

## STAFF REPORT

### POLICY FRAMEWORK FOR 2023 REGIONAL TRANSPORTATION PLAN CALL FOR PROJECTS

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Date: December 5, 2022

Department: Planning, Development & Research

Meeting Date: December 15, 2022

Prepared by: Kim Ellis,  
kim.ellis@oregonmetro.gov

Presenters:

- Margi Bradway, Deputy Director
- Kim Ellis, RTP Project Manager
- Ted Leybold, Resource Development Manager
- Molly Cooney-Mesker, Senior community engagement specialist

Length: 45 minutes

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### ISSUE STATEMENT

A major update to the [Regional Transportation Plan \(RTP\)](#) is underway and must be completed by Dec. 6, 2023 when the current plan expires.

The RTP is the state- and federally-required long-range transportation plan for the Portland metropolitan area. The RTP is the blueprint for transportation in our region and a key tool for implementing the region's [2040 Growth Concept](#) and [Climate Smart Strategy](#). Together, these plans will help ensure that greater Portland thrives by connecting people to their jobs, families, schools and other important destinations and by allowing business and industry to create jobs and move goods to market.

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

A key next step in the process of developing the 2023 RTP is updating the near-term and long-term investment priorities for greater Portland through the Call for Projects. These investment priorities will include two lists of transportation projects that have been prioritized for funding in the near-term (next seven years) and long-term (next 22 years). A third list will include additional priorities that advance RTP policy priorities or need further study but that do not fit within the financial budget of the plan. The policy framework in **Attachment 1** is recommended to guide development of the investment



Draft 2023 RTP Goals developed by JPACT and Metro Council

priority lists. The policy framework reflects the culmination of significant research, engagement<sup>1</sup>, and policy discussions by the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC) and Metro Council during the past year.

### **ACTION REQUESTED**

Metro Council action on the pending recommendation from JPACT:

- accept the RTP Call for Projects Policy Framework (see Attachment 1) and
- direct staff to work with TPAC to fully develop the technical and financial assumptions needed to complete this work.

On Dec. 15, JPACT is anticipated to make a recommendation to the Metro Council. Staff will present any changes recommended by JPACT. With JPACT and Metro Council support, the policy framework in Attachment 1 will guide the Call for Projects early next year.

### **POLICY QUESTIONS**

Does Council support moving forward as recommended by JPACT?

### **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

Policy options for Council to consider include:

- **Option 1**: Council supports moving forward as recommended by JPACT.
- **Option 2**: Council supports moving forward with changes or conditions.
- **Option 3**: Council does not support moving forward.

### **STAFF RECOMMENDATION**

Staff recommends that Council support moving forward as recommended by JPACT.

### **ANTICIPATED EFFECTS**

Pending JPACT and Council action, Metro will release a “Call for Projects” on Jan. 6, 2023. As noted in the recommendation above, additional work is needed to fully develop the technical and financial assumptions needed to complete the Call for Projects. An update on next steps for that work will be presented at the meeting.

The Call for Projects kicks off the window of time for local, regional and state partners to collaboratively update their near-term and long-term investment priorities in the 2023 RTP. This process includes updating existing projects and adding new priority projects to the RTP to advance shared goals for equity, safety, climate, mobility and economy and address identified needs.

In addition to updating the RTP project and program priorities, technical work, engagement and policy discussions will continue in 2023 to further develop new policies related to mobility and pricing, update the High Capacity Transit Strategy and Climate Smart Strategy, and prepare a draft 2023 RTP for public review in July 2023. MPAC, JPACT and Metro Council will have additional opportunities to provide policy feedback on

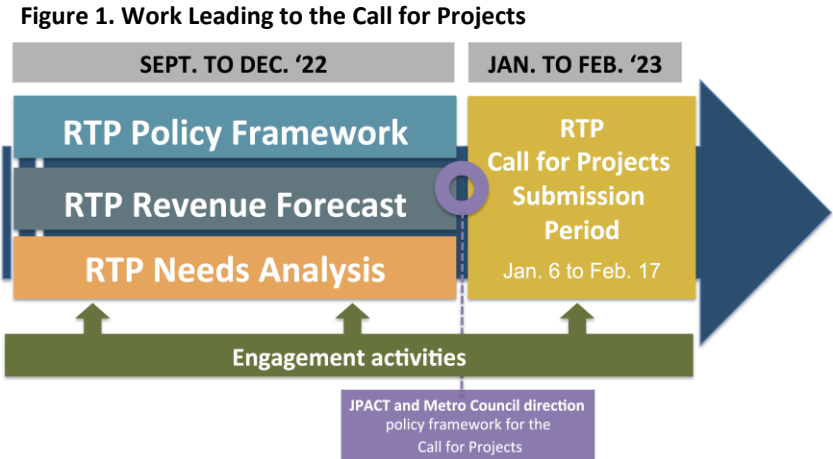
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<sup>1</sup> Summaries of engagement on the vision and goals, needs and priorities for investment are available at: <https://www.oregonmetro.gov/public-projects/2023-regional-transportation-plan/engagement>

development of key aspects of the 2023 RTP, including the updated project priorities submitted during the Call for Projects.

**STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

This action represents a significant milestone in development of the 2023 RTP. During the past year, the RTP project team has worked with stakeholders and decision makers to update the region’s vision and goals for the transportation system and understand the region’s transportation trends<sup>2</sup> and needs<sup>3</sup> and <sup>4</sup>, and priorities for investment. The policy framework reflects extensive engagement with local elected officials, public agencies, Tribal governments, community-based organizations, business groups and the community at large. Community engagement activities completed in phases two and three of the RTP update are summarized in **Attachment 2** as well as key planned engagement activities in phase 4.



A number of activities have been completed and work in several areas will continue into 2023. This work will inform the RTP Call For Projects. Following is a summary of this work with links to more information.

**2023 RTP draft vision and goals** - An updated vision and five goals are guiding the 2023 RTP. The revised vision and goals are informed by the input of the public, agency staff and consulting agencies, and shaped by MPAC, JPACT and Metro Council. The revised vision and goals serve as the foundation for the policy framework for the 2023 RTP Call for Projects. Work will continue in 2023 to review and refine the plan’s objectives and performance targets to align with the revised vision and goals.

**Research** - Research is foundational to the 2023 RTP and for Metro’s ongoing transportation planning. In the first three phases of the RTP update, Metro worked with regional partners and industry experts to build from recent stakeholder input and develop the following:

- [Emerging transportation trends technical memo](#) and [summary](#)
- Safe and Healthy Urban Arterials [policy brief](#) and [fact sheet](#)
- [Equitable transportation funding research report](#)
- [Expert review panel on the climate and transportation](#)
- [Regional Freight Delay and Commodities Movement Study](#)

<sup>2</sup> The emerging transportation trends research summary is available at: [https://www.oregonmetro.gov/sites/default/files/2022/10/12/Metro-Emerging-Trends-summary-final\\_1.pdf](https://www.oregonmetro.gov/sites/default/files/2022/10/12/Metro-Emerging-Trends-summary-final_1.pdf)

<sup>3</sup> Factsheets summarizing the regional transportation needs assessment are available at: <https://www.oregonmetro.gov/sites/default/files/2022/11/29/2023-RTP-Needs-Assessment-fact-sheets.pdf>

<sup>4</sup> Research about trends and needs of the region’s urban arterials is available at: <https://www.oregonmetro.gov/sites/default/files/2022/10/24/Safe%20and%20healthy%20urban%20arterials%20policy%20brief.pdf>

**Needs Assessment** – Presented to Council in November, the draft needs assessment uses the latest available data organized around the updated RTP goals of safety, equity, climate, mobility and a thriving economy. The region’s transportation needs are conveyed using maps, data and input from stakeholders. A [set of fact sheets](#) provides an overview of the assessment work done to-date, and are provided in **Attachment 3**. The needs assessment provides information for use by local, regional and state partners as they work together to update the RTP investment priorities. The needs assessment will continue to be developed into 2023.

**Policy updates** - The 2023 Regional Transportation Plan will continue to build on the [2018 RTP](#) to develop policies and strategies that address transportation needs and priorities in the region. Some of the new and updated policies in the 2023 RTP include the following. Work on each of these policy areas will continue into 2023:

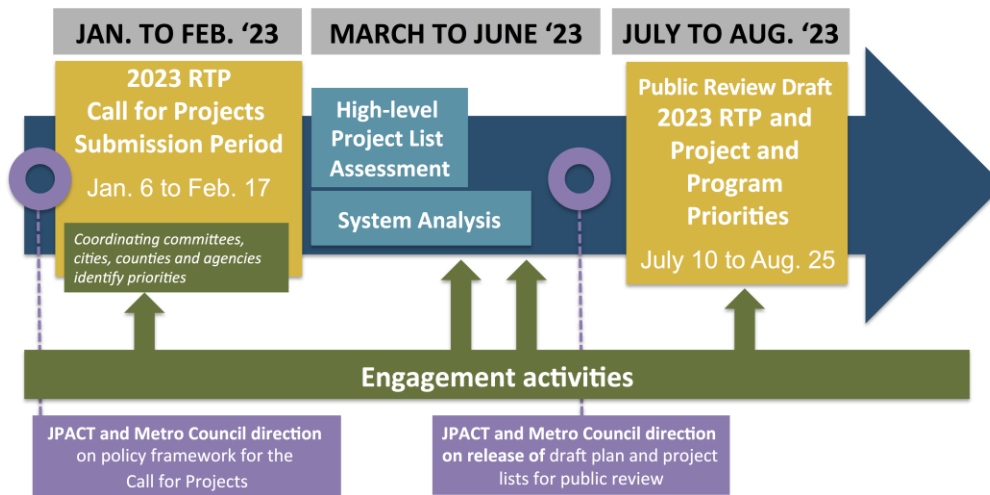
- **Regional Mobility Policy:** The 2023 RTP will test and refine an updated [Regional mobility policy](#). The updated policy takes a holistic approach to measuring mobility, using vehicle miles traveled per capita, system completeness for all modes and reliability of the region’s throughways. The updated policy will support the region in advancing shared goals for transportation and land use. One key outcome of the policy update is cross-agency coordination and collaboration to implement updated transportation plans and state land use rules. This policy work will continue in 2023.
- **Climate Smart Strategy:** The 2023 Regional Transportation Plan will include an update to the [Climate Smart Strategy](#) and policies to help the greater Portland region advance its climate goals and meet the greenhouse gas emissions reduction targets mandated by the state. In June 2022, Metro held an expert panel to learn from national experts about the best practices and tools being used nationally to assess and monitor climate impacts of transportation. A [recording](#) and [summary](#) of the panel discussion are available. In November 2022, JPACT and Metro Council discussed and provided feedback on top strategies for updating the Climate Smart Strategy and next steps. This work will continue in 2023.
- **High Capacity Transit Strategy:** Metro is updating the high capacity transit component of the Regional Transportation Plan (RTP). This [High Capacity Transit Strategy](#) update will address new policy questions about the future of high capacity transit, such as light rail and rapid bus, in the greater Portland region. The strategy will re-envision the network with the addition of bus rapid transit and establish a “pipeline” of investments that will help the region develop the future high capacity transit system. Metro Council, JPACT, and MPAC have provided feedback at key milestones. This work will continue in 2023.
- **Regional Pricing Policies:** Metro has been developing draft regional pricing policies for the 2023 RTP, working with Metro’s technical and policy advisory committees and Metro Council. This work incorporates the findings and recommendations from the [Regional Congestion Pricing Study](#) accepted by Joint Policy Advisory Committee on Transportation and the Metro Council in 2021. Draft pricing policies will be subject to further discussion and refinement along with other

RTP polices starting in March 2023. This work is being coordinated with ODOT's Tolling Program and Urban Mobility Office.

MPAC, JPACT and Metro Council will have additional opportunities to provide feedback on these efforts next year.

**Updating the RTP Project List:** A key next step in the process of developing the 2023 RTP is updating the near-term and long-term investment priorities for greater Portland through the Call for Projects. The timeline for this work is shown in **Figure 2**.

**Figure 2. Overview of the call for projects timeline**



Each city, county, coordinating committee and transportation agency (ODOT, TriMet, SMART and Port of Portland) will have the opportunity to provide recommendations to JPACT and Metro Council on which projects reflect their priorities and advance achievement of the RTP vision, goals and policies of the RTP.

Staff from each coordinating committee, the city of Portland and transportation agencies (ODOT, TriMet, SMART and Port of Portland) have been asked to work together and with their policymakers and county-coordinating committees to develop a coordinated, draft project list to advance local, regional and state priorities for the regional transportation system on behalf of their jurisdiction or agency.

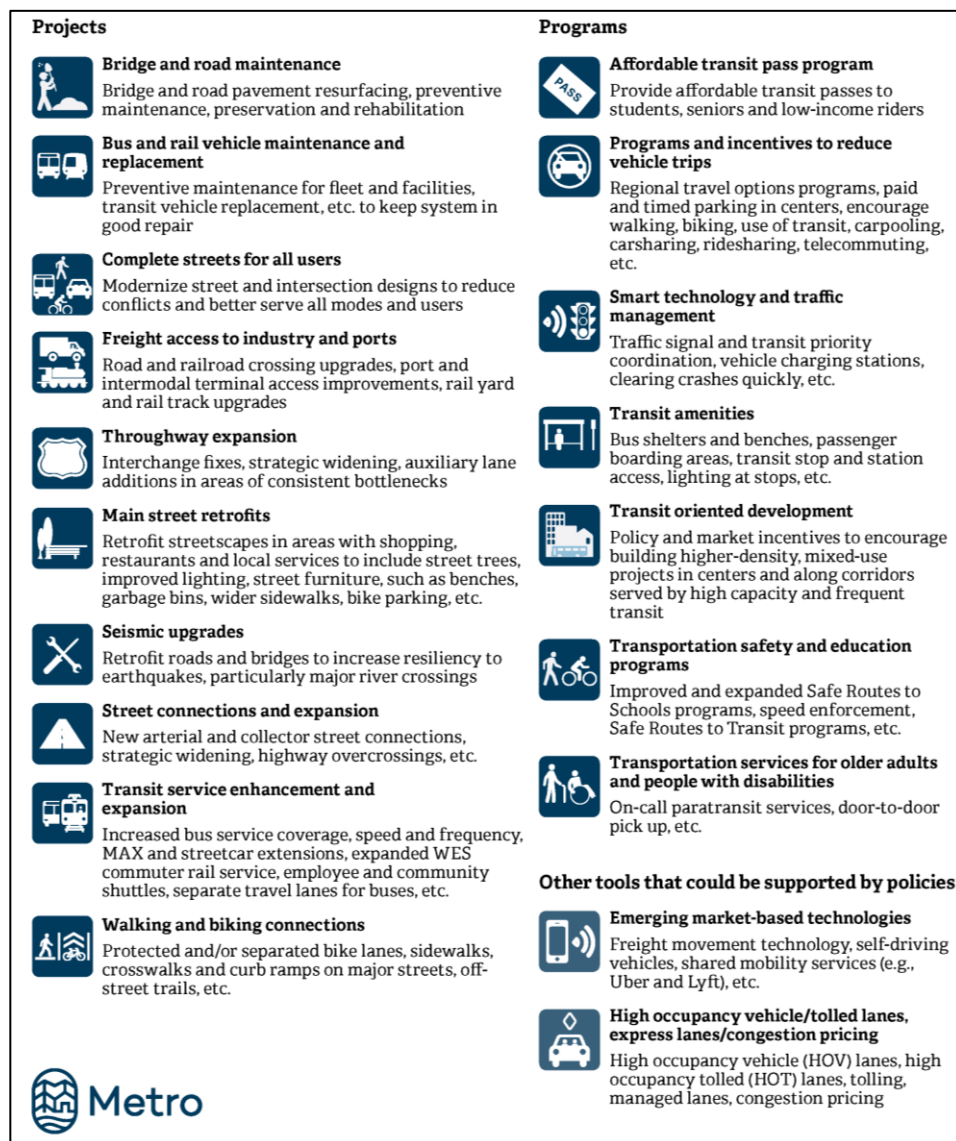
Projects primarily come from local transportation system plans, but also from transit service and master plans, park and trail plans, corridor plans, and other transportation studies that were developed and adopted through a public process with opportunities for public comment.

Staff have already started reviewing the adopted 2018 RTP project list as a starting point to determine which projects have been completed, which projects are likely to be carried over to the 2023 RTP Project List and which projects may need to be updated as part of the process. While many of the projects and programs in the 2018 RTP will be carried forward, with updated costs and, sometimes, refinements to project details and construction timeframes, new projects identified in local transportation system plan updates and other public planning processes since 2018 may be added.

Initial draft lists must be submitted by ODOT, TriMet, SMART, the City of Portland and county coordinating committees **by Feb. 17**. Staff from each jurisdiction must also submit updated or new details about the project and documentation of public engagement **by Feb. 17** through an on-line project hub to support the evaluation and public review process that will follow.

For 2018 RTP projects<sup>5</sup> already in the RTP Project Hub database, much of the information will already be available. Some information will need to be updated, or added for new projects. Several resources and tools are being developed and will be available to support jurisdictional partners. Examples of the types of investments that will address local, regional and state transportation needs on the regional transportation system and regional transportation challenges is provided in **Figure 3**.

**Figure 3. Examples of RTP Projects and Programs**



<sup>5</sup> Existing 2018 RTP Projects can be viewed at:  
<https://www.arcgis.com/apps/webappviewer/index.html?id=73e94a0343ea487e82b4830fead7c88e&extent=-13751666.1848%2C5656339.7069%2C-13586562.2037%2C5748675.6371%2C102100>

All agencies, cities and counties who are sponsoring a project for consideration in the RTP must have their Board or Council endorse those projects by providing a letter of support to Metro **by May 23**. Additional draft project list changes may be submitted at this time if changes are recommended by the governing body through the endorsement process in response to public feedback and/or findings from the technical analysis. This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects. MPAC, JPACT and Metro Council will have opportunities to provide feedback on the draft project list as part of shaping the final 2023 RTP for public review next July.

**Development of the revenue forecast for the 2023 RTP financially constrained project list** - Development of the draft revenue forecast and “budget” for the 2023 RTP Call for Projects is underway. The region has limited transportation funding, which must be used strategically to meet the extensive needs of the people who live and work here.

The RTP revenue forecast is an important part of the call for projects process, providing an estimate of how much funding can be reasonably expected to be available during the life of the plan (2023-2045) both for capital projects and for maintaining and operating the existing transportation system. The RTP revenue forecast will include revenues raised at the federal, state, regional and local levels for transportation projects and programs to be included or accounted for in the 2023 RTP.

The draft forecast is being developed through extensive consultation and coordination with local governments, the Oregon Department of Transportation (ODOT), TriMet and SMART staff that is still underway. Metro convened two workshops with local agency staff and individual meetings with ODOT and TriMet staff to support this work. Forecasted local revenues come from local TSPs and capital improvement programs in consultation with local agencies. Some of these revenues are already committed to individual projects. The federal and state revenues were identified through a statewide funding working group convened by ODOT that included transit providers and Metropolitan Planning Organizations (MPO)s, including Metro. In addition, Metro is working with ODOT to estimate a range of potential tolling revenues that are reasonably expected to be available to fund ODOT capital projects (e.g., I-5 Interstate Bridge Replacement (IBR) Program, I-205/Abernethy Bridge, I-205 Widening) and investments to address the impacts of those projects.

Consistent with the adopted RTP work plan, three levels of investment will be defined for the 2023 RTP, with each level representing a statement of priority. The first and second levels, together, are known as the financially constrained project list under federal and state law. In order for projects to be eligible to receive federal and state funding, they must be on the *Constrained Priorities* project list. In addition, the total cost of the updated financially constrained RTP project list must meet the financial constraints identified by the revenue forecast being developed for the 2023 RTP – e.g., the cost of the financially constrained project list cannot exceed the revenue forecast.

### *Defining terms*

#### **Constrained budget**

The budget of federal, state and local funds the greater Portland region can reasonably expect through 2045 under current funding trends – presumes some increased funding compared to current levels

#### **Constrained list**

Projects that can built by 2045 within the constrained budget – makes up the federal and state constrained transportation plan

#### **Strategic list**

Additional priority projects that could be achieved with additional resources

The RTP Constrained Priorities project list will be prioritized into near-term and long-term priorities – based on the financially constrained revenue forecast in the RTP:

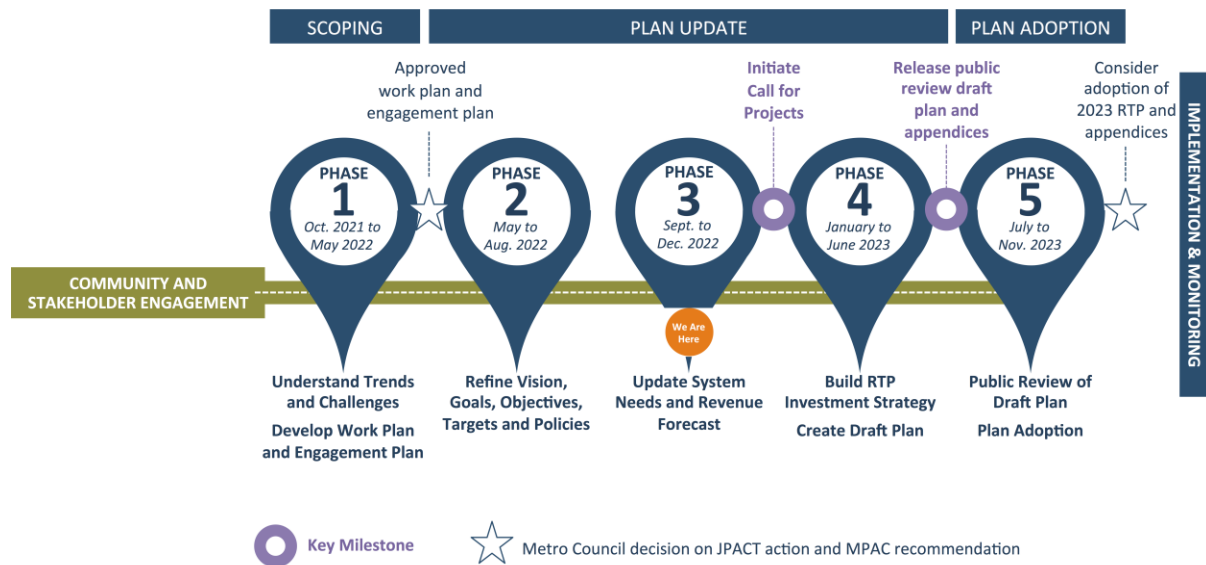
- The first level of priority, the **Near-term Constrained Priorities** represent the highest priority transportation project and program investments for near-term (2023-2030) given the revenues expected to be available.
- The second level of priority, the **Long-term Constrained Priorities** represent the highest priority transportation project and program investments for long-term (2031-2045) given the revenues expected to be available.
- The third level of priority, the **Long-term Strategic Priorities**, represent additional investments that advance RTP policy priorities or need further study but that do not fit within the financially constrained revenue forecast. Being included in the Strategic Project list means the region agrees to work together to complete remaining planning work and identify funding to advance these priorities in the 2031-2045 time period.

An update on this work will be provided at the meeting. The revenue forecast may continue to be revised as additional information becomes available throughout the development of the 2023 RTP.

### NEXT STEPS

The timeline for updating the RTP is provided in Figure 4.

**Figure 4. 2023 Regional Transportation Plan Timeline**





A summary of key dates and next steps follows.

Dec. and Jan.	TPAC continues development of the financially constrained revenue forecast and other technical assumptions needed to support the RTP Call for Projects
Dec. 14, 2022	MPAC discussion on Policy Framework for 2023 RTP Call for Projects
Dec. 15, 2022	JPACT action on TPAC recommendation on the Policy Framework for 2023 RTP Call for Projects
Dec. 15, 2022	Metro Council action on JPACT recommendation
<b>Jan. 6, 2023</b>	Metro releases the <a href="#">call for projects</a>
<b>Feb. 17, 2023</b>	<b>DEADLINE:</b> County Coordinating Committees, the City of Portland, ODOT, the Port of Portland, TriMet and SMART submit draft project lists to Metro; individual city, county and agency staff also submit updated project information for their projects to Metro through online system called the RTP Project Hub
<b>May 24, 2023</b>	<b>DEADLINE:</b> All agencies who are sponsoring a project for consideration in the 2023 RTP must have their Board or Council or other governing body endorse those projects by submitting a letter of support
March-June 2023	<p>Metro conducts outcomes-based technical analysis of the draft project list and system performance, including equity, climate and environmental analysis</p> <p>Metro engages policymakers, regional advisory committees, community members and other stakeholders on the draft project list. Metro will also host an on-line comment opportunity that provides an opportunity for the public to provide input on the draft project list. Community based organizations start engaging community members in transportation priorities and telling community stories.</p> <p>Input on the assessment of projects, along with public input on the system analysis findings will be considered by decision-makers and project agencies as they continue to work together to finalize the draft RTP project priorities for public review in Summer 2023</p> <p>Metro continues to work with technical and policy advisory committees and Metro Council to develop the 2023 RTP Public Draft Plan, including policies (Ch.3), the financial plan (Ch.5) and future planning work (Ch.8)</p> <p>JPACT and Metro Council consider public input and technical analysis before providing direction on release of the draft RTP and list of project and program priorities for public review</p>

July 10 to Aug. 25	45-day public comment period on the public review draft plan (and draft list of project priorities); engagement activities will include a public hearing, online comment opportunity and other activities
September	MTAC and TPAC discuss public comments and staff recommendations for refinement of draft RTP and project list  Metro Council, JPACT and MPAC discuss public comments and staff recommendations for refinement of draft RTP and project list
October TBD	Metro Council discussion of staff recommended refinements to draft RTP and project list
October 6	TPAC considers public comments and begins making recommendation to JPACT
October 18	MTAC considers public comments and makes recommendation to MPAC
October 25	MPAC recommendation to the Metro Council
November 3	TPAC considers public comments makes recommendation to JPACT
November 16	JPACT considers final action and recommendation to the Metro Council
November 30	Metro Council considers final action

**ATTACHMENTS**

1. Draft Policy Framework for the 2023 RTP Call for Projects
2. RTP Community Engagement Summary
3. RTP Needs Assessment Factsheets