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Oregon Transportation Plan: Innovations in the Exploratory Scenario Planning Approach

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Oregon Transportation Plan

Case studies of utilizing scenario planning in an era of rapid change and uncertainty

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The Presenters

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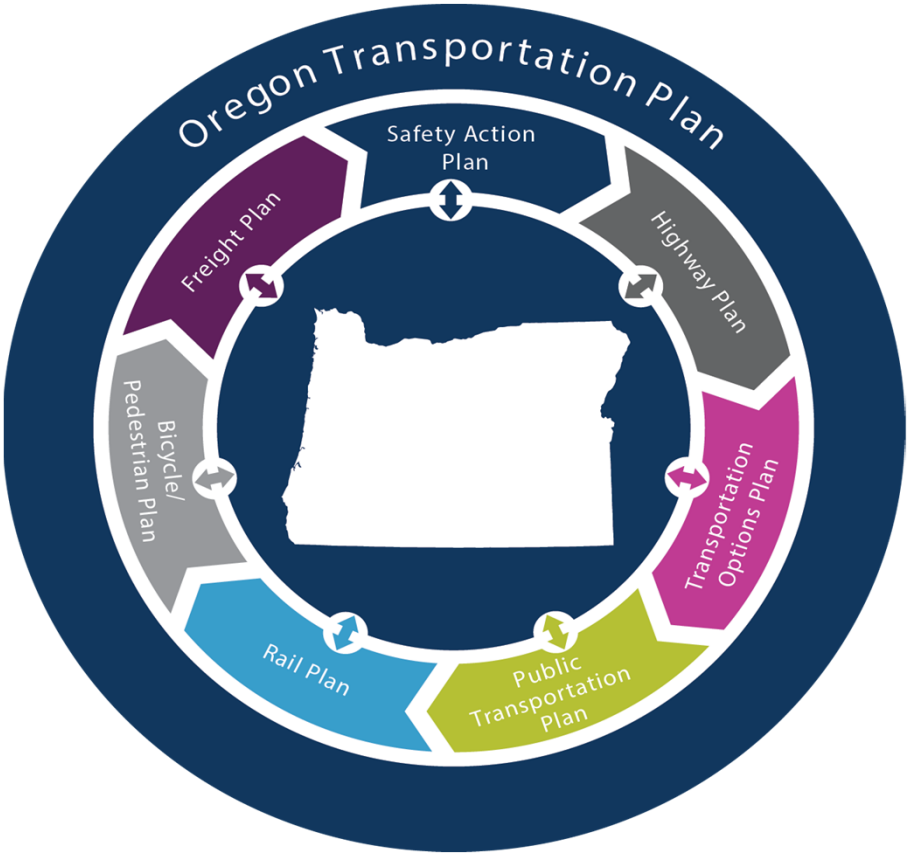
What is the OTP?

- A Plan for ODOT and Oregon
- Multimodal
- Vison out to 2050
- Policies and strategies for the entire transportation lifecycle
- Directs ODOT
- Influences other state agencies
- Locals must be consistent



OTP First Principles

Meta-epistemology: “thinking about how we think”

Consider the *Who, Why, What, How*

Play to the strengths of the process using the tools, applying prescriptive and descriptive accordingly

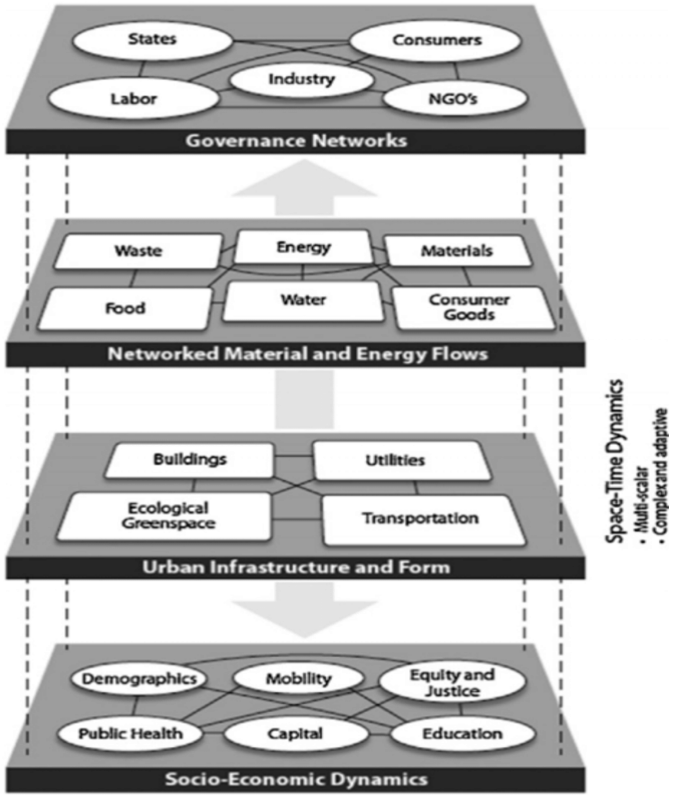
Make *complexity* of the system *relatable*

Complex System Thinking

Consider the complexity of the system in a relatable way

System is about relationships

- People and communities (socio-economics)
- People and institutions (government, industry)
- People and infrastructure
- People and the natural environment
- Networks and flows (goods, resources)



Meerow, Newell, and Stults (2016, 45)

Planning Process

Positioning the “prescriptive” and the “descriptive"

***Prescriptive**:* “What information do we need?” “How will we make informed choices and come to agreement?”

***Tools**:* PMP, PI/O/C, charters, media releases, background reports

***Descriptive**:* “What is happening in transportation?” “How Is the system working/not working for you?”

***Tools**:* Virtual (sometimes in-person) engagement (virtual open house, Focus Groups, transportation personas)

***Prescriptive**:* “Given what we know about x, what could happen if y?” “What should we do?”

***Tools**:* Scenario Planning, virtual open house 2 (informed choices)

Source: R. Goodspeed

Key Drivers of Change

1 **Social Equity**

2 **Climate Change**

3 **Population and Labor Force Changes**

4 **Industry Composition Trends**

5 **Emerging Transportation Technology Trends**

6 **Resiliency and Disaster Planning**

OTP Development Process

Primary “ingredients” for achieving an outcome-driven Oregon Transportation Plan

- Understand the users and uses of the system and needs today and in the future
- Conduct research and identify best practices
- Seek the council of subject matter and other experts
- Balance diverse perspectives and needs
- Be visionary but actionable
- Establish a decision-making framework, considering tradeoffs

Vision and Values Statement

“Oregon’s transportation system supports all Oregonians by connecting people and goods to places in the most climate-friendly, equitable, and safe way.”

Advancing these Goals

- **Mobility**
- **Safety**
- **Sustainability and Climate Action**
- **Economic Vitality and Livability**
- **Stewardship of Public Resources**
- **Social Equity**

Goals to Measurable Processes

- Goals lead to
  - Objectives
- Objectives lead to
  - Measurable outputs from the analytical tools
- Crosswalk enabled a transparent process

Goal	Policy Objective	Model Output Measure
Mobility	Mobility 1: Multimodal Travel	Transit Trips Per Capita
		Bike Trips Per Capita
		Walk Trips Per Capita
	Mobility 2: Reduce Daily VMT	Household Daily VMT Per Person
		Total Daily VMT Per Capita
	Mobility 4: Improve Travel Time Reliability	Travel Time Index under Extreme Congestion
GHG & Equity	Sustain 1: Reduce GHG Emissions	Total CO2e GHG emissions
		Household CO2e Per Person
	Sustain 2: Efficiency of Vehicle Fleet	CO2e per mile of Transit service
		CO2e per mile of Heavy Trucks
	Equity 1: Reduce transportation cost burden	Share of income spent on transportation for households with annual income less than 25k
Safety	Reduce Crashes and improve safety	Number of Urban car deaths
		Number of Urban car injuries
		Number of Rural car deaths
State of Good Repair & Reliability	Minimize disbenefits of maintenance and probably of failures	Funding for Preservation and Adaptation

The OTP is an Outcome Driven Plan

Traditional

Input Driven Planning

- Evaluate A Baseline Future
- Determine Measures of Effectiveness
- Design Normative Scenarios
- Test Scenarios Against Goals
  – Iterate to find optimal solution

OTP!

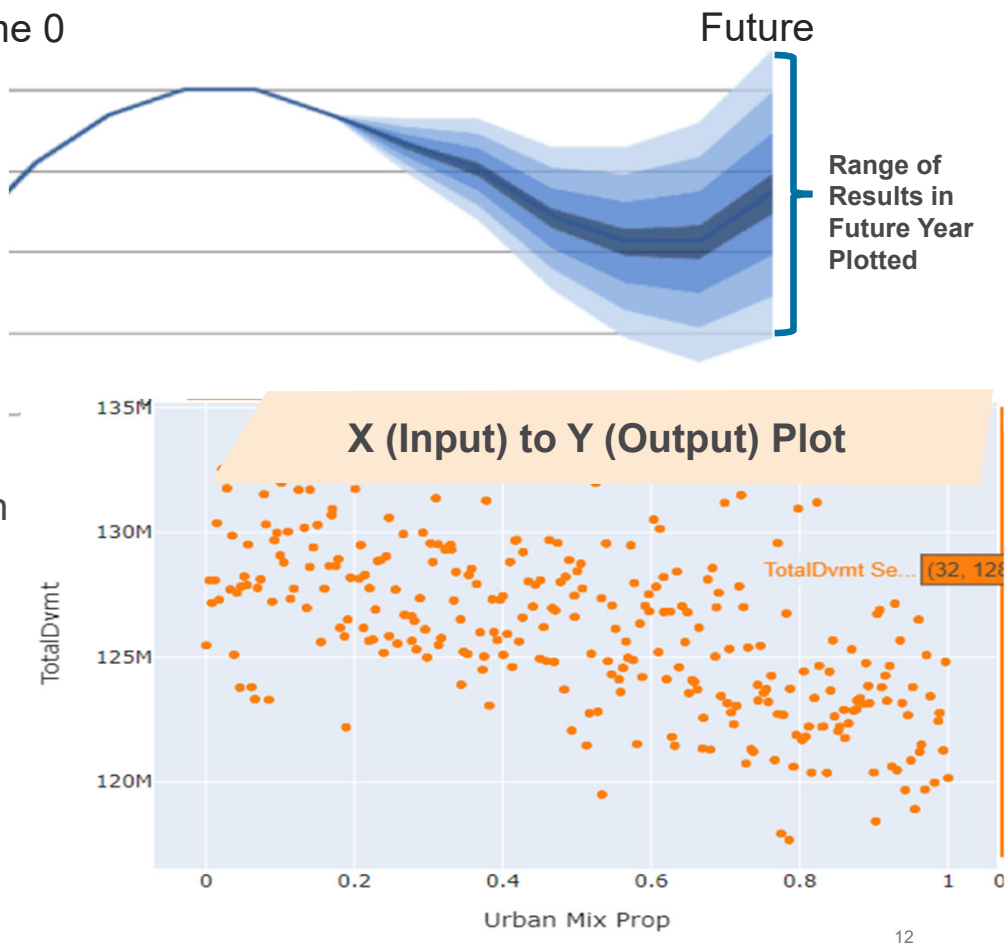
Outcome Driven Planning

- Evaluate A Baseline Future
- Determine Measures of Effectiveness
- Determine Range of Feasible Inputs in Future Years
- Evaluate an Extensive Domain of Possible Future Scenarios
- Identify which Scenarios best Achieves Goals

New Tools Lead to New Opportunities

Outcome Driven Planning

- Enabled by new tools to allow for a robust set of quantitative analysis
- Rather than normative ‘input driven outcomes’ we can focus on a quantitative exploratory scenario planning (XSP) approach
- ‘Goal Seek’ to find Scenarios (and therefore which inputs) produce desirable outcomes
- Many unique results based on combinations of inputs. Beyond stochastic – it is based on design of model to explore scales, interpolations, etc.



What is it?

VisionEval Strategic Model

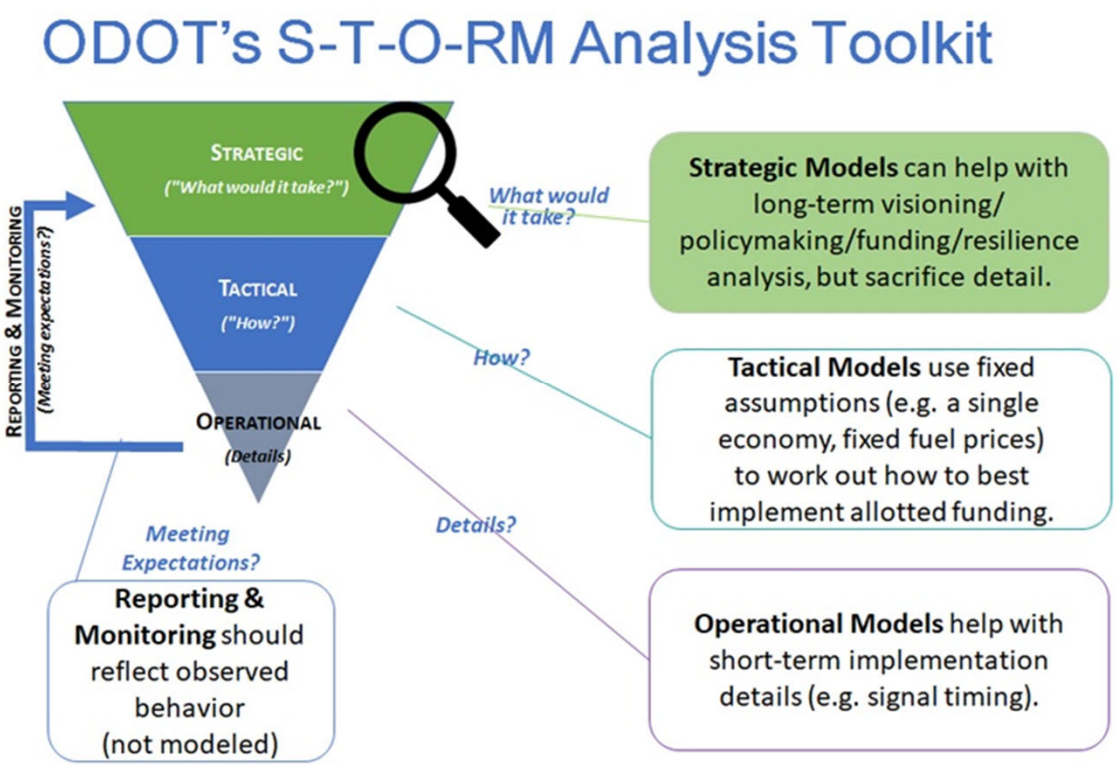
- VisionEval is the most robust, quantitative strategic model that can be used for scenario planning.
- Estimated on readily available data including National data such as the National Household Travel Survey (NHTS) then calibrated to local conditions (PUMS, HPMS, travel surveys, travel models).
- Econometric framework for monetized costs (time & out of pocket) via a household travel budget. (e.g., congestion charges, fuel taxes, electrification effects)
- Sensitive to land use, operational tactics, and policy tactics (e.g., TDM, induced travel, signal coordination, teleworking).
- Runs quickly (run hundreds of scenarios in a short timeframe) because it lacks a specific network to assign trips. It is a daily travel model rather than a trip model.
- Results can be viewed in an interactive visualizer and are available in output files (CSVs, SQL, Excel, etc.)

- VisionEval is supported through a Pooled Fund managed by FHWA
- For more information www.VisionEval.org

Covers more tactics more quickly than full travel models.

This makes them particularly compelling – they compliment existing models well.

Strategic Modeling in the Planning Process



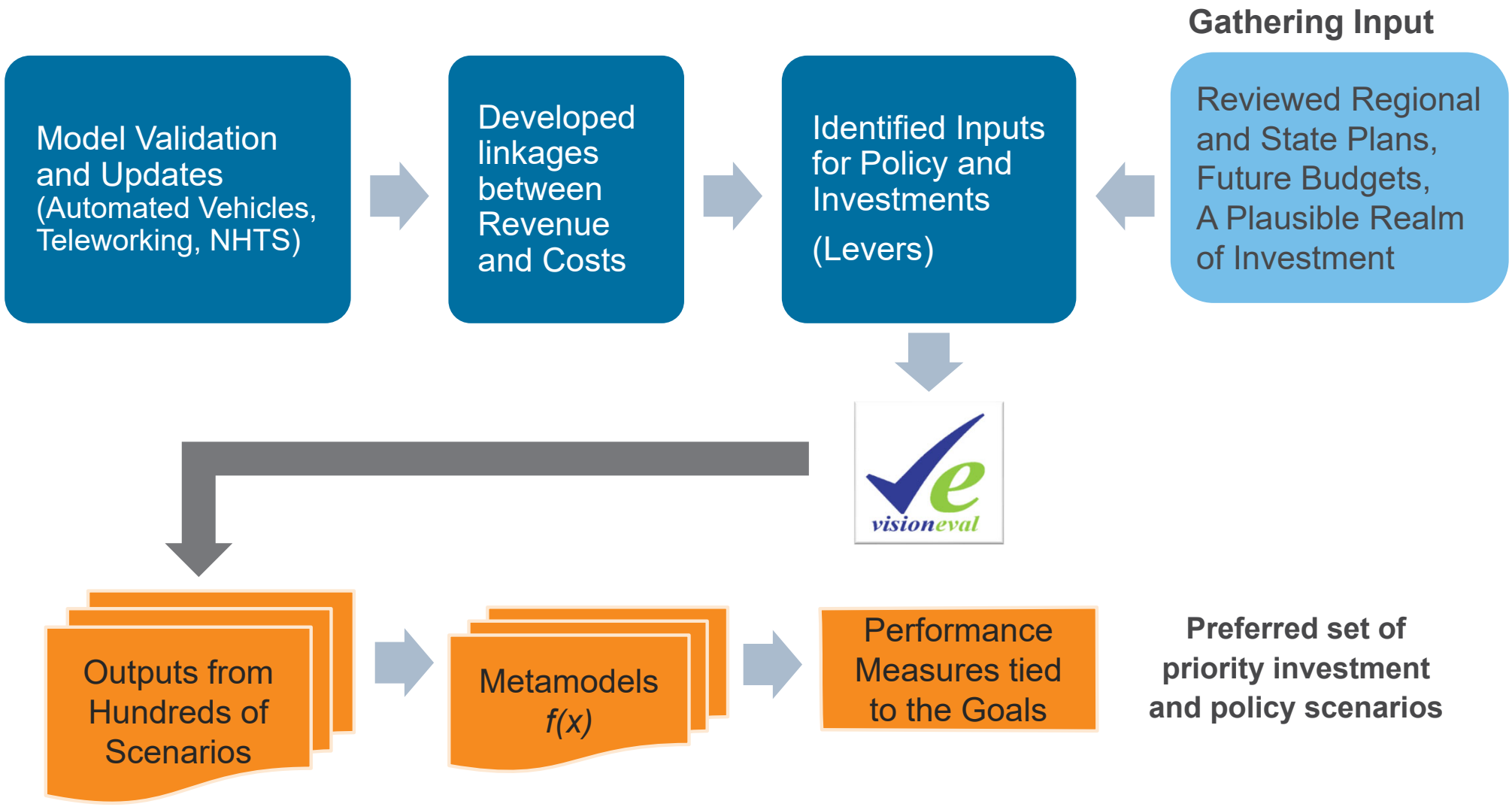
- Scenarios and future visions can be informed and tested
- Assess validity of different approaches
- Key metrics of VMT, GHG, Energy
- Identify likely policies and investments with high ROI early in the process. Justify and direct further detailed work.
- Used for LRTPs at both the MPO and DOT level

What was Novel

- **Financially bounded model**: Investments are limited to budget
  - **Revenue to fund Transportation** = Registrations + Fuel Taxes (gas+electricity) + VMT tax
  - **Costs** = full operational costs of Investing and Maintaining the system (a "loaded" cost to account for 'overhead' as well as cash outlays, debt, etc.)
  - **Feedbacks** = if Preservation and Adaptation were below certain values, disbenefits then accrue back into the system

- Application of the Exploratory Framework **TMIP-EMAT in a Statewide VisionEval Model**
  - Tool built on the Exploratory Modeling Workbench design supported by FHWA through several projects.
  - Expansive scenario design within a budget constrained environment

Recent research highlights the strengths of the VisionEval tool for planning applications and decision making under deep uncertainty


Gathering Input
Model Validation and Updates (Automated Vehicles, Teleworking, NHTS)
Developed linkages between Revenue and Costs
Identified Inputs for Policy and Investments (Levers)
Reviewed Regional and State Plans, Future Budgets, A Plausible Realm of Investment
visioneval
Outputs from Hundreds of Scenarios
Metamodels f(x)
Performance Measures tied to the Goals
Preferred set of priority investment and policy scenarios

Range of Inputs

Phase 1: Levers

Phase 1 Tested a wide range of values among 13 different dimensions within *Oregon's sphere of influence.* They include items such as:

Land Use Density
Btwn: Existing and 40% Mixed Use

Roadway Capacity
Btwn: 1.7% to 3.9% increase

Active Travel
Btwn: 2.5x and 4.5x increase in funding

Transit
Btwn: 25% and 85% increase in revenue miles

Electrification
Up to 30% BEV cars and buses

Demand Management
Btwn: 9% and 21% of Employees participating

Phase 2: Uncertainties

- **L3 and L5 Driverless vehicles (market penetration, capacity, delay)**
- **Teleworking rates (pre-Pandemic to 2021 peaks)**
- **Electrification**
- **Fuel & energy prices, and other ownership costs**
- **Shared rides and ride – hailing prices**

Stress Test the Preferred Outcomes to Uncertainties to better inform the resiliency of certain policies

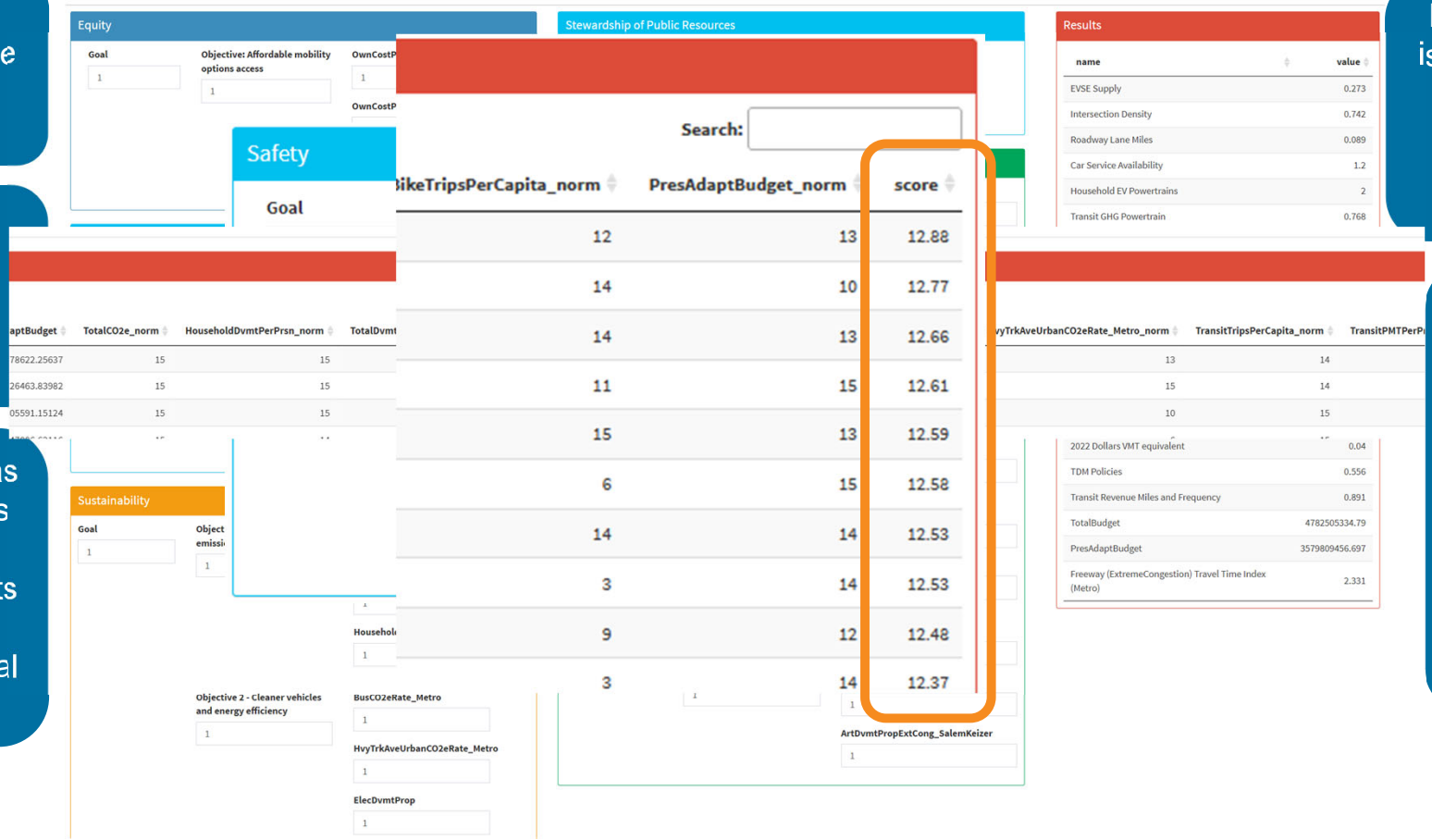
How we used it –
Multicriteria Optimization – Weighting and Scoring

- 4 Funding Levels created the constrained environment (costs balanced to revenue)
- VE processed runs based on combinations of the inputs
- 16,000 scenarios (metamodel results) analyzed at each funding level.
- Developed R-Shiny tool to interactively weight each output from the VE model to develop a ‘score’ for each scenario.
- Higher Scores are associated with meeting the intended goal Areas.
- The Balanced Outcome (equal weights across each goal area) was preferred, with a different future at each funding level

Uploaded all Results from the EMAT Metamodal

A weight for each output, objective, and goal

Each output was put into 15 bins and each bin was given points for how well it attained the goal

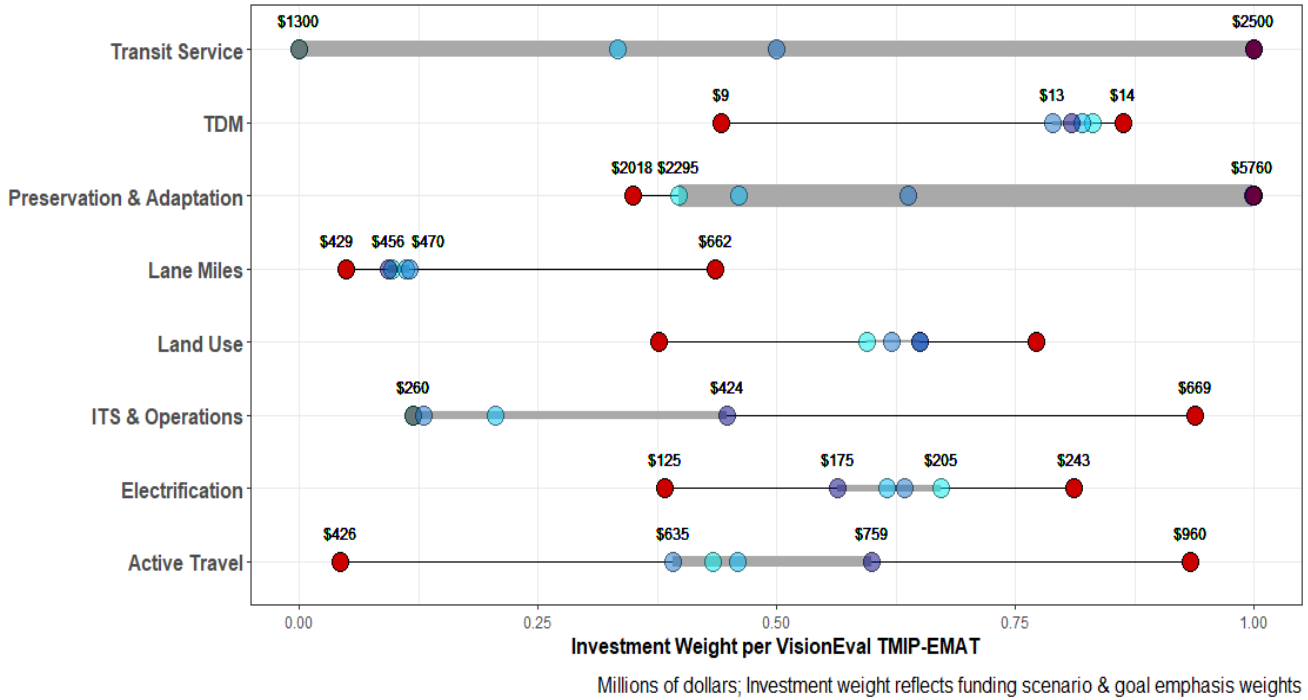


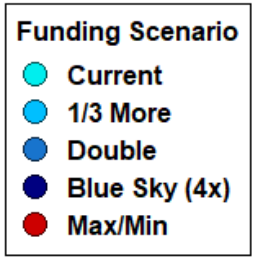
Each Scenario is Scored based on how many points each output had

The Inputs from the 5 highest scoring scenarios were used to determine the inputs that best achieves the goal

Investment Ranges and Funding Amounts

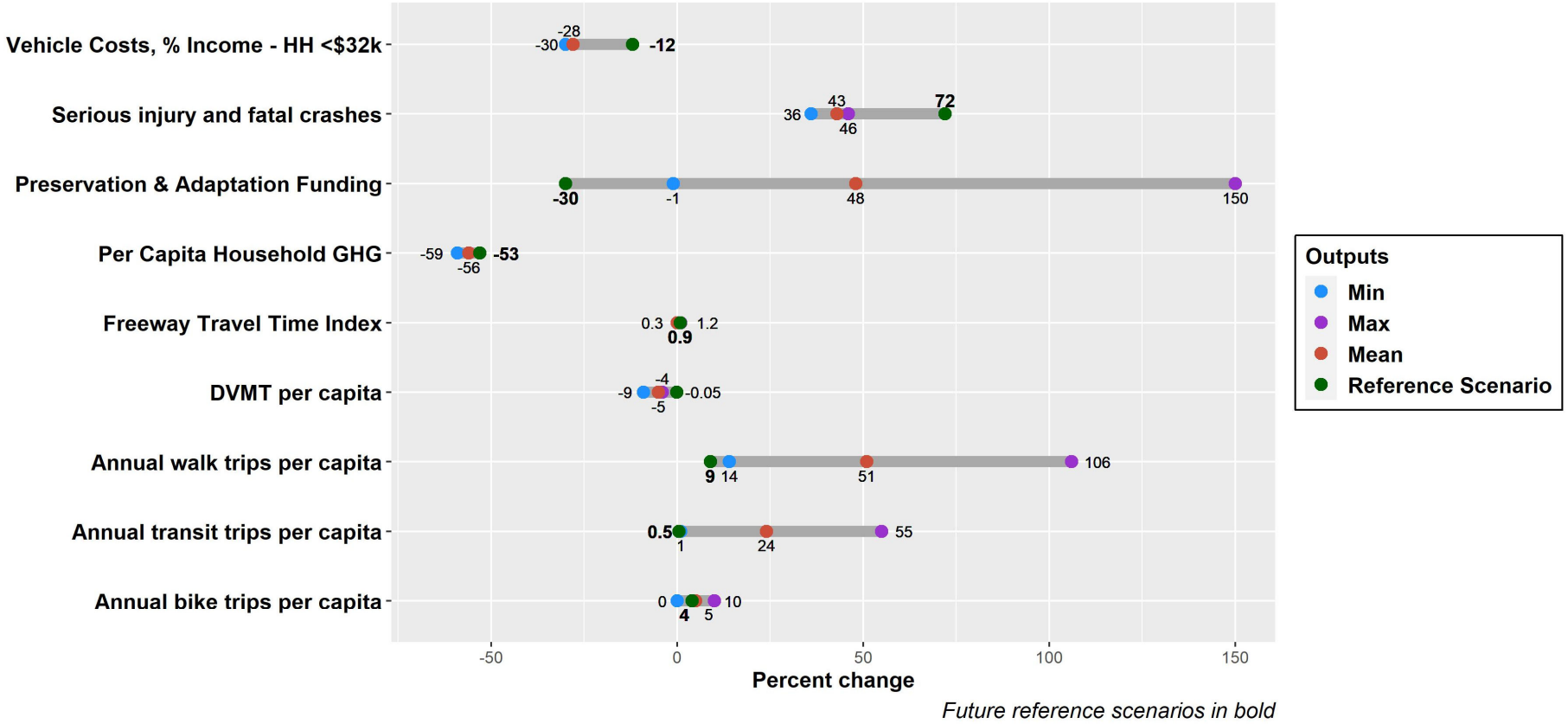
OTP: Balanced Outcome





Balanced Funding in the center – with the ends representing the range of other investment levels for other Goal areas emphasized (GHG, Mobility & Preservation, Multimodal travel)

Outcomes Across the OTP Scenario with Changes in Funding



Future reference scenarios in bold

How We Told The Story

Technical Process

Identify “drivers of change”

Develop and refine scenarios

Define tools and assumptions

Evaluate and report out findings

Gathering Input

Stakeholders consider “what if” questions

Engage public through online open houses

Findings inform understanding of trade-offs

OTC considers feedback

What We Heard Back and Learned

Balanced Outcome Scenario – Optimization across the 6 OTP Goals– supported by ODOT executive leadership and recommended by the Policy Coordinating Committee (chief advisory body for the OTP update process)

Recognize that some outcomes could have been strengthened, but that is the impact of balancing across the 6 OTP Goals

Public comment period recently concluded – most comments on the OTP Scenarios were supportive of Blue Sky (4X) in order to prioritize certain OTP Goals over others

Observed Tensions

- Reduced VMT per capita contrasting with Travel Time Reliability and mobility
- Biking trips and Transit
- VMT and Electrification

Current Status and a Look Ahead

Oregon Transportation Commission officially adopted the OTP July 13, 2023

Plan implementation underway

OTP policies and scenarios are informing investment priorities

- 2027-30 Statewide Transportation Improvement Program (STIP)
- 2025 state legislative session – potential new transportation package

Continuing Analysis

Thank you

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