehicles do to roadways and may enable higher taxes for certain vehicles.
Benefits Received	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the tax funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
Payment Methods	Good	The tax is only eligible for commercial operations and is therefore less likely to impact unbanked individuals.
Penalties	Good	Failure to pay the tax or pay on time may result in penalties. While penalties for low-income households who cannot afford certain taxes or fees has a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

¹¹⁹ [Portland.gov. \(2022\). "Heavy Vehicle Use Tax."](#)

¹²⁰ [City of Portland Bureau of Transportation. \(2022\). "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)

Cannabis Tax

The State of Oregon and many cities in the greater Portland region currently impose a tax on legal purchases of recreational use cannabis or cannabis products. The State currently levies a 17% excise tax on cannabis, and municipalities in Oregon can voluntarily elect to levy an additional 3% tax. Each government body makes their own decisions on where these revenues are directed for spending; transportation is one of many policy areas that are eligible. For example, voters in the City of Portland agreed to Ballot Measure 26-180, which dedicates part of the 3% cannabis tax revenue to public safety investments, for reducing the “impacts of drug and alcohol abuse” and “street infrastructure projects that improve safety”.¹²¹ State Measure 110 which was passed in 2020 will shift most of this revenue to addiction treatment programs.

Share	Poor	Taxes on cigarettes, alcohol, and cannabis are generally regressive. Everyone pays the same tax per unit regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
Burden	Fair	As the cannabis excise tax is targeted directly at recreational cannabis, medical cannabis purchases can be seen as ‘exempted’ from the levy. While no subsidies or other exemptions exist for recreational cannabis, the burden does not disproportionately impact those who rely on the substance for medical and health purposes.
Tiered	Fair	There is no tiered system on the cannabis tax, but the amount paid is based on the price of the product. Additionally, cannabis for medical use is not taxed in the State of Oregon.
Benefits Received	Fair	This tax is collected into a general fund, which is then allocated to a variety of spending programs by policy and legislature. However, depending on the program design by each municipal jurisdiction, this revenue is not necessarily required to be spent on transportation. Indirect externalities of the public safety and drug abuse mitigation programs that come out of cannabis tax revenue can include general roadway safety improvements and reduced incidents of reckless driving. ¹²²
Payment Methods	Good	Tax is collected at point of sale in the payment medium the sale is made in. Most retail locations offer cash options.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment. The tax is collected on every transaction.

¹²¹ [City of Portland. \(2016\). “Notice of Measure Election 26-180”;](#) [Portland City Auditor, City of Portland. \(2019\). “Recreational Cannabis Tax: Greater transparency and accountability needed”.](#)

¹²² [State of Oregon Transportation Vision Panel. \(2016\). “One Oregon. A Vision for Oregon’s Transportation System”.](#) See Appendix D: Funding Applicability Matrix.

Emerging Transportation Revenue Sources

Freeway Tolling

Drivers pay to drive on a particular roadway, the fee is a flat rate and not dependent on congestion or time of day.

Share	Variable	If the freeway tolling program subsidizes tolls under an income threshold, the fee is more progressive.
Burden	Variable	Freeway tolling that use transponders can be less equitable because while they can offer discounted tolls based on the vehicle traveling through, the discount can only be used after purchasing a transponder, which is a barrier to access. ¹²³
Tiered	Variable	Freeway tolling can be equitable if the fee is dependent on type of vehicle used to travel on the roadway.
Benefits Received	Variable	Tolling programs that use the revenue to pay for wear and tear on those roadways are less equitable than programs that use the revenue to fund transit infrastructure projects.
Payment Methods	Poor	The majority of roadway and toll pricing technology has evolved beyond physical toll booths which provide a cash option. Roadway and toll pricing typically relies on a variety of technologies to identify vehicles passing a certain point on roadways. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees
Penalties	Variable	Fees that are collected at point of sale are more equitable than fees that are charged at a later date and can compound into debt.

¹²³ [U.S. Department of Transportation Federal Highway Administration. \(2008\). "Income-Based Equity Impacts of Congestion Pricing."](#)

Vehicle Miles Traveled (VMT) Fee/ Road User Charge (RUC)

Drivers pay for every mile traveled, as known as a road user charge. In 2013, the Oregon State Legislature passed SB 810, which created the permanent voluntary RUC program known as OReGO. The program went live on July 1, 2015, and became the first fully functional VMT fee/ road user charge program in the nation. ODOT’s Road User Fee Taskforce has since conducted a tax equity review of the RUC.¹²⁴

Share	Poor	Data from Oregon’s OReGO program (2009-2011 data) revealed that lower-income households pay a disproportionate percentage of their income to the RUC; the higher the household income, the smaller the percentage.
Burden	Variable	VMT fees and RUC programs can be designed to exempt certain demographics or target particular vehicle types, which can alleviate the regressivity.
Tiered	Variable	Again, variable by program design. Fees that are based on the price of the vehicle travelling on the roadway are more equitable.
Benefits Received	Variable	Fees that are linked to the type of roadway are more equitable because they ensure that revenue is generated to improve the areas where the payer is traveling. ¹²⁵
Payment Methods	Poor	VMT programs may implement different tracking mechanisms. Self-reporting and a cash option may be feasible but would present a burden. Oregon’s pilot program, OReGO, requires a bank card to open an OReGO account. ¹²⁶
Penalties	Variable	Variable by program design.

¹²⁴ [Oregon Department of Transportation. \(2022\). “Road Usage Charging: Vehicle Ownership & Socioeconomic Equity”.](#)

¹²⁵ Transportation Research Record. (2012). “Equity Evaluation of Fees for Vehicle Miles Traveled in Texas.”

¹²⁶ [OReGO. \(2022\). “Sign up for OReGO!”](#)

Cordon Pricing

Drivers pay to enter a designated area.

Share	Variable	Income based fees are more progressive. ¹²⁷
Burden	Variable	Fee exemptions, rebates, and discounts for low-income households are more equitable. ^{Ibid.}
Tiered	Variable	Vehicle- and mode-based fees are more progressive. ^{Ibid.}
Benefits Received	Variable	Pricing is equitable when revenue is reinvested in equitable and sustainable transportation options, like transit. ^{Ibid.}
Payment Methods	Poor	Cordon pricing typically relies on a variety of technologies to identify vehicles entering a priced area. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees. ^{Ibid.}
Penalties	Variable	Progressive fees are collected at point of sale.

¹²⁷ [Portland Bureau of Transportation. \(2020\). "Tolling: Background Memo."](#)

Roadway Pricing

Drivers pay to drive on a particular roadway, the fee is variable based on congestion or time of day.

Share	Variable	Progressive fees vary depending on household income.
Burden	Variable	Pricing that subsidizes or target exemption fees under an income threshold is more equitable.
Tiered	Variable	Tiering payments based on time of day is beneficial to increasing the equity of a fee since “peak hour drivers have higher incomes.” ¹²⁸
Benefits Received	Variable	Fees that targeted transit, bike, and pedestrian reinvestment would be more progressive. ¹²⁹
Payment Methods	Poor	The majority of roadway and toll pricing technology has evolved beyond physical toll booths which provide a cash option. Roadway and toll pricing typically relies on a variety of technologies to identify vehicles passing a certain point on roadways. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees
Penalties	Variable	Progressive fees are collected at point of sale.

¹²⁸ [City Commentary. \(2017\). “Transportation equity: Why peak period road pricing is fair”](#); University of Minnesota. (2015). “Integrated Public Use Microdata Series: Version 6.0.”

¹²⁹ [Oregon Metro. \(2021\). “Metro Regional Congestion Pricing Study.”](#)

Parking Pricing

Drivers pay to park in certain areas.

Share	Variable	Parking pricing that accepts vouchers, transit credits, or reduced fares depending on household income promotes equity.
Burden	Variable	Outcomes are dependent on program design. For example, the City of Portland is not currently able to put into place a parking meter discount or exemption program for low-income drivers. This will require better data, outreach, policy development and potentially technology changes. However, the City has identified an interim step in alignment with POEM recommendations, the transaction fee will allow PBOT to expand distribution of its affordable housing Transportation Wallet program, which provides households on lower incomes with passes and credits that can be used for transit, BIKETOWN, scooter-share, taxis, Uber and Lyft, and other options. It will also help support the BIKETOWN for All program that provides discounted bike-share memberships for Portlanders living on a low income. Finally, the fee will also fund greater research and policy development to inform more robust affordability protections in advance of any future rates increases, as well as outreach around existing affordability programs, such as the SmartPark swing shift reduced rates for people living on low incomes. ¹³⁰
Tiered	Variable	Tiered parking pricing based on household income promotes equity.
Benefits Received	Variable	Programs that reinvest revenue from parking fees to transportation affordability remove barriers to access active transportation options.
Payment Methods	Poor	The majority of parking meter technology has evolved beyond coin operated machines and relies on the use of a credit card. If a cash option is available, it would require additional steps for the driver to submit a form and payment.
Penalties	Variable	Progressive fees are collected at point of sale.

¹³⁰ [Portland.gov. \(2022\). "Parking Climate and Equitable Mobility Transaction Fee Overview."](#)

Potential Future

Carbon Fee

Emitters are charged for each ton of greenhouse gas emissions they emit. Also known as emissions fees, carbon fees can be applied to emitters directly or as a tax on goods or services that are greenhouse gas-intensive such as a carbon tax on gasoline.¹³¹ The implementation of carbon fees are primarily conducted through two policy mechanisms, emissions trading (cap-and-trade); and emissions tax.

Share	Variable	On its own, the purely financial share of an emissions tax is generally regressive, meaning lower income households would pay a larger proportion of their income towards a carbon tax. This is due in many ways to how carbon-intensive technologies and consumption is cheaper than green technology. ¹³² However, parts of the carbon fee revenue can be used to offset income taxes for lower-income households, creating a net positive effect.
Burden	Variable	To offset the regressivity of an energy, emissions, or carbon tax, other forms of subsidies such as income tax credits can be helpful. However, the burden is placed upon lower income households to demonstrate need for and knowledge of potential rebates available to them.
Tiered	Poor	The carbon tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles.
Benefits Received	Variable	The benefits of a carbon tax are highly dependent on the program design, especially if additional measures such as rebates and tax credits are included. Although lower-income households are much more likely to change their behaviors as a result of a carbon tax, those who can afford the added cost may not necessarily change their behaviors. Once again, the actual net financial benefit for transportation funding and for vulnerable populations are largely variable and not immediately evident.
Payment Methods	Variable	Depending on what carbon or emissions sources are taxed, the payment methods could be as straightforward as a post-transaction addition (such as a sales tax on purchasing gas), or added to an energy bill. If the emissions fee is taxed upstream at the point of production, this cost might also be imposed upon consumers via price increases in the purchase of the energy goods themselves. As such, payment methods should be largely unchanged from the status quo.
Penalties	Variable	This is dependent on the payment method. Generally, an indirect sales tax or a price increase would not offer opportunities to not pay the cost of a carbon tax.

¹³¹ [Center for Climate and Energy Solutions. \(2022\). "Carbon Tax."](#)

¹³² [National Bureau of Economic Research. \(2010\). "How Regressive is a Price on Carbon?"](#)

Regional Gas Tax

Taxes on motor fuels can be collected at multiple levels of government, including regionally. Metro, the Portland regional government does not currently collect motor fuel taxes.

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. ¹³³ However, lower income households still pay a greater percentage of their income than a higher income household. ¹³⁴
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. ¹³⁵
Benefits Received	Good	Road users would pay a tax collected and spent regionally, benefiting more directly than gas taxes collected at the state or federal level. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. ¹³⁶
Payment Methods	Good	Payment is collected at the pump and is included in the overall price of gasoline. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

¹³³ [BikePortland. \(2016\). “Low-income households drive much less than high-income households.”](#)

¹³⁴ [Axios. \(2022\). “High gas prices hit low-income Americans the hardest.”](#)

¹³⁵ [Natural Resources Defense Council. \(2022\). “Electric vs. Gas Cars: Is It Cheaper to Drive an EV?”](#)

¹³⁶ [Congressional Research Service. \(2021\). “Federal-Aid Highway Program \(FAHP\): In Brief.”](#)

Gas Tax Indexing

Indexing the motor fuel tax to the Consumer Price Index or other index allows the tax rate to keep pace with the pace of inflation.¹³⁷

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households pay a greater percentage of their income than a higher income household. Lower income household may also have longer commutes to work and less access to transit.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles.
Benefits Received	Good	Road users are paying the tax which supports the Highway Trust Fund. The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. ¹³⁸ The majority of the Highway Trust Fund supports roadways. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. ¹³⁹
Payment Methods	Good	Payment is collected at the pump and is included in the overall price of gasoline. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

¹³⁷ [Mobility Investment Priorities. \(2022\). "Index Statewide Motor Fuels Tax."](#)

¹³⁸ [U.S. Department of Transportation Federal Highway Administration. \(2022\). "Fixing America's Surface Transportation Act or "FAST Act."](#)

¹³⁹ [Congressional Research Service. \(2021\). "Federal-Aid Highway Program \(FAHP\): In Brief."](#)

Studded Tire Fee

Studded tires increase wear to road surfaces, reducing pavement life. Charging a fee on new studded tires can offset some of the road maintenance costs.¹⁴⁰

Share	Fair	Fees are set as a flat rate; however, not all drivers use studded tires. A studded tire fee disproportionately impacts drivers based on their geography, particularly areas that face heavier snowfall and treacherous driving conditions. Since rural areas are typically lower income per capita than urban areas (which often have snow-clearing services), a studded tire fee can potentially impact lower income households disproportionately.
Burden	Variable	This is dependent on program design (e.g., Washington State has exemptions for their studded tire fee). Exemptions based on time of year can help reduce year-round costs to users, and promotion of alternatives such as non-studded traction tires can help reduce the reliance on cheaper studded tires. Discouraging the use of safer tires can have fatal consequences, especially if drivers are forced to use regular tires due to cost.
Tiered	Poor	Fees are the same regardless of type of vehicle.
Benefits Received	Variable	This is dependent on program design. In most existing examples the fee is used to fund road maintenance costs caused by studded tires, which benefits all road users.
Payment Methods	Good	Payment is collected by the tire seller and is included in the overall price of the tire.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

¹⁴⁰ [Department of Revenue Washington State. "Tire fees and studded tire fees."](#)

Regional Vehicle Registration Fees

A vehicle registration fee collected by the state and distributed to regional governments. A regional vehicle registration fee is not currently collected.¹⁴¹ Vehicle registration fees can be tiered by classification of the vehicle, and is often applied heavily on electric vehicles to recover decreasing motor fuels tax revenue.

Share	Variable	This is dependent on program design and tiering. Fees are generally set at a flat rate for each tier. For example, if fuel efficiency is used, this can disproportionately impact lower-income households as older cars tend to have lower MPG ratings. By classification, EV specific fees shifts part of the lifetime cost of vehicle ownership upfront, which can further disincentivize purchase of EVs. Recurring ongoing costs are known to be less psychologically influential as a one-time, larger upfront cost.
Burden	Variable	This is dependent on program design and highly dependent on what other confounding priorities exist in transportation and urban policy. While exemptions for financially vulnerable demographics can alleviate the initial barrier to accessing an EV, the long-term tradeoff of reduced revenue will hurt infrastructure improvements that those very communities may rely on. In Multnomah County, veterans with disabilities are exempt from the fee. Other exemptions and reductions can be designed, including coordination with incentive programs for registering and purchasing new electric vehicles.
Tiered	Variable	This is dependent on program design. Fees can be applied higher or lower depending on size, fuel efficiency, or classification of a vehicle. Electric vehicles are charged a heavier fee in some states to recoup expected lost revenues from their lack of motor fuel purchases.
Benefits Received	Fair	Drivers and owners of vehicles pay the fees, however, the amount of the fees is not based on the amount that a driver operates a vehicle or the number of miles a particular vehicle is driven. Under state law, the vehicle registration fees must be spent in the road right-of-way, including roadways, bikeways, and walkways. Depending on program design, some states have appropriated parts of EV specific fees to pay for charging infrastructure, which will further incentivize EV purchase (and emissions reductions). The greatest benefit will go to those using the roadways the most.
Payment Methods	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services.
Penalties	Fair	Vehicle registration fees must be paid to receive the registration. Penalties may be incurred for operating an unregistered vehicle.

¹⁴¹ [Eco-Northwest. \(December 2019\). "Metro Transportation Revenue Tool Analysis and Evaluation, Final Analysis."](#)

First-Time Title Fee on New Vehicles

A vehicle registration fee or vehicle title fee assessed at a higher rate for new vehicles. A first-time fee on new vehicles differs from the existing privilege tax. The privilege tax is a .005 percent tax on the retail price of any vehicle purchased from a dealer in Oregon, with a few exceptions. This fee would be an additional title fee for new vehicles. The difference would likely be that this would be a flat fee or a scaled fee based on vehicle value, but it would not exceed certain thresholds, unlike the privilege tax.¹⁴²

Share	Fair	Lower-income households are more likely to buy used cars, but not exclusively.
Burden	Variable	This is dependent on program design. Administering agencies can opt to exempt different demographics based on the priorities of the agency, such as income or residential demographics.
Tiered	Fair	Dependent on program design but any new vehicle fee is tiered when not applied to used vehicles.
Benefits Received	Fair	Buyers of new vehicles pay the fees; however, the greatest benefit will go to those using the roadways the most. Under state law, vehicle fees must be spent in the road right-of-way, including roadways, bikeways, and walkways.
Payment Methods	Good	When collected at time of vehicle purchase.
Penalties	Fair	Vehicle registration and licensing fees must be paid to receive the registration. Penalties may be incurred for operating an unregistered vehicle.

¹⁴² [Oregon Driver & Motor Vehicle Services. \(2022\). "Vehicle Title, Registration & Permit Fees."](#)

General Sales Tax

Sales taxes are applied to the purchase of all or most goods and services as a percentage of the total sale.

Share	Poor	Everyone pays the same tax on items regardless of income. Lower income households pay a greater percentage of their income than a higher income household. General sales tax exemptions for items such as groceries and utilities that constitute a larger share of income for poorer taxpayers, or targeted low-income tax credits instead of exemptions are options to provide relief for low-income taxpayers and make the tax more progressive. ¹⁴³
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	Sales is the same regardless of the purchases made.
Benefits Received	Poor	This is dependent on program design. General sales taxes have few direct connections to transportation projects.
Payment Methods	Good	Collected at point of sale in the payment medium the sale is made in.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

¹⁴³ [Institute on Taxation and Economic Policy. \(2011\). "Options for Progressive Sales Tax Relief."](#) "Exemptions and credits are both progressive options for low-income tax relief—but neither is sufficient to offset the basic regressivity of sales taxes. Sales tax exemptions and credits should each be part of a broader strategy for tax fairness that includes a progressive, graduated personal income tax, but sales tax breaks are likely to be insufficient on their own to eliminate the unfairness of state and local taxes."

Targeted Sales Tax

Targeted sales taxes are applied to specific goods and services. Also known as an excise tax if it is levied at moment of manufacture rather than a sale.¹⁴⁴

Share	Variable	This is dependent on the goods and services that are taxed. In general, lower income households pay a greater percentage of their income than a higher income household. Some products are taxed at multiple levels, which compounds regressivity and diminishes consumption. This can potentially lead to a decline in tax revenue at other levels of government.
Burden	Variable	This is dependent on program design, as well as the goods and services that are taxed. Targeting the tax on non-essential goods such as tobacco, alcohol, and betting can have potential in avoiding the blanket regressivity of a general sales tax, but can also exacerbate the financial struggles of long-term users. Excise taxes on luxury goods can be more equitable.
Tiered	Variable	This is dependent on program design. Exemptions could be made on certain tax-free days, such as back-to-school sales where school supplies are made exempt. This would be a form of time and product-based tiering.
Benefits Received	Variable	This is dependent on program design. Most taxation of this form rarely goes towards transportation projects.
Payment Methods	Good	Collected at point of sale in the payment medium the sale is made in.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

¹⁴⁴ [Multnomah County. \(2022\). "Excise Taxes."](#)

Business Income Tax

All businesses except partnerships file an annual federal income tax return, states can also levy income taxes on businesses.¹⁴⁵

Share	Variable	This is dependent on program design, and what the thresholds are for each bracket. Whether this income tax is regressive, highly depends on how much small and local businesses pay relative to what national or multinational corporations are responsible for.
Burden	Variable	This is dependent on program design. Similar to personal income taxes, tax credits can be implemented to alleviate the burden on small businesses and local enterprises.
Tiered	Variable	This is dependent on how the tax brackets and thresholds are designed. Business income taxes can also be tiered by number of employees, and whether they qualify as small-and-medium-enterprises (SMEs).
Benefits Received	Poor	This is dependent on program design, but there is no direct connection to transportation projects.
Payment Methods	Good	Is paid by businesses directly.
Penalties	Fair	Penalties or fine could pose a burden for small businesses.

¹⁴⁵ [Internal Revenue Service. \(2022\). “Business Taxes.”](#)

Corporate Activities Tax

Applied in Oregon to business with \$1 million or more taxable commercial activity, the total amount a business realizes from transactions in Oregon. The funds are currently dedicated to student and education spending.¹⁴⁶

Share	Good	Paid by businesses with a threshold of commercial activity.
Burden	Fair	Passed on in the price of commercial activity, but not directly levied on low-income residents.
Tiered	Good	Applies only to businesses above a threshold.
Benefits Received	Fair	All will benefit but some businesses may rely on transportation network more than others.
Payment Methods	Good	Is paid by businesses directly.
Penalties	Fair	Penalties or fine could pose a burden for small businesses.

¹⁴⁶ [Oregon Department of Revenue. \(2019\). "Corporate Activity Tax \(CAT\)."](#)

Zero-Emission Zone (ZEZ) and Low Emission Zone (LEZ)

Zero-Emission Zones (ZEZ) and Low Emission Zones (LEZ) are a similar concept to cordon-based congestion pricing, zones are identified and vehicles entering are charged a fee if they do not meet emissions and other requirements.¹⁴⁷ This approach can also apply to deliveries only.¹⁴⁸ Enforcement is generally conducted through traffic cameras, which run license plates through registration databases.

Share	Variable	Similar to emissions fees, these have potential to be regressive as highly pollutive vehicles are more likely to be represented in lower income households.
Burden	Variable	This is dependent on program design. ZEZ and LEZ should not be enforced in low-income neighborhoods. Low-income households should not need to pay ZEZ and LEZ fees, as these zones may house essential places for individuals, e.g., place of work, grocery, medical services.
Tiered	Variable	This is dependent on program design. A tiered fee based on income level would remove some barriers to accessibility.
Benefits Received	Variable	This is dependent on program design. Equitable ZEZ and LEZ fees would be invested into accessible transit to and from low-income neighborhoods.
Payment Methods	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
Penalties	Variable	This is dependent on program design. It would be most equitable to offer low-income households prepaid debit cards to use for entering ZEZ and LEZ.

¹⁴⁷ [The International Council on Clean Transportation. \(2021\). “A Global Overview of Zero-Emission Zones in Cities and Their Development Progress.”](#)

¹⁴⁸ [Los Angeles Cleantech Incubator. \(2022\). “Santa Monica Zero Emissions Delivery Zone Pilot.”](#)

Curb Use Fees

Fees can be charged to delivery vehicles, TNCs (e.g., Uber, Lyft), and other curb users who are regulated through additional fees such as the TNC fee described above. Charging all curb users a fee requires metering or other form of payment system.

Share	Variable	This is dependent on program design. For Uber, drivers make around \$30K less than the Portland median income ¹⁴⁹ . As a result, TNC should pay for curb use fees or allow drivers to pay based on their income.
Burden	Variable	This is dependent on program design. To promote equity, TNC can subsidize fees for drivers below a certain income threshold.
Tiered	Variable	This is dependent on program design. Tiered pricing based on the value of the car would make the fees more equitable.
Benefits Received	Variable	This is dependent on program design. Equitable benefits would ensure fees went into transit access and installation.
Payment Methods	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
Penalties	Variable	This is dependent on program design. Penalties should not force drivers to lose their jobs or go into debt, as that would create an endless cycle.

¹⁴⁹ [Indeed. \(2022\). "Driver yearly salaries in the United States at Uber."](#)

First/Last Mile Delivery Fees

The Zero Emission Zone (ZEZ) and Low Emission Zone (LEZ) (a similar concept to cordon-based congestion pricing, zones are identified and vehicles entering are charged a fee if they do not meet emissions and other requirements.¹⁵⁰ This approach can also apply to deliveries only¹⁵¹) as well as curb use fees that can be applied specifically to delivery to incentive more sustainable delivery and raise revenue. Electrifying First/Last Mile Delivery Fees can significantly decrease heavy-duty vehicle use. A fee for vehicles outside of ZEZ or LEZ can help incentivize the change.¹⁵² To approach this equitably, the employer should be responsible for those fees or households on a tiered system could be responsible if they are high-income. Lower-income households should not be penalized for living outside the city center when the city center is too expensive to be livable. Additionally, if corridors provide EV charging stations, this creates more opportunity to drive in a ZEZ or LEZ.

Share	Variable	This is dependent on program design. TNC would need to cover the fees or low-income households would pay a proportionate fee to make the fee equitable.
Burden	Variable	This is dependent on program design; however, an equitable program would subsidize fees for households below an income threshold.
Tiered	Variable	This is dependent on program design, but equitable tiered fees would change depending on the weight and value of the vehicle entering the ZEZ or LEZ.
Benefits Received	Variable	This is dependent on program design. To make the program equitable, fees need to be reinvested in transit programs and access in low-income neighborhoods.
Payment Methods	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
Penalties	Variable	This is dependent on program design. Individuals should not be penalized for driving in ZEZ or LEZ even if they still have unpaid fees when they are working or accessing essential locations. If their fees cannot be paid, there should be a re-evaluation of the fee structure for the most equitable program.

¹⁵⁰ [The International Council on Clean Transportation. \(2021\). "A Global Overview of Zero-Emission Zones in Cities and Their Development Progress."](#)

¹⁵¹ [Los Angeles Cleantech Incubator. \(2022\). "Santa Monica Zero Emissions Delivery Zone Pilot."](#)

¹⁵² [The International Council on Clean Transportation. \(2022\). "Electrifying Last-Mile Delivery: A Total Cost of Ownership Comparison of Battery-Electric and Diesel Trucks in Europe."](#)

Vehicle Rental Fees

Additional fee that renter pays to the jurisdiction that enacts the fee. Depending on the state and region, the fee will be reinvested into the surrounding area but not necessarily into transportation funding.¹⁵³

Share	Variable	This is dependent on program design but would be most equitable if fees were paid by rental companies or charged depending on household income.
Burden	Variable	This is dependent on program design. To avoid regressive taxes/fees, fees should be eliminated for households below an income threshold, where various forms of proof are acceptable.
Tiered	Variable	This is dependent on program design. The value and weight of the vehicle that is rented should determine the exact amount paid by renter.
Benefits Received	Variable	This is dependent on program design. A general fund does not provide equitable benefits, nor do tourism-related events; however, fees that fund transportation projects allow for accessible and equitable opportunities.
Payment Methods	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
Penalties	Variable	This is dependent on program design. To eliminate any penalty structure or legal repercussion, fees should be included in initial cost and be available by loan system if necessary.

¹⁵³ [Tax Foundation. \(2019\). "Reforming Rental Car Excise Taxes."](#)

Traffic Fines

Fines incurred by the person driving a car for violating a variety of different regulations, ultimately determined by the police officer issuing the ticket. Black Oregonians have paid roughly \$5.6 million more than White Oregonians.¹⁵⁴

Share	Poor	Lower-income households pay the same fines.
Burden	Poor	There are no exemptions. Payment plans can be set-up through calling the accounting department, but the exact details of the plans offered are not available.
Tiered	Poor	The fine does not vary.
Benefits Received	Poor	The first \$50 goes to the state, the last \$16 goes to the jail fund, and the remainder is split between the county and agency who issued the fine. About 30% of the revenue is invested into the city, which is does not specifically go towards active transportation projects.
Payment Methods	Good	Payment can be made in a variety of ways and both online and by mail.
Penalties	Poor	Fines can add up to a large debt and can also lead to warrants if unpaid. Research has shown that lower-income households ultimately owe more.

¹⁵⁴ [InvestigateWest. \(2017\). "The High Cost of Disparities For People of Color in Multnomah County."](#)

Public-Private Partnerships

Public-private partnerships (sometimes called P3s) can be used to finance, build, and operate projects. Private partners may have access to additional forms of financing or flexibility. P3s require a source of revenue to pay for the financing, it is not a source of funding.¹⁵⁵

Share	Variable	This is dependent on program design. This could be equitable if private companies fund active transportation projects to go towards low-income households.
Burden	Variable	This is dependent on program design. Equitable P3s need to ensure they do not displace housing or remove transit access for low-income households.
Tiered	Variable	This is dependent on program design, but private companies that put forth large sums of money to invest in transit and pedestrian improvements are more equitable.
Benefits Received	Variable	This is dependent on program design. A good score would result from the growth of transit and pedestrian improvements and enhancements.
Payment Methods	N/A	
Penalties	N/A	

¹⁵⁵ [The World Bank. \(2022\). “How PPPs Are Financed.”](#)

Naming Rights or Sponsorships

Naming rights or sponsorships can generate revenue depending on the arrangement (e.g., Salesforce Transit Center in San Francisco).¹⁵⁶

Share	Good	Only advertisers opt to pay.
Burden	Good	No monetary burden to residents.
Tiered	N/A	
Benefits Received	Variable	This is dependent on program design, but funds raised on advertising are typically spent on the systems being advertised to.
Payment Methods	N/A	
Penalties	N/A	

¹⁵⁶ [U.S. Department of Transportation Federal Highway Administration. “Advertising, Naming Rights, Sponsorships.”](#)

Allowance of Use of ROW for Rest Areas/Privatization

Excess right of way not being used for transportation can be used for rest areas or other developments. Transit agencies are best positioned to benefit from transit-oriented development on their land, development along large roads have noise and pollution challenges.^{157 158 159}

Share	Good	Only developers opt to pay.
Burden	Good	No monetary burden to residents.
Tiered	N/A	
Benefits Received	Variable	Revenue that is used to increase transit-oriented-develop and invest in access to transit is a progressive fee.
Payment Methods	N/A	
Penalties	N/A	

¹⁵⁷ [Delaware Valley Regional Planning Commission. \(2020\). “SEPTA Transit-Oriented Development \(TOD\) Policy Research.”](#)

¹⁵⁸ [U.S. Department of Transportation Federal Highway Administration. “Right-of-Way Use Agreements.”](#)

¹⁵⁹ [Transportation Policy Research Center. \(2014\). “Public Use of Rail Right-of-Way in Urban Areas.”](#)

Overweight Truck and SUV Personal Tax

Multnomah County is exploring a tax for people purchasing vehicles over 6,000 pounds. In D.C., this tax is \$500 annually. This tax is created to help combat pollution and fatalities and serious injuries. Owners of EV vehicles that surpass the 6,000-pound mark will have a “1,000 pound credit”.¹⁶⁰

Share	Fair	The tax is based on the weight of the vehicle, not household income. The initial price of this vehicle creates a barrier for lower income households to own this vehicle.
Burden	Fair	There are no subsidies or exemptions available, and this tax (as exemplified in D.C.) is still applicable whether the vehicle is personal use or needed for work.
Tiered	Fair	The tax is determined by weight, not value of the vehicle. However, vehicles that are over 6,000 pounds carry a higher value than those weighing less.
Benefits Received	Fair	Taxes would contribute to street safety enhancements. The tax is aimed to increase safety for vulnerable users, the majority of which are low-income.
Payment Methods	Variable	This is dependent on program design. Equitable payment methods would allow people to pay their fine over time, with no interest or penalties accrued for late payment.
Penalties	Variable	This is dependent on program design. Equitable penalties would enforce additional fines based on income levels and wave penalty fees if household is below poverty line.

¹⁶⁰ [Bloomberg. \(2022\). “A City Fights Back Against Heavyweight Cars.”](#)

Revenue Sources not Included in Assessment

This list details items that were not included because the item was a financing mechanism rather than a revenue source or did not represent a significant equity impact based on available information. Many of these items are often grouped together under an 'other' category in budget documents and typically do not generate a large share of revenue.

- Bond Proceeds (revenues that generate bond proceeds (e.g., gas tax) are included in the equity assessment). Bonds are a financing mechanism, rather than a specific revenue source.
- Transit advertising. Transit advertising is ads or other forms of advertising, including digital media, placed on public transportation vehicles or areas, such as bus stops.
- Contract Revenue/Service Contracts are typically revenues paid from one agency to another, or one department to another for services rendered. For example, the City of Portland contracts with TriMet for operating personnel for the Portland Streetcar.
- Federal Other taxes, fees investment income and other receipts. This group includes penalties and fines imposed for violation of motor carrier safety requirements, penalties related to highway-user taxes, NHTSA motor vehicle safety penalties, and interest on invested balance.
- Various Revenues generated from government activities (sale of government property, interest income, loan repayment, rent and fines).
- Land Use Planning Fees are charged for each type of land use review. The fee includes portions that are allocated different government departments, including Transportation.
- Potential future Advertising Revenues (for use within ROWs or assets). Billboards on public land, naming rights of facilities, and advertisement on transit vehicles and at stops are some of potential sources of advertising revenue.
- Institutional Zone Development. Hospitals, universities, and other large institutions invest in transportation infrastructure improvements through their conditional use permits and/or Master Plans. The new Comprehensive Plan proposes to implement institutional zones which will remove the Conditional Use status for these institutions. We anticipate institutions will continue to invest in transportation improvements as a part of the new Institutional Zone Development process.
- School Partnerships. Funding included in a school bond measure for traffic safety improvements at schools. In Portland, the process developed in partnership between PPS and the City ensures that development fees are prioritized for safety improvements near the schools that need them the most.

Appendix B: Allocation and Constraints by Revenue Source

Source	Category	Allocation and Constraints Description
Federal		
Fuels tax	Roadways, transit, bike, and pedestrian	Federal revenue sources fund the Highway Trust Fund (HTF). The HTF is made up of the Mass Transit Account and the Highway Account. The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. The remainder of the fuel tax is dedicated to the Highway Account. The Mass Transit Account funds transit projects while the Highway Account funds roadway, bike, and pedestrian projects. Federal funding from the HTF flows through state DOTs and to local agencies and is allocated using formula funds. ⁷⁹
Heavy trucks and trailers sales tax		
Heavy vehicles annual use tax		
Individual income taxes, corporate income taxes (General Fund transfer)		
State		
Motor Fuels Tax	Roadways, bike, and pedestrian within the right-of-way	These revenue sources fund the State Highway Fund. The State Highway Fund is restricted to funding construction, operation, and maintenance of roads, including bike and pedestrian projects in the right-of-way. ⁸⁰ In 1971, ORS 366.514 dedicated at least 1% of highway funds to bicycle and pedestrian projects. ⁸¹
Weight Mile Tax		
Driver and Vehicle Fees		
Transportation License and Fees		
Cigarette Tax	Transit	A portion of the Cigarette tax is dedicated to transit services for seniors and disabled people. ⁸²
Bike Tax	Bike	Revenue from the bicycle excise tax goes into Multimodal Statewide Investments Management Fund. It used to fund a bike and pedestrian program within Connect Oregon. ⁸³
Privilege Tax	Outside of right-of-way – aviation, rail, and marine	Funds are allocated to the Connect Oregon Fund and fund rebates for electric vehicles. The Connect Oregon Fund is restricted to projects outside the highway right-of-way. Historically these projects included active transportation but most recently funds are dedicated to aviation, rail, and marine projects. Any project that is eligible for funding from the State Highway Fund is not eligible for funding from Connect Oregon. ⁸⁴
Lottery Revenues		

⁷⁹ [U.S. Department of Transportation Federal Highway Administration. \(2017\). "Fixing America's Surface Transportation Act or "FAST Act.""](#)

⁸⁰ [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

⁸¹ [Interpretation of ORS 366.514](#)

⁸² [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

⁸³ [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

⁸⁴ [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

Equitable Transportation Funding
Oregon Metro

Source	Category	Allocation and Constraints Description
Payroll Transit Tax	Transit except light rail	The tax is deposited into the Statewide Transportation Improvement Fund and is limited to investments and improvements in public transportation services, except for those involving light rail. ⁸⁵
Income Tax (General Fund Transfer)	Variable	As state legislatively directed. In the past it has been used for capital projects such as light rail.
Local		
Mass-Transit (TriMet) Tax	Transit	The tax funds mass transportation in the TriMet district. ⁸⁶
Transit Fares (Passenger Revenues)	Transit	Fares fund the transit system. They make up 7% of TriMet's FY2023 Budget. ⁸⁷
Gas Tax	Roadways, bike, and pedestrian within the right-of-way.	Under state law, motor vehicle revenue is restricted to funding construction, operation, and maintenance of roads, including bike and pedestrian projects in the right-of-way.
Vehicle Registration Fee		
Transportation System Development Charges	Capital projects that increase or improve capacity	Fees are dedicated to recoup the cost of additional infrastructure projects required to serve new developments. ⁸⁸ In Oregon, state law requires that revenue only be spent on capital projects. ⁸⁹ Local municipalities may have additional requirements on use of revenue, such as specifically serving the impacted area and related parameters.
Street Utility Fees	Street repair and maintenance	Funds are spent locally on street maintenance.
Utility Fees based on estimated number of trips	Street repair and maintenance, Bike and Pedestrian Accessibility, ADA Transition	Revenue funds projects outlined in Milwaukie's Street Surface Maintenance Program, Bicycle and Pedestrian Accessibility Program, and the federal ADA Transition Plan. Funding transit, ADA improvements, and active transportation has a positive equity component.
Franchise Fees	Flexible	Franchise fees feed directly into the General Fund to support a portion of a city's transportation budget.
PGE Privilege Tax	Street repair and maintenance	Funds are spent locally on street maintenance.

⁸⁵ [Oregon Department of Revenue. \(2022\). "Statewide transit tax."](#)

⁸⁶ [TriMet. \(2021\). "Form OR-TM Instructions."](#)

⁸⁷ [TriMet. \(2022\). "Adopted 2022-2023 Budget."](#)

⁸⁸ [Oregon Metro. \(2007\). "System Development Charges."](#)

⁸⁹ [Oregon Legislature. \(2021\). "Chapter 223 – Local Improvements and Works Generally."](#)

Equitable Transportation Funding
Oregon Metro

Source	Category	Allocation and Constraints Description
Parking Fees/Fines	Flexible, discretionary PBOT revenue	Parking fee revenue is general discretionary transportation revenue at PBOT. ⁹⁰
Urban Renewal	Flexible but must be spent within TIF districts	Taxes are paid by all homeowners in a jurisdiction and revenue is spent on local transportation projects within specified districts. Tax Increment Financing (TIF) districts can be used to fund improvements in historically underserved communities, including transportation projects. ^{91 92}
Property Taxes	Flexible, must be on major road.	For example, taxes are paid by local homeowners in Washington County and revenue is spent on local transportation projects through the Major Streets Transportation Improvement Program (MSTIP). MSTIP funding improves the transportation system for bicyclists, pedestrians, drivers, and transit passengers. Projects must improve safety, improve traffic flow or congestion, be on a major road, address needs for all travelers. ⁹³
TNC Fee	Flexible, funds programs	This fee has been used to fund programs that help remove barriers to mobility. Program examples include Wheelchair-Accessible Vehicle program, Safe Ride Home Program, safety inspections, and Transportation Wallet Initiative. ^{94 95}
Local Improvement District	Flexible, must be spent in the LID	A Local Improvement District (LID) is a mechanism for neighboring property owners to share the cost of improvements to infrastructure, where property owners agree to tax themselves (typically at least 51% of the property owners must be in favor). For transportation, it is often used to pave unimproved streets or build sidewalks.
Heavy Truck Fee	Street repair, maintenance, and safety	In Portland, the fee is allocated for 56% Street Repair/Maintenance and 44% Traffic Safety. Projects for both safety and maintenance should focus on streets important to freight movement. ⁹⁶

⁹⁰ [Portland Bureau of Transportation. \(2019\). "PBOT Financial Overview."](#)

⁹¹ [Prosper Portland. \(2021\). "Your property tax bill and urban renewal."](#)

⁹² [Clackamas County Development Agency. \(2011\). "Urban Renewal in Clackamas County."](#)

⁹³ [Washington County, Oregon. "Major Streets Transportation Improvement Program \(MSTIP\)."](#)

⁹⁴ [City of Portland, Oregon. "Private For-Hire Transportation & Regulations."](#)

⁹⁵ [Schafer, Hannah. \(2019\). "PBOT News Release: PBOT, Portland Police Bureau encourage Portlanders to take a Safe Ride Home on St. Patrick's Day." Portland Bureau of Transportation.](#)

⁹⁶ [Portland Bureau of Transportation. "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)



TPAC Agenda Item

November FFY 2023 Formal MTIP Amendment

Resolution 22-5291

Amendment # NV23-03-NOV

Applies to the 2021-26 MTIP

Agenda Support Materials:

- Draft Resolution 22-5291
- Exhibit A to Resolution 22-5291 (MTIP Worksheets)
- Staff Narrative with five attachments

November 4, 2022

Ken Lobeck

Metro Funding Programs Lead

November FFY 2023 Formal MTIP Amendment

Overview: Adding New NEVI & ADA projects, scope change and cost increases

- 6 total projects in the amendment bundle
 - Adding 2 new ODOT National Electric Vehicle Infrastructure (NEVI) charging station projects
 - Adding a new ODOT regional ADA design project for 2024 implementation and beyond
 - Completing a scope change for ODOT's Willamette Stormwater Source Control Improvements project
 - Completing cost increases to an ODOT ADA projects and Metro Parks Columbia Blvd Bridge project

November FFY 2023 Formal MTIP Amendment

Overview: Adding New NEVI & ADA projects, scope change and cost increases

- Cover briefly amendment bundle contents and open for discussion
- Seek approval of Resolution 22-5291

November FFY 2023 MTIP Amendment Bundle

Adding 2 New ODOT NEVI Charging Station Projects

IIJA = Infrastructure Investment and Jobs Act

- #1 - Key 22738, I-205: From I-5 to the Abernethy Bridge
- #2 – Key 22740, I-84: From I-5 to the Idaho Border
- Deploy/Install Electric Vehicle Charging Stations in the identified corridor
- Part of the overall Oregon National Electric Vehicle Infrastructure (NEVI) improvement plan
- Primary funding from the IIJA
- OTC approval during September 2022 meeting

November FFY 2023 MTIP Amendment Bundle

Adding A New ODOT ADA Regional Design Project

ADA = Americans with Disabilities Act

- Key 22978, Portland Metro Area 2024-2027 ADA Curb Ramp Design, Phase 1
- Add PE phase to complete design activities for later ADA compliant curb and ramp improvements
- Region-wide design with the final construction phase projects split off as separate projects starting in FFY 2024
- OTC approval during September 2022 meeting

November FFY 2023 MTIP Amendment Bundle

Scope Change for ODOT's Willamette River Stormwater Source Control Improvements Project

- Key 22552: Adjust project scope and funding to add 30 site locations to the project
- Complete the design and ROW actions of select Source Control Measures (SCMs) to improve stormwater quality within the Portland Harbor from Fremont Bridge and St. Johns Bridge including surrounding areas
- Project cost increases from \$4.4 to \$11.96 million
- OTC approval: Scheduled for November 2022 meeting

November FFY 2023 MTIP Amendment Bundle

Complete Cost Increase to ODOT's OR141/OR217 Curb Ramps Project

- Key 22431: At various location on OR 141 (Hall Blvd) and SW 72nd Ave in the Tigard area, construct ADA compliant curbs and ramps
- Revised cost estimate due to inflation impacts
- Project cost estimate increases from \$4.6 million to \$7.5 million
- OTC approval: September 2022 meeting

November FFY 2023 MTIP Amendment Bundle

Complete Cost Increase to the Greenway Trail Columbia Blvd Bridge Segment

- Key 18832: Willamette Greenway Trail: Columbia Blvd Bridge
- One of three trail improvement segments to the North Portland Greenway Trail
- Columbia Blvd Bridge segment required development of an updated funding plan
- RFFA & Metro/Portland Parks funding added now
- Complete first part in STIP to increase PE. MTIP completing changes to Construction phase.
- OTC approval scheduled for November 2022 meeting

MPO CFR Compliance Requirements

MTIP Review Factors

CFR = Code of Federal Regulations

- ✓ Project must be included in and consistent with the current constrained Regional Transportation Plan
- ✓ Passes fiscal constraint review and proof of funding verification
- ✓ Passes RTP consistency review:
 - Reviewed for possible air quality impacts
 - Verified as a Regionally Significant project status
 - Verified correct location & scope elements in the modeling network
 - Verified RTP and MTIP project costs consistent
 - Satisfies RTP goals and strategies
- ✓ MTIP & STIP programming consistency is maintained against obligations
- ✓ Passes MPO responsibilities verification (*No obligations/impacts*)
- ✓ Completed public notification plus OTC approvals required completed for applicable ODOT funded projects (*OTC approvals September-November*)
- ✓ Examined how performance measurements may apply and if initial impact assessments are required. (*No impacts*)

November FFY 2023 Formal Amendment

Approval Timing

Action	Target Date
Start 30-day Public Notification/Comment Period	November 1, 2022
TPAC Notification and Approval Recommendation	November 4, 2022
JPACT Approval and Recommendation to Council	November 17, 2022
End 30-day Public Notification/Comment Period	December 1, 2022
Metro Council Approval	December 8, 2022
Final Estimated Approvals	January 2023

Notes:

1. The above target dates are planning estimates only. Changes may occur.
2. Processing and approval through JPACT and Metro Council are proposed as agenda consent items
3. Comments via letters or personal testimony still may be submitted at the scheduled committees.

November FFY 2023 Formal MTIP Amendment Discussion, Questions, and Approval Request

- Open up to discussion and Questions
- Approval request includes completing necessary corrections
- Approval Request - Staff request is for:
 - TPAC to provide JPACT an approval recommendation of Resolution 22-5291 consisting of additions or changes to 6 projects enabling federal reviews and fund obligations to then occur

Regional mobility policy update

Transportation Policy
Alternatives
Committee

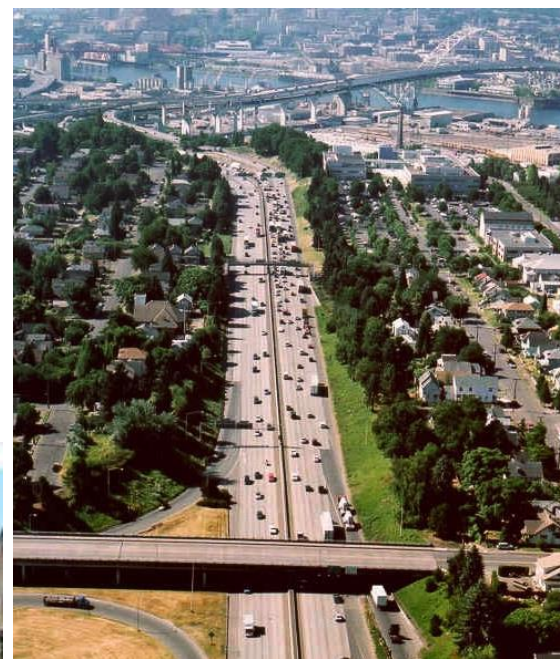
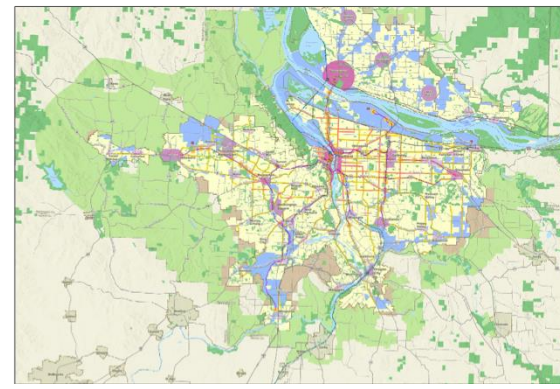
November 4, 2022



Metro



Oregon
Department
of Transportation



Today's purpose

Seek TPAC recommendation to JPACT
on draft mobility policy and next steps:

Recommend that JPACT:

- ***accept the draft regional mobility policy, draft measures and targets, and draft implementation action plan, and***
- ***support moving forward to test and refine the draft measures and targets as part of the 2023 RTP update.***

The recommendation does not adopt the policy – that will be considered next year as part of the RTP adoption package.

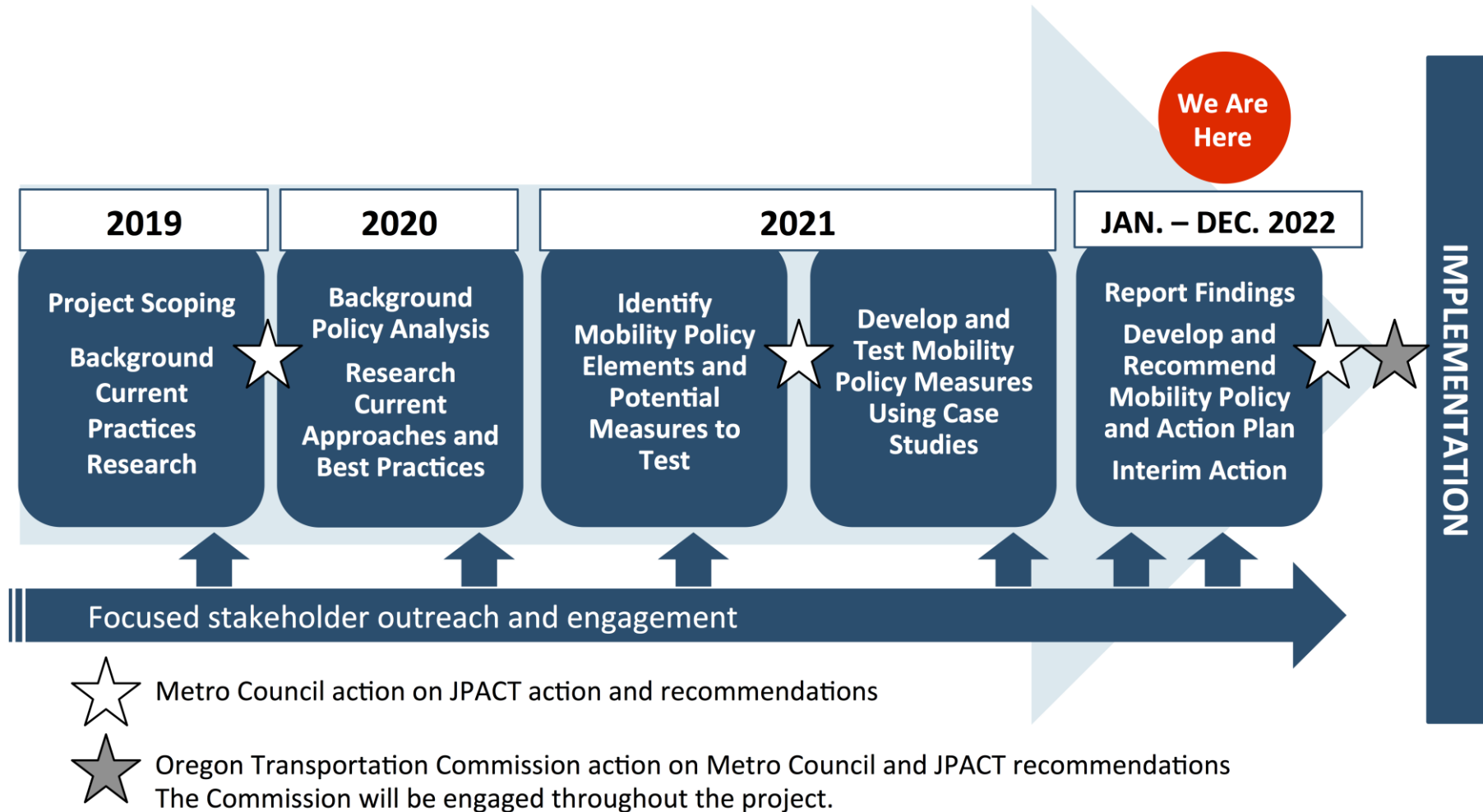
Project purpose

- Update the mobility policy and how we define and measure mobility for the Portland area transportation system
- Recommend amendments to the RTP and Oregon Highway Plan Policy 1F for the Portland area



Visit oregonmetro.gov/mobility

Project timeline



Why Now?



2018 Regional Transportation Plan

*A blueprint for the future of transportation
in the greater Portland region*

Adopted December 6, 2018

oregonmetro.gov/rtp

Better align 20-year old interim policy with state, regional and community values and goals:

- **Land use efficiency** that includes more housing, jobs, services and mixed-use in 2040 centers
- **Travel options and connectivity** that allow people to reliably and safely walk, bike, drive, and take transit to get where they need to go
- **Safe, efficient and reliable travel** speeds for people, goods and services

Applications of the current mobility policy

TARGETS



Planning for the future*

Transportation system plans, corridor and area plans, including concept plans to set performance expectations to identify needs as defined in the RTP and Oregon Highway Plan

STANDARDS



Regulating Plan Amendments*

Zoning changes and land use plan amendments using transportation thresholds defined in the Oregon Highway Plan for state-owned roads and local codes for city- and county-owned roads



Mitigating Development Impacts

Development approval process to mitigate traffic impacts using thresholds defined in the OHP and local codes



Managing and Designing Roads

Operational and road project designs as defined in the 2012 Oregon Highway Design Manual and local codes

*Focus of this effort

Regional Mobility Policy and Oregon Highway Plan Policy 1F

Regional Mobility Policy (Regional Transportation Plan)

- RTP motor vehicle network, including ODOT highways and city and county arterials
- Applied as targets in system planning only

Highway Mobility Standards (Oregon Highway Plan Policy 1F)

- ODOT highways only
- Applied as targets in system planning
- Applied as standards in local comprehensive plan amendments

Volume to Capacity Ratio Targets for Portland Region (adopted in RTP in 2000 and OHP in 2002)

VOLUME TO CAPACITY RATIO TARGETS INSIDE METRO ^{A, B}		
Locations	Target	
	1 st hour	2 nd hour
Central City Regional Centers Town Centers Main Streets Station Communities	1.1	.99
Corridors Industrial Areas Intermodal Facilities Employment Areas Inner Neighborhoods Outer Neighborhoods	.99	.99
I-84 (from I-5 to I-205)	1.1	.99
I-5 North (from Marquam Bridge to Interstate Bridge)	1.1	.99
OR 99E (from Lincoln Street to OR 224 Interchange)	1.1	.99
US 26 (from I-405 to Sylvan Interchange)	1.1	.99
I-405 ^C (from I-5 South to I-5 North)	1.1	.99
Other Principal Arterial Routes I-205 ^C I-84 (east of I-205) I-5 (Marquam Bridge to Wilsonville) ^C OR 217 US 26 (west of Sylvan) US 30 OR 8 (Murray Blvd to Brookwood Avenue) ^C OR 224 OR 47 OR 213 242 nd /US 26 in Gresham OR 99W	.99	.99

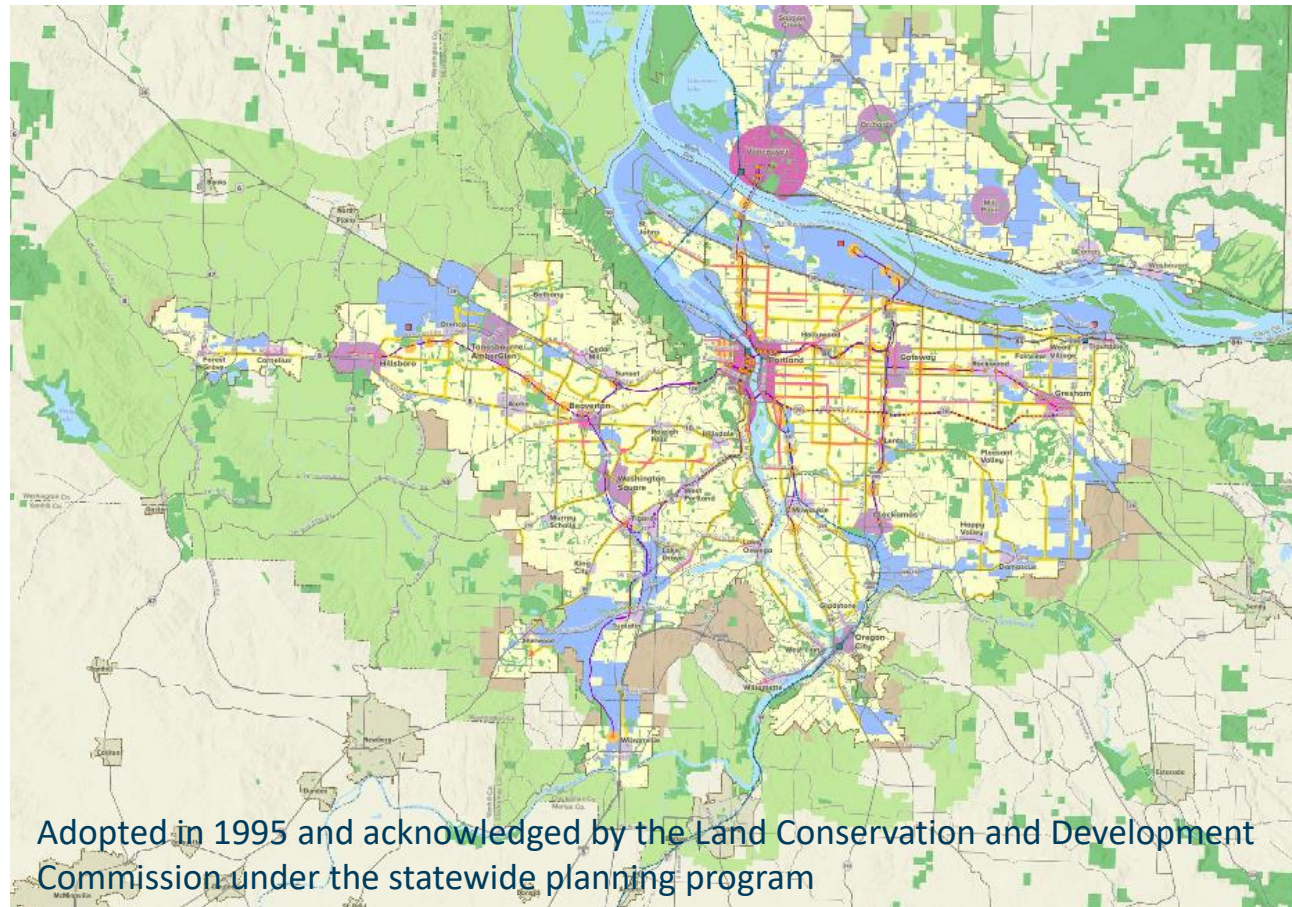
Table 7: Volume to Capacity Ratio Targets within Portland Metropolitan Region

2040 Growth Concept is our foundation

Adopted as the land use plan for the region under state law (ORS 197)

Transportation plans must be adequate to serve planned land uses

Codified in regional functional plans governing cities and counties



Adopted in 1995 and acknowledged by the Land Conservation and Development Commission under the statewide planning program

2023 Regional Transportation Plan vision and goals

The updated mobility policy must advance 2040 plan and these overarching RTP priorities.



Vision---->

Everyone in the greater Portland region will have **safe, reliable, affordable, efficient, and climate-friendly** travel options that allow people to **choose to drive less** and support **equitable, resilient, healthy and economically vibrant communities and region.**

Oregon Transportation Commission Strategic Action Plan priorities



Equity

Prioritize diversity, equity, and inclusion by identifying and addressing systemic barriers to ensure all Oregonians benefit from transportation services and investments.



Modern Transportation System

Build, maintain, and operate a modern, multimodal transportation system to serve all Oregonians, address climate change, and help Oregon communities and economies thrive.



Sufficient and Reliable Funding

Seek sufficient and reliable funding to support a modern transportation system and a fiscally sound ODOT.

Oregon Transportation Commission

Strategic Action Plan priorities



Modern Transportation System

Build, maintain, and operate a modern, multimodal transportation system to serve all Oregonians, address climate change, and help Oregon communities and economies thrive.

- **Preservation and Stewardship:** Preserve, maintain, and operate Oregon's multimodal transportation system and achieve a cleaner environment.
- **Safety:** Prevent traffic fatalities and serious injuries and ensure the safety of system users and transportation workers.
- **Accessibility, Mobility and Climate Change:** Provide greater transportation access and a broader range of mobility options for Oregonians and address climate change.
- **Congestion Relief:** Invest in a comprehensive congestion management strategy for the Portland metropolitan region to benefit all Oregonians. Implement system and operational innovations to reduce traffic congestion throughout Oregon.
- **Project Delivery:** Develop practical solutions to transportation problems in order to address community needs and ensure system reliability and resiliency.
- **Innovative Technologies:** Invest in and integrate technologies to improve transportation services and operations throughout Oregon.

Deep research, analysis, and extensive feedback shaped draft policy

2020

- Share research on current policy and measure
- Identify mobility policy elements
- Define universe of potential measures (more than 100)
- Seek feedback on criteria for evaluating and selecting measures



2021

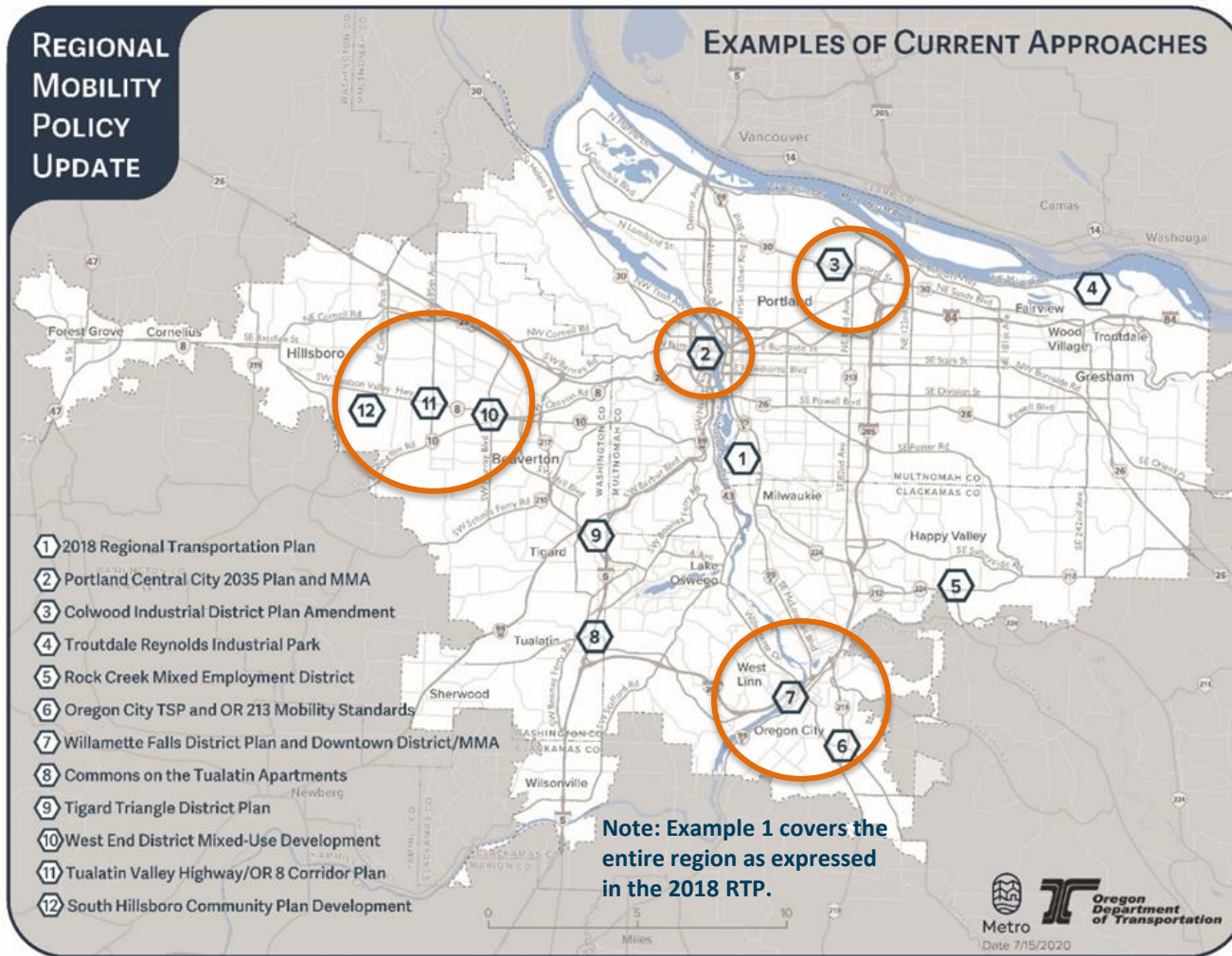
- Develop definition of urban mobility
- Seek feedback on mobility policy elements and potential measures for testing in case studies (narrowed from 38 to 17 to 12 measures)


More than
600
participants
2020-22

2022

- Report case study findings
- Seek feedback on draft mobility policies, measures, targets and how/where to apply them
- Develop implementation action plan

Case studies informed draft policy



 = seven case study locations

- Tualatin Valley Highway area
- Downtown Portland area
- Middle Columbia Corridor Industrial area
- Oregon City area

Information about all twelve available on the project website

oregonmetro.gov/mobility

Vision for urban mobility for the Portland area: *People and businesses can safely, affordably, and efficiently reach the goods, services, places and opportunities they need to thrive by a variety of seamless and well-connected travel options and services that are welcoming, convenient, comfortable, and reliable.*



Mobility elements

Equity

Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other historically marginalized and underserved communities experience equitable mobility.

Access

People and businesses can conveniently and affordably reach the goods, services, places and opportunities they need to thrive.

Efficiency

People and businesses efficiently use the public's investment in our transportation system to travel where they need to go.

Reliability

People and businesses can count on the transportation system to travel where they need to go reliably and in a reasonable amount of time.

Safety

People are able to travel safely and comfortably and feel welcome.

Options

People and businesses can choose from a variety of seamless and well-connected travel modes and services that easily get them where they need to go.



DRAFT mobility policies for the Portland region

Mobility Policy 1

Ensure that **the public's land use decisions and investments in the transportation system enhance efficiency in how people and goods travel** to where they need to go.

Mobility Policy 2

Provide people and businesses a variety of seamless and well-connected travel modes and services that increase connectivity, increase choices and access to low carbon transportation options so that people and businesses can conveniently and affordably reach the goods, services, places and opportunities they need to thrive.

Mobility Policy 3

Create a reliable transportation system, one that people and businesses can count on to reach destinations in a predictable and reasonable amount of time.

Mobility Policy 4

Prioritize the safety and comfort of travelers in all modes when planning and implementing mobility solutions.

Mobility Policy 5

Prioritize investments that ensure that Black, Indigenous and people of color (BIPOC) community members and people with low incomes, youth, older adults, people living with disabilities and other historically **marginalized and underserved communities experience equitable mobility.**

Mobility Policy 6

Use mobility **performance measures and targets** for system planning and evaluating the impacts of plan amendments including **Vehicle Miles Travelled (VMT) per capita** for home-based trips and VMT/employee for commute trips to/from work, **system completeness** and **hours of congestion** on the throughways.

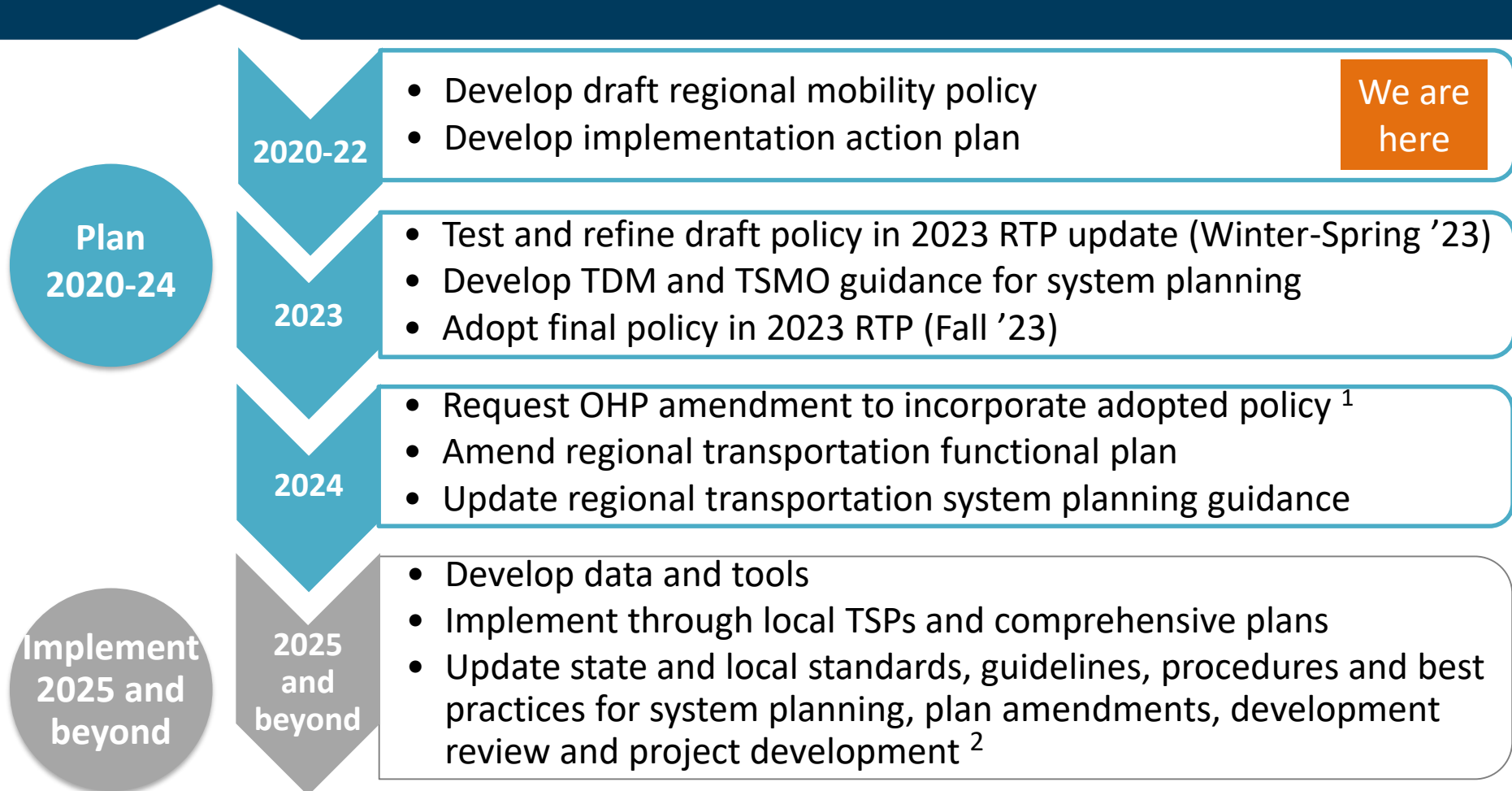


DRAFT mobility policy performance measures and targets

Measure	Target	Expected Mobility Outcomes
VMT/Capita for home-based trips and VMT/Employee for commute trips to/from work	Achieve reductions required by OAR 660 Division 44 (GHG Reduction Rule): 20% by 2035, 25% by 2040, 30% by 2045 and 35% by 2050.	Land Use Efficiency Land use patterns that are more efficient to serve because they reduce the need to drive and are supportive of travel options.
System Completeness (all modes, TSMO, TDM)	Complete the “planned” network and system for walking, biking, transit, vehicles, freight and implement strategies for managing the transportation system and travel demand.	Complete Multi-Modal Networks Travel options and connectivity allow people to reliably and safely walk, bike, drive, and take transit to get where they need to go.
Hours of Congestion on Throughways (based on average travel speed)	Freeway system operates with four or fewer hours of congestion per day based on a speed of 35 mph. Other RTP throughways operate with four or fewer hours of congestion per day based on a speed of 20 mph.	Reliability Safe, efficient and reliable travel speeds for people, goods, and services.



DRAFT implementation action plan



¹ The Oregon Highway Plan is undergoing an update in 2023-24.

² ODOT and DLCD are updating state guidelines, procedures and other tools in 2022-23 to support Climate-Friendly and Equitable Communities (CFEC) implementation.

DRAFT Policy Implementation Actions

2023 Actions

Test and refine the draft Regional Mobility Policy through 2023 RTP update (Metro)

- Establish baseline VMT/capita for home-based trips and VMT/employee for commute trips to/from work for TBD geographies (e.g., by 2040 type, by subarea of the region) in the 2023 RTP (Metro)
- Report draft mobility performance in needs analysis and system analysis (Metro)
- Further define and map TSMO “Key Corridors” for inclusion in 2023 RTP (Metro/TransPort)
- Develop implementation guidance for TDM/TSMO to support the Regional Mobility Policy (Metro)
- Further operationalize policy in RTP congestion management process and corridor refinement planning policies (Metro)
- Develop hours of congestion and travel speed forecasting for throughways guidance (Metro and ODOT)
- Adopt the final Regional Mobility Policy in the 2023 Regional Transportation Plan (Metro)

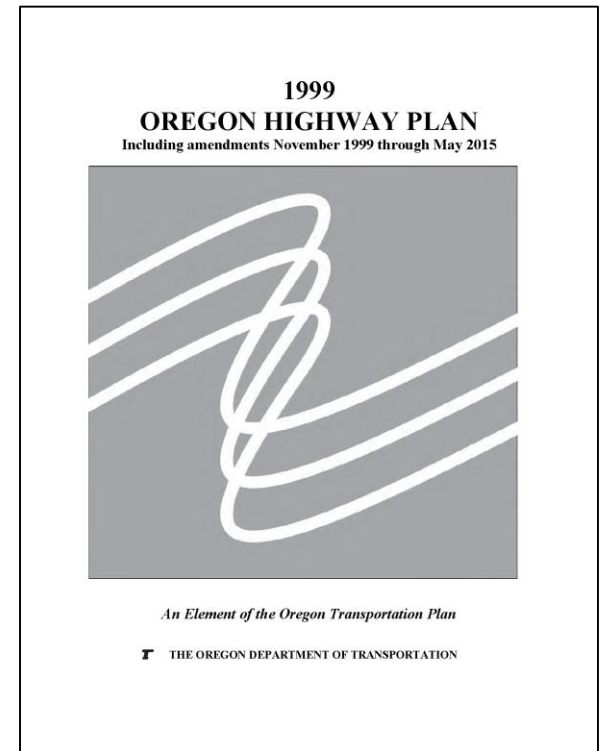


Update Multimodal System Inventories (ODOT)

DRAFT Policy Implementation Actions

2024 Actions

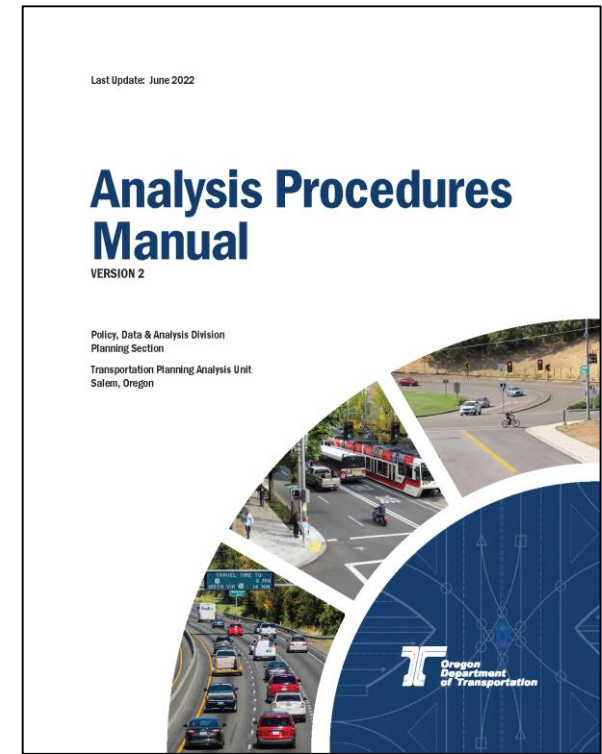
- Request consideration of the updated Mobility Policy for the Portland metropolitan area in the updated Oregon Highway Plan (Metro and ODOT)
- Amend Regional Transportation Functional Plan, Title 3, Transportation Project Development, to reflect the Regional Mobility Policy (Metro)
- Develop a VMT-based spreadsheet tool to support evaluation of plan amendments (ODOT, 2024-2025 timing)



DRAFT Policy Implementation Actions

2024 Actions (continued)

- Update Regional Transportation Functional Plan to encompass additional relevant TSMO and TDM system planning guidance (Metro)
- Update ODOT's Analysis Procedures Manual, development review procedures, and TSP guidelines to reference the updated Regional Mobility Policy (ODOT, 2023-2024 timing)
- Determine remaining needs for updates to the Oregon Highway Design Manual to acknowledge the adopted Portland Metro area mobility policy (ODOT)
- Develop model codes and guidance to support local implementation (Metro)



DRAFT Policy Implementation Actions

2025 and Beyond Actions

- Implement Regional Mobility Policy through local TSP and comprehensive plan updates (Cities and Counties)
- Incorporate regional mobility policy implementation guidance for TDM into Metro's Regional Travel Options (RTO) Strategy Update (Metro, 2025-2026 timing)
- Update Transportation Analysis Zones (TAZs) to support local and regional planning needs (Metro, 2026-2028 timing)
- Expand the region's Dynamic Traffic Assignment capabilities (Metro, timing TBD)
- State and Regional Modeling Collaboration (Metro and ODOT, timing TBD)



Supports statewide policy and implementation

This policy intersects with statewide planning efforts underway.

This policy will support regional and local implementation of statewide policies.

Climate-Friendly and Equitable Communities (2022)

Oregon Highway Plan (2023-2024)

Oregon Transportation Plan (2023)

Regional Transportation Plan (2023)

Regional Mobility Policy (2019-2023)

Consultant team and lead staff

Susie Wright, KAI, project manager

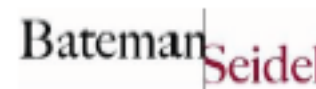
Molly McCormick, KAI

Sarah Peters, Fehr & Peers

Darci Rudzinski, Angelo Planning Group

Charles Brown, Equitable Cities LLC

Bill Kabeiseman, Bateman Seidel (legal review)



Next steps

- | | |
|----------|---|
| 11/17/22 | JPACT considers action on TPAC recommendation |
| 12/1/22 | Metro Council considers action on JPACT recommendation to test and refine the draft policy and measures in the 2023 RTP update |
| 2023 | Continue working with TPAC and MTAC to test and refine draft policy and measures in the 2023 RTP update as outlined in the implementation action plan |

Learn more at:
oregonmetro.gov/mobility



Metro



**Oregon
Department
of Transportation**

TPAC recommendation requested

Recommend that JPACT:

- accept the draft regional mobility policy, draft measures and targets, and draft implementation action plan, and
- support moving forward to test and refine the draft measures and targets as part of the 2023 RTP update.



Thank you!

Kim Ellis, Metro

kim.ellis@oregonmetro.gov



Glen Bolen, ODOT

Glen.A.BOLEN@odot.oregon.gov

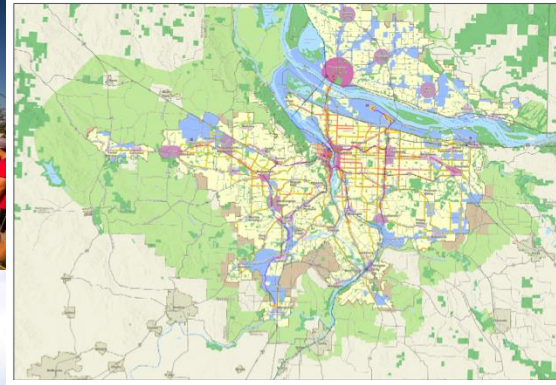


2023 Regional Transportation Plan

Policy Framework and Process for the RTP Call for Projects

TPAC

November 4, 2022



Today's purpose

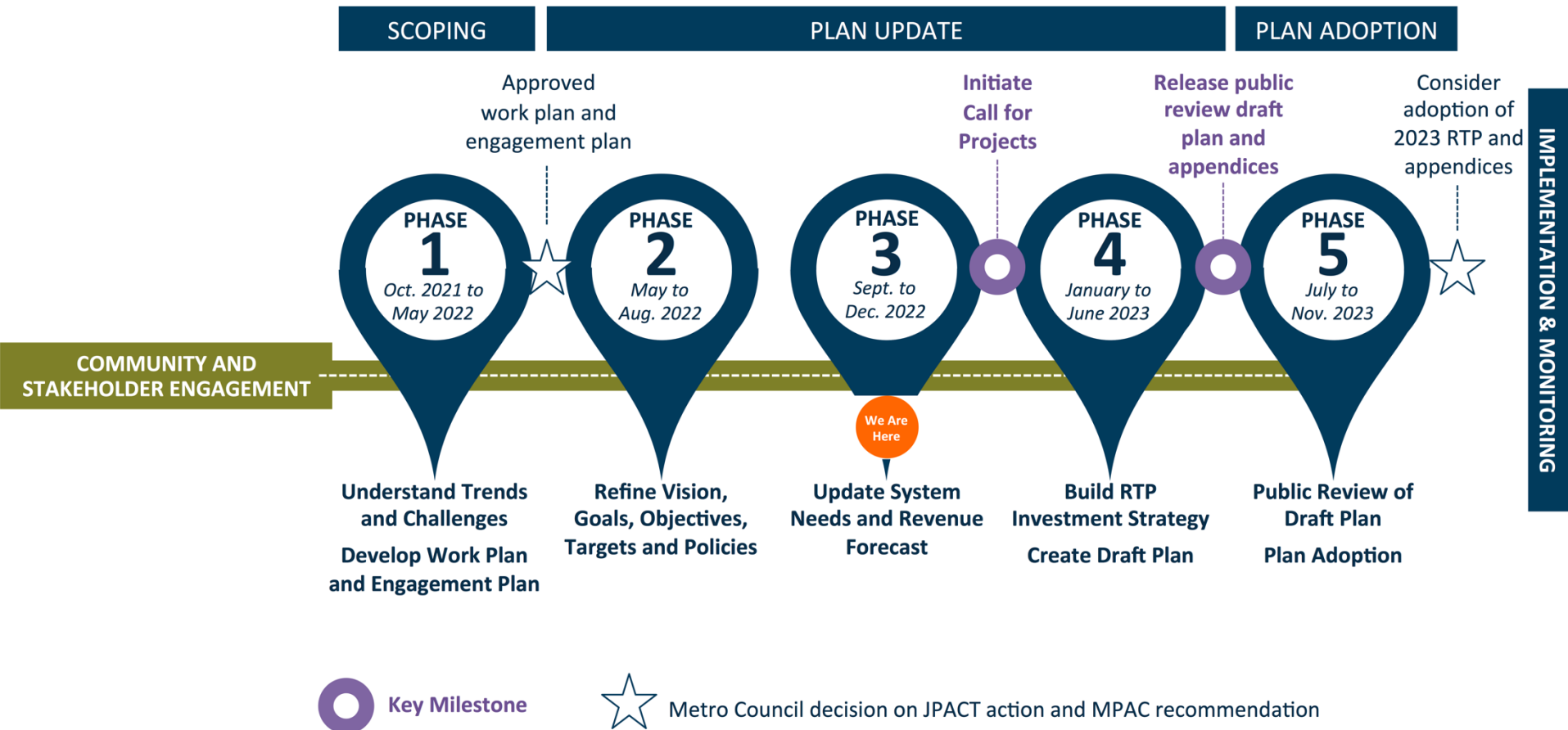
Discussion and feedback

1. Does the policy framework provide adequate direction and guidance to agency partners to update the RTP investment priorities?
2. Comments or questions about the process?
3. Comments or questions about development of the draft revenue forecast or cost targets?

Next month TPAC will be asked to make a recommendation to JPACT



2023 RTP timeline



Looking ahead to the Call for Projects

SEPT. TO DEC. '22

RTP Policy Framework

RTP Revenue Forecast

RTP Needs Analysis

JAN. TO FEB. '23

RTP
Call for
Projects

Jan. 6 to Feb. 17

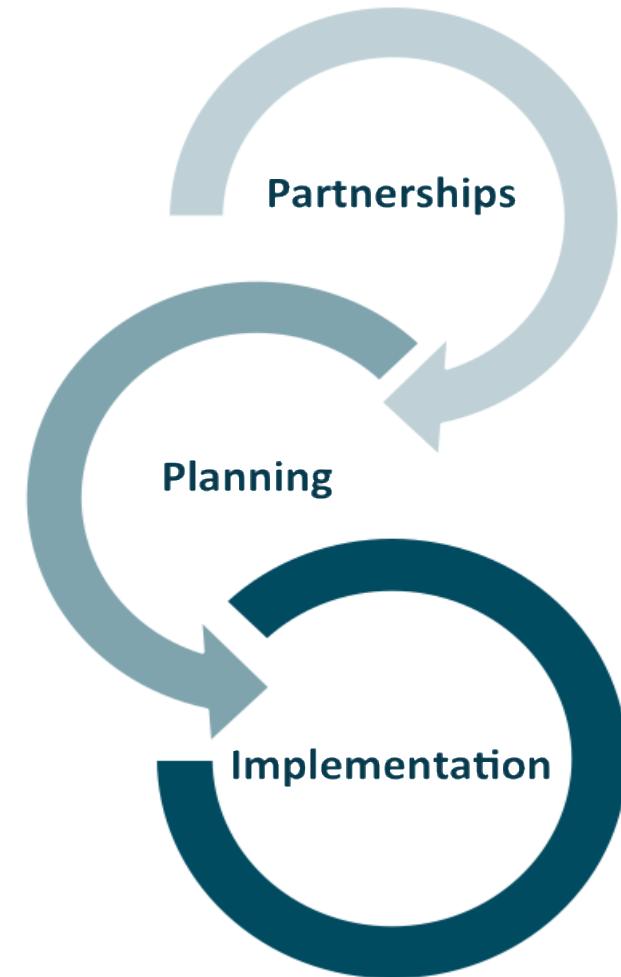
Engagement activities

2023 RTP CALL FOR PROJECTS

Updating the region's priorities

Call for Projects from Jan. 6 to Feb. 17, 2023

- Build draft RTP list for evaluation, review, and refinement:
 - **Constrained priorities** – region's top priorities given current funding outlook
 - **Strategic priorities** – additional priorities the region agrees to work together to advance
- Priorities identified collaboratively through City of Portland and through county coordinating committees
- Capital funding targets determine how many projects may be submitted



Where do RTP projects come from?

Transportation system plans

Regional planning

Concept planning

Subarea and topical plans
and studies

Comprehensive plans

Capital improvement plans

Project development

Transit service plans

Legislature



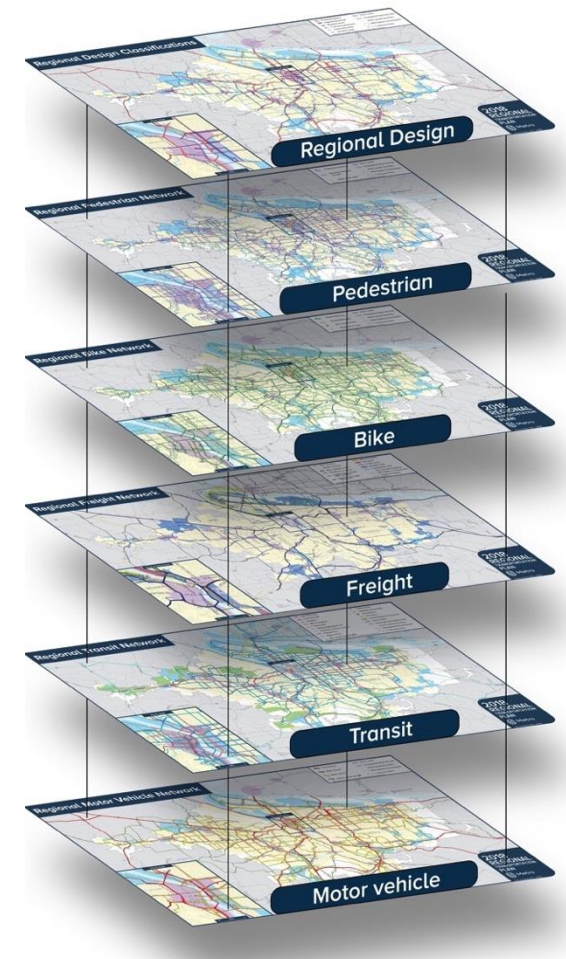
CITY OF
GRESHAM



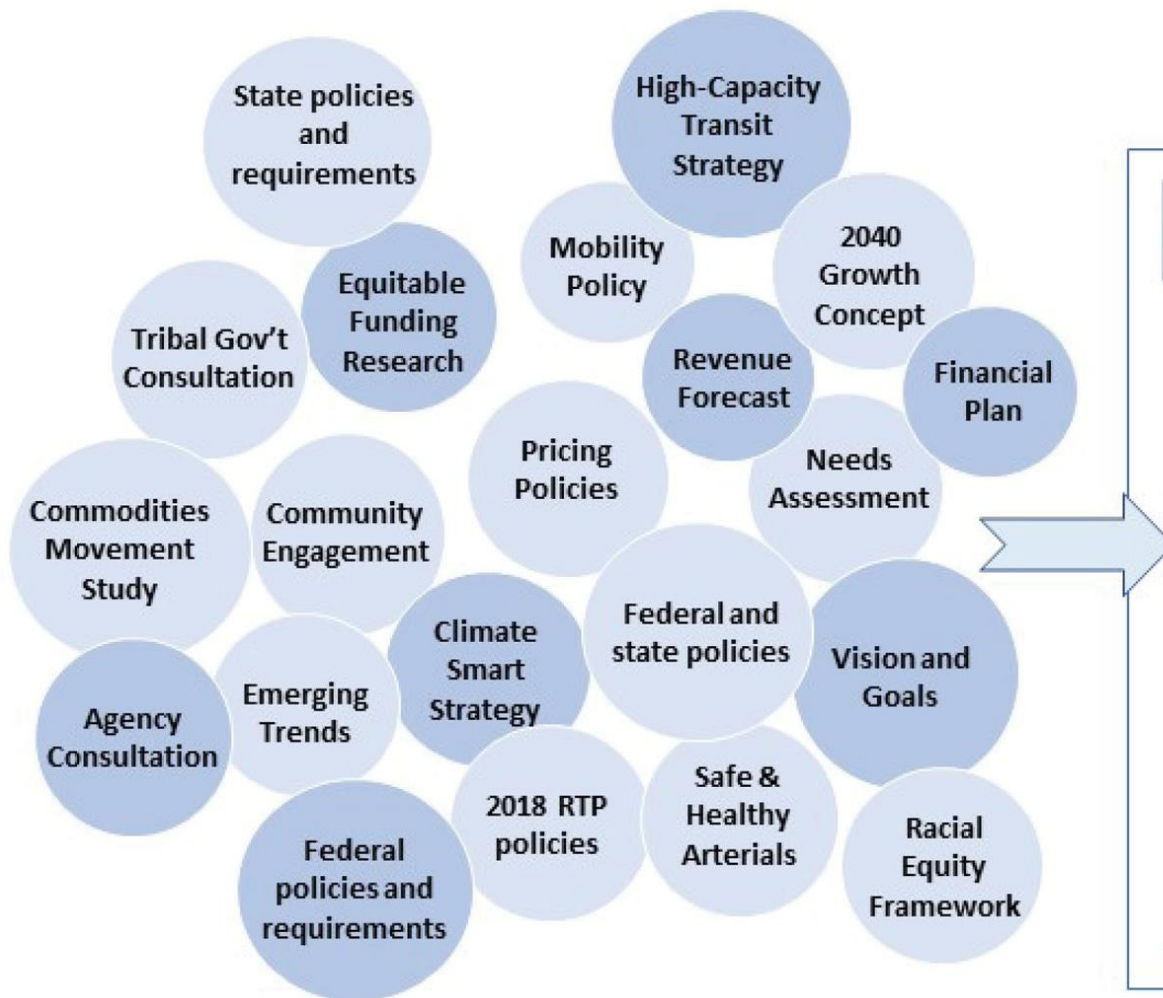
What projects are eligible to be included in the 2023 RTP?


Projects that:

- ❑ help achieve vision, goals and policies
- ❑ come from adopted plans or strategies that had opportunities for public input
- ❑ are located inside the MPO boundary and on the designated regional system
- ❑ cost at least \$2 million or be bundled with like projects



Elements informing the RTP Call for Projects





2023 Regional Transportation Plan call for projects


An overview of the policy framework and approach

The 2023 Regional Transportation Plan is an opportunity to bring together city, county, regional and state priority transportation projects to create a coordinated list of priority projects and programs for the period from 2023 to 2045. It is a key step for these projects to qualify for regional, state and federal funding.

Purpose
A major update to the Regional Transportation Plan is underway. The RTP is the blueprint for transportation in our region and a key tool for implementing the region's [2040 Growth Concept](#) and [Climate Smart Strategy](#). Together, these plans will help ensure that greater Portland thrives by connecting people to their jobs, families, schools and other important destinations and by allowing business and industry to create jobs and move goods to market.

This document describes the policy framework and approach for updating, assessing, and refining the list of projects and programs for the 2023 RTP. The policy framework reflects the culmination of more than two years of work by regional and community partners to identify transportation needs and develop a vision, goals, objectives, targets and a financial plan. The 2023 RTP call for projects responds to this direction as agency partners work together and with communities to update the investment priorities of the plan.

DRAFT - Oct. 27, 2022



An outcomes-based approach
An outcomes-based approach means the RTP guided by how residents want greater Portland to be in the future: the vision and goals of the RTP for a thriving region. An outcomes-based approach identifies the policies and investment that will achieve these vision and goals within a financially achievable budget.

Measurable objectives and performance targets are used to evaluate performance over time of the investments recommended in the plan and to monitor how the transportation system is performing between scheduled plan updates, which occur every five years. Figure 1 shows the elements of this outcomes-based approach.

Figure 1. 2023 RTP outcomes-based planning framework

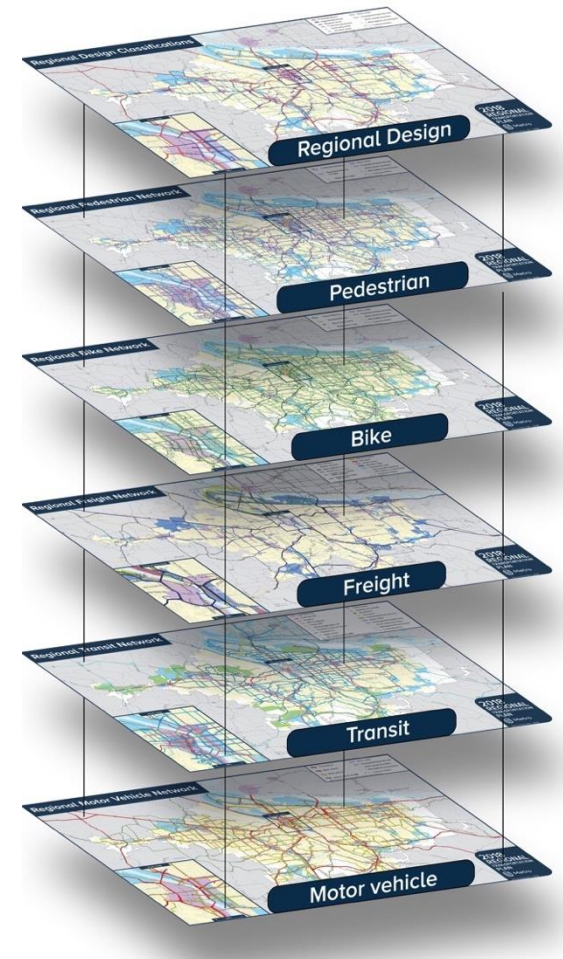
Vision		
Goals	Objectives & Targets	Policies
Financial Plan	Investment Strategy	

Policy framework for the 2023 RTP Call for Projects...

2040 Growth Concept map and supporting policies that identify priority areas and investments

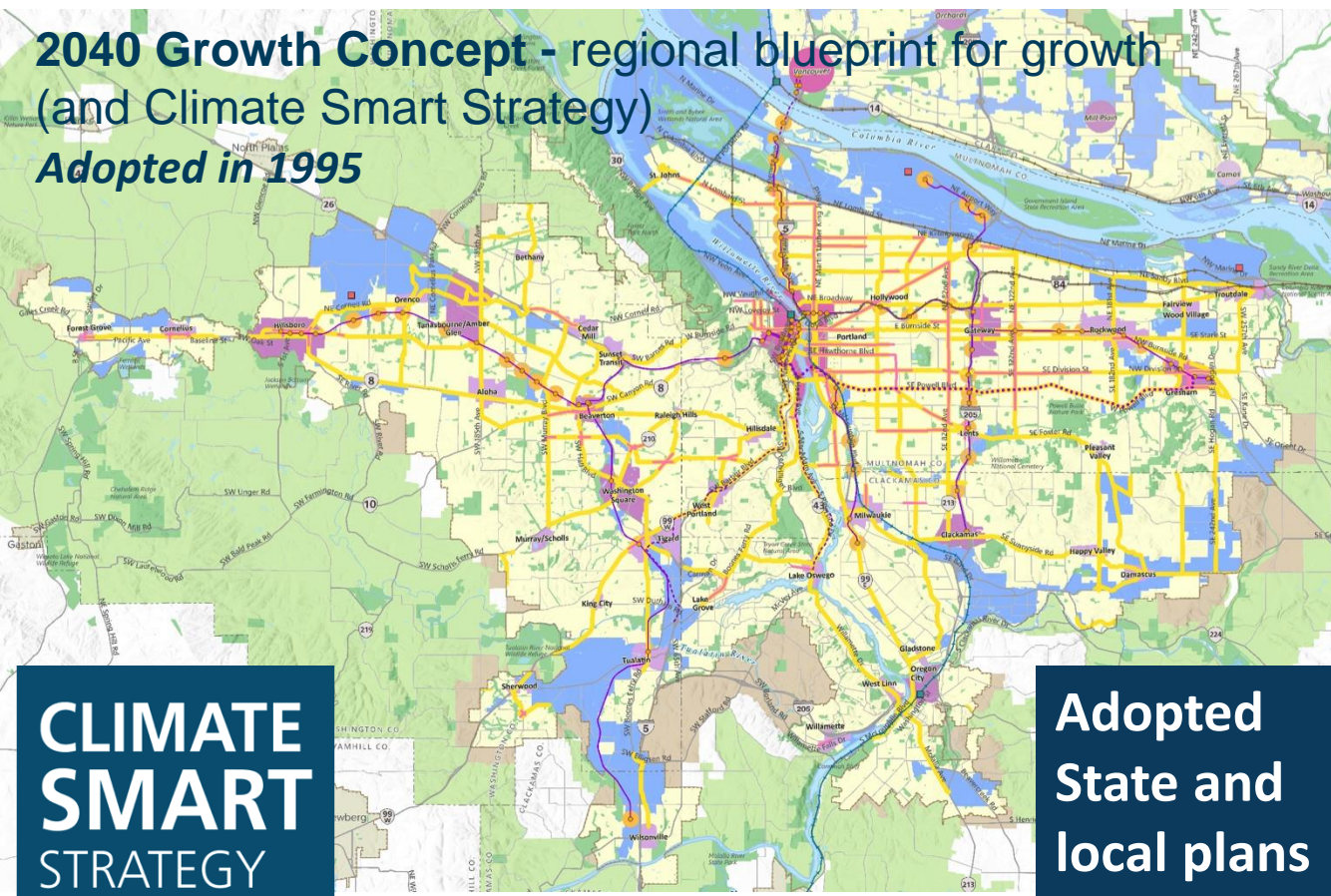
Draft 2023 RTP vision, goals and policies

RTP transportation network maps and policies that designate the regional system for transit, motor vehicle, freight, bicycle and pedestrian travel and priorities for investment



2040 Growth Concept is our foundation

2040 Growth Concept - regional blueprint for growth
(and Climate Smart Strategy)
Adopted in 1995



**CLIMATE
SMART
STRATEGY**

**Adopted
State and
local plans**

Implemented through adopted
community and regional plans



Building toward
six desired outcomes

Draft vision for 2023 RTP



Vision---→

Everyone in the greater Portland region will have **safe, reliable, affordable, efficient, and climate-friendly** travel options that allow people to **choose to drive less** and support **equitable, resilient, healthy and economically vibrant communities and region.**

Draft Goals for 2023 RTP

EQUITABLE TRANSPORTATION

Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.

CLIMATE ACTION AND RESILIENCE

People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.

SAFE SYSTEM

Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.



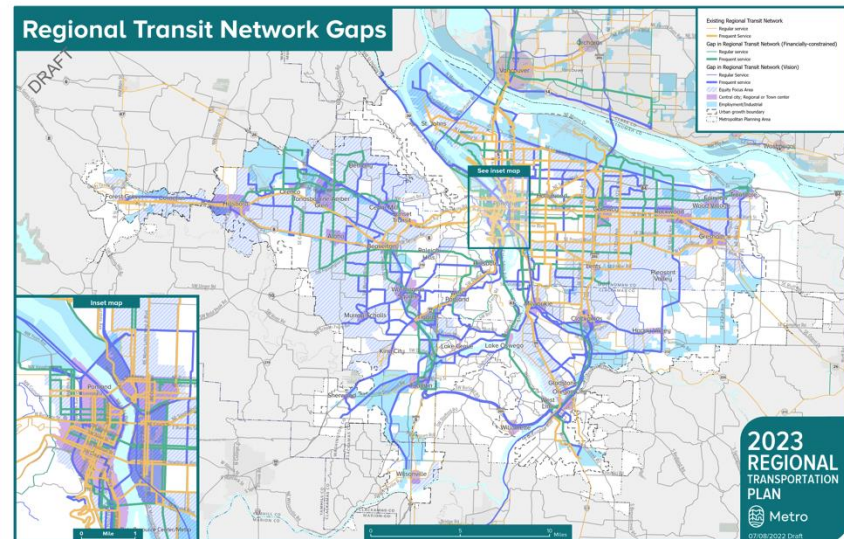
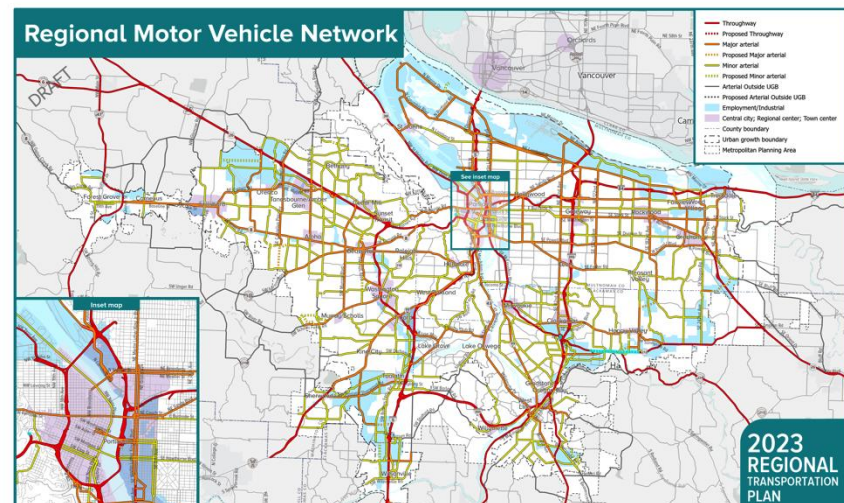
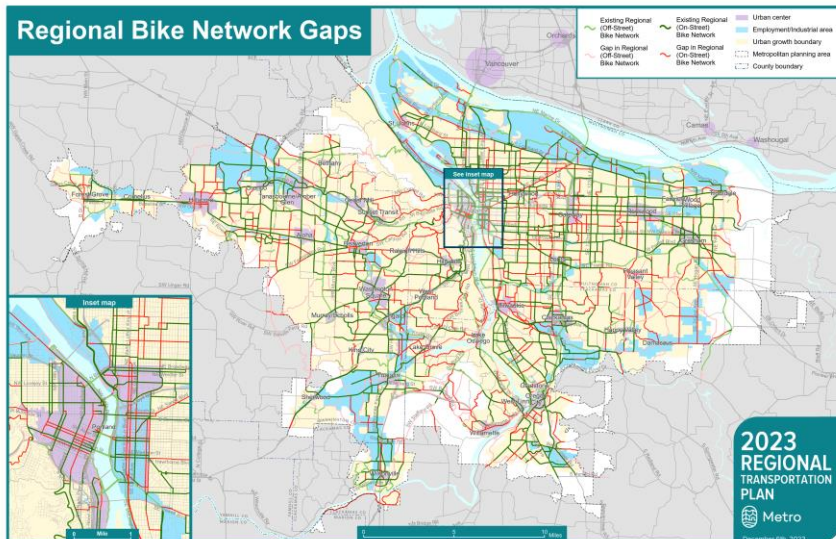
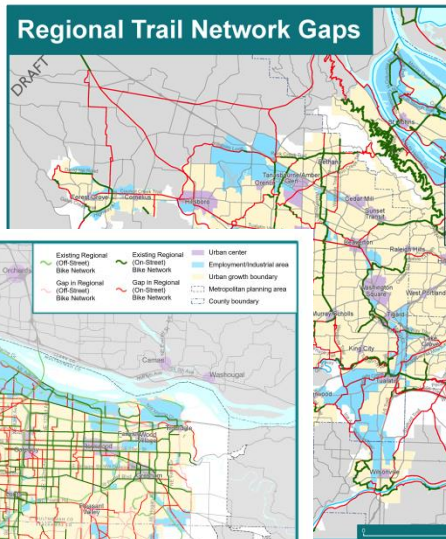
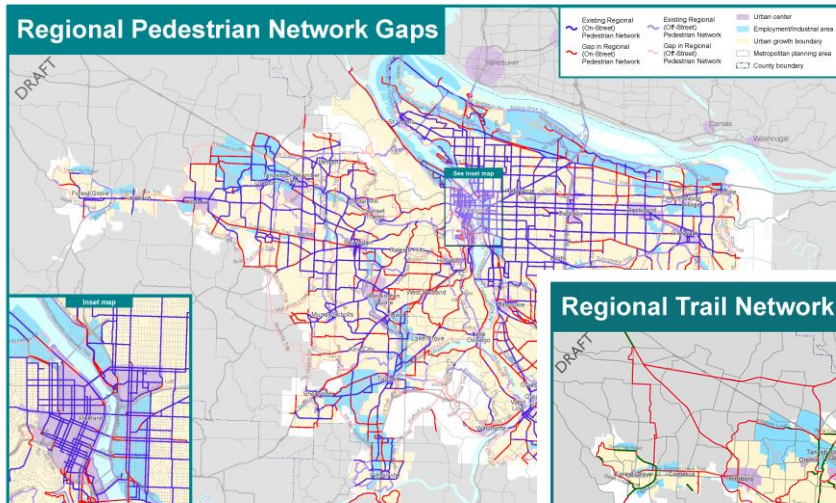
MOBILITY OPTIONS

People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming.

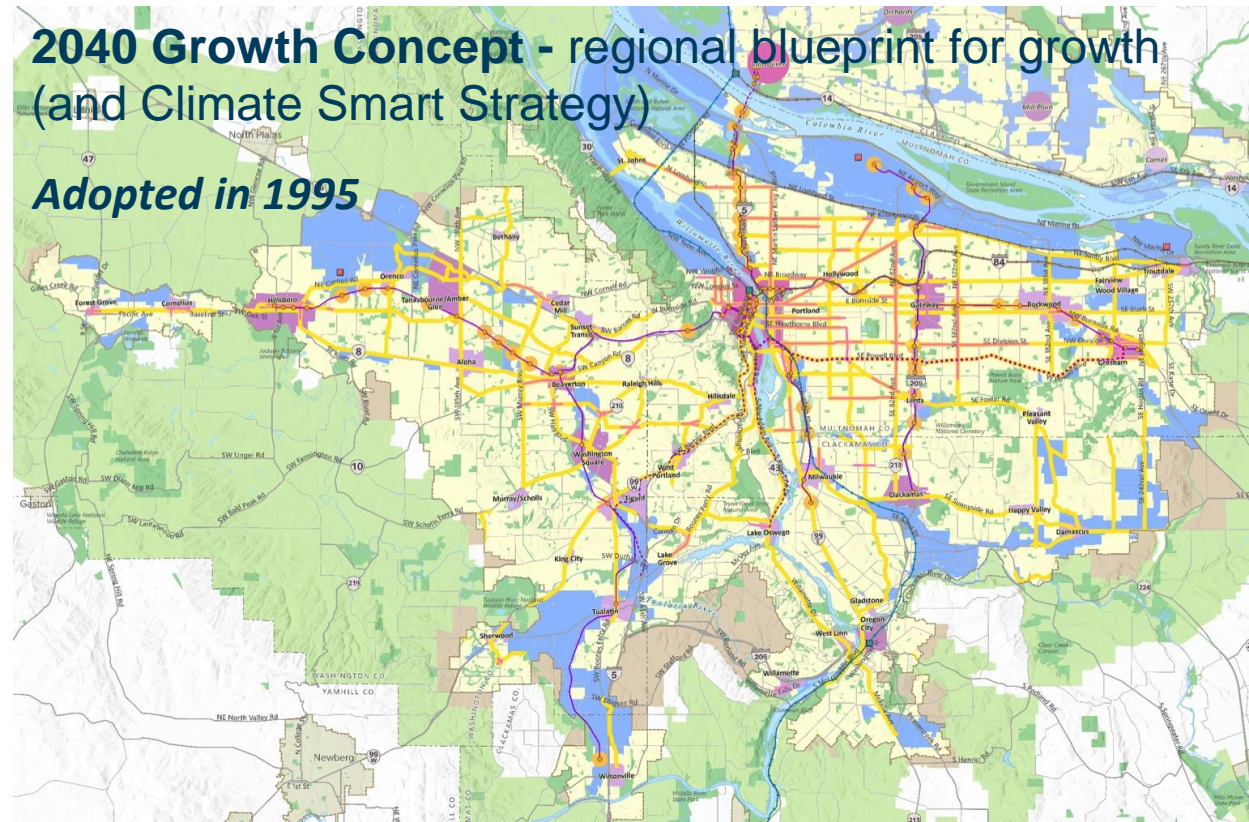
THRIVING ECONOMY

An economically vibrant greater Portland region includes centers, ports, industrial areas, employment areas, and other regional destinations that are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.

Focus on building a complete, connected multimodal system

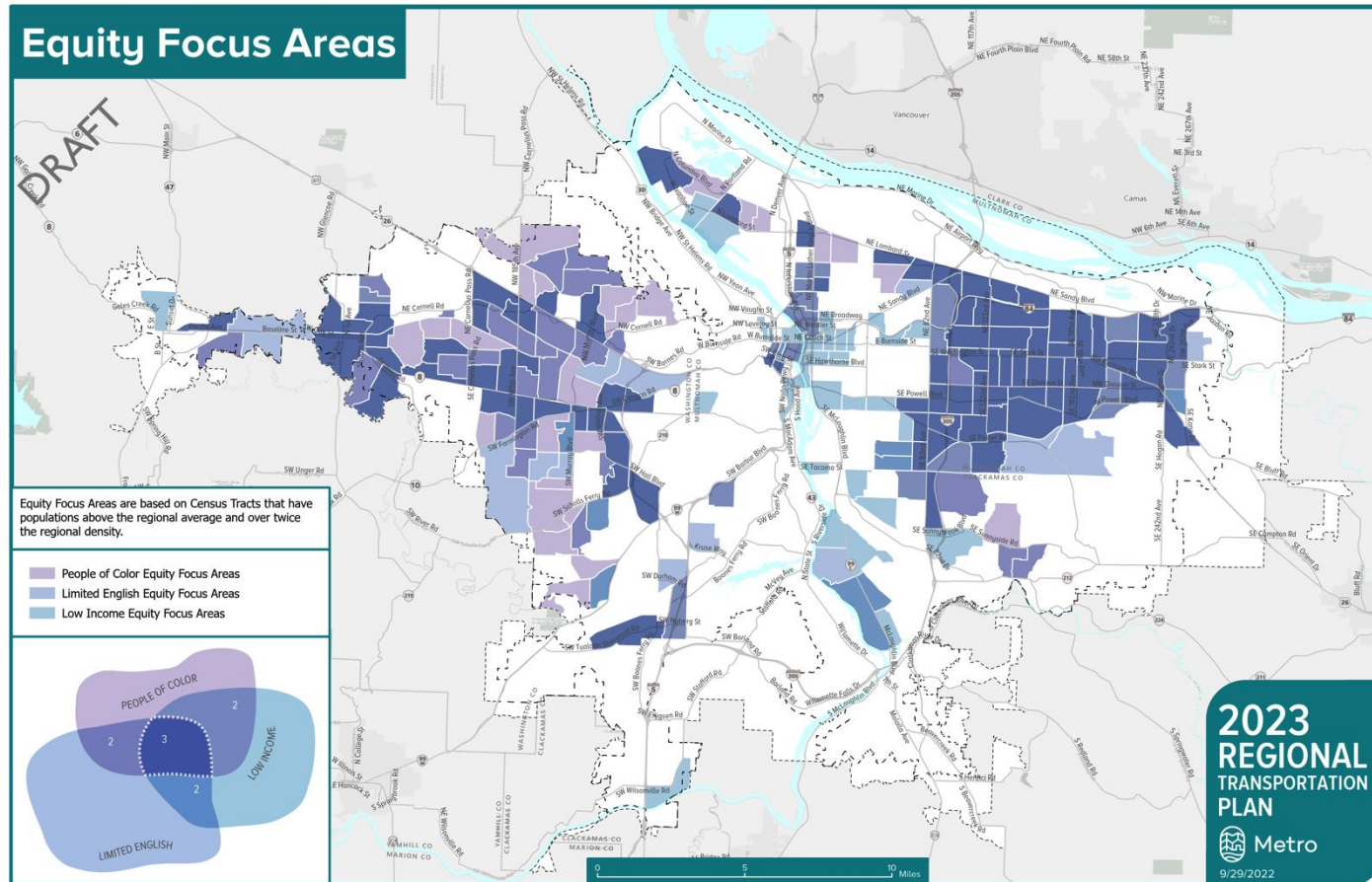


RTP economy policy framework



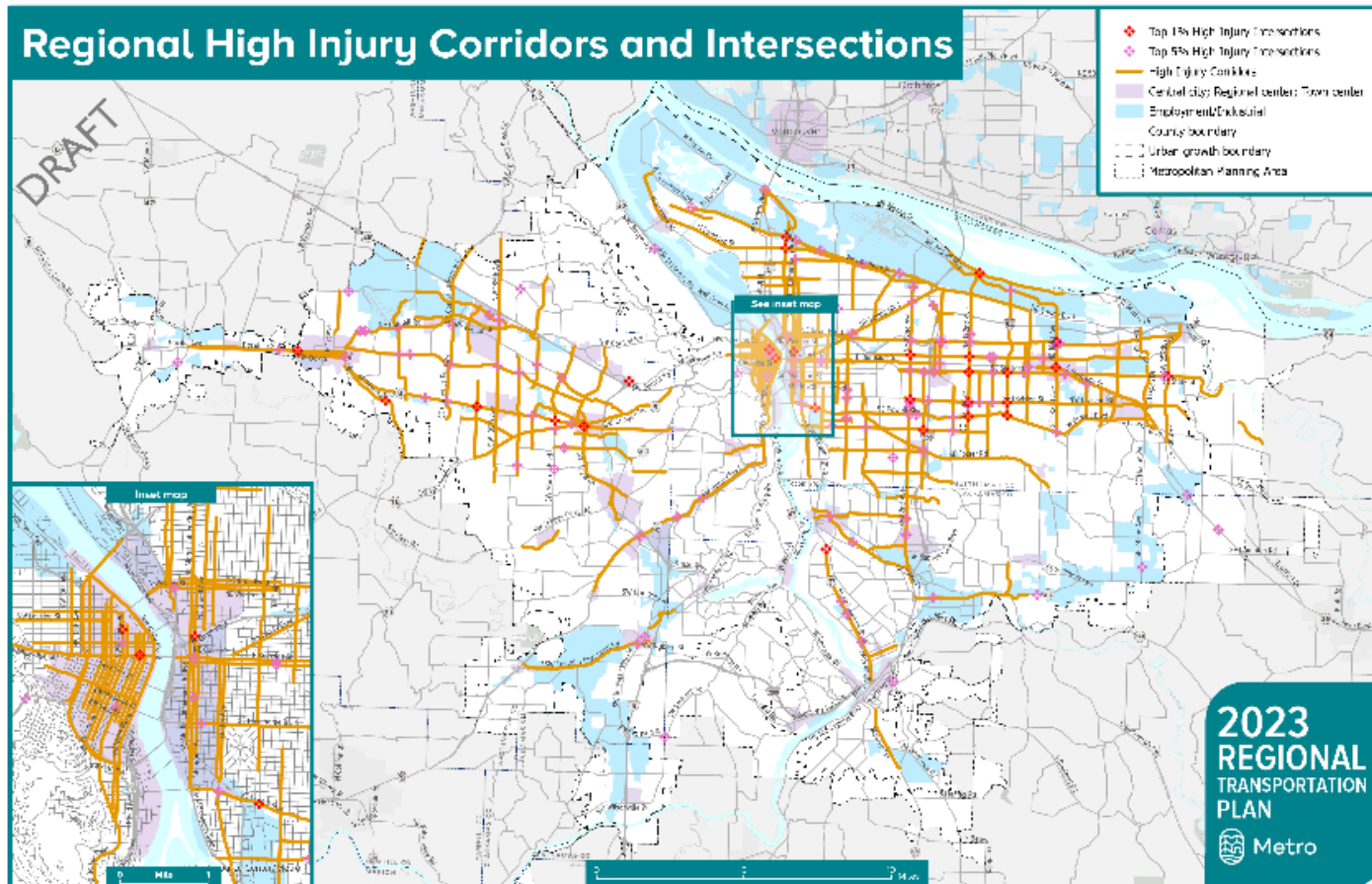
Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper

RTP equity policy framework



EFAs are communities with concentrations of people of color, people with low incomes, and people with limited English proficiency.

RTP safety policy framework



Corridors where 60 percent of serious/bike/ped crashes occur & the 5% of **intersections** with the highest rates of these crashes.

RTP climate policy framework

The Climate Smart Strategy establishes a plan to meet greenhouse gas reduction targets set by the State. It identifies high- and moderate-impact climate actions.

Climate Smart Strategy | Largest potential carbon reduction impact*



Vehicles and Fuels (Investment)

- Newer, more fuel efficient vehicles
- Low- and zero-emission vehicles
- Reduced carbon intensity of fuels



Pricing (Policy)

- Carbon pricing
- Gas taxes
- Per-mile road usage charges (e.g., OReGO)
- Parking management and pricing
- Pay-as-you-drive private vehicle insurance



Community Design (Policy with Investment)

- Walkable communities and job centers facilitated by compact land use in combination with walking, biking and transit connections



Transit (Investment)

- Expanded transit coverage
- Expanded frequency of service
- Improvements in right-of-way to increase speed and reliability of buses and MAX

Climate Smart Strategy | Moderate potential carbon reduction impact*



Active Transportation (Investment)

- New biking and walking connections to schools, jobs, downtowns and other community places



Travel Information and Incentives (Investment)

- Commuter travel options programs
- Household individualized marketing programs
- Car-sharing and eco-driving techniques



System Management and Operations (Investment)

- Variable message signs and speed limits
- Signal timing and ramp metering
- Transit signal priority, bus-only lanes, bus pull-outs
- Incident response detection and clearance

The RTP needs to reduce per capita VMT/GHG emissions by 30 percent below 2005 levels by 2045.

Draft RTP mobility policy framework

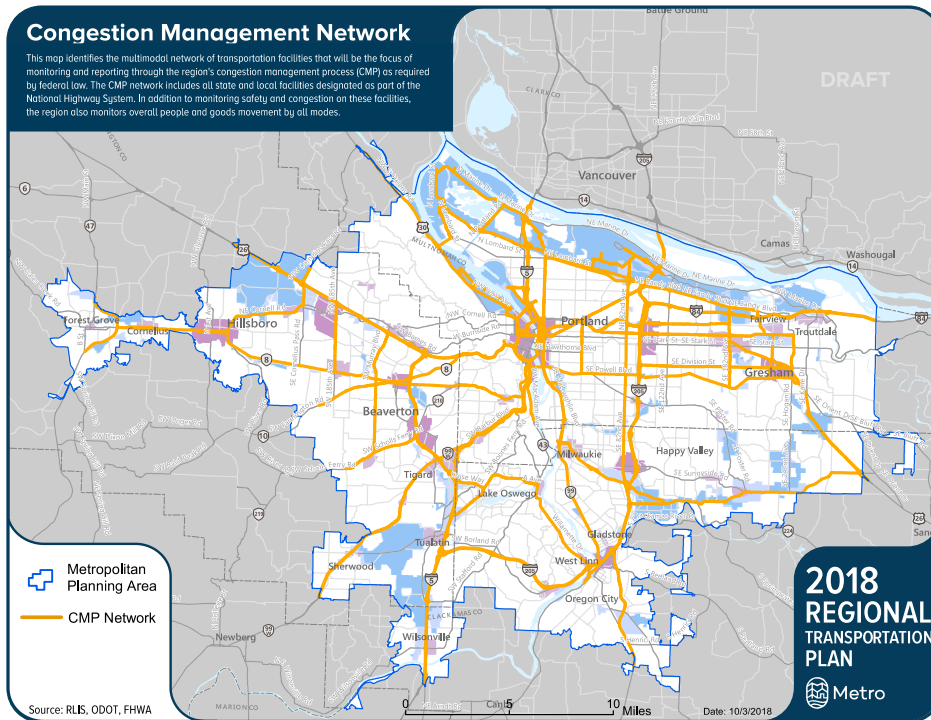
The updated Regional Mobility Policy will replace a 20-year-old interim policy that focused on addressing motor vehicle congestion.



The draft updated policy addresses all modes and mobility outcomes for VMT/capita, system completeness, and hours of congestion on the region's throughways.

Draft RTP mobility policy framework follows congestion management process

Congestion Management Process Network



Source: 2018 RTP Appendix L

CMP toolbox of strategies

1		Community design strategies <ul style="list-style-type: none"> Walkable communities and job centers facilitated by compact land use in combination with walking, biking and transit connections Mixed-used areas and transit-oriented development Parking management and pricing
2		Travel Information and Incentives strategies <ul style="list-style-type: none"> Commuter travel options programs Household individualized marketing programs Car-sharing and eco-driving techniques Safe Routes to School programs Ridesharing (carpool, vanpool) services
3		System management and operations strategies <ul style="list-style-type: none"> Real-time variable message signs and speed limits Signal timing and ramp metering Transit signal priority, bus-only lanes, bus pull-outs Incident response detection and clearance Access management (e.g., turn restrictions, medians)
Emerging		Congestion pricing strategies <ul style="list-style-type: none"> Peak period pricing Managed lanes High occupancy toll (HOT) lanes
4		Active Transportation strategies <ul style="list-style-type: none"> New biking and walking connections to schools, jobs, downtowns and other community places Bicycle infrastructure (e.g., bicycle racks, lockers and other bicycle amenities at transit stations and other destinations) Separated pathways and trails
5		Transit strategies <ul style="list-style-type: none"> High capacity transit Expanded transit coverage Expanded frequency of service Improvements in right-of-way to increase speed and reliability of buses and MAX Community and job connector shuttles Park-and-ride lots in combination with transit service
6		Street and throughway capacity strategies <ul style="list-style-type: none"> Local and arterial street connectivity to spread out travel Addition of turn lanes at intersections, driveway restrictions and other geometric designs such as roundabouts Road widening to add new lane miles of capacity (e.g., adding auxiliary lanes, additional general purpose lanes); pricing is considered when adding new throughway capacity in the region

Source: 2018 RTP (Chapter 3) and Appendix L

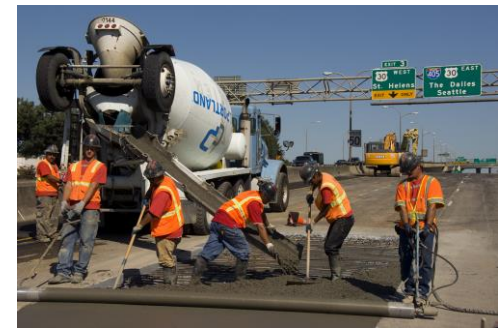
Revenue forecast elements

- **Local Agencies**
 - Locally generated revenues and State pass through – draft \$15 – \$25 billion
 - Federal funding to local agencies – draft near \$2.2 billion
- **Transit Agencies**
 - Locally generated revenues
 - State revenues to transit agencies
 - Federal funding
- **ODOT**
 - State generated revenues forecast to Metro region
 - Federal funding forecast to Metro region



Maintenance & Operations Costs

- **Demonstrate adequately maintaining and operating the federal aid system**
 - Most of the federal aid road system is on ODOT facilities
 - Will utilize existing asset management reporting
- **Cost estimation by each agency is next task**
 - Instructions and guidance distributed next week
 - Start from 2018 RTP materials
 - Have already received drafts from some agencies
- **Subtract these costs from revenue estimates to calculate funds available for capital projects**
 - Basis for cost targets



Draft revenue forecast and cost targets

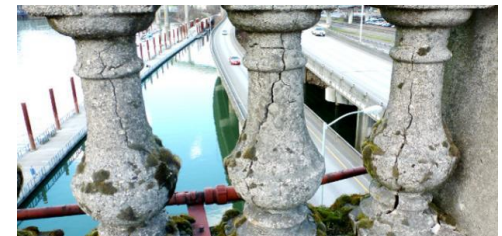
Draft 2023 RTP cost targets for capital projects (*under development*)

Agency/County coordinating committee	Constrained List cost target for 2023-2030 (billions, 2023 dollars)	Constrained List cost target for 2031-2045 (billions, 2023 dollars)	Strategic List cost target for 2031-2045 (billions, 2023 dollars)	Total RTP List cost target for 2023-2045 (billions, 2023 dollars)
City of Portland	\$0.000	\$0.000	\$0.000	\$0.000
Clackamas County, Cities, & NCPRD	\$0.000	\$0.000	\$0.000	\$0.000
Multnomah County and Cities	\$0.000	\$0.000	\$0.000	\$0.000
Washington County, Cities & THPRD	\$0.000	\$0.000	\$0.000	\$0.000
Oregon Dept. of Transportation	\$0.000	\$0.000	\$0.000	\$0.000
TriMet & SMART (Transit Capital)	\$0.000	\$0.000	\$0.000	\$0.000
Metro	\$0.000	\$0.000	\$0.000	\$0.000
Port of Portland	\$0.000	\$0.000	\$0.000	\$0.000

The strategic list cost target is recommended to be **1.5 times** the financially constrained list cost target.

Capital project costs: 2023-45

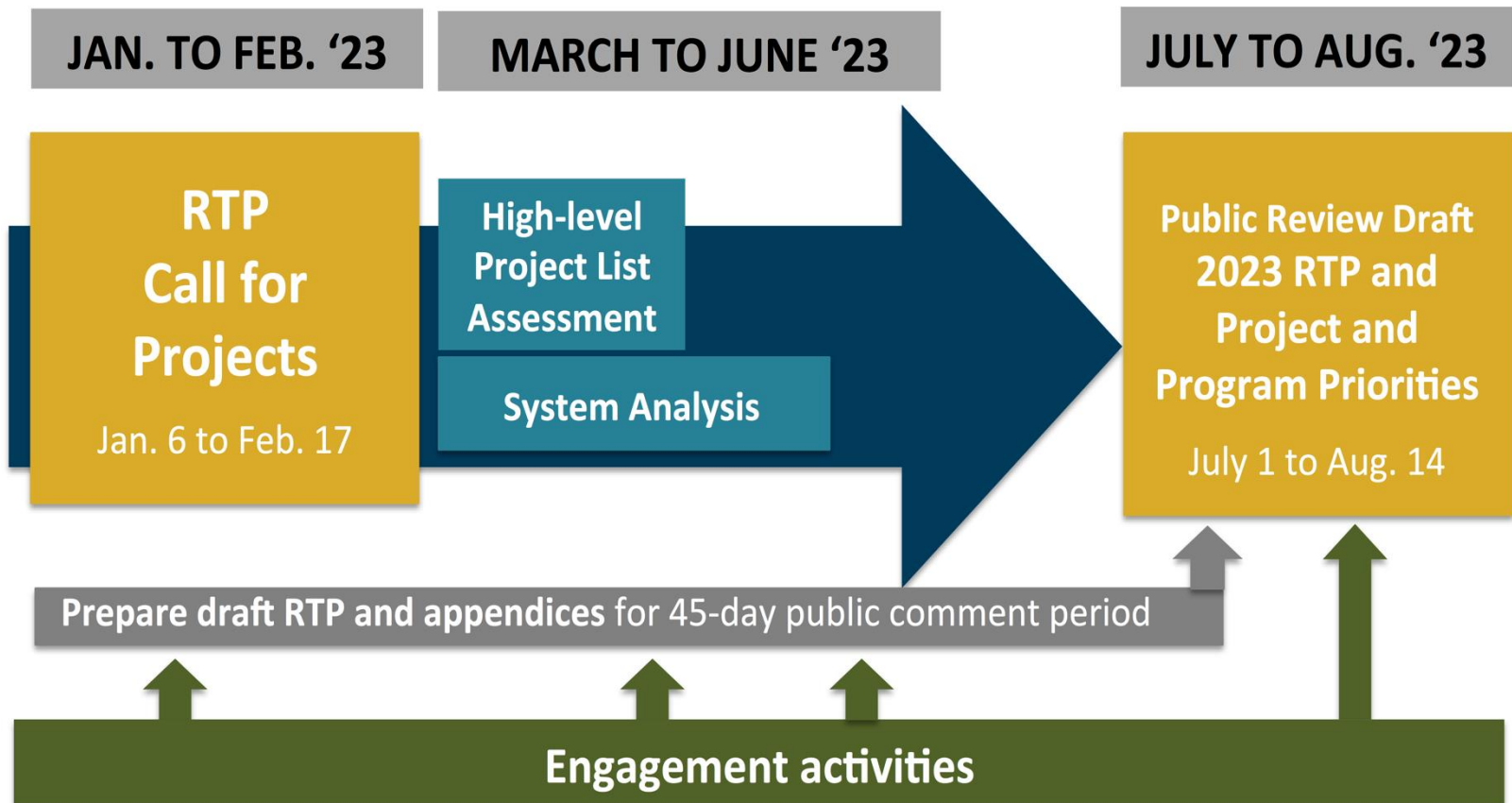
- **2018 RTP project cost information**
 - Metro will inflate projects costs from 2016 dollars to 2023 dollars - a 35-40% increase (*TBD*)
 - Agencies will review project cost data and adjust as appropriate
- **Year-of-expenditure project cost information**
 - Call for Projects process includes updating and prioritizing projects in two time periods: 2023-2030 or 2031-45
 - Metro will provide guidance on inflation calculation
- **Total project costs must equal forecasted revenues**



Outcomes-based technical analysis

	High-level project assessment	System analysis
Equity	Is the project located in an Equity Focus Area?	Does the RTP benefit Equity Focus Areas at least as much, if not more, than other communities in the region?
Climate	Does the project have a high or medium greenhouse gas reduction potential?	Does the RTP meet vehicle miles traveled per capita reduction targets?
	Is the project located in a designated center?	Does the RTP meet transit, bicycle and pedestrian mode share targets?
Safety	Is the project identified as safety project?	Does the RTP meet regional safety targets?
	Is the safety project on a high injury corridor?	
Mobility	Does the project complete a gap in the region's pedestrian, bicycle or transit networks?	Does the RTP meet targets for completing the multimodal transportation system?
		Does the RTP meet vehicle miles traveled per capita reduction targets?
		Does the RTP meet targets for reliable travel on throughways?
Economy	Does the project improve access to destinations within centers and industrial and employment areas?	Does the RTP improve freight, transit, bicycle and pedestrian access that serve centers and industrial and employment areas?
		Does the RTP increase access by auto and transit to 24 destinations?

Call for Project timeline and process



2023 RTP CALL FOR PROJECTS

Role of coordinating committees

Build a coordinated, sub-regional list of project and program priorities for the 2023-2045 time period in collaboration with state and regional partners

Submit three packages within respective cost targets:

- 1 – “Constrained” priorities for 2023 to 2030
- 2 – “Constrained” priorities for 2031 to 2045
- 3 – “Strategic” priorities for 2031 to 2045

Submit endorsement letter stating packages are sub-region’s agreed upon priorities for 2023 RTP

Key dates in the Call for Projects

Dec. 6 and 7	Online RTP Hub training for agency staff (12/6: noon to 3PM and 12/7: 9AM-noon)
Jan. 6	Call for Projects begins and online database system available
Jan. 27	Partners provide draft list of projects
Feb. 17	<u>Deadline #1</u> Project sponsors submit required project information through online system and coordinating committees email endorsement letters to Metro
March-May	Metro conducts technical analysis and reviews findings with technical and policy committees
April	Metro and CBOs seek public input on draft lists
May 1	<u>Deadline #2</u> Project sponsors submit letters of endorsement from governing bodies
May-June	JPACT and Metro Council consider input and findings and provide direction on finalizing draft RTP and updated priorities for public review and adoption

Key resources and tools to support jurisdictional partners

RTP Hub online system and web page with resources:

- **Project Submission Guide** – *a how to guide with more details about information to be updated/submitted in the hub*
- **Online resource maps and geospatial data** of 2018 RTP projects, policy framework maps and needs assessment maps and data
- **Cost estimate guidance** and workbook
- **Metro RTP staff liaisons**

December TPAC action

Request TPAC recommendation to JPACT for updating the RTP project and program priorities:

- Use policy framework to update priorities to address identified needs
- Accept draft revenue forecast and sub-regional cost targets for capital projects for the Call for Projects

The recommendation will provide direction to move forward and does not adopt policy, a funding strategy, or a plan – that comes next year.

Discussion and feedback

- Does the **policy framework provide adequate direction and guidance** to agency partners to update the RTP investment priorities?
- Comments or questions about **the process**?
- Comments or questions about **development of the draft revenue forecast or cost targets**?

Learn more about the **Regional Transportation Plan** at:



Metro

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