11-13-2003

Meeting Notes 2003-11-13 [Part D]

Joint Policy Advisory Committee on Transportation

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Regional Travel Options Program
5-Year Strategic Plan

Draft November 24, 2003

A consensus of the members of the Regional Travel Options Subcommittee
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I. OVERVIEW AND PURPOSE

After 10 years of experience implementing TDM programs, the TDM Subcommittee sees an opportunity to restructure the regional Transportation Demand Management program to become more collaborative at marketing, implementing and evaluating TDM programs funded through the Metropolitan Transportation Improvement Program (MTIP). The number one priority for the TDM Subcommittee is to create a message and image that increases the impact of the program and allows decision makers and the general public better understand the program.

The Regional Travel Options Program is Metro's newly envisioned program for transportation demand management because it more clearly articulates the intention of the program - to provide travel options to all residents of the region. However, it is still very apparent to the TDM Subcommittee that few people, even those working in the transportation planning field, understand exactly what that means.

Regional travel options include all of the alternatives to driving alone - carpooling, vanpooling, riding transit, bicycling, walking and telecommuting. In order increase the number of people using these travel options, the region needs to

- develop a marketing message and communications plan that supports local program implementation
- develop regional policies that support more people using travel options
- evaluate program impacts that can be used to refine programs and marketing strategies, and
- identify new funding sources that can be used to expand the travel options program over the next five years.

The Regional Travel Options program is primarily a marketing program that works directly with people to find the best option for them for any number of trips they make throughout the day. The focus in the past ten years has been reducing drive alone commute trips, specifically working with ECO employers to reduce commute trips as required by the ECO Rules. The TDM Subcommittee would like to take a new direction to more actively market travel options through a unified regional marketing program.

This strategic plan provides a new vision and proposed direction for the Regional Travel Options program that emphasizes working more collaboratively to implement a highly integrated program that has measurable results and tangible impacts on the environment, the economy and the quality of life of all people in the region.

II. BACKGROUND

During the past 10 years the regional TDM program has advanced from a policy and planning program towards a regionally coordinated implementation program. In 1992, the TPAC Transportation Demand Management (TDM) Subcommittee was established by Metro Resolution to develop project selection criteria and oversee program implementation activities for the first two rounds of Congestion Mitigation and Air Quality (CMAQ) projects in the region. The mission of the TDM Subcommittee is to reduce the need to drive by advocating for TDM in the region, developing funding and policy recommendations to TPAC and coordinating regional TDM programs. In order to achieve this mission, the TDM program at TriMet was expanded to include regional marketing and technical assistance to employers that faced local transportation and parking concerns.
In 1997, TriMet and the Department of Environmental Quality (DEQ) became the region’s key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule. In 1999, the TDM program became more coordinated with the addition of an Employee Commute Options (ECO) clearinghouse, a regional telecommuting program, a local TDM program in Wilsonville, a TMA Assistance Program, and a Region 2040 Initiatives program. Also in 1999, the City of Portland restructured its Transportation Bureau to include a Transportation Options Division, and other counties and cities in the region began actively working with businesses and communities to address the need for transportation options.

The TDM Subcommittee has identified a need to revise the mission to reflect the new strategic direction to create a more collaborative approach to program development, marketing, implementation and evaluation. This plan details the TDM Subcommittee’s strategy for implementing a newly envisioned Regional Travel Options program.
III. 2003 – 2008 PROGRAM PRIORITIES

A. Travel Options 101
Regional Travel Options include transit, vanpools, carpools, bicycling, walking and telecommuting. The newly envisioned Regional Travel Option Program will promote these options through the following programs:

• Collaborative Marketing Program – regional message and identity for program
• Regional Rideshare Program – market carpool and vanpool to employers
• TriMet Employer Outreach Program – markets travel options to employers and schools
• SMART TDM Program – markets travel options to employers and schools
• Regional TMA Program – markets travel options to employers to catalyze economic development in Region 2040 centers
• Region 2040 Initiatives Grant Program – pilots innovative projects
• Regional Telework Program – market telework to employers
• Business Energy Tax Credit Program – provides tax incentives to employers implementing travel option programs

Bicycling and walking are promoted through policies in the Regional Transportation Plan and local Transportation System Plans. The City of Portland Transportation Options program has a fully staffed Transportation Options program that researches, develops and implements innovative projects to local residents. Some of these programs are funded through the Region 2040 Initiatives program to assess their potential implementation in other Region 2040 centers.

B. Connections to other regional land use and transportation goals

2040 Centers
The Regional Travel Options program is an economic development tool for regional centers and industrial areas. RTO strategies support economic growth in centers by freeing up land currently used for parking for jobs and housing and by increasing the capacity of current transportation infrastructure thereby saving millions of dollars in costly road expansion projects. A study by the Lloyd District TMA found that over $170 million in parking infrastructure costs could be saved using more cost effective RTO strategies. TMA’s provide local leadership, which is one of the most critical components of developing successful community centers. TMAs provide a connection between businesses and the community that acts as a catalyst for economic development and add value to infrastructure investments, both of which provide positive community benefits.

Regional centers are intended to be places where people can take transit, walk and bicycle to destinations within the center. The RTO program, specifically TMAs, TravelSmart and land use policies can be used to increase the number of people bicycling and walking in centers. The Region 2040 Initiatives grant program provides funding for innovative programs such as TravelSmart.

Corridors
Major corridor studies are conducted by state or regional agencies working in partnership with local governments to develop appropriate transportation strategies and solutions when safety, mobility and congestion standards are exceeded. The RTO Program will work with each of these corridor studies to identify opportunities to implement strategies that increase the capacity
and prevent the unnecessary expansion of roadways. Strategies identified in the I-5 Trade Corridor study completed in 2002 included, enhanced vanpool service, education and outreach, transit pass subsidies, TMAs and promotion of carpoolmatchNW.org. Another tool that is proving to be useful in changing travel behavior is TravelSmart, which is an innovative program that targets those people who are looking for alternatives to driving and provides them with information and incentives to leave their cars at home.

**Transit Oriented Development**

Transit oriented developments are intended to increase ridership on transit by building housing and jobs in close proximity to transit lines. However, it is not expected that all trips will be made on transit so it is essential to provide other alternatives. TODs typically have reduced parking requirements, which assumes that not all residents will own cars. By providing a wide range of options (e.g., FlexCar, free bicycles or bicycle storage, and information about how to access the various services provided within the community on foot) beyond transit we can work to increase the mobility of residents while reducing the number of car trips within the community.

**TriMet's Transit Investment Plan**

Fast, reliable and safe transit service is one of the critical components of implementing successful travel option programs. In areas where transit service is not convenient, accessible and safe other strategies such as carpools and vanpools can be used until additional transit service coverage, frequency and availability is provided. TriMet's Transit Investment Plan (TIP) provides a framework for how transit investments will be made over the next five years. The TIP focuses on specific corridors and focus areas in conjunction with regional priorities set out in the Region 2040 Growth Concept and the Regional Transportation Plan. Travel options programs can be used to better leverage and add value to transit investments. The RTO program will work with TriMet to enhance travel options programs in targeted corridors and focus areas.

**Community Health**

There is renewed interest in physically active modes including walking and bicycling primarily due to the Center for Disease Control and the Robert Wood Johnson Foundation's leadership in addressing the negative health implications of our auto-oriented communities. Regional partners recently received a grant from the Foundation to increase physical activity, including walking and bicycling for everyday needs and activities, in Lents Town Center, Interstate corridor and Damascus. The Regional Travel Options program will work with partners and local leaders to make stronger connections between land use, transportation and health throughout the region and within the 2040 centers.

**Air Quality**

Motor vehicles are the largest single source of air pollution in the Portland area. Under the Department of Environmental Quality's (DEQ's) ECO program, employers with more than 50 employees at a work site must provide commute alternatives to employees designed to reduce the number of cars driven to work in Portland and surrounding areas. ECO is one of several strategies in a federally-required plan to keep the air clean in the Portland area. This plan was adopted by the Environmental Quality Commission on July 12, 1996 after public comment. The plan helps the region prevent adverse health impacts, avoid additional industrial growth impediments, avoid sanctions on federal transportation funds and reduce traffic. The RTO program will continue to work with DEQ to monitor progress towards reducing commute trips and the resulting improvement.
Water Quality
By reducing the need for road expansion the RTO program reduces the amount of impervious surface. Stormwater runoff from street rights of way is the number one cause of water quality degradation in urban areas. Reducing the number of people driving prevents the expansion of roadways, which in turns prevent the amount of impervious surface being added to watersheds. Metro’s Green Streets program addresses water quality and runoff issues associated with existing and new street rights-of-way. The RTO program will work with the Green Street programs to promote alternative street designs that reduce the impact of streets on water quality. RTO program work will also coordinate with Metro’s Goal 5 program to help reduce the amount of impervious surface being added to regional watersheds.

C. Regional Travel Options Program Components

Mission
The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region.

Goal 1 Develop a proactive marketing program that acts as an “umbrella” for all travel options programs being implemented throughout the region.

Goal 2 Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Goal 3 Develop performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

Goal 4 Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

Goal 5 Develop regional policies that integrate RTO programs into other regional land use and transportation programs including the Centers Program, TOD Program, Corridors program, Goal 5 program and TriMet’s Transit Investment Plan.

Goal 6 Develop a funding plan that helps create a sustainable Regional Travel Options program.

Since each program has a unique way of operating, each has its own strategies and actions that help to achieve overall regional goals listed above. The next section provides more detailed information about program goals, strategies, actions and impact. The strategies and actions are prioritized for each of the program components. The impacts of each program are not cumulative as they all work together to reduce vehicle miles traveled. The number one priority for the evaluation program is to develop a tool or series of tools for measuring the impact and cost effectiveness of each program. The program costs are based on the preferred funding scenario as seen on page 3 of Appendix A.
Goal 1  Develop a proactive marketing program that acts as an “umbrella” for all travel options programs being implemented throughout the region.

Collaborative Marketing Program
The RTO Collaborative Marketing Program is the number one priority for the next three years. The program will work to coordinate all marketing and outreach efforts of the regional partners to create a broader public awareness about the travel options available to people as they move around the region. The regional program will support the messages currently being used by the partners and will act as a clearinghouse of information that helps people learn more about the options available to them.

There is an exciting opportunity for the newly envisioned Collaborative Marketing program to work more closely with Metro’s Community Media Project, “Zig Zag: Real Stories, New Angles,” a program that seeks to broaden the discussion of transportation issues through personal stories told by people living in the region. The RTO program will assist in the creation of a resource guide for the Zig Zag community screening events and will provide a venue for ongoing discussions during the two-year awareness campaign that will kickoff in Spring 2004. The impacts of the campaign will be measured by a pre and post campaign survey to determine if there has been a significant change in people’s awareness.

Strategy 1  Initiate a two-year, broad based travel options awareness campaign that invites people to think about how they travel around the region resulting in a measurable increase in the use of travel options.

Action 1  Create a Regional Marketing Program manager position at Metro to coordinate regional marketing efforts, raise awareness about travel options and measure the degree to which awareness is increasing.

Action 2  Develop a region-wide RTO image and message delivery strategy that more actively engages the general public and enhances local and regional program implementation activities.

Action 3  Create a series of position papers that explain the connection between travel options and health, transit, development patterns, air and water quality, and getting to school, work and shopping destinations throughout the region.

Action 4  Develop a unified RTO presence at special events, conferences and school events.

Action 5  Create a centralized regional clearinghouse that includes a staffed informational hotline, an interactive website and a mobile program information unit.

Action 6  Develop a Regional Transportation Education Program over the next five years that works directly in schools throughout the region.
Action 7  Continue to support Travel Smart as a one on one home-based marketing program in key regional centers.

Employer Outreach Program
TriMet works with employers in the Portland Region to help them develop successful travel options programs that reduce the number of vehicle miles traveled by reducing drive alone commute trips. TriMet’s Employer Outreach program targets the region’s ECO affected employers (>50 employees) and provides the same services for employers with fewer employees. The Employer Outreach program includes marketing representatives, a rideshare specialist, employer materials and the emergency ride home program.

Strategy 1  Increase the number of employer programs from 772 to 1,156 over the next 5 years resulting in a reduction of approximately 59,000,000 VMT.

Action 1  TriMet will continue to use a variety of methods to promote TDM to employers including one-on-one communication, direct mailing, transportation fairs, public events, informational materials, website, transit pass programs and the Emergency Ride Home program.

Action 2  Develop and implement a targeted marketing effort for large non-participating employers in key regional centers and TIP target areas.

Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Employer Programs*</th>
<th>Number of Employees Impacted</th>
<th>Annual VMT Reduction** (miles)</th>
<th>Program Cost</th>
<th>Cost per VMT Reduced</th>
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</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>676</td>
<td>237,000</td>
<td>38,000,000</td>
<td>$555,073</td>
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<td>2003-04</td>
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<td>-5730000</td>
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<td>($0.08)</td>
</tr>
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<td>2004-05</td>
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<td>23,000</td>
<td>6,730,000</td>
<td>$465,322</td>
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</tr>
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<td>2005-06</td>
<td>96</td>
<td>23,000</td>
<td>6,500,000</td>
<td>$488,589</td>
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</tr>
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<td>2006-07</td>
<td>96</td>
<td>23,000</td>
<td>6,500,000</td>
<td>$513,018</td>
<td>$0.08</td>
</tr>
<tr>
<td>2007-08</td>
<td>96</td>
<td>23,000</td>
<td>7,000,000</td>
<td>$538,670</td>
<td>$0.08</td>
</tr>
</tbody>
</table>

* TriMet works with TDM partners to market transportation programs to employers, regardless of boundaries (for example, with TMAs).

** Average weekday reduction (from aggregate of ECO survey commute mode data) x 261 total weekdays. Because of partnerships, VMT reductions somewhat overlap with estimates found in other partner’s three-year plan documents.

Regional Rideshare Program
The Rideshare program includes both vanpool and carpool programs. In the next three years the program will be developed into a bi-state program that coordinates with CTRANs rideshare program. CTRAN recently completed a vanpool market analysis that calls for a doubling of their fleet in the next year. A marketing program will be developed to actively market carpooling and vanpooling in targeted areas throughout the region. These areas will be identified in 2004 through a regional rideshare market analysis. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travelshed for the Portland area reaches a radius of 50 miles or more from the central city. This analysis will address the appropriate organizational structure for this program.
Strategy 1  Increase the number of carpools by 1,060 a year and vanpool groups by 30 a year in the next 5 years resulting in an annual VMT reduction of approximately 18 million miles.

Action 1  Establish a baseline number of people carpooling and vanpooling in the region and develop a measuring device that can be used to track progress.

Action 2  Conduct a regional rideshare market analysis that identifies target areas for marketing carpool and vanpool.

Action 3  Determine the appropriate structure for the program.

Action 4  Create a new marketing program for Ridesharing that targets audiences in specific locations identified in Action 2.

Action 5  Enhance CarpoolmatchNW.org to better serve vanpool matches.

Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>New Carpools</th>
<th>New Vanpools</th>
<th>Reduced Trips/day (Carpool)</th>
<th>Reduced Trips/day (Vanpool)</th>
<th>Reduced Trips/yr (Carpool)</th>
<th>Reduced Trips/yr (Vanpool)</th>
<th>Annual VMT Reduction* (Carpool)</th>
<th>Annual VMT Reduction** (Vanpool)</th>
<th>Annual Funding</th>
<th>Cost/trip reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>294</td>
<td>10</td>
<td>500</td>
<td>100</td>
<td>131,000</td>
<td>26,200</td>
<td>3,117,800</td>
<td>2,358,000</td>
<td></td>
<td></td>
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<tr>
<td>2003</td>
<td>588</td>
<td>20</td>
<td>1000</td>
<td>200</td>
<td>262,000</td>
<td>52,400</td>
<td>6,235,600</td>
<td>4,716,000</td>
<td>$245,140</td>
<td>$0.78</td>
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<td>2004</td>
<td>882</td>
<td>30</td>
<td>1500</td>
<td>300</td>
<td>393,000</td>
<td>78,600</td>
<td>9,353,400</td>
<td>7,074,000</td>
<td>$206,720</td>
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<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
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<td>$0.77</td>
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<td>2006</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$300,000</td>
<td>$0.55</td>
</tr>
<tr>
<td>2007</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$436,000</td>
<td>$0.79</td>
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<td>2008</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$436,000</td>
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<tr>
<td>2009</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$436,000</td>
<td>$0.79</td>
</tr>
<tr>
<td>2010</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$436,000</td>
<td>$0.79</td>
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<tr>
<td>2011</td>
<td>1059</td>
<td>30</td>
<td>1800</td>
<td>300</td>
<td>471,600</td>
<td>78,600</td>
<td>11,224,080</td>
<td>7,074,000</td>
<td>$436,000</td>
<td>$0.79</td>
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<tr>
<td>Totals</td>
<td>9,176</td>
<td>270</td>
<td>15,600</td>
<td>2,700</td>
<td>4,087,200</td>
<td>707,400</td>
<td>97,275,360</td>
<td>63,666,000</td>
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</table>

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 262 workdays per year, 2.7 passengers per carpool = reduction of 1.7 trips per carpool, 90 miles round trip mileage per vanpool, 14 miles round trip mileage per carpool.

SMART/WILSONVILLE Travel Options Program

South Metro Area Rapid Transit (SMART) is operated by the City of Wilsonville and provides five fixed routes with connections to other transit districts. The travel options program works directly with employers to help set up programs to reduce the number of auto commute trips. The travel options program also conducts outreach to residents and schools to encourage great use of travel options.

Strategy 1  Increase the number of people using travel options by 1% a year over the next 5 years.
Action 1  Determine how to measure the impact of outreach efforts over the next year and secure additional funding to perform a program evaluation.

Action 2  Promote travel options to employers through transportation fairs, information packets, training transportation coordinators, new employee packets and at regional events.

Action 3  Promote travel options to the residents of Wilsonville through county fairs, webpage, newspaper, newsletters, and one on one travel planning and informational displays.

Action 4  Promote travel options to schools through the Art on the Bus competition and outreach programs.

Action 5  Work with local planning department to ensure that travel options are supported in local planning processes.

Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Residents Participating</th>
<th>Number of Employees Participating</th>
<th>Number of Schools Participating</th>
<th>Annual VMT Reduction (miles)</th>
<th>Program Cost</th>
<th>Cost per Ride Reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>Not measured</td>
<td>Not measured</td>
<td>Not measured</td>
<td>Not measured</td>
<td>$55,000</td>
<td>Not measured</td>
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<tr>
<td>2003-04</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>$88,400</td>
<td>TBD</td>
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<td>2004-05</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>$89,700</td>
<td>TBD</td>
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<tr>
<td>2005-06</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>$91,400</td>
<td>TBD</td>
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<tr>
<td>2006-07</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>$94,194</td>
<td>TBD</td>
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<td>2007-08</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
<td>$96,966</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Regional TMA Program
The TMA Program operates under the policy direction as provided in Metro Resolutions No.98-2676 and No.02-3183. TMAs are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs provide important leadership development in Region 2040 centers that catalyze economic and community development. The TDM Subcommittee recognizes that there may be other mechanisms for promoting TDM in some 2040 centers besides TMAs. These opportunities will be explored with local jurisdictions as a part of the regional evaluation program.

Strategy 1  Reduce the number of people driving alone and catalyze economic development in regional centers and industrial areas by enlisting the business community in creating transportation options for their communities and employees.

Action 1  Work with the TMAs over the next 3 years to develop Region 2040 commute mode split targets and create performance measures that track progress towards these targets.

Action 2  Include Travel Options element in center and industrial area master plans (with cost analysis of projected growth with and without travel options effort).
Action 3  Continue to develop TMAs in regional centers where significant transportation investments are being made. Over the next 3-5 years this will include proposed TMA start-ups in Hillsboro, Washington Square, Gateway and Oregon City (if they are ripe for TMA formation).

Action 4  Develop business plans for each TMA that support the unique character of each regional center and industrial areas. Attached work plans detail the strategies currently being used by each TMA recognizing that they are at different levels of development.

Action 5  Conduct a study to better understand why the Tualatin and Columbia Corridor TMAs were not successful and use the results to create new criteria for the TMA approval process.

Action 6  Identify the appropriate agency to administer the TMA program (a 20% match is needed) as it transitions from TriMet by July 2004.

Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Existing TMAs</th>
<th>Number of TMA in Exploratory Phase</th>
<th>Number of TMA member organizations*</th>
<th>Number of Employees Impacted</th>
<th>Annual VMT Reduction** (miles)</th>
<th>Program Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>5</td>
<td>1</td>
<td>266</td>
<td>45,317</td>
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<td>$250,000</td>
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<tr>
<td>2003-04</td>
<td>5</td>
<td>1</td>
<td>297</td>
<td>49,233</td>
<td>1,071,163</td>
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<tr>
<td>2004-05</td>
<td>6</td>
<td>2</td>
<td>332</td>
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<td>2005-06</td>
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<td>1</td>
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<tr>
<td>2006-07</td>
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<td>397</td>
<td>62,670</td>
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<td>$348,500</td>
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<tr>
<td>2007-08</td>
<td>10</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>$347,750</td>
</tr>
</tbody>
</table>

*based on information submitted by the TMAs. Does not include new TMAs.

** data submitted by Swan Island TMA, Gresham Regional Center TMA and Lloyd District TMA. All TMAs will begin to report these numbers by FY05.

Region 2040 Initiatives Grant Program

The Region 2040 Program is a grant program currently administered by TriMet with oversight by the TDM Subcommittee. It is expected that program administration will transition out of TriMet and into Metro over the next 3 years. The grant funds are allocated annually and fund transportation demand management services and programs. The grant program is funded with federal Congestion Mitigation/Air Quality (CMAQ) program monies that have been allocated through the Transportation Priorities process.

All jurisdictions, transportation management associations and nonprofit organizations with the mission of implementing transportation demand management programs located within Metro’s boundary are eligible for the funds.

Projects funded with Region 2040 Program monies must strive to reduce the number of people driving alone and/or daily vehicle miles traveled within a specific geographic location. Examples of past program investments, current programs and future program prioritizing for Region 2040 Initiatives is included in Appendix C.

Regional Travel Options Strategic Plan  Page 10
Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Programs</th>
<th>Annual VMT Reduction* (miles)</th>
<th>Program Cost**</th>
<th>Cost per VMT Reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>3</td>
<td>575,750</td>
<td>$203,250</td>
<td>$0.35</td>
</tr>
<tr>
<td>2003-04</td>
<td>7</td>
<td>1,300,000</td>
<td>$118,000</td>
<td>$0.09</td>
</tr>
<tr>
<td>2004-05</td>
<td>5-10</td>
<td>1,300,000</td>
<td>$269,000</td>
<td>$0.21</td>
</tr>
<tr>
<td>2005-06</td>
<td>5-10</td>
<td>1,300,000</td>
<td>$269,000</td>
<td>$0.21</td>
</tr>
<tr>
<td>2006-07</td>
<td>5-10</td>
<td>1,300,000</td>
<td>$269,000</td>
<td>$0.21</td>
</tr>
<tr>
<td>2007-08</td>
<td>5-10</td>
<td>1,300,000</td>
<td>$269,000</td>
<td>$0.21</td>
</tr>
</tbody>
</table>

*Numbers were not provided by all programs in 2002. Projections are based on future program reporting improvements as required in the new grant application.
**Program requires a 20% match.

Regional Telework Program
The Oregon Department of Energy (ODOE) works with employers in the Portland metro region to develop successful telework programs. Telework is working at home or at location closer to home instead of traveling to the traditional place of business. Telework reduces the number of vehicle miles traveled by eliminating or reducing commute trips. ODOE provides technical assistance and outreach services including education and training materials, consultations, presentations, training sessions, and an extensive telework website.

Strategy 1 Increase the number of telework programs by 60% in the next year and 20% a year for the next 4 years.

Action 1 Regional Marketing Program will market telework to the 2,000 eligible employers in the region with a target of enrolling 35%.

Action 2 Oregon Department of Energy will continue to provide high quality technical support and outreach services for employers with telework programs, including educational materials, training sessions, consultation and the telework website.

Program Impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Telework Programs</th>
<th>Number of Teleworkers</th>
<th>Annual VMT Reduction (miles)</th>
<th>Program Cost</th>
<th>Cost per VMT Reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>340</td>
<td>6,000</td>
<td>7,560,000</td>
<td>$100,000</td>
<td>$0.01</td>
</tr>
<tr>
<td>2003-04</td>
<td>50</td>
<td>500</td>
<td>630,000</td>
<td>OOE funded*</td>
<td></td>
</tr>
<tr>
<td>2004-05</td>
<td>55</td>
<td>550</td>
<td>693,000</td>
<td>$30,000</td>
<td>$0.04</td>
</tr>
<tr>
<td>2005-06</td>
<td>60</td>
<td>605</td>
<td>762,300</td>
<td>$30,000**</td>
<td>$0.04</td>
</tr>
<tr>
<td>2006-07</td>
<td>66</td>
<td>665</td>
<td>837,900</td>
<td>$60,000**</td>
<td>$0.07</td>
</tr>
<tr>
<td>2007-08</td>
<td>72</td>
<td>731</td>
<td>921,060</td>
<td>$60,000**</td>
<td>$0.07</td>
</tr>
</tbody>
</table>

*Assumes that Collaborative Marketing Program is marketing telework to employers.
**For technical support only. The dollars for marketing are in the Regional Marketing Program.

Business Energy Tax Credits
The BETC Program is a one-of-a-kind in the nation. Oregon employers can get a state tax credit for projects that reduce vehicle miles traveled by employees, students, clients, or customers. Eligible projects include telework, transit passes, commuter pool vehicles, financial
incentive programs, bicycles, Transportation Management Association (TMA) dues, parking cash out and FlexCar.

**Strategy 1**  
Increase the number of Oregon employers taking advantage of BETC program by 35% over the next 5 years.

**Action 1**  
Market BETC to all employers in the region through the Employer Outreach Program and the Collaborative Marketing Program.

**Action 2**  
ODOE will continue to provide technical assistance to employers wanting to take advantage of the program including finding pass through partners and submitting applications.

**Program Impact:**

<table>
<thead>
<tr>
<th>Year</th>
<th>New BETC Projects Approved</th>
<th>Total Project Implementation Costs (submitted)</th>
<th>Annual VMT Reduction* (miles)</th>
<th>Total Gallons of Gas Saved**</th>
<th>Cost of Program</th>
<th>Cost per VMT reduced***</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>45</td>
<td>$2,700,000</td>
<td>59,000,000</td>
<td>3,000,000</td>
<td>$100,000</td>
<td>N/A</td>
</tr>
<tr>
<td>2003-04</td>
<td>27</td>
<td>$1,900,000</td>
<td>35,000,000</td>
<td>1,700,000</td>
<td>ODOE</td>
<td>N/A</td>
</tr>
<tr>
<td>2004-05</td>
<td>14</td>
<td>$900,000</td>
<td>18,000,000</td>
<td>900,000</td>
<td>$30,000****</td>
<td>N/A</td>
</tr>
<tr>
<td>2005-06</td>
<td>17</td>
<td>$1,100,000</td>
<td>22,000,000</td>
<td>1,100,000</td>
<td>$30,000***</td>
<td>N/A</td>
</tr>
<tr>
<td>2006-07</td>
<td>15</td>
<td>$1,400,000</td>
<td>20,000,000</td>
<td>1,300,000</td>
<td>$60,000</td>
<td>N/A</td>
</tr>
<tr>
<td>2007-08</td>
<td>16</td>
<td>$1,600,000</td>
<td>20,000,000</td>
<td>1,200,000</td>
<td>$60,000</td>
<td>N/A</td>
</tr>
</tbody>
</table>

*In 2002 59,000,000 VMT reduced x 60% increase in 2003. A 20% increase is assumed for the next three years. 68% of the projects approved are for transit passes. The remaining 32% includes telework, bicycles, commuter pool vehicles, incentives and TMA dues.

**Based on an average gas mileage of 20mpg**

***The program itself does not reduce VMT but provides the incentive to businesses to reduce their VMT.

****Assumes Regional Travel Options Marketing program is actively marketing BETC

**Goal 2**  
Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

**Strategy 1**  
Convene senior managers on a bi-monthly basis over the next year in order to solicit their input and provide guidance on RTO programs and activities.

**Strategy 2**  
Convene senior managers quarterly in years 2-5 to stabilize RTO program funding and support.

**Goal 3**  
Refine performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

The RTO evaluation program will continue to improve our method for collecting, analyzing and reporting data for each RTO program. The annual evaluation report will be used to refine program development, marketing and implementation so that we can invest limited program dollars in the most cost effective ways.
The RTO Subcommittee has four strategies for achieving the greatest impact with the limited funding available:

**Strategy 1**  
Report annually on RTO program activities and impact.

**Strategy 2**  
Survey all ECO affected employers in the next five years and increase the number of ECO employers that are in compliance with ECO Rules from 50% to 75%.

**Action 1**  
Develop and distribute a set of tools that employers can use to implement the most effective Employee Commute Options (ECO) programs increasing the impact of programs on VMT reduction.

**Action 2**  
Create a central database for the RTO program that can be used in conjunction with other regional travel behavior data to monitor each program component.

**Action 3**  
Process ECO surveys annually and report on compliance with ECO rule.

**Action 4**  
Continue to develop and enhance the ECO survey database so data can be evaluated much faster and with a higher degree of accuracy.

**Strategy 3**  
Evaluate all 38 Region 2040 Centers on an annual basis to determine progress towards non-SOV modal targets.

**Action 1**  
Work with regional partners to establish commute mode split targets for regional centers preparing for TMA development.

**Action 2**  
Identify land use measures that can be monitored and related to travel behavior data.

**Action 3**  
Develop and implement a targeted marketing effort for large non-participating employers in key regional centers.

**Strategy 4**  
Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.

**Action 1**  
Work with each travel options program to identify survey questions, run stated preference surveys for selected sets, and derive the cost effectiveness of each program.

**Action 2**  
Conduct a survey to derive quality predictors of how people respond to various travel options programs.
**Action 3**  Develop a set of predictors for the effectiveness range of travel options programs.

<table>
<thead>
<tr>
<th>Year</th>
<th>Cost of Program</th>
<th>Percent of Total Program*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-03</td>
<td>$122,000</td>
<td>9%</td>
</tr>
<tr>
<td>2003-04</td>
<td>$113,000</td>
<td>9%</td>
</tr>
<tr>
<td>2004-05</td>
<td>$125,905</td>
<td>8%</td>
</tr>
<tr>
<td>2005-06</td>
<td>$259,500</td>
<td>10%</td>
</tr>
<tr>
<td>2006-07</td>
<td>$288,450</td>
<td>10%</td>
</tr>
<tr>
<td>2007-08</td>
<td>$293,010</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Goal 4**  Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

**Strategy 1**  Create a Regional Travel Options Marketing Program Manager position at Metro to coordinate regional programs.

**Strategy 2**  Convene senior managers on a bi-monthly basis in the first year and quarterly for the next 5 years to oversee and advise the RTO subcommittee on strategic plan implementation.

**Strategy 3**  Convene the Regional Travel Options Subcommittee and working groups (e.g., marketing, performance measures, rideshare, policy development, funding) monthly to support stronger partnering and coordination.

**Strategy 4**  Conduct an annual retreat to review strategic plan (mission, goals, strategies, performance measures) and update work programs accordingly.

**Goal 5**  Develop regional policies that integrate RTO programs into other land use and transportation programs including Metro's Centers Program, TOD Program, Corridors program and TriMet's Transit Investment Plan.

**Strategy 1**  Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).

**Strategy 2**  Develop policies in regional centers and industrial areas that create more travel options for people coming to and traveling within the area.

**Strategy 3**  Use the results from the SW Portland TravelSmart pilot program to develop a plan for implementing TravelSmart in regional centers over the next 5 years.
Strategy 4  Develop a policy that would require a certain percentage of upfront funding for TDM strategies on all corridor projects. The approach could be similar to TravelSmart where existing travel behavior is assessed and those who are interested in shifting modes would be targeted. A policy is needed to allocate funding for an upfront TDM program that can be used to increase capacity of the corridor and prevent costly roadway expansion.

Strategy 5  Work with Metro’s TOD program to develop a Travel Options package to provide to residents and employees living and working in transit oriented developments.

Strategy 6  Work with Metro’s Goal 5 and Green Streets programs to help make a stronger policy connection between reducing the amount of roadway expansion and improving water quality.

Strategy 7  Work with local jurisdictions to monitor the implementation of TDM strategies as a part of their development codes. Other strategies include enhancing land use policies, strengthening local incentive programs, and working with Flex Car to reduce parking requirements for developments.

Strategy 8  Research other policy options that help to make RTO programs more effective such as, implementing HOV lanes and bridge tolls, Fannie Mae’s Smart Commute program, Metro’s Livable Streets program, Motorist Education, and improving freight policies.

Goal 6  Develop a funding plan that helps create a more sustainable Regional Travel Options program (see Preferred Scenario C in Attachment A).

Strategy 1  Secure additional program funds for Regional Marketing Program through ODOT Transportation funds.

ODOT’s 04-06 budget includes $1.5 million in federal STP funds to be used on transportation demand management measures around the state. A percentage of this funding may be available to the Metro region in Spring 2004.

Strategy 2  Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).

Strategy 3  Research other Potential Funding Sources including BETC, Climate Trust, EPA, OTIA, STIP and corridor projects.
Appendix A: Funding Scenarios
Three funding scenarios are offered up in Appendix A. Scenario A reflects a budget that maintains current levels of funding. Scenario B reflects a budget that reduces program funding by $500,000 in 2006 – 2008 and Scenario C reflect the preferred program funding scenario.

Appendix B: Detailed Work plans
Each Regional Travel Options program completed a detailed work program for the next 3-5 years. These work plans will be adjusted annually to reflect unexpected funding and policy changes. In order to be most effective and because the RTO program leverages so many private dollars, a stable regional funding source is needed to continue to implement successful travel options programs.

Appendix C: Past Program Expenditures
Information about past program expenditures for the TMA program and Region 2040 Initiatives program are provided. Funding decisions for both programs are made by the TDM Subcommittee and presented to TPAC on an annual basis.
Appendix A
Budget/Funding Scenarios
**Regional Transportation Options (RTO) Program Scenario A**

<table>
<thead>
<tr>
<th>Program Description</th>
<th>Current FY04/05</th>
<th>Current FY05-06</th>
<th>Current FY06-07</th>
<th>Current FY07-08</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collaborative Marketing Program</strong>: Includes funding to market non-transit modes for all trips using a regional clearinghouse, message development and integrated communication plan</td>
<td>$98,280</td>
<td>$98,280</td>
<td>$100,000</td>
<td>$100,000</td>
</tr>
<tr>
<td><strong>TriMet Employer Program</strong>: Supports employee outreach and Transit PASSport marketing program</td>
<td>$303,000</td>
<td>$303,000</td>
<td>$195,000</td>
<td>$195,000</td>
</tr>
<tr>
<td><strong>Regional Rideshare</strong>: Combines Vanpool Program and CarpoolMatchNW into new structure that collaborates with regional partners including CTRAN.</td>
<td>$426,000</td>
<td>$245,720</td>
<td>$379,500</td>
<td>$379,500</td>
</tr>
<tr>
<td><strong>SMART TDM</strong>: Employer outreach and marketing program for Wilsonville area.</td>
<td>$55,000</td>
<td>$55,000</td>
<td>$55,000</td>
<td>$55,000</td>
</tr>
<tr>
<td><strong>Regional TMA Program</strong>: Promote travel options to employers as a catalyst for economic development while creating local leadership in key regional centers.</td>
<td>$378,000</td>
<td>$125,000</td>
<td>$409,000</td>
<td>$409,000</td>
</tr>
<tr>
<td><strong>Ongoing</strong>: Distributes funds between 5 existing TMAs</td>
<td>$125,000</td>
<td>$125,000</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td><strong>Startup</strong>: Exploratory and 3-year formation funding for two to three new TMAs in Centers and Industrial Areas</td>
<td>$156,250</td>
<td>$96,750</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td><strong>Innovative</strong>: Funds new, expanded and innovative programs at existing TMAs</td>
<td>Not funded</td>
<td>Not funded</td>
<td>$109,000</td>
<td>$109,000</td>
</tr>
<tr>
<td><strong>Region 2040 Initiatives Program</strong>: A grant program that funds innovative SOV reduction projects</td>
<td>$269,000</td>
<td>$269,000</td>
<td>$269,000</td>
<td>$269,000</td>
</tr>
<tr>
<td><strong>Region 2040 Initiatives Program</strong>: A grant program that funds innovative SOV reduction projects</td>
<td>$269,000</td>
<td>$269,000</td>
<td>$269,000</td>
<td>$269,000</td>
</tr>
<tr>
<td><strong>Regional Telework Program</strong>: Markets telework to regional employers using ODOE online tools and training.</td>
<td>Not funded</td>
<td>Not funded</td>
<td>$15,000</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Regional Business Energy Tax Credit program</strong>: Promotes BETC to regional businesses as an incentive for developing travel options programs for employees.</td>
<td>Not funded</td>
<td>Not funded</td>
<td>$15,000</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Regional Evaluation Program</strong>: ECO data analysis and database management, annual program evaluation report, performance measures for all program elements</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
</tr>
<tr>
<td><strong>I-5 Corridor TDM Plan</strong>: Develops a strategy for implementing TDM in corridors.</td>
<td>$56,000</td>
<td>$56,000</td>
<td>$56,000</td>
<td>$56,000</td>
</tr>
<tr>
<td><strong>Interstate TravelSmart</strong>: Pilot #2 for implementing home based marketing program in key corridors and centers.</td>
<td>$150,000</td>
<td>$150,000</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$1,629,280</strong></td>
<td><strong>$1,196,000</strong></td>
<td><strong>$1,743,500</strong></td>
<td><strong>$1,743,500</strong></td>
</tr>
</tbody>
</table>

**Metro Staff Discussion Draft Based on TDM Subcommittee Strategic Planning**

**Draft October 31, 2003**

**Not funded** means the program is either not currently funded or not funded in the future.
RTO Program Scenario B

<table>
<thead>
<tr>
<th>Program</th>
<th>FY05-06</th>
<th>FY06-07</th>
<th>FY07-08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes Allocated CMAQ Funds Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaborative Marketing Program: Absorbs some of the cuts proposed above while moving towards more collaborative marketing program. Focus on message development and delivery.</td>
<td>$98,280</td>
<td>$37,500</td>
<td>$37,500</td>
</tr>
<tr>
<td>TriMet Employer Program: Program cuts proposed in 06/07 and in 07/08 reflect transfer of $500,000 to TriMet Frequent Bus Program</td>
<td>$303,000</td>
<td>$37,500</td>
<td>$37,500</td>
</tr>
<tr>
<td>Regional Rideshare: Same as Scenario A</td>
<td>$245,720</td>
<td>$379,500</td>
<td>$379,000</td>
</tr>
<tr>
<td>SMART TDM: Same as Scenario A</td>
<td>$55,000</td>
<td>$55,000</td>
<td>$55,000</td>
</tr>
<tr>
<td>Regional TMA Program: Same as Scenario A</td>
<td>$125,000</td>
<td>$409,000</td>
<td>$409,500</td>
</tr>
<tr>
<td>Ongoing</td>
<td>$125,000</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>Startup</td>
<td>$96,750</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>Innovative</td>
<td>Not funded</td>
<td>$109,000</td>
<td>$109,000</td>
</tr>
<tr>
<td>Region 2040 Initiatives Program: Same as Scenario A</td>
<td>$269,000</td>
<td>$269,000</td>
<td>$269,000</td>
</tr>
<tr>
<td>Regional Telework Program: Same as Scenario A</td>
<td>Not funded</td>
<td>$15,000</td>
<td>$15,000</td>
</tr>
<tr>
<td>BETC Program: Same as Scenario A</td>
<td>Not funded</td>
<td>$15,000</td>
<td>$15,000</td>
</tr>
<tr>
<td>Regional Evaluation Program: same as Scenario A</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
</tr>
<tr>
<td>I-5 Corridor TDM Plan: Same as Scenario A</td>
<td>$56,000</td>
<td>$56,000</td>
<td>$56,000</td>
</tr>
<tr>
<td>Interstate TravelSmart: Same as Scenario A</td>
<td>$150,000</td>
<td>$150,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$1,196,000</td>
<td>$1,523,500</td>
<td>$1,523,500</td>
</tr>
</tbody>
</table>

**Financially Constrained B: Program restructured with $500,000 Reserve Transferred to TriMet Frequent Bus Program**

$220,000 $220,000
<table>
<thead>
<tr>
<th>RTO Program Scenario C</th>
<th>Preferred: Collaborative RTO Program + TriMet program</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Includes Allocated CMAQ Funds Plus Funding Not Yet Identified</strong></td>
<td><strong>FY04/05</strong></td>
</tr>
<tr>
<td><strong>Collaborative Marketing Program:</strong> Scenario A + moving entire RTO marketing program into collaborative structure to fund a 3 year campaign.</td>
<td>$485,000</td>
</tr>
<tr>
<td><strong>TriMet Employer Outreach Program:</strong> Continues employment site contacts, adds marketing rep. Assumes 5% inflation in FY07 &amp; 08.</td>
<td>$303,000</td>
</tr>
<tr>
<td><strong>Regional Rideshare:</strong> Scenario A + expanded bi-state marketing and implementation in more focus areas.</td>
<td>$426,000</td>
</tr>
<tr>
<td><strong>SMART TDM:</strong> Scenario A + enhanced employer outreach and marketing program to leverage commuter rail investment.</td>
<td>$89,700</td>
</tr>
<tr>
<td><strong>Regional TMA Program:</strong> Scenario A + additional startups in key centers and industrial areas as coordinated with Metro's Centers program.</td>
<td>$470,000</td>
</tr>
<tr>
<td><strong>Ongoing:</strong> Scenario A + support for one additional TMA</td>
<td>$125,000</td>
</tr>
<tr>
<td><strong>Startup:</strong> Scenario A + TMA startups in 2 regional centers</td>
<td>$205,000</td>
</tr>
<tr>
<td><strong>Innovative:</strong> Same as Scenario A</td>
<td>$140,000</td>
</tr>
<tr>
<td><strong>Region 2040 Program:</strong> Same as Scenario A.</td>
<td>$269,000</td>
</tr>
<tr>
<td><strong>Regional Telework:</strong> Scenario A + enhanced marketing program.</td>
<td>$30,000</td>
</tr>
<tr>
<td><strong>BETC Program:</strong> Scenario A + enhanced marketing program</td>
<td>$30,000</td>
</tr>
<tr>
<td><strong>Regional Evaluation Program:</strong> Scenario A + survey research in Centers, RTO program performance measures, regional database and analysis</td>
<td>$125,905</td>
</tr>
<tr>
<td><strong>I-5 Corridor TDM Plan:</strong> Same as Scenario A</td>
<td>$56,000</td>
</tr>
<tr>
<td><strong>Interstate TravelSmart:</strong> Same as Scenario A</td>
<td>$150,000</td>
</tr>
<tr>
<td><strong>Subtotal: Collaborative Program</strong></td>
<td><strong>$2,228,605</strong></td>
</tr>
<tr>
<td><strong>Programs submitted by TriMet</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TriMet Targeted Travel Training:</strong> Increase transit ridership among seniors and people with disabilities (funding not identified).</td>
<td>$75,000</td>
</tr>
<tr>
<td><strong>TriMet Targeted Pedestrian Safety Campaign</strong> (funding not</td>
<td>$36,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$2,228,605</strong></td>
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Difference between Scenario A and Preferred Program

<table>
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<tr>
<th><strong>FY04/05</strong></th>
<th><strong>FY05-06</strong></th>
<th><strong>FY06-07</strong></th>
<th><strong>FY07-08</strong></th>
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<tr>
<td><strong>$599,325</strong></td>
<td><strong>$1,165,489</strong></td>
<td><strong>$1,365,712</strong></td>
<td><strong>$1,579,523</strong></td>
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</table>
The Main Freeway designation on Burnside/181st Avenue is an interim freight route. This designation shall be replaced with a 242nd Avenue/Hogan Road route upon completion of planned improvements in that corridor.
STA Designations

<table>
<thead>
<tr>
<th>Category 1</th>
<th>Category 2</th>
<th>Proposed STA's</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS Routes</td>
<td>Rural area</td>
<td>Urban growth</td>
</tr>
</tbody>
</table>

- Urban centers
- Industry
- Neighborhoods

STA Candidates in the Portland Region
Date: November 5, 2003
To: JPACT
From: Ross Roberts
Re: South Corridor Locally Preferred Alternative Revision and Land Use Final Order

Locally Preferred Alternative Decision

The item on your agenda today is informational, however at your December 11th meeting you will be asked to forward a recommendation to the Metro Council regarding the Locally Preferred Alternative, or LPA for the Downtown Segment of the South Corridor I-205 Light Rail Project. The downtown segment was added to the I-205 project as part of the Metro Council’s LPA decision for the South Corridor in April 2003. The upcoming LPA decision will revise the downtown light rail alignment selected in 1998 for the South/North Corridor Light Rail Project. An amended environmental document was prepared at the request of the Federal Transit Administration to update the 1998 South/North Corridor Draft Environmental Impact Statement.

Information for this decision comes from several sources:

1) Public input received during the 45-day public comment period for the Amended Supplemental Draft Environmental Impact Statement (ASDEIS) for the downtown segment
2) Testimony at the October 21st public hearing before the Mayor’s Steering Committee and the South Corridor Policy Committee,
3) Technical information from the document itself, and
4) Recommendations by the Mayor’s Steering Committee and the South Corridor Policy Committee, TriMet Board and the Portland City Council.

The ASDEIS public comment period will close on November 17th. All comments received will be addressed as part of the Final Environmental Impact Statement and will be included in the Public Comment Document, a compendium of all public comment available for distribution on November 19th.

The decision will not address the urban design and station configuration issues currently under discussion by the Mayor’s Steering Committee. The LPA decision will address:

- Mode – light rail or a no-build option?
- Alignment – the Portland Mall on SW 5th and 6th Avenues or some other streets?
• Terminus – Main Street or Portland State University?
• Station Locations – generally, where would stations be located?

Your recommendation will be forwarded to the Metro Council for action on January 8th, 2004.

**Land Use Final Order**

The Land Use Final Order, or LUFO is an action taken by the Metro Council based on an application from TriMet and ODOT. The LUFO sites the project and is a land use action based on state statutes. The LUFO gives a light rail alignment special status and shortens the appeal process if the line is contested. JPACT is not required to act on a LUFO, however it will be presented to you on December 11th as an information item.

Three areas will be addressed in the LUFO decision:

- Downtown Segment from Union Station to Portland State University – add PSU segment, change some stations included in the existing South/North Corridor LUFO from 1998
- I-205 light rail alignment from Gateway to Clackamas Regional Center – add LUFO designation to the rail alignment including stations and park and ride lots, and
- Interstate MAX alignment – “housekeeping” measure to make sure that the LUFO captures minor changes to match the project as it has been built.

Attachments:

Downtown Segment Map
LPA and LUFO Process Flowchart

C:\Documents and Settings\Varaca\Desktop\JPACT Memo 11-05-03 RR.DOC
South Corridor and Portland Mall LPA and LUFO Decision Processes
Mall Steering Committee Nov 4, 2003

Downtown Amendment to the South Corridor SDEIS
(Published Oct. 3rd)
  Technical Findings

Public Hearing (Oct. 21st)
45-Day Comment Period (Nov. 17th)
Public Comment Document (Nov. 19th)

Mall Steering Committee (Nov. 21st)
South Corridor Policy Committee (Nov. 24th)
Recommendations on:
Mode, Alignment, Terminus, Station Locations

Recommendations Considered by:
TriMet Board (Nov. 26th)
Portland City Council (Dec 4th)
JPACT (Dec. 11th)

South Corridor Policy Committee Makes Land Use Final Order (LUFO)
Recommendation (Nov. 24th)
ODOT Makes Recommendation

TriMet Board (Nov. 26th)
Approves LUFO Application,
Forwards to Metro Council

Metro Council LPA Decision
(Jan. 8th)

Metro Council LUFO Hearing and Adoption
(Jan. 8th)
BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ENDORSING A BI-
STATE COORDINATION COMMITTEE TO
DISCUSS AND MAKE RECOMMENDATIONS
ABOUT LAND USE, ECONOMIC
DEVELOPMENT, TRANSPORTATION AND
ENVIRONMENTAL JUSTICE ISSUES OF BI-
STATE SIGNIFICANCE

RESOLUTION NO. 03-3388

Introduced by: Councilor Rex Burkholder

WHEREAS, in 1999, the Southwest Washington Regional Transportation Council (RTC) and Metro established a Bi-State Transportation Committee to develop recommendations to the Joint Policy Advisory Committee on Transportation (JPACT) and RTC on bi-state transportation issues; and,

WHEREAS, the June 2002 Final Strategic Plan of the I-5 Transportation and Trade Partnership recommended that the Bi-State Transportation Committee "...expand its role to review and advise JPACT, RTC, other councils, commissions and boards on: 1. Management plans, interchange plans and agreements and transit station plans for the I-5 Corridor; and 2. Other transportation, land use and economic development issues of bi-state significance"; and

WHEREAS, the Final Strategic Plan of the I-5 Transportation and Trade Partnership recommended that a community enhancement fund be established for use in the impacted areas in the I-5 Corridor in Oregon and Washington and that "The Bi-State Coordination Committee would recommend the specific details in conjunction with the Environmental Justice Work Group..."; and,

WHEREAS, the recommendations of the Final Strategic Plan of the I-5 Transportation and Trade Partnership were endorsed by the RTC, JPACT and the Metro Council; and,

WHEREAS, local jurisdiction can be affected by land use, economic development and transportation decisions made by other jurisdictions in the bi-state area, as well as be affected by possible environmental justice impacts resulting from these decisions; and,

WHEREAS, on October 23, 2003, the Bi-State Transportation Committee recommended approval of the draft Charter attached as Exhibit A; and,

WHEREAS, the Joint Policy Advisory Committee on Transportation and the Metro Policy Advisory Committee reviewed and recommended approval of the draft Bi-State Charter attached as Exhibit A; and,

WHEREAS, on November 4, 2003, the Southwest Washington Regional Transportation Council recommended approval of the draft Charter for the formation of a Bi-State Coordination Committee; and
WHEREAS, the Metro Council finds that the opportunity to discuss and make recommendations about issues of bi-state significance through membership on and participation in a Bi-State Coordination Committee would provide more and better information, encourage better cooperation among jurisdictions and better coordinate the investment of public resources; now therefore,

BE IT RESOLVED,

1. That the Metro Council endorses the Bi-State Coordination Committee charter attached as Exhibit "A" and directs the Chief Operating Officer to provide the charter to the other signatories.

2. That upon receipt of resolutions from the other signatories endorsing the Bi-State Coordination Committee charter, the Metro Council will designate a Metro Council representative and alternate for the Bi-State Coordination Committee.

3. That the creation of the Bi-State Coordination Committee will result in it replacing the current Bi-State Transportation Committee.

4. That upon creation of the Bi-State Coordination Committee, Metro, along with the Southwest Washington Regional Transportation Council, shall provide staffing for the Committee.

5. The Bi-State Coordination Committee shall review and provide recommendations concerning land use, economic development, transportation and environmental justice issues of bi-state significance as described in Exhibit A. Further, Bi-State Coordination Committee recommendations concerning land use shall be referred to the Metro Policy Advisory Committee (MPAC). Bi-State Coordination Committee recommendations concerning transportation shall be referred to the Joint Policy Advisory Committee on Transportation (JPACT). Bi-State Coordination Committee recommendations to both JPACT and MPAC may be made where both land use and transportation issues are concerned. When economic development and/or environmental justice issues are a component of land use or transportation topics, recommendations from the Bi-State Coordination Committee may also be included and referred along with the transportation and/or land use recommendations to MPAC and/or JPACT. JPACT and MPAC will forward the issue item along with recommendations to the Metro Council.

6. The Bi-State Coordination Committee shall adopt bylaws for the business conduct of its meetings.

ADOPTED by the Metro Council this ___ day of November, 2003.

Approved as to Form:

__________________________
Daniel B. Cooper, Metro Attorney
Draft Charter
Establishing Bi-State Coordination Committee

October 23, 2003 – As Discussed with Bi-State Transportation Committee and Revised

Participation in the new committee will be accomplished through adoption of resolutions of intent to participate and observe the charter by local jurisdictions, and through letters of intent to participate and observe the charter by state or federal agencies. Operating details for the committee will be established by its membership in the form of bylaws and a work plan once the new committee has been established and convened.

Draft Committee Charter Text
To be included in resolutions or letters of intent to participate in identical form.

Purpose: This charter defines voluntary participation by jurisdictions within the cross-Columbia River area of the I-5 corridor between Clark County in Washington and Multnomah County in Oregon. This region is linked by economic development and land use objectives, which also drive a shared objective to preserve and add to critical transportation investments. The existing Bi-State Transportation Committee has been constructive in addressing bi-state transportation issues within the corridor. This charter expands the scope of the bi-state effort to include both transportation and land use. Review of land use and transportation issues of bi-state significance may prompt review of these topics in the context of economic development, environmental, and environmental justice issues. It also ensures that regionally significant aspects of transportation – highway, bridge, transit, freight rail, and transportation system and demand management – are considered.

The new Committee, the Bi-State Coordination Committee, replaces the Bi-State Transportation Committee. It serves as a forum to share information, coordinate review, and discuss implications of significant legislative land use and transportation issues which may have environmental, economic development and environmental justice implications for actions taken within the corridor. It encourages regional collaboration to facilitate decision making by individual jurisdictions on issues affecting the broader corridor. The results of the Committee’s deliberations are advisory to the Southwest Washington Regional Transportation Council (RTC), Metro’s Joint Policy Advisory Committee on Transportation (JPACT), and Metro, on issues of bi-state transportation significance. On issues of bi-state land use and economic significance, the Committee advises the local and regional governments appropriate to the issue.

The Committee holds no regulatory authority, but builds and sustains regional dialogue and works together on solving problems related to evolving linkages among transportation, land use, and economic development. Member jurisdictions retain their full existing authorities, but consider carefully and give weight to Committee recommendations. Jurisdictions also agree, according to their authorities, to create their own strategies and plans that contribute to managing land uses and economic development to protect transportation investments throughout the corridor.
**Membership:** The Bi-State Coordination Committee consists of elected officials from the jurisdictions within the corridor, as well as leadership from key agencies and organizations. The membership structure includes:

- Cities of Portland, OR and Vancouver, WA
- Clark and Multnomah Counties
- One smaller city each in Multnomah and Clark Counties
- Oregon Department of Transportation
- Washington State Department of Transportation
- Ports of Vancouver and Portland
- Tri-Met
- C-Tran
- Metro

The Committee may, as desired, create ex-officio (non-voting) memberships for state and federal agency representatives. Input from other interests in the corridor, such as communities, businesses, and civic and interest groups, is actively sought by the Committee to augment the perspectives of members. Such additional stakeholder involvement is to be obtained through encouraging public comment and input, and through project-level involvement and existing or new working groups or subcommittees, advisory to the Bi-State Coordination Committee. Member organizations provide leadership-level representatives, and participate actively and consistently in Committee meetings and activities. The Committee is primarily staffed by RTC and Metro professionals, calling on land use and economic development resources from each jurisdiction as needed. Meetings are noticed and open to the public, and the Committee meets regularly at intervals determined in its bylaws.

**Geographic Scope:** The Committee’s focus is the area of the I-5 corridor bounded in the south by the Fremont Bridge on I-405, and in the north by 179th Street. Its scope to the west extends to include important freight transport and economic development activities, especially along the river. Consideration of the area east of the immediate corridor extends as far as I-205, as indicated by linkages and impacts to I-5 corridor investments and communities.

**Agenda Setting:** The Committee work plan will define issues to be addressed, including significant baseline policy issues for the region such as comprehensive and subarea plans and interchange management plans. Members bring, prior to adoption, significant management plans to the Committee for review. More specific projects and policy issues are nominated by each jurisdiction that desires Committee review, and the Committee establishes its agenda collaboratively. The committee does not address issues related to quasi-judicial applications for specific land use projects, once applications are submitted.

**Decision-Making Process:** Committee decisions on its recommendations are made by consensus, or if necessary a majority vote of its quorum membership, defined as 2/3 of total membership. Such decisions on Committee recommendations are advisory to JPACT/Metro, RTC, and local and regional agencies, and have no legal or regulatory authority. The Committee’s process for introducing and agreeing on revisions to this charter, including changes to membership, is also by consensus or majority vote. All such revisions at the charter level are
adopted by member jurisdictions and organizations by resolutions or letters of intent to change the charter.
IN CONSIDERATION OF RESOLUTION NO. 03-3388, FOR THE PURPOSE OF ENDORSING A BI-STATE COORDINATION COMMITTEE TO DISCUSS AND MAKE RECOMMENDATIONS ABOUT LAND USE, ECONOMIC DEVELOPMENT, TRANSPORTATION AND ENVIRONMENTAL JUSTICE ISSUES OF BI-STATE SIGNIFICANCE

Date: November 5, 2003
Prepared by: Mark Turpel

BACKGROUND

The Final Strategic Plan of the I-5 Transportation and Trade Partnership recommended that the Bi-State Transportation Committee "...expand its role to review and advise JPACT, RTC, other councils, commissions and boards on: Management plans, interchange plans and agreements and transit station plans for the I-5 Corridor; and 2. Other transportation, land use and economic development issues of bi-state significance." It further recommended that a community enhancement fund be established and that "The Bi-State Coordination Committee would recommend the specific details in conjunction with the Environmental Justice Work Group."

Accordingly, after interviewing members of the Bi-State Transportation Committee, a draft Bi-State Coordination Committee charter was written. At its October 23, 2003 meeting, the Bi-State Transportation Committee reviewed a draft of a charter and approved the charter with some recommended changes that are reflected in the draft charter attached as Exhibit A to resolution 03-3388. At the November 4, 2003 Southwest Washington Regional Transportation Council (RTC) approved by unanimous vote "Adoption of (RTC) Resolution 11-03-30 "Bi-State Coordination Committee Charter", that once supported by member local government and agency resolutions, would be established." The charter adopted by the RTC is identical to that attached as Exhibit A to proposed Metro Resolution No. 03-3388.

ANALYSIS/INFORMATION

1. Known Opposition
   None known.

2. Legal Antecedents
   - Metro Resolution No. 99-2778 (establishing, along with the Southwest Washington Regional Transportation Council, the Bi-State Transportation Committee)
   - Metro Resolution No. 00-2991 (revising agreement on roles and responsibilities of Bi-State Transportation Committee)
   - Metro Resolution No. Resolution 02-3227A (endorsing the I-5 Strategic Plan and directing staff to incorporate the I-5 Strategic Plan recommendations)
3. **Anticipated Effects**
   Increased coordination and cooperation with jurisdictions in Southwest Washington. Replacement of the Bi-State Transportation Committee with a new Bi-State Coordination Committee

4. **Budget Impacts**
   Continuing staff support to Committee.

**RECOMMENDED ACTION**
Adopt Metro Resolution No. 03-3388.
For the Purpose of Endorsing a Bi-State Committee to Discuss and Make Recommendations about Transportation and Land Use, With Consideration of Economic Development, Environmental, and Environmental Justice Issues of Bi-State Significance and Recommending Creation of Such Committee

WHEREAS, in 1999, the Southwest Washington Regional Transportation Council (RTC) and Metro established a Bi-State Transportation Committee to develop recommendations to the Joint Policy Advisory Committee on Transportation (JPACT) and RTC on bi-state transportation issues; and,

WHEREAS, jurisdictions on both side of the Columbia River can be affected by land use, transportation, economic development, environmental, and environmental justice decisions made by other jurisdictions in the bi-state area; and,

WHEREAS; the June 2002 Final Strategic Plan of the I-5 Transportation and Trade Partnership recommended that the Bi-State Transportation Committee "...expand its role to review and advise JPACT, RTC, other councils, commissions and boards on: 1. Management plans, interchange plans and agreements and transit station plans for the I-5 Corridor; and 2. Other transportation, land use and economic development issues of bi-state significance"; and

WHEREAS, the Final Strategic Plan of the I-5 Transportation and Trade Partnership recommended that a community enhancement fund be established for use in the impacted areas in the I-5 Corridor in Oregon and Washington and that "The Bi-State Coordination Committee would recommend the specific details in conjunction with the Environmental Justice Work Group..."; and,

WHEREAS, the recommendations of the Final Strategic Plan of the I-5 Transportation and Trade Partnership were endorsed by the RTC, JPACT and the Metro Council; and,

WHEREAS, the Bi-State Transportation Committee finds that the opportunity to discuss and make recommendations about issues of bi-state significance concerning land use and transportation, with particular consideration of economic development, environmental, and environmental justice issues, by a Bi-State Coordination Committee would provide more and better information, encourage better cooperation among jurisdictions and coordination of scarce public resources; now therefore,
BE IT RESOLVED,

1. The Bi-State Transportation Committee endorses the creation of a Bi-State Coordination Committee as described in the draft Charter, labeled Exhibit A and attached hereto.

2. The Bi-State Transportation Committee recommends that the RTC, JPACT and Metro Council, formally endorse the creation of a Bi-State Coordination Committee and approval of the Charter.

3. The Bi-State Transportation Committee recommends that RTC, JPACT and the Metro Council authorize the release of the draft Charter for local government consideration.

4. The Bi-State Transportation Committee recommends that RTC, JPACT and the Metro Council, upon receipt of local government resolutions of support for the draft Charter, adopt the draft Charter and create a Bi-State Committee, replacing the Bi-State Transportation Committee.

ADOPTED by the Bi-State Transportation Committee this 23rd day of October 2003.

Craig A. Pridemore, Chair Bi-State Transportation Committee, Clark County Commissioner
DATE: November 12, 2003

TO: Cities and Counties in Portland metropolitan area

FROM: Rod Park, Chair, Joint Policy Committee on Transportation

RE: Clean Diesel Initiative

The Portland metropolitan area, and the state of Oregon as a whole, has enjoyed considerable progress in protecting and maintaining Oregon’s air quality. While there has been considerable success in reducing exposures to carbon monoxide and ozone (smog) it has been unclear until recently how much residual risk there may be from toxic air contaminants. The Environmental Quality Commission, in a pioneering move among states, last month adopted rules outlining how the Department of Environmental Quality will assess and protect Oregonians from exposures to these toxic air contaminants. In a preliminary assessment of the hazard from air pollutants the number one risk, by far, turns out to be diesel particulate.

Diesel engines are a critical and, in some cases, essential part of the fleet of vehicles we depend upon to serve the public. In recognizing the engines’ utility as well as their adverse impact on the environment and public health, the DEQ is rolling out the Clean Diesel Initiative, a multi-pronged, voluntary effort to reduce the impact of diesels while still retaining their essential benefits. The Joint Policy Advisory Committee on Transportation strongly urges you to join with the other jurisdictions in the Portland metropolitan area to participate in this effort.

The overall program consists of two steps: Burn Cleaner Fuel and Burn Fuel Cleaner. The first step is the most critical opportunity for our involvement at this time. DEQ is working to introduce into Oregon a grade of diesel fuel with much lower sulfur contamination. This is a fuel that will become the standard for highway fuel in late 2006. In order to realize the benefits of a cleaner fuel now at the lowest possible cost we must demonstrate to the oil companies that there is sufficient interest to create a viable market. We can do that by participating in a collaborative effort to purchase diesel fuel being organized by DEQ and TriMet. The anticipated premium to use this cleaner fuel is expected to be around 3 cents a gallon. Using this fuel in your fleet reduces particulate and other harmful emissions by at least 15 percent and is an excellent step towards managing the most harmful components of diesel exhaust.
A second step is to install exhaust control devices on existing vehicles in your fleet. These devices, akin to the catalytic converters on automobiles, are so effective that they make heavy duty diesel trucks run as cleanly as those powered by natural gas, but at a much lower cost and while still retaining the inherent advantages of diesel engines. These devices are so effective that in some air sheds the exhaust coming out of the tailpipe is cleaner than the air that went into the engine. There is a range of options in this regard and DEQ is prepared to assist in evaluating your fleet for the most effective applications.

A third opportunity to support clean diesel efforts is to consider incorporating preferences for clean diesel equipment in projects your jurisdiction contracts out. This can go a long way towards reducing the impact of diesels especially since nonroad equipment is historically much more polluting than onroad engines.

The Department is also working on other fronts to engage private fleet operators in the Initiative. In one case, working with Portland area garbage haulers to use ultra low sulfur diesel fuel and incorporate clean diesel technology in their vehicles and in another, with truck stop operators to install technology that eliminates the need for long duration truck idling.

We are not the only ones expected to participate in the Clean Diesel Initiative but we are expected to be a leader. Our commitment to providing everyday high quality service to the public should include taking steps to mitigate those significant impacts to public health, the environment and quality of life that are under our control. Our leadership on this issue, especially in the case of the fuel, will enable others to become engaged and to follow. Our participation in making the Initiative a success could also demonstrate that compelling environmental issues can be addressed in a collaborative manner, avoiding the need for further regulation.

I look forward to hearing from you on how you will participate in the Clean Diesel Initiative. For more information about the Initiative itself, please contact Kevin Downing at DEQ at 503.229.6549.
MEMORANDUM

600 NORTHEAST GRAND AVENUE  PORTLAND, OREGON 97232 2736
TEL 503 797 1700  FAX 503 797 1794

DATE: November 6, 2003
TO: JPACT and Interested Parties
FROM: Andy Cotugno, Planning Director
SUBJECT: TPAC Recommendations on Policy 1.B. OHP Amendments

The Transportation Policy Advisory Committee (TPAC) recommendation to JPACT on the proposed amendments to Policy 1.B. of the Oregon Highway Plan (OHP) is attached. However, based on direction from the Metro Council, JPACT is requested to discuss two issues identified by Council members in more detail prior to finalizing a recommendation on the letter.

Issues for JPACT Discussion
These issues are related to the second bullet on page 2 of the letter and relate to the Policy 1.B requirement for STA management plans on freight routes:

- Appropriateness of ODOT using local and regional plan designations to require an STA management plan
- Lack of an open public process for STA management plans

Recommended Changes to TPAC's Recommendation
To address these issues, it is recommended that JPACT consider the following highlighted changes to TPAC's recommendation (underscore is TPAC's recommendation, additional highlighted changes are in gray and strikethru):

- The movement of freight is another key component of the 2040 Growth Concept. The RTP includes a detailed freight system of highways, inter-modal connectors, terminals and industrial areas. We support a requirement for management plans for STAs located on the NHS, and OHP Freight System Map and/or the RTP Freight System. However, we believe that Metro's Freight System designation alone should not trigger the need for an STA management plan. The management plan should only be required for areas located along State freight routes identified in the OHP and along NHS routes. In the Metro region, the Regional Transportation Plan is used to evaluate how best to serve freight movement in the region at a system level through our modal system policies and maps for motor vehicle, freight, transit, bicycle and pedestrian travel. Our regional street design policies guide how to best integrate the accessibility and mobility goals for each travel mode while also supporting implementation of the 2040 Growth Concept.

As proposed, the State's STA management plan does not apply to NHS routes and remains outside our region's process to balance the different modal interests with freight mobility concerns at a system level. It is important that Metro be involved in the development of STA management plans to ensure the plans adequately address the RTP goals and policies for all modes. We recommend Policy 1.B. be revised to include Metro and other MPO's in the development of STA management plans and that the management plans be approved by local governing bodies and the Commission through a public process. This would provide for a forum for discussing these important issues in an open manner that involved all key stakeholders and to better coordinate land use and transportation planning at the local, regional and state levels. We also recommend removal of the management plan requirement for facilities that are not located on the NHS or OHP Freight System Map.
November 13, 2003

The Honorable Stuart Foster, Chair
Oregon Transportation Commission
355 Capitol St. NE Room 101
Salem, OR 97301-3871

Dear Mr. Commissioner Foster:

During the past two years, Metro and our local partners in the region have been involved in ODOT efforts to establish Special Transportation Areas (STAs) that correspond to our Boulevard designations and to update the Oregon Highway Design Manual (OHDM) to allow more streamlined development of Boulevard projects. The design of state highways through urban areas is as much about building successful communities as it is for moving traffic. We are, therefore, pleased that the Commission is moving ahead more aggressively to establish more effective provisions in the Oregon Highway Plan (OHP) to create and implement these districts, and to establish several STAs in the Metro region.

Metro Region STA Candidates
More recently, Metro staff and local planners worked with ODOT Region 1 staff to prepare a list of potential STA candidates in the Metro region, and they are described in Attachment 1. Attachment 1 includes a table that identifies state highways in the Metro region that appear eligible to be designated as a Special Transportation Area (STA) in the Oregon Highway Plan (OHP). The STA candidates are located on state highways in 2040 centers/main streets, and correspond to locally adopted town/regional center plan boundaries and the Regional Transportation Plan (RTP) boulevard designation. The table also identifies the facility’s recommended STA status and whether the proposed facility is located on the National Highway System (NHS), OHP Freight System Map and/or the RTP Freight System Map.

As the table notes, there are several amendments to the Regional Transportation Plan that are being proposed in tandem with the STA recommendations to ensure consistency between state and regional policies. The current update to the Regional Transportation Plan is scheduled for completion in December 2003. In addition, the table identifies several STA candidates that will be forwarded to the Commission by local governments for approval in the future once adequate STA provisions have been locally adopted.

Policy 1.B. OHP Amendments
The proposed revisions to the OHP are an excellent step forward in streamlining the process of creating STAs, and will make it much easier to create these districts in the Metro region where the necessary planning to justify the designation has clearly taken place. The tiered system of processes for establishing STAs, in particular, manages to protect larger mobility concerns in corridors where statewide and freight mobility must be factored into design decisions, while also acknowledging the need for traffic to be calmed in compact urban centers that are the backbone of the region's strategy to curb urban sprawl.
While we recognize it may be necessary to modify the OHP to better implement Policy 1.B. based on input from various stakeholders, it is critical that the Commission remain committed to Policy 1.B. as originally envisioned. The proposed revisions to the July 16 draft policy component of Policy 1.B. are quite extensive, and we are concerned the revisions could have the unintended effect of weakening the Commission's original policy intent, particularly with regard to supporting adopted community and regional goals while protecting freight mobility concerns.

In addition, we believe additional guidance is needed for some of the implementation provisions identified in Policy 1.B. Following is a summary of our comments on the implementation component of Policy 1.B. proposed revisions, which primarily focus on the STA portion of the proposed amendments:

- It is important that the proposed OHP amendments be expanded to provide adequate guidance on a process to address future STA designations. This could also be accomplished in the OHP Implementation Handbook.

- The movement of freight is another key component of the 2040 Growth Concept. The RTP includes a detailed freight system of highways, inter-modal connectors, terminals and industrial areas. We support a requirement for management plans for STAs located on the NHS, OHP Freight System Map and/or the RTP Freight System. However, we believe that Metro's Freight System designation alone should not trigger the need for an STA management plan. The management plan should only be required for areas located along State Freight Routes identified in the OHP. In the Metro region, the Regional Transportation Plan is used to evaluate how best to serve freight movement in the region at a system level through our modal system policies and maps for motor vehicle, freight, transit, bicycle and pedestrian travel. Our regional street design policies guide how to best integrate the accessibility and mobility goals for each travel mode while also supporting implementation of the 2040 Growth Concept.

As proposed, the State's STA management plan does not apply to NHS routes and remains outside our region's process to balance the different modal interests with freight mobility concerns at a system level. It is important that Metro be involved in the development of STA management plans to ensure the plans adequately address the RTP goals and policies for all modes. We recommend Policy 1.B. be revised to include Metro and other MPO's in the development of STA management plans.

- The Category 2 section should be expanded to more clearly define what is meant by "less design flexibility on higher speed facilities." The same design flexibility should be allowed for all STAs, regardless of their category designation. By virtue of being designated an STA, a facility will be designed to encourage slower speeds and enhanced bicycling and walking environments to support the adjacent mixed-use centers.

- We have not recommended STA designations for several facilities in the Metro region where ODOT anticipates transferring the jurisdiction to local governments in the near term. It is likely that ODOT will complete improvements to these facilities prior to the jurisdictional transfer, and it is important that any improvements be allowed to use the STA design standards. Similarly, ODOT preservation and safety projects in STAs should also address the STA design standards as they provide a significant opportunity to leverage the long-term vision for these areas.
The OHP amendments and OHDM design standards do not provide adequate guidance on how the facility's design should transition into an STA. The STA design standards are intended to allow for slower traffic speeds and enhanced pedestrian, bicycle and transit accessibility. We strongly believe the design transition should occur outside of the area designated as a STA to better support these goals and that additional guidance on this implementation issue be provided.

Link to the Oregon Highway Design Manual
We commend ODOT for allowing peer review of the draft OHDM by practicing professionals from our region. The OHDM, and Chapter 8 in particular, is the critical counterpoint to the Commission's efforts to create STAs. Without the STA provisions in the new urban chapter of the OHDM, the cumbersome design exceptions process would be the only mechanism to actually build a Boulevard design in Metro region STAs. Our experience with the exceptions process in these areas is that the final design does not adequately address the pedestrian-oriented travel needs of urban centers, and thus the new urban design provisions in the draft OHDM are a welcome addition. These new provisions will be the basis for advancing a number of funded Boulevard projects in the region that are central to leveraging development of the main streets, light rail station communities, town centers, regional centers and Portland's central city, as envisioned in our 2040 Growth Concept.

Because the new urban provisions of the OHDM are directly linked to the STA designation in the Oregon Highway Plan, we urge the Commission to be more involved in the adoption of the OHDM. In June 2003, Metro coordinated two meetings with planners and engineers in the region and ODOT staff to learn more about the relationship of STAs to the OHDM and the contents of the OHDM. The meetings also provided an opportunity for the region to discuss and comment on the OHDM, particularly with regard to the design standards proposed for state facilities designated as STAs and treatment of bicycle, pedestrian and transit facilities. Based on these discussions, we submitted comments to the ODOT Technical Services Manager, Cathy Nelson, for consideration during the conversion of the OHDM to English units. Cathy Nelson agreed to several changes to the OHDM based on those comments.

Currently, the document is being finalized administratively, and there are still significant design issues where practicing design professionals in the Metro region view the draft as an impediment to actually achieving the goals set forth for STAs in the Highway Plan. Among these are excessive right-of-way devoted to highway features like "shy distance", long turn radii and extensive transition areas where lane widths change. While these features are appropriate on high-speed, mobility-oriented routes, they are at odds with the central purpose of Boulevards and STAs, where the emphasis is on traffic calming, slower vehicle speeds and corresponding design emphasis on pedestrian travel.

Because of the importance of the OHDM in making STAs happen, we recommend that the OTC serve as the approval body for the document and that updates to the manual be completed soon. While some past editions have been developed and adopted administratively, our belief is that transportation engineering is an increasingly important part of the larger planning process, sets important statewide policy and thus must be conducted in full view of the public. We also urge the Commission to link completion of the OHDM to their actions on STAs. The two should proceed in tandem to ensure that the OHDM can deliver the designs needed to ensure that the STA concept is successful on the ground.

We request that ODOT remain committed to reconvening the Metro region OHDM review group to continue discussions related to the OHDM design exceptions process and other issues originally identified by the review group, but that were not addressed during the OHDM update. We may bring any outstanding issues to your attention in the future.
Finally, we continue to believe that Regional Managers and engineers should be given the flexibility to solve these urban design issues without further approval from the Technical Services Manager because the regional managers are most acquainted with the local issues that are being addressed through project development. At a minimum, a work group from the region with an ODOT-Salem representative should be established to work through the issues early in the project development process.

We wish to thank the Commission for its dedication to the STA concept, and current effort to ensure that the program succeeds. We understand that the designation and development of STAs is still relatively young, and recognize that future amendments to the OHP may be needed to resolve additional issues that come to light during implementation. We look forward to working with you in the future to implement STAs in this region and to bring our 2040 vision to reality.

Sincerely,

David Bragdon, President
Metro Council
Rod Park, Chair
Joint Policy Advisory Committee on Transportation

cc: Pat Egan, Office of the Governor
Randy Franke, Chair, Land Conservation and Development Commission
Bruce Warner, Director, Oregon Department of Transportation
Cathy Nelson, Technical Services Management, Oregon Department of Transportation
Ken Strobeck, League of Oregon Cities
Xavier Falconi, President, Oregon Institute of Transportation Engineers
### Special Transportation Area (STA) Candidates for the Metro Region

**City of Portland and East Multnomah County**

<table>
<thead>
<tr>
<th>Category 1 designation</th>
<th>STA Location and associated STA proposition</th>
<th>NHS</th>
<th>ORP</th>
<th>RTP</th>
<th>Comments/Areas Plan</th>
</tr>
</thead>
</table>
| No designation proposed at this time | West Portland town center  
- Barbur Boulevard (Bertha Blvd. to Capitol Highway) | no  | no  | no  | Consider STA in the future as part of Town Center Plan or I-5/Barbur Boulevard Corridor Plan |
| Category 1 designation | St. Johns town center  
- Lombard St. from Mohawk to Lombard Way to Richmond to Ivanhoe to intersection of Ivanhoe and Philadelphia) | no  | no  | no  | Request transfer of US 30 Bypass route to Lombard Street/Columbia Blvd consistent with NHS/RTP Freight designation |
| No designation proposed | Sandy Boulevard main street  
- Sandy Boulevard (Burnside St. to 39th Ave.) | no  | no  | no  | To be transferred on June 30, 2003, therefore no STA designation needed |
| No designation proposed | Hollywood town center  
- Sandy Boulevard (39th Ave. to 57th Ave.) | no  | no  | no  | To be transferred on June 30, 2003; therefore no STA designation needed |
| No designation proposed at this time | 82nd Avenue station community  
- 82nd Avenue (Glisan St. to Halsey St.) | no  | no  | no  | Consider STA in the future as part of Station Community Plan or 82nd Avenue Corridor Plan |
| Category 1 designation | Macadam Avenue Main Street  
- Hwy 43 (Bancroft to Taylors Ferry) | no  | no  | no  | |
| No designation proposed at this time | Parkrose main street  
- Sandy Boulevard (99th Avenue to 122nd Avenue) | no  | no  | yes (from 99th to 102nd Ave.) | No designation proposed, because no Main Street Plan has been adopted, and highway segment has been recently improved. Remove RTP freight designation. |
| No designation proposed | Gresham regional center  
- Powell Boulevard (Eastman Parkway to Burnside St.) | no  | no  | no  | To be transferred; therefore no STA designation needed |

**Note:** Shaded areas indicate proposed STAs
## Clackamas County

<table>
<thead>
<tr>
<th>Category 1 designation proposed</th>
<th>Category 2 designation proposed</th>
<th>Category 3 designation proposed</th>
<th>Note: Shaded areas indicate proposed STAs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Milwaukie town center</strong></td>
<td></td>
<td></td>
<td>Remove RTP freight route designation in order to be Category 1 as part of RTP Update (Freight route to be provided via Highway 224 and I-205 to Oregon City)</td>
</tr>
<tr>
<td>• McLoughlin Boulevard (Scott Street to River Road)</td>
<td>no</td>
<td>no</td>
<td>yes</td>
</tr>
<tr>
<td><strong>Clackamas regional center</strong></td>
<td></td>
<td></td>
<td>Consider removing NHS designation in the future</td>
</tr>
<tr>
<td>• 22nd Avenue (King Road to Sunnybrook St.)</td>
<td>no</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>Lake Oswego town center</strong></td>
<td></td>
<td></td>
<td>Consider removing NHS designation and RTP Boulevard designation. Town Center Plan not supportive of STA designation.</td>
</tr>
<tr>
<td>• Highway 43 (Mcvey Ave. to Terwilliger Blvd.)</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>West Linn town center</strong></td>
<td></td>
<td></td>
<td>Consider STA designation for Clackamas River Bridge to Dunes Drive upon local adoption of Regional Center Plan and zoning designations, including provision for building orientation and local street connectivity. Remove RTP freight designation from Highway 224 to I-205 as part of RTP Update (Freight route to be provided via Highway 224 and I-205 to Oregon City).</td>
</tr>
<tr>
<td>• Highway 43 (Failing St. to I-205)</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>Oregon City regional center</strong></td>
<td></td>
<td></td>
<td>No designation proposed because town center moved from 99E to Portland Avenue. Remove RTP boulevard and freight designations as part of RTP Update.</td>
</tr>
<tr>
<td>• McLoughlin Boulevard (Clackamas River bridge to Dunes Drive)</td>
<td>no</td>
<td>no</td>
<td>yes</td>
</tr>
<tr>
<td>• McLoughlin Boulevard (14th Street to railroad tunnel)</td>
<td>no</td>
<td>no</td>
<td>yes</td>
</tr>
<tr>
<td>• Highway 43 bridgehead area</td>
<td>no</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>Gladstone town center</strong></td>
<td></td>
<td></td>
<td>Remove RTP freight route designation in order to be Category 1 as part of RTP Update (Freight route to be provided via Highway 224 and I-205 to Oregon City)</td>
</tr>
<tr>
<td>• McLoughlin Boulevard (Gloucester St. to Arlington St.)</td>
<td>no</td>
<td>no</td>
<td>yes</td>
</tr>
</tbody>
</table>

Special Transportation Area Candidates for the Metro Region
October 24, 2003
## Washington County

<table>
<thead>
<tr>
<th>Category</th>
<th>Location and proposed STA boundaries</th>
<th>NHS</th>
<th>CHP</th>
<th>RTP</th>
<th>Consideration and future planning</th>
</tr>
</thead>
</table>
| No designation proposed at this time | Raleigh Hills town center  
- Beaverton-Hillsdale Highway (78th Ave. to 65th Ave.) | no | no | no | Consider STA designation in the future as part of Town Center Plan. |
| No designation proposed | Forest Grove town center  
- Highway B (Maple St. to B St. in Forest Grove) | yes | no | yes | To be transferred, therefore no STA designation needed. |
| Category 2 designation proposed | Cornelius Main Street  
- Highway B (14th Ave. to 10th Ave. in Cornelius) | yes | no | yes | Consider extending STA in the future as part of TSP Update. |
| No designation proposed at this time | Hillsboro regional center  
- Highway B (Oak and Baseline from 10th Ave. to 1st Ave. plus portion of 10th Avenue in Hillsboro) | yes | no | yes | Consider STA designation and management plan as part of Comprehensive Plan or Downtown Plan amendments in future. Category 3 would apply. |
| Category 1 designation proposed | Washington Square regional center  
- Hall Boulevard (Scholls Ferry Road to Hemlock Street) | no | no | no | Consider STA designation in the future as part of Town center plan; Category 3 designation would apply to 99W; management plan to be addressed as part of I-5/99W Corridor study. |
| No designation proposed at this time | Tigard town center  
- 99W (I-5 to Walnut St.)  
- Hall Boulevard (Pfaffle St. to McDonald St.) | yes | yes | yes | Consider STA designation in the future as part of town center plan and TSP future planning. Category 3 designation would apply. Management plan to be addressed as part of I-5/99W corridor study and TSP. |
| No designation proposed at this time | King City town center  
- 99W (Royalty Parkway to Royal Villa Dr.) | yes | yes | yes | Consider STA designation in the future as part of town center plan and TSP future planning. Category 3 designation would apply. Management plan to be addressed as part of I-5/99W corridor study and TSP. |
| No designation proposed | Tualatin town center  
- Boones Ferry Rd. (Lower Boones Ferry Rd. to Tualatin Rd.) | no | no | no | To be transferred, therefore no STA designation needed. |
| No designation proposed at this time | Sherwood town center  
- 99W | yes | yes | yes | Category 3 designation would apply. Management plan to be addressed as part of I-5/99W corridor study and TSP. |
| No designation proposed at this time | Aloha town center  
- Highway B / Tualatin Valley Highway (190th Ave. to 170th Ave.) | yes | no | yes | Consider STA designation and management plan in the future as part of town center plan and TV Highway corridor refinement plan future planning. Category 3 designation would apply. |

Note: Shaded areas indicate proposed STAs.
November 5, 2003

✓ JPACT
Metro Council
Oregon Transportation Commission
c/o Andy Cotugno, Metro Planning Director
600 NE Grand
Portland, OR 97232-2736

Dear Fellow Officials:

Oregon City supports and requests Special Transportation Area (STA) designation by the Oregon Transportation Commission on Highway 99E (McLoughlin Boulevard) for its entire length between the Clackamas River bridge and the Union Pacific Railroad tunnel, excepting the I-205 interchange. We also request that the transition area occur outside of these STA boundaries.

Oregon City has taken an active role in establishing land use plans and policies that support our designation as a regional center in the Metro 2040 plan. We see this as not only being important for regional planning, but in the interest of Oregon City and its residents, and ultimately for state progress and success.

We have adopted the Downtown Community Plan that directly addresses regional center goals and requirements. Our Comprehensive Plan updates are nearly complete that will impose a “Mixed Use Downtown” plan designation throughout our downtown and along McLoughlin Boulevard within the regional center boundaries. “Mixed Use Downtown” zoning is associated with this map designation that encourages a mix of high density residential, office, and retail uses with primarily retail and service uses on the ground floor, and primarily office and residential uses on the upper floors. The emphasis is on those uses that serve a walk-in clientele.

We have adopted the Oregon City Waterfront Master Plan that focuses on land use goals that integrate the regional center concepts with our Willamette River and Clackamas River waterfronts. The current and recent past City Commissions, Planning Commissions, and our citizens have especially supported this plan. They recognized that any regional center activities needed to include connections to our rivers, a distinctive part of our heritage and true resources for our future.

Through a TGM grant with ODOT, our staff has just completed the McLoughlin Boulevard Enhancement Plan that will guide multi-modal improvements on this important highway connection that is also seen as a catalyst for economic growth and
downtown redevelopment in our community. It is important to note that the linear nature of our regional center will particularly rely on design and land use continuity along McLoughlin Boulevard both south of I-205 and north of I-205.

Our current development code requires design standards for buildings to be set close to the sidewalk that promote transit corridors and support multi-modal activity and connectivity. These standards are applicable to McLoughlin Boulevard - especially so given the region and Tri-Met's commitment to near-term bus rapid transit and long-term light rail transit along the McLoughlin Boulevard corridor between Portland, Milwaukie, and Oregon City. We also have street connections identified to assure that a parallel local system can assist traffic flow in and around the STA.

In summary, the City appreciates your consideration of McLoughlin Boulevard as a Special Transportation Area and its official designation by the Oregon Transportation Commission. This designation is consistent with our planning efforts and land use goals for a downtown that represents a meaningful history and a very exciting future.

Very truly yours,

Honorable Alice Norris
Commissioner Bob Bailey
Commissioner Doug Neeley

Commission President, Tom Lemons
Commissioner Gary Hewitt

C: JPACT
Metro Council
Oregon Transportation Commission
October 30, 2003

Lidwien Rahman  
ODOT Region 1  
123 NW Flanders  
Portland, OR 97209-4037

Dear Lidwien:

Thank you for the opportunity to discuss potential Special Transporation Area (STA) designations within Portland with you and Metro staff. We have reviewed the proposed STA designations within the St. Johns town center and on the Macadam Avenue main street and concur with Metro’s recommendation and with the boundaries proposed by Metro.

Within the St. Johns town center the STA designation is proposed for N Lombard from N Mohawk to N Lombard Way to Richmond and N Ivanhoe to the intersection of Invanhoe and N Philadelphia. This designation is consistent with the St. Johns and Lombard Plan that is currently going through the approval process at Planning Commission and City Council.

The Macadam Avenue main street STA is proposed from SW Bancroft to SW Taylors Ferry. These termini are consistent with the Southwest Community Plan main street designation that was adopted by City Council on July 13, 2000 (Ordinance No. 174667).

We look forward to working with you on additional STA designations as future planning efforts are completed.

Sincerely,

[Signature]

Laurel Wentworth  
Chief Transportation Planner, Transportation Planning

Cc: Tom Kloster  
    Kim Ellis
November 10, 2003

The Honorable Gordon H. Smith  
404 Russell Senate Office Building  
Washington, D.C. 20510

Dear Senator Smith:

As you know, Congress has the important task of adopting a new 6-year reauthorization of the Transportation Equity Act for the 21st century (TEA.21). Towards this end, the Senate Environment and Public Works Committee has released a draft for the highway component of the bill. As you remember, the Portland region through the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) provided you in February with a comprehensive analysis of the issues. Enclosed is a specific analysis of the EPW bill with elements that we support as well as requests for amendments.

As the legislation progresses through the Senate Banking and the House Transportation Committees we will be providing you with further analysis and comments.

Sincerely,

Rod Park, Metro Council  
Chair, JPACT

Enclosure

RP:ac:pac

c: Metro Council  
JPACT
November 10, 2003

The Honorable Ron Wyden
516 Hart Senate Office Bldg.
Washington, D.C. 20510

Dear Senator Wyden:

As you know, Congress has the important task of adopting a new 6-year reauthorization of the Transportation Equity Act for the 21st century (TEA.21). Towards this end, the Senate Environment and Public Works Committee has released a draft for the highway component of the bill. As you remember, the Portland region through the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) provided you in February with a comprehensive analysis of the issues. Enclosed is a specific analysis of the EPW bill with elements that we support as well as requests for amendments.

As the legislation progresses through the Senate Banking and the House Transportation Committees we will be providing you with further analysis and comments.

Sincerely,

Rod Park
Metro Council Chair, JPACT

Enclosure

RP:ac:pac

c: Metro Council
   JPACT
Portland Region Comments on the Draft SAFETEA Bill
Released by Senate Environment and Public Works (EPW) Committee
(October 24, 2003)

In January 2003, the Portland Metropolitan Area through the Metro Council and the Joint Policy
Advisory Committee on Transportation (JPACT) adopted a comprehensive position statement on issues
to be addressed through the reauthorization of TEA-21. At that time, it was recognized that it would be
necessary to review proposals introduced by the Administration, the Senate and the House of
Representatives to determine if priority issues are being addressed.

This review is of the proposed draft produced on the Highway elements of the bill by the Senate
Environment and Public Works (EPW) Committee. There will be similar reviews in the future of the
Transit element to be produced by the Senate Banking Committee and the full bill to be produced by the
House Transportation Committee.

Presented below are the Portland region’s three High Priority requested amendments to the draft EPW
bill. The attachment addresses additional requested amendments for the EPW bill and sections of the
EPW bill for which regional support is highlighted.

High Priority Amendment No. 1: In Section 1401(2), amend the allocation of STP funds to
urbanized areas with a population over 200,000 to be 62.5%, the same as in TEA-21, rather
than the 55.5% proposed in the draft EPW bill.

The draft EPW bill provides an increase, compared to TEA-21 levels, of 44% in Surface Transportation
Program (STP) funds that are formula allocated to large metropolitan regions (population greater than
200,000) compared to increases of 60% or more in all other major highway programs. This occurs at a
time when such funds must be allocated among more large metropolitan regions. The disproportionately
low funding increase results from a provision in the EPW bill that lowers the percent of STP funds
allocated to the large metropolitan regions. The following paragraphs detail the problem.

In Title I – Federal-Aid Highways, Subtitle A – Funding, Section 1101. “Authorization of
Appropriations,” the authorized funding levels for the major highway categories of Interstate
Maintenance, National Highway System and Bridge are proposed to be increased by approximately 60%
above the levels provided by TEA-21. While the EPW bill appears to provide a 44% increase in Surface
Transportation Program (STP) funds compared to TEA-21, the EPW bill creates a separate category for
the Highway Safety Program whereas TEA-21 merged the Safety Program into the STP program. When
taking this into account, the proposed net increase in STP funds for non-safety and enhancement projects
(61%) is similar to the other major highway funding categories.

However, Section 1401(2) “Allocation of Apportioned Funds” includes a provision to change the
allocation formula for large metropolitan regions (i.e. urbanized areas with a population over 200,000);
lowering the percent sub-allocated to large regions from the 62.5% in TEA-21 to 55.5%. This change
results in large metropolitan regions realizing an increase in their STP allocation of 44% compared to
TEA-21 levels, while other areas of the state realize a 92% increase in STP funds and all other major
highway programs realize a 60% or greater increase.

If the STP allocation formula for large metropolitan regions were to remain at 62.5%, the metropolitan
regions would enjoy the same increase in funding over TEA-21 levels as the other highway programs.
This is particularly important when taking into account the increase in the number of urbanized areas with a population over 200,000 in the 2000 Census.

**High Priority Amendment No. 2: Ensure that the Portland region is authorized a fair share of CMAQ funds as follows:**

A. In Section 1101(5), increase the authorized funding level for CMAQ commensurate with the addition of areas designated for receipt of funds as PM 2.5 nonattainment or maintenance areas; and

B. Amend Section 1613(2) to add subsection (x) as follows: “(x) 1.0 if, at the time of apportionment, the area is not designated as a nonattainment or maintenance area under the 8-hour ozone standard but was designated as a nonattainment area or maintenance area under the 1-hour ozone standard.”

A combination of factors affecting how Congestion Management Air Quality (CMAQ) funds are allocated to regions interact to reduce the amount of CMAQ funds available to the Portland region. As a result, a reduction in CMAQ funds would reduce the region’s ability to implement projects to reduce vehicle emissions and stay in attainment of national air quality standards. The following paragraphs detail the problem.

In **Title I – Federal-Aid Highways, Subtitle A – Funding, Section 1101. “Authorization of Appropriations,”** the authorized funding level for CMAQ funding is proposed to increase by 59% compared to TEA-21, comparable with the other major categories. However, Section 1613(3) proposes to change to the distribution formula for nonattainment areas or maintenance areas from one that is currently based on ozone and carbon monoxide (CO) levels to one that is based on ozone, CO and fine particulate matter (PM – 2.5) levels. This has the affect of spreading CMAQ funds to more areas, resulting in an unintended CMAQ funding decrease in “attainment” areas like Portland.

In addition, on November 5, 2003 EPA issued a new rule changing the 1-hour standard for ozone to an 8-hour standard. In the case of Portland, we were previously a nonattainment area for the 1-hour ozone standard and were redesignated as a maintenance area after having reached attainment of the standard in 1996. Under this “maintenance” classification, the Portland region would be eligible to receive a distribution of CMAQ funds to enable us to implement transportation projects that keep us in that attainment status.

However, the affect of the new 8-hour standard is that we were never in nonattainment and, therefore, no longer classified as a maintenance area. Section 1613(2) provides a factor to distribute CMAQ funds to areas newly designated as nonattainment or maintenance under the new 8-hour standard but fails to provide for distribution to areas previously designated as a nonattainment area or maintenance area under the previous 1-hour standard but no longer classified under the new 8-hour standard. As such, the region would no longer receive CMAQ funds for ozone and would risk slipping into nonattainment as transportation projects to reduce air pollution cannot be implemented due to the loss of CMAQ funds.

**High Priority Amendment 3: To help fund project development activities needed to advance the I-5 Trade Corridor Project:**

A. Amend Section 1101(10) and (11), which establishes funding levels for the Corridor Program and Border Program, respectively, to either (i) combine the separate authorities into one
combined authority, as in TEA-21, or (ii) revise the relative funding levels between these programs to better reflect the size of the pool of eligible projects for these programs.

B. In Section 1811, change the maximum share that Highway Trust funds can pay for studies using Corridor Program funds from 50 percent to 80 percent.

C. In Section 1811, make projects using Border Program funds ineligible for Corridor Program funding.

D. If and when the Senate addresses earmark projects, seek an earmark for preparing an Environmental Impact Statement for the I-5 Project.

E. The I-5 Project will have multi-modal, Highway and LRT components. As such, when the Transit Title is introduced by the Banking Committee, identify the I-5 Project as eligible under the New Starts Program.

F. It may be necessary to ensure the section of the bill addressing tolls allows for (i) using toll revenues to pay for the replacement bridge on I-5 (which may necessitate a change to the defined term “initial construction”) and (ii) there may be a need for flexibility to toll the I-5 bridge and other infrastructure in the vicinity if warranted and supported by the process.

The Oregon Department of Transportation (ODOT), Washington State Department of Transportation (WSDOT) and the Portland region have each established the I-5 Trade Corridor Project (“I-5 Project”) as a high priority. Studies to date have resulted in agreement on a general concept that includes construction of a new river crossing in the I-5 corridor, related highway improvements on I-5 and an extension of light rail to Clark County. During the timeframe covered by the EPW bill, the I-5 Project will require substantial planning and development funds (the amount is currently being determined, but likely in excess of $30 million) to advance the project. As currently formulated, the EPW bill will make securing planning and development funds for the I-5 Project difficult. The following paragraphs detail the problem.

Within the presumed six-year term of the EPW bill, it is anticipated that the multi-modal project will advance through the following stages:

• If the project is pursued in part or whole as a public-private partnership project, selection of the private entity partner through a Request for Proposal (RFP); and
• Completion of the EIS, both Draft and Final;
• Determination of whether tolling is required on the I-5 Bridge and, possibly, other infrastructure in the vicinity.
• Early stages of construction.

Our sense is that it will take a combination of (i) a “demonstration project” earmark in the authorization bill and (ii) access to an on-going discretionary funding source to secure the discretionary funding needed to advance the I-5 Project to the start of construction. We understand that the Senate traditionally does not address earmarking funds until required to by House actions; so we will not elaborate on that element at this time.

With regard to access to an on-going discretionary funding program, during TEA-21 ODOT has pursued federal funding for the project through the National Corridor Planning and Development Program with some success. During TEA-21, about $1.1 billion in funds was appropriated for projects from this
program and its sister “Border Planning, Operations, and Technology Program.” Of the total, about 20 percent of the funds went to the “border program” projects because the represent a small percentage of the national need. ODOT received about $14.5 million from the corridor program, mostly for the I-5 Trade Corridor Project (some going to Medford and Polk County).

The EPW bill replaces the National Corridor Planning & Development Program and the Coordinated Border Infrastructure Program with the Multi-state Corridor Planning Program (“Corridor Program”) and the Border Planning, Operations, and Technology Program (“Border Program”). As in TEA-21, the I-5 Project is ineligible for “Border Program” funding, which is limited to projects along the Mexican and Canadian borders. It should be noted, however, that many projects eligible for Border Program funds are also eligible for Corridor Program funds; allowing them to “double dip” and reduce the pool of funds available for the I-5 Project.

There are two changes proposed to the Corridor Program in the EPW bill from that in TEA-21 that must be noted. First, whereas TEA-21 provided a combined authorization for the Corridor and Border programs, the EPW bill provides separate authorized amounts for these programs – and the authorization for the Border Program is equal to that for the Corridor Program, even though it incorporates a small percentage of needed projects. We feel it would be preferable to either (i) return to the combined authorization approach used in TEA-21, or (ii) modify the relative authorized amounts to more reasonably reflect the pool of eligible projects. At a minimum, projects using Border Program funds should be ineligible for use of Corridor Program funds. Second, the Corridor Program limits the share of highway trust funds to 50 percent of project costs, while the Border Program provides for an 80 percent share. We believe, the highway trust fund share of both programs should be 80 percent.

In addition to these funding initiatives, the I-5 Project has, or may have, the following needs in reauthorization:

-- If Congress continues to require that projects potentially seeking New Starts funds be authorized in the bill, such authorization for the I-5 project would be required in the Transit Title.

-- ODOT has requested research into the need for legislative changes related to tolling authority on Interstates or Interstate Bridges. It is possible that the River Crossing Project will require tolling. There are questions about whether the existing statute would work for this approach.
Attachment
Other Regional Positions on EPW Draft Bill

A. Other Requested Revisions to EPW Draft Bill

1. Metropolitan Planning

Section 1103(b) provides for the set-aside of 1% of the program for metropolitan planning. However, other sections of the bill increase the requirements to be met through the metropolitan planning process, most notably the requirements to address water quality, environmental mitigation and consultation with the natural resource agencies. While these are worthwhile objectives, they increase the cost of the program. At the same time, the effect of the 2000 Census is to increase the number of urbanized areas required to meet the metropolitan planning requirements and eligible for receipt of a portion of these funds. In Oregon alone, the number of urbanized areas increased from four (Portland, Eugene, Salem, Medford) to 6 (with the addition of Bend and Corvallis). So, while the requirements are going up, the funding to meet the requirements is not keeping pace.

Recommendation: Amend Section 1103 (b) (1) to raise the set-aside for metropolitan planning to 2% of the program.

2. Air Quality Conformity

Section 1617(b)(4) revises the requirements for demonstrating conformity between the metropolitan areas long-range transportation plan and the air quality implementation plan. Under TEA-21, the conformity analysis had to address changes in vehicle emissions over both a 10-year and 20-year timeframe; under the proposed EPW bill, only a 10-year period would be addressed.

It is important to retain the current requirement to address both the 10 and 20-year periods because the affect of building transportation projects on traffic volumes, use of alternative modes to reduce vehicle emissions and land use affects of transportation projects have a very long lasting affect. Most projects take many years to develop and build, and the affect on vehicle emissions and land use patterns will not be significant in the first 10-year period.

Recommendation: Retain the current requirement to demonstrate air quality conformity for both a 10-year and 20-year period.

3. Variable Toll Pricing Program

Section 1611(b) provides for the continuation of the variable toll pricing program but no longer authorizes funding for planning, development and implementation of these projects on a competitive basis. This has been a small but effective source that has provided for creative development of projects that have served as valuable lessons for the rest of the country.

Recommendation: Provide $11 million per year in authorized funding for the Variable Toll Pricing Program.

4. Transportation Research

In Title II of the EPW bill, Section 510 “University Research Centers” provides for an authorization of specific research centers. We have been working closely with Portland State University on the establishment of a Transportation Research Center which meets all of the requirements established by this
section. The Center would focus on Advanced Information Technology, Urban Transit, Freight, and Livability, Health and Transportation. Unless it is authorized, it will not be eligible for Section 510 funding.

Recommendation: Include PSU as a “Group D” Center, which would make $25 million per year available to PSU.

B. Support for Provisions in the EPW Bill

1. Transportation and Community and System Preservation Pilot Program (TCSP)

Section 1816 proposes to change the program to be predominately distributed to each state in the amount of $500,000 per state. This is a good step to ensure this funding source is no longer predominately earmarked through the appropriations process to projects that don’t meet the intent of the program.

2. National Commission on Future Revenue Sources to Support the Highway Trust Fund

The bill would create an 11-member commission to study and make recommendations on future funding sources to support the Highway Trust Fund. In Oregon, the Legislature has taken the same action because of the affect of increasing fuel economy on the viability of this source. This is particularly important as the industry moves to more hybrid and electric vehicles.

3. Substitution of Air Quality Transportation Control Measures

Section 1619 would allow transportation control measures in the state implementation plan for meeting and maintaining air quality standards to be substituted with other measures with equivalent effectiveness. This has been an approach employed in Oregon that has proven effective.

4. Apportionment Factor for CMAQ funds

Section 1613 corrects a provision of TEA-21 that penalized areas for meeting air quality standards. Under TEA-21, in recognition of the differing severity of air pollution problems throughout the country, a distribution formula was created to increase the distribution to the most severe areas (by using a sliding scale factor of 1.0 to 1.4).

The unintended consequence of the provision was to apply a factor of 0.8 to areas that reach the maintenance status for meeting air quality standards (that is, they would receive 80% of the CMAQ funds once they reach attainment). In effect, the area is penalized with a funding reduction as a reward for meeting air quality standards even though it is important to continue to implement projects that reduce vehicle emissions in order to maintain air quality standards. This bill fixes that problem by retaining the apportionment factor of 1.0 when an areas status changes from nonattainment to maintenance.

5. Long Range Transportation Plan Update Schedule

Section 1617 changes the interval that a metropolitan area is required to update their long range transportation plan from every 3 years to every 5 years. This would be an effective change.
JPACT Retreat Proposal
For review by JPACT at December 11 meeting

Date: Friday, January 16 or 23
Time: 8:00 am to 2:00 pm (depending on Agenda)
Place: Zoo Conference Center
Participants: JPACT members and alternates, Metro Council, selected OTC members, selected Legislators

Purpose:

The region has spent considerable time identifying needed transportation projects, which are significant to the regional economy and well-being of our communities. Since our funding needs are significantly larger than the amount of funding we traditionally receive, we run the danger of 1) not meeting our goals and damaging economic health and community well-being, and 2) fighting among ourselves over limited resources and undermining regional consensus on policy direction. The purpose of the Retreat is to identify how we can collectively meet the need for transportation improvements and establish a priority for action by JPACT members.

Agenda:

1. Review and Discuss our collective Vision and Priority for transportation improvements (30 minutes)

   The 2040 Growth Concept provides the overall framework for the Vision and the basis for defining needed transportation improvements. However, the needs are significantly greater than revenues and valid transportation projects that support different elements of the Growth Concept compete for priority funding. The Retreat should start with a brief review of the vision and assess differing attitudes among the members of JPACT on which transportation elements are highest priority.

2. Recap existing and expected transportation funding sources (30 minutes)

   Staff will provide an analysis of needed transportation improvements and how that stacks up relative to known and possible funding sources. This is to help develop a strategy to define which funding source to pursue for which transportation needs. The federal landscape is changing rapidly and we need to influence its direction. The approach to a state package at the '05 Legislature is not yet formed. There is the proposal from the Transportation Finance Task Force for a Metro Ballot Measure.

3. Break (15 minutes)
4. Discussion of Funding Strategies at the Federal, State and Regional level (2 hours)

The goal of a discussion with the full group will be to develop a consensus on which parts of the transportation program will be pursued through which approach. To the extent possible, there should be agreement on roles and responsibilities of different JPACT members and agencies and necessary follow-up steps for JPACT action.

5. Lunch (45 minutes)

6. Discussion of the region’s strategy for being more effective at the State Legislature (45 minutes)

Regardless of what is being pursued from the Legislature, there can be a more unified regional approach to seeking transportation funding from the Legislature. JPACT should discuss how to establish this approach.

7. How does formation of an ACT benefit the region’s goals? (30 minutes)

The OTC encouraged JPACT to revisit the issue of formation of an ACT in the Metro region to encompass a larger geographic area and add representation from interest groups. Should this be pursued and how can it be used to advance the region’s priority transportation funding agenda?
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