

## **Joint Policy Advisory Committee on Transportation (JPACT) agenda**

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**Thursday, January 19, 2023**

**7:30 AM**

**<https://zoom.us/j/91720995437> (Webinar  
ID: 917 2099 5437) or 877-853-5257 (Toll  
Free)**

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### **1. Call To Order, Declaration of a Quorum & Introductions (7:30 AM)**

This meeting will be held online. You can join the meeting on your computer or other device by using this link: <https://zoom.us/j/91720995437> or by calling +1 917 2099 5437 or 888 475 4499 (toll free).

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-813-7591 or email at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov).

### **2. Public Communication on Agenda Items (7:35 AM)**

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by mailing [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Written comments received by 4:00 pm on the Wednesday before the meeting will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the item on which you

wish to testify; or (b) registering by email by sending your name and the item on which you wish to testify to [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Individuals will have three minutes to testify unless otherwise stated at the meeting.

### **3. Updates from the JPACT Chair (7:40 AM)**

### **4. Consent Agenda (7:45 AM)**

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- |  |   |                             |
|--|---|-----------------------------|
| 4.1                                    | Resolution No. 23-5308, For the Purpose of Advancing Metro Eligible Unified Planning Work Program (UPWP) Projects for Inclusion in the State Fiscal Year 2023 UPWP and Completing a Scope Change for an ODOT Americas with Disabilities Curbs and Ramps Project | <a href="#">COM 22-0640</a> |
|  | Attachments: <a href="#">Worksheet</a><br><a href="#">Draft Resolution No. 23-5308</a><br><a href="#">Exhibit A</a><br><a href="#">Staff Report</a>   |                             |
| 4.2                                    | Consideration of the December 15th, 2022 JPACT Minutes  | <a href="#">COM 22-0649</a> |
|  | Attachments: <a href="#">121522 Minutes</a>   |                             |
| <b>5. Information/Discussion Items</b> |   |                             |
| 5.1                                    | JPACT Overview (7:55 AM)  | <a href="#">COM 22-0648</a> |
|  | Presenter(s):    Margi Bradway (she/her), Metro   |                             |
|  | Attachments: <a href="#">2023 Work Plan for JPACT Memo</a>  |                             |
| 5.2                                    | 2023 RTP: Finding from the Equitable Transportation Funding Research Project (8:25 AM)  | <a href="#">COM 22-0642</a> |
|  | Presenter(s):    Lake McTighe (she/her), Metro<br>Theresa Carr (she/her), Nelson/Nygaard<br>Aria Wong (she/her), Nelson/Nygaard   |                             |
|  | Attachments: <a href="#">Worksheet</a><br><a href="#">Equitable Transportation Funding Research Report</a>  |                             |
| 5.3                                    | High Capacity Transit Strategy Update: Corridor Investment Readiness Tiers (8:45 AM)  | <a href="#">COM 22-0643</a> |
|  | Presenter(s):    Ally Holmqvist, Metro  |                             |
|  | Attachments: <a href="#">Worksheet</a><br><a href="#">HCT Meeting Schedule</a><br><a href="#">HCT Policy Framework</a><br><a href="#">HCT Readiness Approach</a><br><a href="#">HCT Vision Readines</a><br><a href="#">Readiness Tiers Draft</a>                |                             |
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- 5.4 Carbon Reduction Program Introduction & Proposal (9:10 AM)

[COM 22-0644](#)

Presenter(s): Grace Cho, Metro  
Ted Leybold, Metro  
Suzanne Carlson, ODOT  
Rye Baerg, ODOT

Attachments: [Staff Report](#)  
[Worksheet](#)

6. Update from JPACT Members (9:20 AM)
7. Adjourn (9:30)

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### សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

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## 2023 JPACT Work Program

**As of 12/30/2022**

*Items in italics are tentative*

<p><b><u>January 19, 2023</u></b></p> <ul style="list-style-type: none"> <li>• <b>Resolution No. 23-5308</b> For the Purpose of Advancing Metro Eligible Unified Planning Work Program (UPWP) Projects for Inclusion in the State Fiscal Year 2023 UPWP and Completing a Scope Change for an ODOT Americas with Disabilities Curbs and Ramps Project <b>(consent)</b></li> <li>• JPACT 101 (Margi Bradway (she/her), Metro; 10 min)</li> <li>• 2023 RTP: Finding from the Equitable Transportation Funding Research Project (Lake McTighe (she/her), Metro, Theresa Carr (she/her), Nelson/Nygaard, and Aria Wong (she/her), Nelson/Nygaard; 30 min)</li> <li>• RTP - High Capacity Transit Strategy Update for 2023 RTP (Ally Holmqvist, Metro; 20 min)</li> <li>• Carbon Reduction Program Introduction &amp; Proposal (Ted Leybold (he/him), Metro; 25 min)</li> </ul>	<p><b><u>February 16, 2023</u></b></p> <ul style="list-style-type: none"> <li>• Rose quarter update (Margi Bradway (she/her), Metro, Eliot Rose (he/him), Metro; 20 min)</li> <li>• Earthquake Ready Burnside Bridge- Vote (Alex Oreschak, Metro; Megan Neil, Multnomah County) <b>(action)</b></li> <li>• Regional Mobility Pricing Project (RMPP) (Alex Oreschak (he/him), Metro and Margi Bradway (she/her), Metro; 30 min)</li> <li>• Climate Smart Strategy Update Workshop Recap and CFEC update (Margi Bradway (she/her), Metro, Kim Ellis (she/they), Metro; 30 min)</li> </ul>
<p><b><u>March 16, 2023</u></b></p> <ul style="list-style-type: none"> <li>• Carbon Reduction Program Approval <b>(action)</b></li> <li>• Legislative update</li> <li>• ODOT Great Streets Program and Funding Allocation</li> </ul>	<p><b><u>April 20, 2023</u></b></p> <ul style="list-style-type: none"> <li>• 2024-27 Metropolitan Transportation Improvement Program (MTIP) Performance Evaluation (comment from Chair)</li> <li>• Unified Planning Work Program (UPWP) discussion</li> <li>• 2023 RTP: High level assessment of draft project list</li> </ul>
<p><b><u>May 18, 2023</u></b></p> <ul style="list-style-type: none"> <li>• Unified Planning Work Program (UPWP) <b>(action) (consent)</b></li> <li>• High Capacity Transit Strategy Update: Draft Report (Ally Holmqvist (she/her), Metro)</li> <li>• 2023 RTP System analysis</li> <li>• Cascadia Corridor Ultra-high speed ground transportation</li> </ul>	<p><b><u>June 15, 2023</u></b></p> <ul style="list-style-type: none"> <li>• Release of RTP draft plan to public <b>(action)</b></li> <li>• 2024-27 MTIP Adoption draft</li> <li>• I-5 Interstate Bridge Replacement Project (IBR) - Financial Plan + Legislative Session Update</li> <li>• Public Transportation Strategy to Complement Regional Pricing</li> </ul>
<p><b><u>July 20, 2023</u></b></p> <ul style="list-style-type: none"> <li>• 2024-27 MTIP adoption <b>(action) (consent)</b></li> <li>• 2023 RTP Draft Implementation Plan (Kim Ellis (she/her), Metro)</li> <li>• Freight Commodity Study: Draft Findings (Tim Collins (he/him), Metro)</li> <li>• 82<sup>nd</sup> Avenue Transit Plan</li> </ul>	<p><b><u>August 17, 2023</u></b></p> <ul style="list-style-type: none"> <li>• Better Bus Program update</li> <li>• TV Highway Corridor Plan</li> <li>• WMIS Update</li> </ul>

<b><u>September 21, 2023</u></b> <ul style="list-style-type: none"> <li>• WMIS Approval <b>(action)</b></li> <li>• I-5 Interstate Bridge Replacement Program (IBR) SDEIS</li> <li>• Safety Update</li> <li>• Construction Careers Pathways Program (C2P2) update</li> </ul>	<b><u>October 19, 2023</u></b> <ul style="list-style-type: none"> <li>• 82<sup>nd</sup> avenue transit plan</li> <li>• TV highway corridor plan</li> <li>• Public Transportation Strategy to Complement Regional Pricing: Final Strategy</li> </ul>
<b><u>November 16, 2023</u></b> <ul style="list-style-type: none"> <li>• 82<sup>nd</sup> avenue transit plan <b>(action)</b></li> <li>• TV highway corridor plan <b>(action)</b></li> <li>• 2023 RTP <b>(action)</b></li> </ul>	<b><u>December 21, 2023</u></b>

**4.1 Resolution No. 23-5308, For the Purpose of Advancing Metro Eligible Unified Planning Work Program (UPWP) Projects for Inclusion in the State Fiscal Year 2023 UPWP and Completing a Scope Change for an ODOT Americas with Disabilities Curbs and Ramps Project**

*Consent Agenda*

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023

# JPACT Worksheet

**Agenda Item Title:****January FFY 2023 MTIP Formal Amendment & Resolution 23-5308 Approval Request**

**Presenters:** N/A (Ken Lobeck or Ted Leybold if a presentation is required). However, the item is proposed to proceed as a Consent item on the JPACT January 19, 2023 agenda which will negate the need for a presentation

**Contact for this worksheet/presentation:** Ken Lobeck, Funding Programs Lead

**Purpose/Objective:**

**FOR THE PURPOSE OF ADVANCING METRO ELIGIBLE UNIFIED PLANNING WORK PROGRAM (UPWP) PROJECTS FOR INCLUSION IN THE STATE FISCAL YEAR 2024 UPWP AND COMPLETING A SCOPE CHANGE FOR AN ODOT AMERICANS WITH DISABILITIES CURBS AND RAMPS PROJECT**

**Outcome:**

JPACT to approve and provide an approval recommendation to Metro Council which upon final approval will enable the five included projects under Resolution 23-5308 to complete pending federal approvals and phase obligation steps.

**What has changed since JPACT last considered this issue/item?**

Not applicable. This is the first JPACT has considered the January Formal Amendment bundle.

The January 2023 MTIP Formal Amendment Bundle contains five projects. Four of them support the development of the SFY 2024 UPWP. To avoid conflicts with the annual Obligations Targets requirement, Metro pushed-out several UPWP projects with their estimated funding to the non-fiscally constrained year of 2025. Now that the UPWP budget is in development, staff is repositioning several UPWP federally funded projects (with STBG funds) in FFY 2023 to be available to obligate in support of the SFY 2024 UPWP in June.

The remaining fifth project is an ODOT US30BY & OR99E ADA curbs and ramps improvement project. PBOT is completing a pilot project on Lombard St to refine their permitting process as a certified agency. This action impacts ODOT's project and requires a scope change to eliminate the OR99E portion. The remaining US30BY ADA portion is also completing a construction phase cost update as part of the amendment.

The overall project changes in the amendment bundle are consider routine and are more of a technical nature. There are no controversial aspects to this amendment.

**What packet material do you plan to include?**

Included materials:

- Draft Resolution 23-5308
- Exhibit A to Resolution 23-5308
- Staff Report (no attachments)

BEFORE THE METRO COUNCIL

<b>FOR THE PURPOSE OF ADVANCING METRO</b>	)	RESOLUTION NO. 23-5308
<b>ELIGIBLE UNIFIED PLANNING WORK</b>	)	
<b>PROGRAM (UPWP) PROJECTS FOR</b>	)	Introduced by: Chief Operating Officer
<b>INCLUSION IN THE STATE FISCAL YEAR 2024</b>	)	Marissa Madrigal in concurrence with
<b>UPWP AND COMPLETING A SCOPE CHANGE</b>	)	Council President Lynn Peterson
<b>FOR AN ODOT AMERICANS WITH</b>	)	
<b>DISABILITIES CURBS AND RAMPS PROJECT</b>	)	

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

WHEREAS, the U.S. Department of Transportation requires federal funding for transportation projects located in a metropolitan area to be programmed in an MTIP; and

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

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

WHEREAS, preliminary development of Metro's State Fiscal Year 2024 Unified Planning Work Program (UPWP) now requires re-programming of multiple MTIP supporting UPWP projects; and

WHEREAS, three Regional Flexible Fund Allocation (RFFA) Step 1 funded projects supporting the SFY 2024 UPWP are being advanced to FFY 2023 and will be combined into the single UPWP Master Agreement project key; and

WHEREAS, the advancement and combining effort affects the planned SFY 2024 UPWP Surface Transportation Block Grant allocations to the Freight and Economic Development Planning, Transportation System Management and Operations, and Regional Planning funds to simplify the federal obligation process and be included as part of Metro's FFY 2023 Obligation Targets program; and

WHEREAS, Federal Highways Administration based Planning funds and Federal Transit Administration Section 5303 funds allocated for the Metro SFY 2024 UPWP are being adjusted based on their latest approved funding levels; and

WHEREAS, the city of Portland is designating Lombard St (OR99E) as a pilot project to evaluate expedited and streamlined Americans with Disabilities Act (ADA) permitting processes which impacts the Oregon Department of Transportation planned ADA curb and ramp improvement project in the area and now requires a scope change to drop the OR99E segment and adjust the revised project for inflationary cost increases; and

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

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

WHEREAS, on January 6, 2023, Metro's Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on January 19, 2023, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to amend the five projects in the 2021-24 Metropolitan Transportation Improvement Program.

ADOPTED by the Metro Council this \_\_\_\_ day of \_\_\_\_\_ 2023.

\_\_\_\_\_  
Lynn Peterson, Council President

Approved as to Form:

\_\_\_\_\_  
Carrie MacLaren, Metro Attorney



2021-2026 Metropolitan Transportation Improvement Program  
**Exhibit A to Resolution 23-5308**

January FFY 2023 Formal Transition Amendment Bundle Contents  
 Amendment Type: Formal/Full  
 Amendment #: JA23-05-JAN  
 Total Number of Projects: 5

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # <b>22146</b> MTIP ID 71119	Metro	<b>Freight and Economic Development Planning (FFY 2023)</b>	Regional planning to support freight systems planning and economic development planning activities. (FY 2023 UPWP allocation year)	<a href="#"><u>ADVANCE &amp; COMBINE</u></a> Key 22146 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
(#2) ODOT Key # <b>22170</b> MTIP ID 71125	Metro	<b>TSMO Administration (FFY 2023)</b>	Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)	<a href="#"><u>ADVANCE &amp; COMBINE</u></a> Key 22170 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
(#3) ODOT Key # <b>22152</b> MTIP ID 71132	Metro	<b>Regional MPO Planning (FFY 2023)</b>	Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)	<a href="#"><u>ADVANCE &amp; COMBINE</u></a> Key 22152 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
#4 ODOT Key <b>22311</b> MTIP ID 71225	Metro	<b>Portland Metro Planning SFY24</b>	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)	<a href="#"><u>ADD &amp; COMBINE</u></a> Key 22311 adds the ODOT contribution (State STBG) to the SFY 24 UPWP Master Agreement and combines STBG-U from Keys 22146, 22152, and 22170.

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#5) ODOT Key # <b>22469</b> MTIP ID 71259	ODOT	<del>US30BY &amp; OR99E Curb Ramps (Portland)</del> <b>US30BY Curb Ramps (Portland)</b>	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along <del>OR99E and</del> US30BY to reduce mobility barriers and make state highways more accessible to disabled persons	<b>SCOPE &amp; COST CHANGE:</b> PBOT will use Lombard as a pilot project for streamlining and expediting ADA permitting for Lombard project. As a result, Key 22469's scope, name, and funding is being adjusted. An additional \$1.6 million is being pulled from the ADA program to address the revised cost to US30BY locations. The OR99E segment is being eliminated.

Proposed Amendment Review and Approval Steps:

- Wednesday, January 4, 2023: Post amendment & begin 30-day notification/comment period
- Friday, January 6, 2023: TPAC meeting (Required notification)
- Thursday, January 19, 2023: JPACT meeting
- Thursday, February 9, 2023: Metro Council meeting
- Wednesday, February 15, 2023: Signed resolution available to complete amendment bundle
- Thursday, February 16, 2023: Metro approved January 2023 Formal MTIP Amendment bundle sent on to ODOT and FHWA for final reviews and approvals
- Final amendment approval dates: Final approvals from FHWA and FTA can take up to thirty days or longer to complete.

## 2021-2026 MTIP Formal Amendment - Exhibit A

### January 2023 Formal Amendment for FFY 2023 - Amendment Number JA23-05-JAN

Summary Reason for Change: The allocated RFFA Step 1 funds for Freight and Goods Movements planning needs will be used as part of the SFY 2024 UPWP. As a result, they are being advanced and combined into Key 22311.



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

**MTIP Formal Amendment  
ADVANCE & COMBINE**  
Advance to FFY 2023 and combine  
into Key 22311

<b>Lead Agency:</b> Metro		Project Type:	Local Road	<b>ODOT Key:</b>	<b>22146</b>
<b>Project Name:</b> Freight and Economic Development Planning (FFY 2023)	<b>1</b>	Fiscal Constraint Cat:	Planning	<b>MTIP ID:</b>	<b>71119</b>
		ODOT Type	SM&O	<b>Status:</b>	<b>0</b>
<b>Project Status:</b> 0 = No activity.		Performance Goal:	N/A	<b>Comp Date:</b>	<b>9/30/2024</b>
		Capacity Enhancing:	No	RTP ID:	11103
		Conformity Exempt:	Yes	RTP Approval:	12/6/2018
		On CMP:	No	Trans Model:	12/6/2018
		30 Day Notice Begin:	1/4/2023	TCM:	No
		30 Day Notice End:	2/2/2023	TSMO Award	No
		Funding Source	Metro	TSMO Cycle	N/A
		Funding Type:	STBG	RFFA ID:	50410
		State Highway Route	No	RFFA Cycle:	2022-24
		Mile Post Begin:	N/A	UPWP:	Yes
<b>Short Description:</b> Regional planning to support freight systems planning and economic development planning activities. (FY 2023 UPWP allocation year)		Mile Post End:	N/A	UPWP Cycle:	SFY 24
		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	2/9/2023
		1st Year Program'd:	2023	OTC Approval:	No
		Years Active:	1	OTC Date	N/A
		STIP Amend #:	TBD	<b>MTIP Amnd #:</b>	<b>JA23-05-JAN</b>
<b>Detailed Description:</b> Regional planning to support freight systems planning and economic development planning activities. (UPWP RFFA Step 1 STBG allocation)					

STIP Description: N/A

Last Amendment of Modification: Formal - May 2021 - MA21-10-MAY - REPROGRAM FUNDS: Reprogram to the unconstrained FY 2025 to avoid possible conflicts with the development and execution of annual obligation targets

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
<b>Federal Funds</b>								
<del>STBG-U</del>	<del>Y230</del>	<del>2025</del>	<del>\$ 76,491</del>					\$ -
								\$ -
								\$ -
Funds are advanced to FFY 2023 and combined into Key 22311							<b>Federal Totals:</b>	<b>\$ -</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2025</del>	<del>\$ 8,755</del>					\$ -
								\$ -
							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			<del>\$ 85,246</del>	\$ -	\$ -	\$ -	\$ -	<del>\$ 85,246</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Project Cost Estimate (all phases):							\$	\$ -
Year of Expenditure Cost Amount:							\$	\$ -

**Programming Summary Details**

Why project is short programmed: The project is not short programmed. The funds are being advanced and transferred to Key 22311

Phase Change Amount:	\$ (85,246)	\$ -	\$ -	\$ -	\$ -	\$ (85,246)
Phase Change Percent:	100%	0%	0%	0%	0%	-100%
Revised Match Federal:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revised Match Percent:	N/A	N/A	N/A	N/A	N/A	N/A

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						N/A
Initial Obligation Date:						Other Notes Transfer to Key 22311 to become part of the SFY 24 UPWP Master Agreement list of approved projects
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: The formal amendment advances the project and funds from the non-constrained FFY 2025 year forward to the constrained year of FFY 2023. The scope and funds are then being combined into Key 22311 which is also part of this amendment bundle. As a result, Key 22146 programming level is reduced to \$0.					
4	MTIP Programming Submitted Supporting Documentation: Preliminary UPWP Available Revenues Summary and UPWP Budget Guidance					
Public Notification and Comment Process:						
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes.					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? January 4, 2023 to February 2, 2023					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No significant comments are expected. Any received will be logged and documented. They be forward on to Metro Communications staff for their review and evaluation as well. Appropriate replies with occur as needed.					
6	Added clarifying notes: The funding represent personnel administrative costs to manage the Metro Freight/Goods Movements program					

### Fiscal Constraint Consistency Check Areas

1	Will Performance Measurements Apply? No. This is a planning project. Performance measurement goals do not apply to UPWP planning projects.
2A	Does the amendment include fiscal updates? Yes. The funds are being advanced and combined into Key 22311.
2B	What is the funding source for the project? Metro STBG, RFFA Step 1 funds supporting the Metro UPWP
2C	Was the Proof-of Funding requirement satisfied and how? A review of preliminary SFY 2024 UPWP revenues and the official practice of combining these and other administrative type UPWP funds into the Master Agreement project key.
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 11103 - Regional MPO Activities for 2018-2027
1B	RTP Project Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? 40 CFR 93.126, Table 2
2B	What is the exception category per the regulation: Other - Planning and technical studies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete required transportation demand modeling through the RTP Update or via an RTP amendment? N/A
3C	Is Air Quality analysis required? No. The Metro MPA has obtained conformity attainment. Special air quality analysis requirements do not apply
3D	Is an Air Quality analysis approval date required? No. If the project is capacity enhancing, then transportation modeling analysis was completed as part of the RTP update. The RTP approval date 12/6/2018 can be considered the date for the completion of any required transportation demand modeling requirements for projects if they are capacity enhancing.
4	What RTP Goal(s) does the project support? Goal #11 - Transparency and Accountability - Objective 11.2 Performance-Based Planning Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The project is a planning project and well less than 100 million dollars.

### UPWP Consistency Check Areas


1A	Does the MTIP action also require an UPWP amendment: Yes, but as part of the SFY 24 UPWP update
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Yes. Advancing and combining Key 22146 into Key 22311 is a positioning amendment for the later UPWP budget and project list. Fund obligation and follow-on expenditures will occur per the final executed UPWP Master Agreement
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Master Agreement list of approved UPWP projects

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No - N/A
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, N/A
2B	What is the Metro modeling designation? Not applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

### Fund Type Codes References

PL	Federal planning funds appropriated to the State DOT and then with a portion allocated to the MPOs in support of regional planning and UPWP needs. The federal portion is normally 89.73% with the match at 10.27%. In the Metro region, the match is provided by ODOT
5303	Federal FTA based planning funds. The funds are appropriated to the states and then allocated to the MPOs. 5303 funds support a wide range of planning activities are eligible under this program and include the development of transportation plans and programs, planning, design, and evaluation of a public transportation project, and technical studies related to public transportation. The federal share is normally 89.73% with a match requirement of 10.27%.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects. STBG is a flexible federal funding program and can be applied to many areas. See added description under STBG-U funds.
State	General state funds committed to the project normally to support the match requirement against the federal funds.
STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process. STBG may also be used in support of UPWP planning projects. STBG provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.

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**ODOT Key: 22146 | MTIP ID: 71119**

Freight and Economic Development Planning (FFY 2023) - Cycle 2021-26

**Current Programming**

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2025		\$76,491	\$8,755		\$85,246	<input type="checkbox"/>
	2023	STBG-URBAN	\$76,491	\$8,755		\$85,246	
<b>Totals &gt;&gt;</b>			<b>\$76,491</b>	<b>\$8,755</b>	<b>\$0</b>	<b>\$85,246</b>	



## 2021-2026 MTIP Formal Amendment - Exhibit A

### January 2023 Formal Amendment for FFY 2023 - Amendment Number JA23-05-JAN

Summary Reason for Change: The allocated RFFA Step 1 funds for TSMO administration planning needs will be used as part of the SFY 2024 UPWP. As a result, they are being advanced and combined into Key 22311.



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

**MTIP Formal Amendment  
ADVANCE & COMBINE**  
Advance to FFY 2023 and combine  
into Key 22311

<b>Lead Agency:</b> Metro		Project Type:	Other (ITS)		<b>ODOT Key:</b>	<b>22170</b>
<b>Project Name:</b> TSMO Administration (FFY 2023)	2	Fiscal Constraint Cat:	SM&O		<b>MTIP ID:</b>	<b>71125</b>
		ODOT Type	TBD		<b>Status:</b>	<b>0</b>
<b>Project Status:</b> 0 = No activity.		Performance Goal:	N/A		<b>Comp Date:</b>	<b>9/30/2024</b>
		Capacity Enhancing:	No		RTP ID:	11104
		Conformity Exempt:	Yes		RTP Approval:	12/6/2018
		On CMP:	No		Trans Model:	12/6/2018
		30 Day Notice Begin:	1/4/2023		TCM:	No
		30 Day Notice End:	2/2/2023		TSMO Award	No
		Funding Source	Metro		TSMO Cycle	N/A
		Funding Type:	STBG		RFFA ID:	N/A
		State Highway Route	No		RFFA Cycle:	2022-24
		Mile Post Begin:	N/A		UPWP:	Yes
<b>Short Description:</b> Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)		Mile Post End:	N/A		UPWP Cycle:	SFY 24
		Length:	N/A		Past Amend:	1
		Flex Transfer to FTA	No		Council Appr:	Yes
		FTA Conversion Code:	N/A		Council Date:	2/9/2023
		1st Year Program'd:	2023		OTC Approval:	No
		Years Active:	1		OTC Date	N/A
		<b>STIP Amend #: TBD</b>			<b>MTIP Amnd #: JA23-05-JAN</b>	
<b>Detailed Description:</b> Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. The regional Transportation System Management & Operations (TSMO) program includes a sub-allocation of funds to capital and operations projects (See MTIP ID 71116/RFFA ID 50407). (FY 2023 allocation year)						

STIP Description: TBD

Last Amendment of Modification: Formal - June 2021 - JN21-11-JUN - REPROGRAM FUNDS: Reprogram to the unconstrained FY 2025 to avoid possible conflicts with the development and execution of annual obligation targets

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
<b>Federal Funds</b>								
<del>STBG-U</del>	<del>Y230</del>	<del>2025</del>	-				<del>\$ 194,369</del>	\$ -
								\$ -
								\$ -
Funds are advanced to FFY 2023 and combined into Key 22311							<b>Federal Totals:</b>	<b>\$ -</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2025</del>	-				<del>\$ 22,246</del>	\$ -
								\$ -
							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			\$ -	\$ -	\$ -	\$ -	<del>\$ 216,615</del>	<del>\$ 216,615</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Project Cost Estimate (all phases):							\$	\$ -
Year of Expenditure Cost Amount:							\$	\$ -

**Programming Summary Details**

Why project is short programmed: The project is not short programmed. The funds are being advanced and transferred to Key 22311

Phase Change Amount:	\$ -	\$ -	\$ -	\$ -	\$ (216,615)	\$ (216,615)
Phase Change Percent:	0%	0%	0%	0%	100%	-100%
Revised Match Federal:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revised Match Percent:	N/A	N/A	N/A	N/A	0%	0%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						N/A
Initial Obligation Date:						Other Notes Transfer to Key 22311 to become part of the SFY 24 UPWP Master Agreement list of approved projects
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: The formal amendment advances the project and funds from the non-constrained FFY 2025 year forward to the constrained year of FFY 2023. The scope and funds are then being combined into Key 22311 which is also part of this amendment bundle. As a result, Key 22170 programming level is reduced to \$0.					
4	MTIP Programming Submitted Supporting Documentation: Preliminary UPWP Available Revenues Summary and UPWP Budget Guidance					
Public Notification and Comment Process:						
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes.					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? January 4, 2023 to February 2, 2023					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No significant comments are expected. Any received will be logged and documented. They be forward on to Metro Communications staff for their review and evaluation as well. Appropriate replies with occur as needed.					
6	Added clarifying notes: The funding represent personnel administrative costs to manage the Metro TSMO/ITS regional program					

### Fiscal Constraint Consistency Check Areas

1	Will Performance Measurements Apply? No. This is a planning project. Performance measurement goals do not apply to UPWP planning projects.
2A	Does the amendment include fiscal updates? Yes. The funds are being advanced and combined into Key 22311.
2B	What is the funding source for the project? Metro STBG, RFFA Step 1 funds supporting the Metro UPWP
2C	Was the Proof-of Funding requirement satisfied and how? A review of preliminary SFY 2024 UPWP revenues and the official practice of combining these and other administrative type UPWP funds into the Master Agreement project key.
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 11104 - Regional TSMO Program Investments for 2018-2027
1B	RTP Project Description: Implement and maintain Transportations System Management and Operations (TSMO) investments used by multiple agencies (e.g., Central Signal System, traffic signal priority, data communications and archiving) and coordinate response to crashes. The regional program also includes strategy planning (e.g., periodic TSMO Strategy updates), coordination of activities for TransPort subcommittee to TPAC, updates to the blueprints for agency software and hardware systems (ITS Architecture), improving traveler information with live-streaming data for connected vehicle and mobile information systems (TripCheck Traveler Information Portal Enhancement), and improving “big data” processing (PSU PORTAL) to support analyzing performance measures.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? 40 CFR 93.126, Table 2
2B	What is the exception category per the regulation: Other - Planning and technical studies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete required transportation demand modeling through the RTP Update or via an RTP amendment? N/A
3C	Is Air Quality analysis required? No. The Metro MPA has obtained conformity attainment. Special air quality analysis requirements do not apply
3D	Is an Air Quality analysis approval date required? No. If the project is capacity enhancing, then transportation modeling analysis was completed as part of the RTP update. The RTP approval date 12/6/2018 can be considered the date for the completion of any required transportation demand modeling requirements for projects if they are capacity enhancing.
4	What RTP Goal(s) does the project support? Goal #11 - Transparency and Accountability - Objective 11.2 Performance-Based Planning Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The project is a planning project and well less than 100 million dollars.

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: Yes, but as part of the SFY 24 UPWP update
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Yes. Advancing and combining Key 22146 into Key 22311 is a positioning amendment for the later UPWP budget and project list. Fund obligation and follow-on expenditures will occur per the final executed UPWP Master Agreement

2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Master Agreement list of approved UPWP projects
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Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? No - N/A
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, N/A
2B	What is the Metro modeling designation? Not applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

Fund Type Codes References	
PL	Federal planning funds appropriated to the State DOT and then with a portion allocated to the MPOs in support of regional planning and UPWP needs. The federal portion is normally 89.73% with the match at 10.27%. In the Metro region, the match is provided by ODOT
5303	Federal FTA based planning funds. The funds are appropriated to the states and then allocated to the MPOs. 5303 funds support a wide range of planning activities are eligible under this program and include the development of transportation plans and programs, planning, design, and evaluation of a public transportation project, and technical studies related to public transportation. The federal share is normally 89.73% with a match requirement of 10.27%.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects. STBG is a flexible federal funding program and can be applied to many areas. See added description under STBG-U funds.
State	General state funds committed to the project normally to support the match requirement against the federal funds.
STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process. STBG may also be used in support of UPWP planning projects. STBG provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.

ODOT Key: 22170 | MTIP ID: 71125

TSMO Administration (FFY 2023) - Cycle 2021-26

Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Other (explain)	2025		\$194,369	\$22,246		\$216,615	<input type="checkbox"/>
	2023	STBG-URBAN	\$194,369	\$22,246		\$216,615	
Totals >>			\$194,369	\$22,246	\$0	\$216,615	

## 2021-2026 MTIP Formal Amendment - Exhibit A

January 2023 Formal Amendment for FFY 2023 - Amendment Number JA23-05-JAN

Summary Reason for Change: The allocated RFFA Step 1 STBG-U funds for annual UPWP planning needs will be used as part of the SFY 2024 UPWP. As a result, they are being advanced and combined into Key 22311.



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

**MTIP Formal Amendment  
ADVANCE & COMBINE**  
Advance to FFY 2023 and combine  
into Key 22311

<b>Lead Agency:</b> Metro		Project Type:	Other	<b>ODOT Key:</b>	<b>22152</b>
<b>Project Name:</b> Regional MPO Planning (FFY 2023)	<b>3</b>	Fiscal Constraint Cat:	Planning	<b>MTIP ID:</b>	<b>71132</b>
		ODOT Type	TBD	<b>Status:</b>	<b>0</b>
<b>Project Status:</b> 0 = No activity.		Performance Goal:	N/A	<b>Comp Date:</b>	<b>9/30/2024</b>
		Capacity Enhancing:	No	RTP ID:	11103
		Conformity Exempt:	Yes	RTP Approval:	12/6/2018
		On CMP:	No	Trans Model:	12/6/2018
		30 Day Notice Begin:	1/4/2023	TCM:	No
		30 Day Notice End:	2/2/2023	TSMO Award	No
		Funding Source	Metro	TSMO Cycle	N/A
		Funding Type:	STBG	RFFA ID:	50416
		State Highway Route	No	RFFA Cycle:	2022-24
		Mile Post Begin:	N/A	UPWP:	Yes
<b>Short Description:</b> Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)		Mile Post End:	N/A	UPWP Cycle:	SFY 24
		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	2/9/2023
		1st Year Program'd:	2023	OTC Approval:	No
		Years Active:	1	OTC Date	N/A
		<b>STIP Amend #:</b> TBD		<b>MTIP Amnd #:</b> JA23-05-JAN	
<b>Detailed Description:</b> Funding to replace former local agency dues system that helps the MPO meet planning requirements and supports the provision of planning tools and services for use by transportation planning agencies. Includes work such as development and data maintenance of the regional travel model and geographic information systems and planning activities to ensure the MPO remains certified as meeting federal planning requirements to maintain the region's eligibility to receive federal transportation funds. (UPWP RFFA Step 1 STBG allocation)					

STIP Description: TBD

Last Amendment of Modification: Formal - May 2021 - MA21-10-MAY - REPROGRAM FUNDS: Reprogram to the unconstrained FY 2025 to avoid possible conflicts with the development and execution of annual obligation targets

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
<b>Federal Funds</b>								
<del>STBG-U</del>	<del>Y230</del>	<del>2025</del>	<del>\$ 1,442,694</del>				-	\$ -
								\$ -
								\$ -
Funds are advanced to FFY 2023 and combined into Key 22311							<b>Federal Totals:</b>	<b>\$ -</b>
<b>State Funds</b>								
								\$ -
								\$ -
							<b>State Total:</b>	<b>\$ -</b>
<b>Local Funds</b>								
<del>Local</del>	<del>Match</del>	<del>2025</del>	<del>\$ 165,123</del>				-	\$ -
								\$ -
							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			<del>\$ 1,607,817</del>	\$ -	\$ -	\$ -	\$ -	<del>\$ 1,607,817</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Project Cost Estimate (all phases):							\$	-
Year of Expenditure Cost Amount:							\$	-

**Programming Summary Details**

Why project is short programmed: The project is not short programmed. The funds are being advanced and transferred to Key 22311

Phase Change Amount:	\$	(1,607,817)	\$	-	\$	-	\$	-	\$	(1,607,817)
Phase Change Percent:		0%		0%		0%		0%		-100%
Revised Match Federal:	\$	-	\$	-	\$	-	\$	-	\$	-
Revised Match Percent:		0.00%		N/A		N/A		N/A		0%



Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						N/A
Initial Obligation Date:						Other Notes Transfer to Key 22311 to become part of the SFY 24 UPWP Master Agreement list of approved projects
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						
MTIP Programming Consistency Check Details and Glossary						
General Areas						
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.					
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.					
3	This amendment to the MTIP completes what action: The formal amendment advances the project and funds from the non-constrained FFY 2025 year forward to the constrained year of FFY 2023. The scope and funds are then being combined into Key 22311 which is also part of this amendment bundle. As a result, Key 22152 programming level is reduced to \$0.					
4	MTIP Programming Submitted Supporting Documentation: Preliminary UPWP Available Revenues Summary and UPWP Budget Guidance					
Public Notification and Comment Process:						
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes.					
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? January 4, 2023 to February 2, 2023					
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes					
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes					
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No significant comments are expected. Any received will be logged and documented. They be forward on to Metro Communications staff for their review and evaluation as well. Appropriate replies with occur as needed.					
6	Added clarifying notes: The funding represent personnel administrative costs to manage the Metro TSMO/ITS regional program					

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? No. This is a planning project. Performance measurement goals do not apply to UPWP planning projects.
2A	Does the amendment include fiscal updates? Yes. The funds are being advanced and combined into Key 22311.
2B	What is the funding source for the project? Metro STBG, RFFA Step 1 funds supporting the Metro UPWP
2C	Was the Proof-of Funding requirement satisfied and how? A review of preliminary SFY 2024 UPWP revenues and the official practice of combining these and other administrative type UPWP funds into the Master Agreement project key.
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 11103 - Regional MPO Activities for 2018-2027
1B	RTP Project Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? 40 CFR 93.126, Table 2
2B	What is the exception category per the regulation: Other - Planning and technical studies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete required transportation demand modeling through the RTP Update or via an RTP amendment? N/A
3C	Is Air Quality analysis required? No. The Metro MPA has obtained conformity attainment. Special air quality analysis requirements do not apply
3D	Is an Air Quality analysis approval date required? No. If the project is capacity enhancing, then transportation modeling analysis was completed as part of the RTP update. The RTP approval date 12/6/2018 can be considered the date for the completion of any required transportation demand modeling requirements for projects if they are capacity enhancing.
4	What RTP Goal(s) does the project support? Goal #11 - Transparency and Accountability - Objective 11.2 Performance-Based Planning Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The project is a planning project and well less than 100 million dollars.

UPWP Consistency Check Areas	
1A	Does the MTIP action also require an UPWP amendment: Yes, but as part of the SFY 24 UPWP update
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Yes. Advancing and combining Key 22146 into Key 22311 is a positioning amendment for the later UPWP budget and project list. Fund obligation and follow-on expenditures will occur per the final executed UPWP Master Agreement

2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Master Agreement list of approved UPWP projects
---	--

Other Review Areas	
1	Is the project location identified on the National Highway System (NHS), and what is its designation? No - N/A
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, N/A
2B	What is the Metro modeling designation? Not applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No

Fund Type Codes References	
PL	Federal planning funds appropriated to the State DOT and then with a portion allocated to the MPOs in support of regional planning and UPWP needs. The federal portion is normally 89.73% with the match at 10.27%. In the Metro region, the match is provided by ODOT
5303	Federal FTA based planning funds. The funds are appropriated to the states and then allocated to the MPOs. 5303 funds support a wide range of planning activities are eligible under this program and include the development of transportation plans and programs, planning, design, and evaluation of a public transportation project, and technical studies related to public transportation. The federal share is normally 89.73% with a match requirement of 10.27%.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects. STBG is a flexible federal funding program and can be applied to many areas. See added description under STBG-U funds.
State	General state funds committed to the project normally to support the match requirement against the federal funds.
STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process. STBG may also be used in support of UPWP planning projects. STBG provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.

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**ODOT Key: 22152 | MTIP ID: 71132**  
Regional MPO Planning (FFY 2023) - Cycle 2021-26

#### Current Programming

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2025		\$1,442,694	\$165,123		\$1,607,817	<input type="checkbox"/>
	2023	STBG-URBAN	\$1,442,694	\$165,123		\$1,607,817	
Totals >>			\$1,442,694	\$165,123	\$0	\$1,607,817	

# 2021-2026 MTIP Formal Amendment - Exhibit A

## January 2023 Formal Amendment for FFY 2023 - Amendment Number JA23-05-JAN

Summary Reason for Change: The allocated RFFA Step 1 STBG-U funds for various annual UPWP planning needs will be used as part of the SFY 2024 UPWP Master Agreement. As a result, they are being into Key 22311 which will become the Metro SFY 24 UPWP Master Agreement list of approved projects



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

**MTIP Formal Amendment  
ADD & COMBINE**  
Combine into 22311 scope & funds  
from Keys 22146, 22170, & 22152

<b>Lead Agency:</b> Metro		Project Type:	Other	<b>ODOT Key:</b>	<b>22311</b>
<b>Project Name:</b> Portland Metro Planning SFY24	<b>4</b>	Fiscal Constraint Cat:	Planning	<b>MTIP ID:</b>	<b>71132</b>
		ODOT Type	TBD	<b>Status:</b>	<b>0</b>
<b>Project Status:</b> 0 = No activity.		Performance Goal:	N/A	<b>Comp Date:</b>	<b>9/30/2024</b>
		Capacity Enhancing:	No	RTP ID:	11103
		Conformity Exempt:	Yes	RTP Approval:	12/6/2018
		On CMP:	No	Trans Model:	12/6/2018
		30 Day Notice Begin:	1/4/2023	TCM:	No
		30 Day Notice End:	2/2/2023	TSMO Award	No
		Funding Source	Metro	TSMO Cycle	N/A
		Funding Type:	STBG	RFFA ID:	50416
		State Highway Route	No	RFFA Cycle:	2022-24
		Mile Post Begin:	N/A	UPWP:	Yes
<b>Short Description:</b> Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)		Mile Post End:	N/A	UPWP Cycle:	SFY 24
		Length:	N/A	Past Amend:	1
		Flex Transfer to FTA	No	Council Appr:	Yes
		FTA Conversion Code:	N/A	Council Date:	2/9/2023
		1st Year Program'd:	2023	OTC Approval:	No
		Years Active:	1	OTC Date	N/A
<b>STIP Amend #: TBD</b>			<b>MTIP Amnd #: JA23-05-JAN</b>		

**Detailed Description:** ~~Key 21849 will be used to combine SFY allocated 5303 and STBG in Key 22152 and possible other planning keys dedicated to UPWP activities in SFY 2024 (FFY 2023). The Combination amendment for SFY 24 UPWP should occur around March 2023. Key 21849 will become the final approval "Key" for the SFY 24 UPWP Master Agreement list of projects to be obligated by the end of June 2023. The UPWP MA project list are recurring annual planning projects Metro must complete by CFR requirements and unique 1-year Metro led/non-consultant driven projects. Inclusion of specific projects are through the annual UPWP process.~~

**Key 22311 will become the SFY 2024 UPWP Master Agreement list of approved projects based on the final approved annual UPWP. RFFA Step 1 STBG funding is allocated to various UPWP projects which are now being combined into Key 22311. This includes STBG from Keys 22146, 22170, and 22152. PL and 5303 funds are adjusted based on revised approved funding allocations.**

**STIP Description:** TBD

Last Amendment of Modification: Formal - ADD NEW PROJECT: Adding a new project to the FY 2021-24 MTIP which includes required UPWP planning fund estimates of PL and 5303 for Metro for SFY 24 (FFY 2023)

#### PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
<b>Federal Funds</b>								
<del>PL</del>	<del>Z450</del>	<del>2023</del>	<del>\$ 2,107,855</del>					\$ -
PL	Z450	2023	\$ 2,636,693					\$ 2,636,693
<del>5303</del>	<del>Z77D</del>	<del>2023</del>	<del>\$ 620,694</del>					\$ -
5303	Z77D	2023	\$ 1,337,453					\$ 1,337,453
State STBG	Y240	2023	\$ 201,892					
STBG-U	Y230	2023	\$ 1,713,554					\$ 1,713,554
								\$ -
PL & 5303 increase per revised updates. Match for PL is from ODOT State STBG. STBG-U is added from multiple sources							<b>Federal Totals:</b>	<b>\$ 5,687,700</b>

<b>State Funds</b>								
<del>State (PL)</del>	<del>Match</del>	<del>2023</del>	<del>\$ 241,253</del>					\$ -
State (PL)	Match	2023	\$ 301,782					\$ 301,782
State (St STBG)	Match	2023	\$ 23,108					\$ 23,108
								\$ -
							<b>State Total:</b>	<b>\$ 324,890</b>

Local Funds							
Local (5303)	Match	2023	<del>\$ 71,041</del>			-	\$ -
Local (5303)	Match	2023	\$ 153,077				\$ 153,077
Local (STBG-U)	Match	2023	\$ 196,124				\$ 196,124
							\$ -
						Local Total	\$ 349,201
Phase Totals Before Amend:			<del>\$ 3,040,843</del>	\$ -	\$ -	\$ -	<del>\$ 3,040,843</del>
Phase Totals After Amend:			\$ 6,563,683	\$ -	\$ -	\$ -	\$ 6,563,683
Total Project Cost Estimate (all phases):							\$10+ million
Year of Expenditure Cost Amount:							\$10+ million

Programming Summary Details						
Why project is short programmed: This amendment is one of multiple that will occur as the SFY 24 UPWP approved budget is under development. However, Keys 22146, 22152, and 22170 will be committed to the UPWP Master Agreement list of final approved projects. Additional STBG and local overmatch will be added to Key 22311 per the developed and approved SFY 2024 UPWP budget.						
Phase Change Amount:	\$ 3,522,840	\$ -	\$ -	\$ -	\$ -	\$ 3,522,840
Phase Change Percent:	116%	0%	0%	0%	0%	116%
Revised Match Federal:	\$ 674,091	\$ -	\$ -	\$ -	\$ -	\$ 674,091
Revised Match Percent:	10.27%	N/A	N/A	N/A	N/A	10.27%

Phase Obligations and Expenditures Summary						
Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						TBD
Initial Obligation Date:						Other Notes
EA Number:						ODOT's contribution is added in the form of State STBG. STBG-U from Keys 22146, 22152, and 22170 is being added now.
EA Start Date:						
EA End Date:						
Known Expenditures:						

MTIP Programming Consistency Check Details and Glossary	
General Areas	
1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: The formal amendment adds and combines STBG-U from Keys 22146, 22170, and 22152. It also updates the PL and 5303 funding levels per ODOT allocation updates. State STBG is also being added as part of their annual contribution. This amendment is the first of a possible two formal amendments needed to add the approved funding to the FY 2024 UPWP Master Agreement list of projects. Still to determine will be the required STBG-U in support of Next Corridor Planning activities. Local overmatch also will need to be added once the final SFY 24 UPWP budget is developed and approved.
4	MTIP Programming Submitted Supporting Documentation: Preliminary UPWP Available Revenues Summary and UPWP Budget Guidance
Public Notification and Comment Process:	
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes.
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? January 4, 2023 to February 2, 2023
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? No significant comments are expected. Any received will be logged and documented. They be forward on to Metro Communications staff for their review and evaluation as well. Appropriate replies with occur as needed.
6	Added clarifying notes: The funding represent personnel administrative costs to manage the Metro TSMO/ITS regional program

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? No. This is a planning project. Performance measurement goals do not apply to UPWP planning projects.
2A	Does the amendment include fiscal updates? Yes. The funds are being advanced and combined into Key 22311.
2B	What is the funding source for the project? Metro STBG, RFFA Step 1 funds supporting the Metro UPWP
2C	Was the Proof-of Funding requirement satisfied and how? A review of preliminary SFY 2024 UPWP revenues and the official practice of combining these and other administrative type UPWP funds into the Master Agreement project key.
2D	Was overall fiscal constraint demonstrated? Yes.

### RTP Consistency Check Areas

1A	RTP ID and Name: ID# 11103 - Regional MPO Activities for 2018-2027
1B	RTP Project Description: System planning, topical planning, and activities that Metro must conduct for the period 2018-2027 in order to remain certified as an metropolitan planning organization (MPO) by the federal government and be eligible to receive and distribute federal transportation dollars.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? 40 CFR 93.126, Table 2
2B	What is the exception category per the regulation: Other - Planning and technical studies.
3A	Is the project considered capacity enhancing? No
3B	If capacity enhancing, did the project complete required transportation demand modeling through the RTP Update or via an RTP amendment? N/A
3C	Is Air Quality analysis required? No. The Metro MPA has obtained conformity attainment. Special air quality analysis requirements do not apply
3D	Is an Air Quality analysis approval date required? No. If the project is capacity enhancing, then transportation modeling analysis was completed as part of the RTP update. The RTP approval date 12/6/2018 can be considered the date for the completion of any required transportation demand modeling requirements for projects if they are capacity enhancing.
4	What RTP Goal(s) does the project support? Goal #11 - Transparency and Accountability - Objective 11.2 Performance-Based Planning Make transportation investment decisions using a performance-based planning approach that is aligned with the RTP goals and supported by meaningful public engagement, multimodal data and analysis.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The project is a planning project and well less than 100 million dollars.

### UPWP Consistency Check Areas

1A	Does the MTIP action also require an UPWP amendment: Yes, but as part of the SFY 24 UPWP update
1B	Can the MTIP amendment proceed ahead of the UPWP amendment? Yes. Advancing and combining Key 22146 into Key 22311 is a positioning amendment for the later UPWP budget and project list. Fund obligation and follow-on expenditures will occur per the final executed UPWP Master Agreement
2	What UPWP category does the project fit under (e.g. Master Agreement, Metro Funded Regionally Significant, or Non-Metro Funded Regionally Significant)? Master Agreement list of approved UPWP projects

### Other Review Areas

1	Is the project location identified on the National Highway System (NHS), and what is its designation? No - N/A
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)? No, N/A
2B	What is the Metro modeling designation? Not applicable
3	Is the project designated as a Transportation Control Measure (TCM)? No
4	Is the project location identified on a Congestion Management Plan route? No



### Fund Type Codes References

PL	Federal planning funds appropriated to the State DOT and then with a portion allocated to the MPOs in support of regional planning and UPWP needs. The federal portion is normally 89.73% with the match at 10.27%. In the Metro region, the match is provided by ODOT
5303	Federal FTA based planning funds. The funds are appropriated to the states and then allocated to the MPOs. 5303 funds support a wide range of planning activities are eligible under this program and include the development of transportation plans and programs, planning, design, and evaluation of a public transportation project, and technical studies related to public transportation. The federal share is normally 89.73% with a match requirement of 10.27%.
Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Other	Normally local funds above the minimum match requirement committed by the lead agency to the project. Also referred to as "overmatch" funds
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects. STBG is a flexible federal funding program and can be applied to many areas. See added description under STBG-U funds.
State	General state funds committed to the project normally to support the match requirement against the federal funds.
STBG-U	(Metro STBG) Federal Surface Transportation Block Grant funds appropriated to ODOT and with a portion allocated under a formula to the MPOs and then committed to eligible projects via a discretionary award process. STBG may also be used in support of UPWP planning projects. STBG provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.

FINAL NUMBERS FOR SFY 24				
Attachment A				
FEDERAL AND STATE FUNDING FOR TRANSPORTATION PLANNING PROGRAMS FOR OREGON'S				
URBANIZED AREA				
FEDERAL FISCAL YEAR 2023 (State Fiscal Year 2024)				
FUND TYPE	FEDERAL SHARE	STATE MATCH	LOCAL MATCH	TOTAL
<b>Portland Metro Agreement No.</b>				
FY 2024 PL (#22311)	2,316,577.14	265,142.62	0	2,581,719.76
FY 2022 PL Savings (Move from #20597 to #22311)	320,115.58	36,638.66	0	356,754.24
FY 2024 ODOT's STBG Funds (#22311)	201,892.50	23,107.50		225,000.00
FY 2022 STBG Savings (Move from #20597 to #22311)	286,903.88		32,837.43	319,741.31
FY 2024 5303 Funding (#22311)	766,102.05		87,683.81	853,785.86
FY 2022 5303 Saving (#20597 move saving to #22311)	571,350.55		65,393.63	636,744.18
<b>Metro Total</b>	<b>4,462,941.70</b>	<b>324,888.78</b>	<b>185,914.87</b>	<b>4,973,745.35</b>

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**ODOT Key: 22170 | MTIP ID: 71125**

TSMO Administration (FFY 2023) - Cycle 2021-26

**Current Programming**

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Other (explain)	2025		\$194,369	\$22,246		\$216,615	<input type="checkbox"/>
	2023	STBG-URBAN	\$194,369	\$22,246		\$216,615	
Totals >>			\$194,369	\$22,246	\$0	\$216,615	

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**ODOT Key: 22152 | MTIP ID: 71132**

Regional MPO Planning (FFY 2023) - Cycle 2021-26

**Current Programming**

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2025		\$1,442,694	\$165,123		\$1,607,817	<input type="checkbox"/>
	2023	STBG-URBAN	\$1,442,694	\$165,123		\$1,607,817	
Totals >>			\$1,442,694	\$165,123	\$0	\$1,607,817	

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**ODOT Key: 22146 | MTIP ID: 71119**

Freight and Economic Development Planning (FFY 2023) - Cycle 2021-26

**Current Programming**

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2025		\$76,491	\$8,755		\$85,246	<input type="checkbox"/>
	2023	STBG-URBAN	\$76,491	\$8,755		\$85,246	
Totals >>			\$76,491	\$8,755	\$0	\$85,246	

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**ODOT Key: 22311 | MTIP ID: 71225**

Portland Metro Planning SFY24 - Cycle 2021-26

**Current Programming**

phase	year	fund type	federal amount	minimum local match	other amount	total	hold from mtip
Planning	2023		\$2,728,549	\$312,294		\$3,040,843	<input type="checkbox"/>
	2017	Metro Planning (Z450)	\$2,107,855	\$241,253		\$2,349,108	
	2018	Metro PL (5303)	\$620,694	\$71,041		\$691,735	
Totals >>			\$2,728,549	\$312,294	\$0	\$3,040,843	

# 2021-2026 MTIP Formal Amendment - Exhibit A

January 2023 Formal Amendment for FFY 2023 - Amendment Number JA23-05-JAN

Summary Reason for Change: PBOT has agreed to treat Lombard St as a pilot project to evaluate and streamlining PBOT ADA permitting process. As a result, Key 22469 name, scope and funding is being adjusted to reflect the updated expedited process. \$1.6 million is also added from ADA program.



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

**MTIP Formal Amendment  
SCOPE & COST CHANGE**  
Delete US99E scope & ROW, adjust  
Name, and increase funding

<b>Lead Agency:</b> ODOT		Project Type:	Highway	<b>ODOT Key:</b>	<b>22469</b>
<b>Project Name:</b> US30BY & <del>OR99E</del> Curb Ramps (Portland) US30BY Curb Ramps (Portland)	<b>5</b>	Fiscal Constraint Cat:	SM&O	<b>MTIP ID:</b>	<b>71259</b>
		ODOT Type	ADAP	<b>Status:</b>	<b>6</b>
		Performance Goal:	Safety	<b>Comp Date:</b>	<b>12/31/2027</b>
		Capacity Enhancing:	No	RTP ID:	12095
		Conformity Exempt:	Yes	RTP Approval:	12/6/2018
		On CMP:		Trans Model:	12/6/2018
		30 Day Notice Begin:	1/4/2023	TCM:	No
		30 Day Notice End:	2/2/2023	TSMO Award	No
		Funding Source	ODOT	TSMO Cycle	N/A
		Funding Type:	AC-STBGS	RFFA ID:	N/A
<b>Project Status:</b> 6 = Pre-construction activities (pre-bid, construction management oversight completion of utility relocation activities, etc.).		US30B	State Highway Route	RFFA Cycle:	N/A
		4.50	Mile Post Begin:	UPWP:	No
		5.35	Mile Post End:	UPWP Cycle:	N/A
		0.85	Length:	Past Amend:	3
<b>Short Description:</b> Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along <del>OR99E</del> and US30BY to reduce mobility barriers and make state highways more accessible to disabled persons			Flex Transfer to FTA	Council Appr:	Yes
			FTA Conversion Code:	Council Date:	12
			1st Year Program'd:	OTC Approval:	No
			Years Active:	OTC Date	N/A
			STIP Amend #:	21-24-3009	<b>MTIP Amnd #: JA23-05-JAN</b>

**Detailed Description:** On US30BY (~~NE Lombard St~~), and ~~OR99E~~ at multiple site locations in Portland, ~~Milwaukie~~, and ~~Oregon City~~, construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards and reduce mobility barriers and make state highways more accessible to disabled persons (2-2022 Admin Mod splits and reprograms funding and deliverables among three existing projects Keys 22468, 22469, and 22470. Scope remains unchanged) (1/23 FA = drops ~~OR99E~~ Scope)

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

Last Amendment of Modification: Administrative - June 2022 - AM22-23-JUN3 - PHASE SLIP: Slip ROW, UR, and Construction phases from FFY 2022 to FFY 2023 due to unresolved project issues delaying implementation

**PROJECT FUNDING DETAILS**

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
<b>Federal Funds</b>								
AC-STBGS	ACP0	2023	-		<del>\$ 269,190</del>			\$ -
AC-STBGS	ACP0	2023				<del>\$ 43,968</del>		\$ -
State STBG	Y240	2023				\$ 43,968		\$ 43,968
AC-STBGS	ACP0	2023					<del>\$ 897,300</del>	\$ -
State STBG	Y240	2023					\$ 2,602,170	\$ 2,602,170
								\$ -
							<b>Federal Totals:</b>	<b>\$ 2,646,138</b>
<b>State Funds</b>								
State	Match	2023			<del>\$ 30,810</del>			\$ -
State	Match	2023				\$ 5,032		\$ 5,032
State	Match	2023					<del>\$ 102,700</del>	\$ -
State	Match	2023					\$ 297,830	\$ 297,830
								\$ -
							<b>State Total:</b>	<b>\$ 302,862</b>
<b>Local Funds</b>								
								\$ -
								\$ -
Other funds = local overmatch contribution							<b>Local Total</b>	<b>\$ -</b>
Phase Totals Before Amend:			\$ -	\$ -	<del>\$ 300,000</del>	\$ 49,000	<del>\$ 1,000,000</del>	<del>\$ 1,349,000</del>
Phase Totals After Amend:			\$ -	\$ -	\$ -	\$ 49,000	\$ 2,900,000	\$ 2,949,000
Total Project Cost Estimate (all phases):							\$	\$ 2,949,000
Year of Expenditure Cost Amount:							\$	\$ 2,949,000

### Programming Summary Details

Why project is short programmed: The project is not short programmed.

Phase Change Amount:	\$ -	\$ -	\$ (300,000)	\$ -	\$ 1,900,000	\$ 1,600,000
Phase Change Percent:	0%	0%	-100%	0%	190%	119%
Revised Match Federal:	\$ -	\$ -	\$ -	\$ 5,032	\$ 297,830	\$ 302,862
Revised Match Percent:	N/A	N/A	0%	10.27%	10.27%	10.27%

### Phase Obligations and Expenditures Summary

Item	Planning	PE	ROW	Other/Utility	Construction	
Total Funds Obligated:						Federal Aid ID
Federal Funds Obligated:						S081(083)
Initial Obligation Date:						Other Notes: ADA scope improvements remain unchanged, but the quantity and location changes
EA Number:						
EA Start Date:						
EA End Date:						
Known Expenditures:						

### MTIP Programming Consistency Check Details and Glossary

#### General Areas

1	Phase funding fields: Red font = prior amended funding or project details. Blue font = amended changes to funding or project details. Black font indicates no change has occurred.
2	Amendment Purpose: The purpose of an MTIP amendment is normally to add a new project due to required federal review actions involving the MTIP and STIP, or complete required changes to the project (name description, or funding) to meet the project's next federal approval delivery step.
3	This amendment to the MTIP completes what action: PBOT will use Lombard as a pilot project for streamlining and expediting ADA permitting. As a result, Key 22469's scope, name, and funding are being adjusted. An additional \$1.6 million is being pulled from the ADA program to address the revised cost to US30BY locations. The OR99E segment is being eliminated. The cost increase along with the scope update triggers the need for a formal amendment.
4	MTIP Programming Submitted Supporting Documentation: STIP Summary Report, STIP Impacts Worksheet, project location map.



Public Notification and Comment Process:	
5A	Was a 30 Public Notification/Opportunity to Comment Period Required? Yes
5B	What were the 30 day Public Notification/Opportunity to Comment Start and end dates? January 4, 20223 through February 2, 2024
5C	Was the Public Notification/Opportunity to Comment period completed consistent with the Metro Public Participation Plan? Yes
5D	Was the Public Notification/Opportunity to Comment period included on the Metro website allowing email submissions as comments? Yes
5E	Were there a significant amount of comments received requiring a comments log summary provided to Metro Communications Staff? Any significant comments are included in a public notification comment log and passed on to Metro communications staff, and/or ODOT public information contacts to determine appropriate replies. For this specific project, no significant comments are expected.
6	Added clarifying notes:

Fiscal Constraint Consistency Check Areas	
1	Will Performance Measurements Apply? Yes, Safety
2A	Does the amendment include fiscal updates? Yes
2B	What is the funding source for the project? Available funding from the ODOT ADA program
2C	Was the Proof-of Funding requirement satisfied and how? Acknowledgement from ADA Program that the funds are available to the project.
2D	Was overall fiscal constraint demonstrated? Yes.

RTP Consistency Check Areas	
1A	RTP ID and Name: ID# 12095 - Safety & Operations Projects
1B	RTP Project Description: Projects to improve safety or operational efficiencies such as pedestrian crossings of arterial roads, railroad crossing repairs, slide and rock fall protections, illumination, signals and signal operations systems, that do not add motor vehicle capacity.
2A	Is the project exempt per 40 CFR 93.126, Table 2 or 40 CFR 92.127, Table 3? Yes, the project is exempt per 40 CFR 93.126, Table
2B	What is the exception category per the regulation: Table 2 - Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
3A	Is the project considered capacity enhancing? No. The project is not capacity enhancing.
3B	If capacity enhancing, did the project complete required transportation demand modeling through the RTP Update or via an RTP amendment? N/A
3C	Is Air Quality analysis required? No. The Metro MPA has obtained conformity attainment. Special air quality analysis requirements do not apply.
3D	Is an Air Quality analysis approval date required? No. If the project is capacity enhancing, then transportation modeling analysis was completed as part of the RTP update. The RTP approval date 12/6/2018 can be considered the date for the completion of any required transportation demand modeling requirements for projects if they are capacity enhancing.
4	What RTP Goal(s) does the project support? Goal #5 - Safety and Security: Objective 5.1 Transportation Safety – Eliminate fatal and severe injury crashes for all modes of travel.
5	Does the project require a special performance assessment evaluation as part of the amendment? (applies to capacity enhancing projects, \$100 million or greater, and regionally significant). No. The Performance Evaluation Assessment requirement does not apply for this project.

### UPWP Consistency Check Areas

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

### Other Review Areas

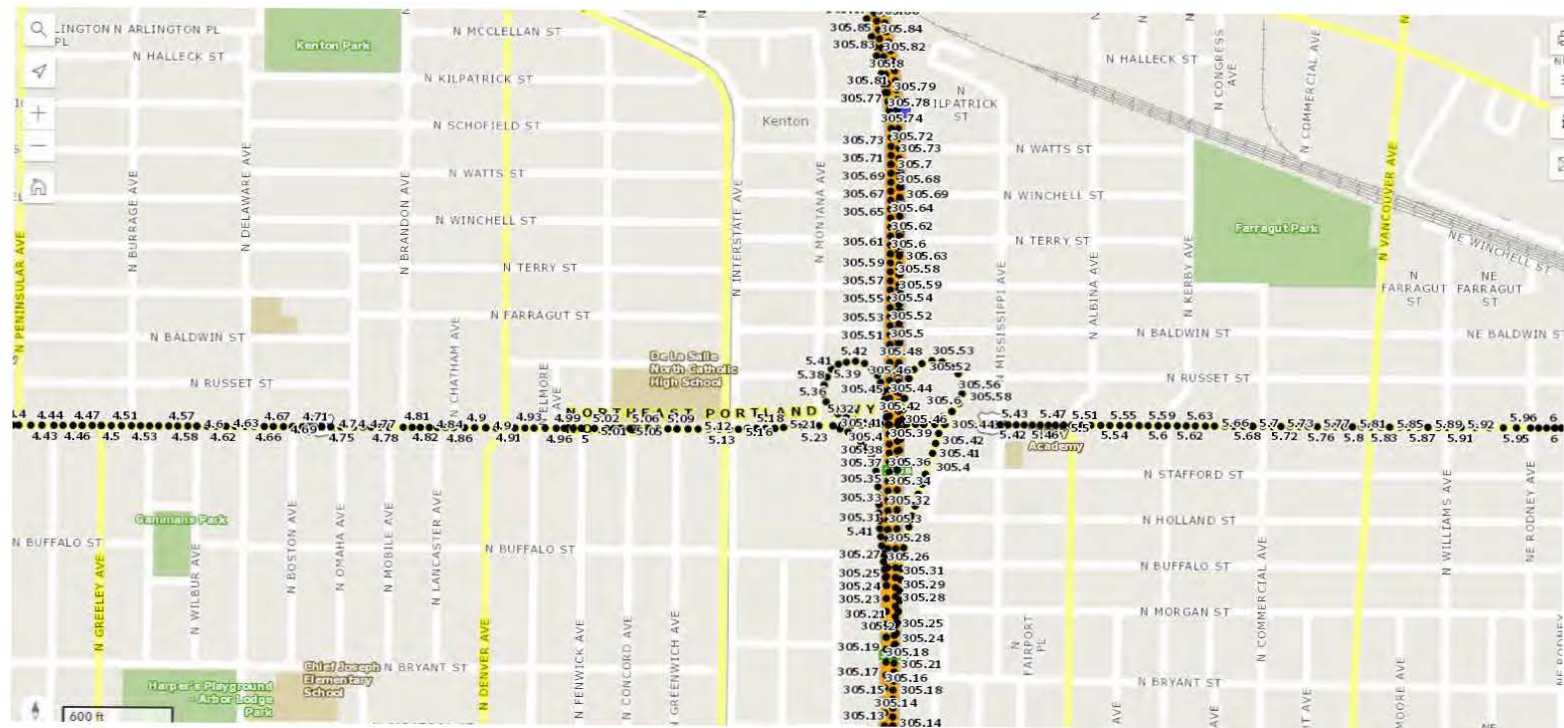
1	Is the project location identified on the National Highway System (NHS), and what is its designation?
2A	Is the project location identified as part of one or more of Metro Modeling Networks, and which one(s)?
2B	What is the Metro modeling designation?
3	Is the project designated as a Transportation Control Measure (TCM)?
4	Is the project location identified on a Congestion Management Plan route?

### Fund Type Codes References

ADVCON	A general Federal Advance Construction fund type placeholder used by ODOT when the expected federal fund code (e.g. HSIP, NHPP) is not available or designated yet. ODOT covers the initial expenditures allowing the phase obligation to occur. Later the federal conversion fund code is assigned.
AC-STBGS	Federal Advance Construction fund type code with the anticipated federal conversion code identified. For AC-STBGS, the anticipated conversion code is State STBG
State STBG	Federal Surface Transportation Block Grant funds appropriated to ODOT and committed to eligible projects
State	General state funds committed to the project normally to support the match requirement against the federal funds.

Fund Codes											
Phase	Fund Code	Description	ICA P	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
RW	Y240	Surface Transportation Block Grant (STBG) - Flex IJJA		0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
	RW Totals			0.00%	0.00		0.00		0.00		0.00
UR	Y240	Surface Transportation Block Grant (STBG) - Flex IJJA		100.00%	49,000.00	89.73%	43,967.70	10.27%	5,032.30	0.00%	0.00
	UR Totals			100.00%	49,000.00		43,967.70		5,032.30		0.00
CN	Y240	Surface Transportation Block Grant (STBG) - Flex IJJA		100.00%	2,900,000.00	89.73%	2,602,170.00	10.27%	297,830.00	0.00%	0.00
	CN Totals			100.00%	2,900,000.00		2,602,170.00		297,830.00		0.00
Grand Totals					2,949,000.00		2,646,137.70		302,862.30		0.00





# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: January 6, 2023  
To: JPACT and Interested Parties  
From: Ken Lobeck, Funding Programs Lead  
Subject: January FFY 2023 MTIP Formal Amendment & Resolution 23-5308 Approval Request

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## **FORMAL MTIP AMENDMENT STAFF REPORT**

### **Amendment Purpose Statement**

**FOR THE PURPOSE OF ADVANCING METRO ELIGIBLE UNIFIED PLANNING WORK PROGRAM (UPWP) PROJECTS FOR INCLUSION IN THE STATE FISCAL YEAR 2024 UPWP AND COMPLETING A SCOPE CHANGE FOR AN ODOT AMERICANS WITH DISABILITIES CURBS AND RAMPS PROJECT**

### **BACKGROUND**

#### **What This Is:**

The January FFY 2023 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment bundle is primarily a positioning amendment supporting the development of the State fiscal Year (SFY) Unified Planning Work Program (UPWP). The January FFY 2023 Formal MTIP Amendment also completes a necessary scope and cost change to one of ODOT's Americans with Disabilities (ADA) projects. The summary of changes includes the following:

- Three Metro Regional Flexible Fund Allocation (RFFA) Step 1 UPWP program allocations for the SFY 24 UPWP (Freight/Goods Movements administration (Key 22146), TSMO administration (Key 22170), and the FFY 2023 UPWP STBG Regional Planning allocation (in Key 22152) are being advanced from non-constrained out-tears of the MTIP and combined into Key 22311.
- Key 22311 will function as the primary SFY 2024 UPWP project containing all approved UPWP projects part of the Master Agreement with ODOT.
- The ODOT State contribution is being added to Key 22311.
- Finally, Federal Highways based "PL" planning funds, and Federal Transit based Administration Section 5303 funding levels are being updated per revised authorized amounts to the MPOs.
- The fifth project in the bundle is an ODOT ADA improvement project on US30BY and OR99E is completing a scope and cost change to drop the OR99E portion and adjust the costs for the remaining US30BY ADA improvement portion.

#### **What is the requested action?**

**TPAC was provided their official notification January 6, 2023 and approved staff's recommendation. TPAC now request JPACT approve Resolution 23-5308 consisting of the five amended projects enabling further required UPWP updates to occur and allow ODOT to move forward with their US30BY ADA project.**

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

December FFY 2023 Formal Transition Amendment Bundle Contents				
Amendment Type: Formal/Full				
Amendment #: JA23-05-JAN				
Total Number of Projects: 5				
Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#1) ODOT Key # <b>22146</b> MTIP ID 71119	Metro	<b>Freight and Economic Development Planning (FFY 2023)</b>	Regional planning to support freight systems planning and economic development planning activities. (FY 2023 UPWP allocation year)	<b><u>ADVANCE &amp; COMBINE</u></b> Key 22146 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
(#2) ODOT Key # <b>22170</b> MTIP ID 71125	Metro	<b>TSMO Administration (FFY 2023)</b>	Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)	<b><u>ADVANCE &amp; COMBINE</u></b> Key 22170 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
(#3) ODOT Key # <b>22152</b> MTIP ID 71132	Metro	<b>Regional MPO Planning (FFY 2023)</b>	Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)	<b><u>ADVANCE &amp; COMBINE</u></b> Key 22152 is being advanced to FFY 2023 and combined into Key 22311 to be part of the SFY 2024 UPWP Master Agreement project list
(#4) ODOT Key # <b>22311</b> MTIP ID: 71225	Metro	<b>Portland Metro Planning SFY24</b>	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)	<b><u>ADD &amp; COMBINE</u></b> Key 22311 adds the ODOT contribution (State STBG) to the SFY 24 UPWP Master Agreement and combines STBG-U from Keys 22146, 22152, and 22170.
(#5) ODOT Key # <b>22469</b> MTIP ID: 71259	ODOT	<del>US30BY &amp; OR99E</del> <del>Curb Ramps (Portland)</del> <b>US30BY Curb Ramps (Portland)</b>	Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along <del>OR99E and</del> US30BY to reduce mobility barriers and make state highways more accessible to disabled persons	<b><u>SCOPE &amp; COST CHANGE:</u></b> PBOT will use Lombard as a pilot project for streamlining and expediting ADA permitting for Lombard project. As a result, Key 22469's scope, name, and funding is being

				adjusted. An additional \$1.6 million is being pulled from the ADA program to address the revised cost to US30BY locations. The OR99E segment is being eliminated.
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#### AMENDMENT BUNDLE SUMMARY:

A total of five projects are included in the January FFY 2023 MTIP Formal Amendment bundle. The amendment bundle is proceeding under amendment number JA23-05-JAN. All changes are to existing projects. There are no new projects included in the bundle. All projects completed a 30-day public notification/opportunity to comment period consistent with Metro's Public Participation Plan. The public comment period opened on January 4, 2023 and closed on February 2, 2023.

#### TPAC January 6, 2022 Meeting Summary:

Ken Lobeck, Metro Funding Lead provide TPAC members with an overview of the January MTIP Formal Amendment bundle. Ken explained that four of the five projects involve advancing and combining projects in support of the SFY 2024 UPWP. The fifth project involves a needed scope and cost change to the ODOT US30BY/OR99E ADA Curbs and Ramps project which requires a scope change to remove the OR99E portion and a cost update.

A question was raised to clarify why the UPWP projects were programmed in FFY 2025 and are now being advanced from to FFY 2023. Ken explained that normally are programed in their expected year of obligation. However, the UPWP is a fluid document and the annual planning needs and funding requirements change from year to year. To avoid conflicts with the annual Obligation Targets and to provide added flexibility to the UPWP, many of the STBG funded UPWP projects were pushed out to FFY 2025. They are then advanced as required to their specific year of obligation once it's clear through the UPWP budget development process that the funding is needed to support the annual UPWP. Ken added that this is a two-step amendment process, and few more project advancements will occur as part of the February 2023 Formal Amendment bundle.

With no further discussion, TPAC move and unanimously approved staff's recommendation to provide JPACT an approval recommendation for Resolution 23-5308 and the five included projects.

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

<b>Project #1 Key 22146</b>	<b>Freight and Economic Development Planning (FFY 2023) (Advance &amp; Combine) Lead Agency: Metro</b>
<b><u>Project Description:</u></b> Regional planning to support freight systems planning and economic development planning activities. (FY 2023 UPWP allocation year)	
<b>Identifications/Key Consistency Check Areas:</b> <ul style="list-style-type: none"> <li>• Lead Agency: Metro</li> <li>• ODOT Key Number: <b>22146</b></li> <li>• MTIP ID#: 71119</li> <li>• RTP ID: 11103</li> <li>• Proof-of Funding/Fiscal Constraint Demonstrated: Yes</li> </ul>	

- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval required: No.
- Performance Measurements applicable: No. The project is a planning project. Performance measurements are not applicable to planning projects.
- Special Amendment Performance Assessment Required: No. Same reason as for performance measurements.
- Were overall RTP Consistency checks achieved and satisfactory? Yes
- UPWP approved project: Yes. The project allocation will support the development of the SFY 2024 UPWP
- Can the required changes be made to the MTIP without issues? Yes

### **Description of Changes**

The formal amendment advances the project from the non-financially constrained year of FFY 2025 to FFY 2023 to be included in the SFY 2024 UPWP Master Agreement list of approved projects. Programming for UPWP Master Agreement will occur through Key 22311.

Each year Metro develops the annual Unified Planning Work Program (UPWP). As the MPO, Metro is required by the federal government to develop the Unified Planning Work Program each year with input from local governments, TriMet, the Oregon Department of Transportation, Federal Highway Administration and Federal Transit Administration. The program is a guide for transportation planning activities to be conducted over the course of each fiscal year (July 1 to June 30). The UPWP includes:

- Planning priorities for the region
- Projects of regional significance: description, objectives, previous work, methodology, products expected, responsible entities, costs, funding sources and schedules
- Transportation planning, programs, projects, research and modeling: participating entities, tasks and products for the coming year along with costs, funding sources and schedules.

The final approved UPWP and budget will include twenty or more planning projects. Some are required to remain as stand-alone projects and are programmed separately in the MTIP and STIP. The remaining UPWP projects are consolidated into a single Master Agreement list of approved projects. Rather than obligation eighteen or more separate projects and trying to manage their obligations and expenditures separately, they are combined into a single project and obligated together at the same time.

Developing the annual UPWP is a multi-step process which TPAC members participate. Initially, the projects are identified individually as a RFFA Step 1 approved allocation for their specific year. From there, the process refines the list and approved funding. The final product produces a summary budget table containing the project list. The below table is an example from the SFY 23 UPWP approved budget for reference.

As the annual budget table takes shape, related MTIP programming adjustments also begin occurring. The purpose is the position the required funding for the expected approved projects in the correct year, and begins the single-key programming consolidation for the Master Agreement list of approved projects. For the SFY 2024 UPWP Master Agreement list of approved projects, Key 22311 will be used as the single obligation project Key.

METRO		Requirements	Resources										
		Total Direct and Indirect Costs	PL	PL Match (ODOT)	5303	5303 Match (Metro)	STBG	STBG Match (Metro/ODOT)	FTA, FHWA, ODOT Discretionary Grants	FTA, FHWA, ODOT Grants Match (Metro)	Metro Direct Contribution	Local Support	Total
Regional Transportation Planning													
1	Transportation Planning	\$ 469,533					\$ 421,312	\$ 48,221					\$ 469,533
2	Climate Smart Implementation	\$ 478,854					\$ 69,858	\$ 7,996			\$ 401,000		\$ 478,854
3	Regional Transportation Plan Update 2023	\$ 2,632,643	\$ 289,828	\$ 33,172			\$ 539,089	\$ 61,701			\$ 1,458,853	\$ 250,000	\$ 2,632,643
4	Metropolitan Transportation Improvement Program	\$ 1,615,520	\$ 1,243,227	\$ 142,293							\$ 230,000		\$ 1,615,520
5	Air Quality Program	\$ 26,918					\$ 24,153	\$ 2,764					\$ 26,918
6	Regional Transit Program	\$ 384,984					\$ 121,121	\$ 13,863			\$ 250,000		\$ 384,984
7	Regional Freight Program	\$ 215,337					\$ 193,222	\$ 22,115					\$ 215,337
8	Complete Streets Program	\$ 126,635					\$ 113,630	\$ 13,005					\$ 126,635
9	Regional Travel Options and Safe Routes to School Program	\$ 3,804,676							\$ 3,642,938	\$ 161,738			\$ 3,804,676
10	Transportation System Management & Operations - Regional Mobility Program	\$ 310,438					\$ 278,556	\$ 31,882					\$ 310,438
11	Enhanced Transit Concepts Program	\$ 2,513,252									\$ 2,513,252		\$ 2,513,252
12	Regional Freight Delay and Commodities Movement Study	\$ 130,000					\$ 116,649	\$ 13,351					\$ 130,000
13	Economic Value Atlas Implementation	\$ 66,491					\$ 59,663	\$ 6,829					\$ 66,491
14	Regional Emergency Transportation Routes Phase 2	\$ 138,216										\$ 138,216	\$ 138,216
Regional Transportation Planning Total:		\$ 12,913,496	\$ 1,533,055	\$ 175,465	\$ -	\$ -	\$ 1,937,253	\$ 221,727	\$ 3,642,938	\$ 161,738	\$ 4,853,105	\$ 388,216	\$ 12,913,498
Regional Corridor/Area Planning													
1	Investment Areas Corridor Refinement and Project Development	\$ 547,668									\$ 547,668		\$ 547,668
2	Southwest Corridor Transit Project	\$ 537,215							\$ 413,750	\$ 97,218		\$ 26,248	\$ 537,215
3	Columbia Connects	\$ 133,136					\$ 119,463	\$ 13,673					\$ 133,136
4	City of Portland Transit and Equitable Development Assessment	\$ 50,000							\$ 50,000				\$ 50,000
5	TV Highway Transit and Development Project	\$ 1,089,418					\$ 224,043	\$ 25,643	\$ 425,000	\$ 47,222	\$ 367,511		\$ 1,089,418
6	Westside Multimodal Improvements Study	\$ 267,681							\$ 125,000		\$ 142,681		\$ 267,681
7	82nd Ave	\$ 817,401					\$ 244,697	\$ 28,007			\$ 544,697		\$ 817,401
Regional Corridor/Area Planning Total:		\$ 3,442,518	\$ -	\$ -	\$ -	\$ -	\$ 588,202	\$ 67,322	\$ 1,013,750	\$ 144,440	\$ 1,602,556	\$ 26,248	\$ 3,442,518
Administration & Support													
1	MPO Management and Services	\$ 473,552	\$ 349,842	\$ 40,041							\$ 83,669		\$ 473,552
2	Data Management and Visualization	\$ 1,695,045			\$ 461,429	\$ 52,813					\$ 1,180,804		\$ 1,695,045
3	Land Use and Socio-Economic Modeling Program	\$ 375,831			\$ 300,137	\$ 34,352					\$ 41,341		\$ 375,831
4	Travel Model Program	\$ 727,063	\$ 289,161	\$ 33,096	\$ 290,000	\$ 33,192					\$ 81,614		\$ 727,063
5	Oregon Household Travel and Activity Survey Program	\$ 237,514					\$ 213,121	\$ 24,393					\$ 237,514
6	Technical Assistance Program	\$ 111,759					\$ 100,281	\$ 11,478					\$ 111,759
7	Intergovernmental Agreement Fund Management	\$ 2,406,523									\$ 2,406,523		\$ 2,406,523
Administration & Support Total:		\$ 6,027,287	\$ 639,003	\$ 73,137	\$ 1,051,566	\$ 120,356	\$ 313,403	\$ 35,870	\$ -	\$ -	\$ 3,793,951	\$ -	\$ 6,027,287
GRAND TOTAL		\$ 22,383,303	\$ 2,172,058	\$ 248,602	\$ 1,051,566	\$ 120,356	\$ 2,838,858	\$ 324,920	\$ 4,656,688	\$ 306,178	\$ 10,249,612	\$ 414,464	\$ 22,383,303

**2021-2026 Metropolitan Transportation Improvement Program (MTIP)**  
Current Approved Project List with Approved Amendments



LEAD AGENCY		Metro				
PROJECT NAME		Portland Metro Planning SFY24				
Project IDs		Project Description				Project Type
ODOT KEY	22311	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)				Other
MTIP ID	71225					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2023	Metro Planning (Z450)	\$2,107,855	\$241,253	\$0	\$2,349,108
Planning	2023	Metro PL (5303)	\$620,694	\$71,041	\$0	\$691,735
		FY 21-26 Totals	\$2,728,549	\$312,294	\$0	\$3,040,843
		Estimated Project Cost (VOES)	\$2,728,549	\$312,294	\$0	\$3,040,843

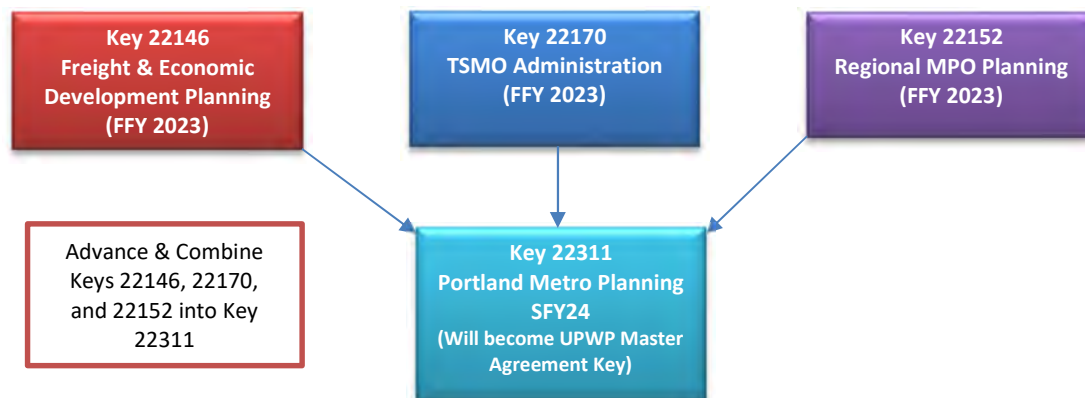
Since the UPWP includes federal Metro Surface Transportation Block Grant (STBG-U) funds, they federal funds are also part of Metro's required annual Obligation Targets program. Unfortunately, the obligation targets must be completed and submitted to ODOT by the end of December. The UPWP budget is not completed until nearly March. Due to this disconnect, staff rely in a multi-step amendments process to complete the



required adjustments once the projects are known and funding amounts for them are clear.

The January FFY 2023 Formal MTIP Amendment is the first of multiple MTIP amendments that may be required to properly build Key 22311 with its final approved projects and required funding levels. This first amendment begins by positioning and known UPWP project funding in the correct obligation year, combining the UPWP Master Agreement projects together into the single obligation key, and updates approved funding if known.

The action to Key 22146 takes the allocated UPWP administrative funds for the Freight/Goods Movements program, advances them to FFY 2023, and combines them into Key 22311.



#### Support Item(s): Existing MTIP Programming for Key 22146

- Scope and funds are being advanced and combined into Key 22311

LEAD AGENCY		Metro				
PROJECT NAME		Freight and Economic Development Planning (FFY 2023)				
Project IDs		Project Description				Project Type
ODOT KEY	22146	Regional planning to support freight systems planning and economic development planning activities. (FY 2023 UPWP allocation year)				Freight
MTIP ID	71119					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2025	STBG-URBAN	\$76,491	\$8,755	\$0	\$85,246
FY 21-26 Totals			\$76,491	\$8,755	\$0	\$85,246
Estimated Project Cost (VOES)			\$76,491	\$8,755	\$0	\$85,246

<b>Project #2 Key 22170</b>	<b>TSMO Administration (FFY 2023) (Advance &amp; Combine) Lead Agency: Metro</b>
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#### Project Description:

Administration of the regional TSMO program; providing program strategy and direction, administration of grant allocations, and staffing of the Transport committee. (FY 2023 allocation year)

Identifications/Key Consistency Check Areas:

- Lead Agency: Metro

- ODOT Key Number: **22170**
- MTIP ID#: 71125
- RTP ID: 11104
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval required: No.
- Performance Measurements applicable: No. The project is a planning project. Performance measurements are not applicable to planning projects.
- Special Amendment Performance Assessment Required: No. Same reason as for performance measurements.
- Were overall RTP Consistency checks achieved and satisfactory? Yes
- UPWP approved project: Yes. The project allocation will support the development of the SFY 2024 UPWP
- Can the required changes be made to the MTIP without issues? Yes

### **Description of Changes**

The formal amendment advances the project from the non-financially constrained year of FFY 2025 to FFY 2023 to be included in the SFY 2024 UPWP Master Agreement list of approved projects. Programming for UPWP Master Agreement will occur through Key 22311.

**2021-2026 Metropolitan Transportation Improvement Program (MTIP)**  
Current Approved Project List with Approved Amendments

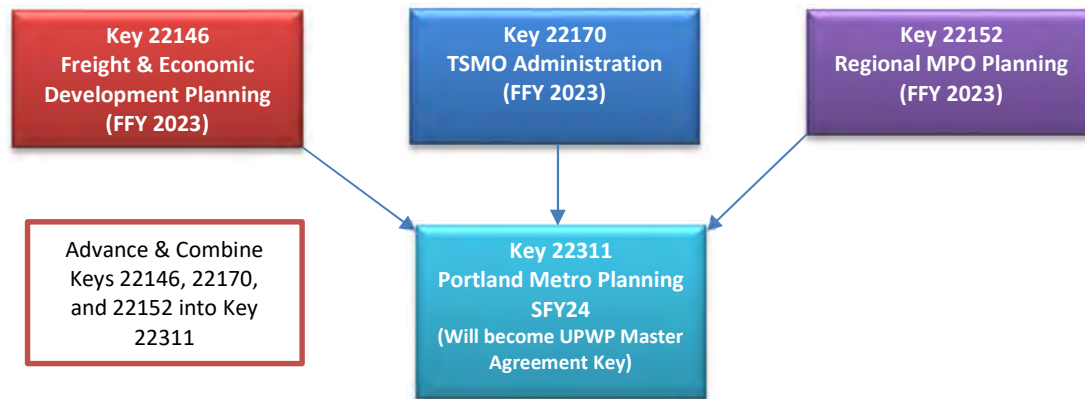


LEAD AGENCY		Metro				
PROJECT NAME		Portland Metro Planning SFY24				
Project IDs		Project Description				Project Type
ODOT KEY	22311	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)				Other
MTIP ID	71225					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2023	Metro Planning (Z450)	\$2,107,855	\$241,253	\$0	\$2,349,108
Planning	2023	Metro PL (5303)	\$620,694	\$71,041	\$0	\$691,735
FY 21-26 Totals			\$2,728,549	\$312,294	\$0	\$3,040,843
Estimated Project Cost (VOE\$)			\$2,728,549	\$312,294	\$0	\$3,040,843

The January FFY 2023 Formal MTIP Amendment is the first of multiple MTIP amendments that may be required to properly build Key 22311 with its final approved projects and required funding levels. This first amendment begins by positioning and known UPWP project funding in the correct obligation year, combining the UPWP Master Agreement projects together into the single obligation key, and updates approved funding if known.



The action to Key 22170 takes the allocated UPWP administrative funds for the Transportation Systems Management and Operations (TSMO) program, advances them to FFY 2023, and combines them into Key 22311.



#### Support Item(s): Existing MTIP Programming for Key 22170

- Scope and funding are being advanced and combined into Key 22311

LEAD AGENCY		Metro				
PROJECT NAME		TSMO Administration (FFY 2023)				
Project IDs		Project Description				Project Type
ODOT KEY	22170	Administration of the regional TSMO program; providing program strategy and direction administration of grant allocations and staffing of the Transport committee. (FY 2023 allocation year)				Transportation System Management Operations
MTIP ID	71125					
RTP ID	11104					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Other	2025	STBG-URBAN	\$194,369	\$22,246	\$0	\$216,615
FY 21-26 Totals			\$194,369	\$22,246	\$0	\$216,615
Estimated Project Cost (VOES)			\$194,369	\$22,246	\$0	\$216,615

#### Project #3 Key 22152 Regional MPO Planning (FFY 2023) (Advance & Combine) Lead Agency: Metro

##### Project Description:

Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)

##### Identifications/Key Consistency Check Areas:

- Lead Agency: Metro
- ODOT Key Number: **22152**
- MTIP ID#: 71132
- RTP ID: 11103
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval required: No.
- Performance Measurements applicable: No. The project is a planning project. Performance measurements are not applicable to planning projects.
- Special Amendment Performance Assessment Required: No. Same reason as for performance measurements.
- Were overall RTP Consistency checks achieved and satisfactory? Yes

- UPWP approved project: Yes. The project allocation will support the development of the SFY 2024 UPWP
- Can the required changes be made to the MTIP without issues? Yes

### **Description of Changes**

The formal amendment advances the project from the non-financially constrained year of FFY 2025 to FFY 2023 to be included in the SFY 2024 UPWP Master Agreement list of approved projects. Programming for UPWP Master Agreement will occur through Key 22311.

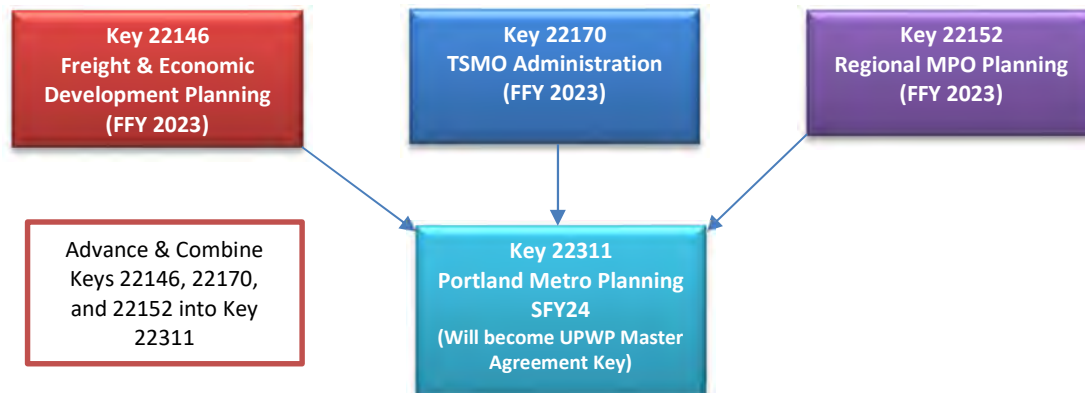
**2021-2026 Metropolitan Transportation Improvement Program (MTIP)**  
Current Approved Project List with Approved Amendments



LEAD AGENCY		Metro				
PROJECT NAME		Portland Metro Planning SFY24				
Project IDs		Project Description				Project Type
ODOT KEY	22311	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)				Other
MTIP ID	71225					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2023	Metro Planning (Z450)	\$2,107,855	\$241,253	\$0	\$2,349,108
Planning	2023	Metro PL (5303)	\$620,694	\$71,041	\$0	\$691,735
FY 21-26 Totals			\$2,728,549	\$312,294	\$0	\$3,040,843
Estimated Project Cost (YOE\$)			\$2,728,549	\$312,294	\$0	\$3,040,843

The January FFY 2023 Formal MTIP Amendment is the first of multiple MTIP amendments that may be required to properly build Key 22311 with its final approved projects and required funding levels. This first amendment begins by positioning and known UPWP project funding in the correct obligation year, combining the UPWP Master Agreement projects together into the single obligation key, and updates approved funding if known.

The action to Key 22152 takes the allocated UPWP Regional Planning STBG funds, advances them to FFY 2023, and combines them into Key 22311.



### **Support Item(s): Existing MTIP Programming for Key 22152**

- Scope and funding are being advanced and combined into Key 22311

LEAD AGENCY		Metro				
PROJECT NAME		Regional MPO Planning (FFY 2023)				
Project IDs		Project Description				Project Type
ODOT KEY	22152	Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)				Regional Program
MTIP ID	71132					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2025	STBG-URBAN	\$1,442,694	\$165,123	\$0	\$1,607,817
FY 21-26 Totals			\$1,442,694	\$165,123	\$0	\$1,607,817

<b>Project #4 Key 22311</b>	<b>Portland Metro Planning SFY24 (Add &amp; Combine) Lead Agency: Metro</b>
<b><u>Project Description:</u></b> Funding to support transportation planning activities and maintain compliance with federal planning regulations. (FY2023 UPWP allocation year)	
<b>Identifications/Key Consistency Check Areas:</b> <ul style="list-style-type: none"> <li>• Lead Agency: Metro</li> <li>• ODOT Key Number: <b>22311</b></li> <li>• MTIP ID#: 71225</li> <li>• RTP ID: 11103</li> <li>• Proof-of Funding/Fiscal Constraint Demonstrated: Yes</li> <li>• Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements</li> <li>• OTC approval required: No.</li> <li>• Performance Measurements applicable: No. The project is a planning project. Performance measurements are not applicable to planning projects.</li> <li>• Special Amendment Performance Assessment Required: No. Same reason as for performance measurements.</li> <li>• Were overall RTP Consistency checks achieved and satisfactory? Yes</li> <li>• UPWP approved project: Yes. The project allocation will support the development of the SFY 2024 UPWP</li> <li>• Can the required changes be made to the MTIP without issues? Yes</li> </ul>	
<b><u>Description of Changes</u></b> The formal amendment advances the project from the non-financially constrained year of FFY 2025 to FFY 2023 to be included in the SFY 2024 UPWP Master Agreement list of approved projects. Programming for UPWP Master Agreement will occur through Key 22311.	

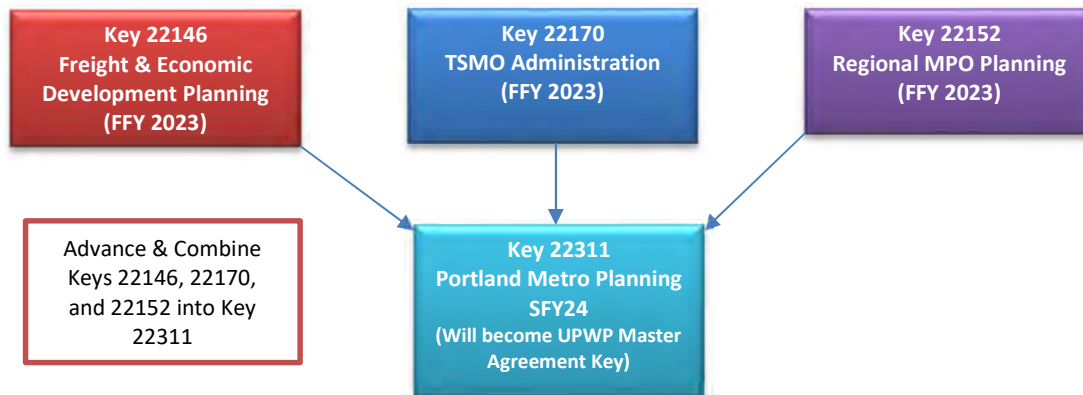
**2021-2026 Metropolitan Transportation Improvement Program (MTIP)**  
Current Approved Project List with Approved Amendments



LEAD AGENCY		Metro				
PROJECT NAME		Portland Metro Planning SFY24				
Project IDs		Project Description				Project Type
ODOT KEY	22311	Portland Metro MPO planning funds for SFY 24 (FFY 2023). Projects will be selected and support the annual Metro Unified Planning Work Program (UPWP)				Other
MTIP ID	71225					
RTP ID	11103					
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount
Planning	2023	Metro Planning (Z450)	\$2,107,855	\$241,253	\$0	\$2,349,108
Planning	2023	Metro PL (5303)	\$620,694	\$71,041	\$0	\$691,735
FY 21-26 Totals			\$2,728,549	\$312,294	\$0	\$3,040,843
Estimated Project Cost (VOE\$)			\$2,728,549	\$312,294	\$0	\$3,040,843

The January FFY 2023 Formal MTIP Amendment is the first of multiple MTIP amendments that may be required to properly build Key 22311 with its final approved projects and required funding levels. This first amendment begins by positioning and known UPWP project funding in the correct obligation year, combining the UPWP Master Agreement projects together into the single obligation key, and updates approved funding if known.

The action to Key 22152 takes the allocated UPWP Regional Planning STBG funds, advances them to FFY 2023, and combines them into Key 22311.



**Support Item(s): Revised MTIP Programming for Key 22311**

- PL and 5303 funds are updated per latest authorizations. STBG-U from Keys 22146, 22170, and 22152 are advanced and combined into Key 22311.

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Construction	Other (ITS)	Total
<b>Federal Funds</b>								
PL	2450	2023	\$ <del>2,107,855</del>					\$ -
PL	2450	2023	\$ 2,636,693					\$ 2,636,693
5303	277D	2023	\$ <del>620,694</del>					\$ -
5303	277D	2023	\$ 1,337,453					\$ 1,337,453
State STBG	Y240	2023	\$ 201,892					\$ -
STBG-U	Y230	2023	\$ 1,713,554					\$ 1,713,554
PL & 5303 increase per revised updates. Match for PL is from ODOT State STBG. STBG-U is added from multiple sources							<b>Federal Totals:</b>	\$ 5,687,700
<b>State Funds</b>								
State (PL)	Match	2023	\$ <del>241,253</del>					\$ -
State (PL)	Match	2023	\$ 301,782					\$ 301,782
State (St STBG)	Match	2023	\$ 23,108					\$ 23,108
							<b>State Total:</b>	\$ 324,890
<b>Local Funds</b>								
Local (5303)	Match	2023	\$ <del>71,041</del>					\$ -
Local (5303)	Match	2023	\$ 153,077					\$ 153,077
Local (STBG-U)	Match	2023	\$ 196,124					\$ 196,124
							<b>Local Total:</b>	\$ 349,201
Phase Totals Before Amend:			\$ <del>3,040,843</del>	\$ -	\$ -	\$ -	\$ -	\$ <del>3,040,843</del>
Phase Totals After Amend:			\$ 6,563,683	\$ -	\$ -	\$ -	\$ -	\$ 6,563,683
Total Project Cost Estimate (all phases):								\$10+ million
Year of Expenditure Cost Amount:								\$10+ million

**Project #5**  
**Key**  
**22469**

**US30BY & OR99E Curb Ramps (Portland)**  
**US30BY Curb Ramps (Portland)**  
**(Scope & Cost Change)**  
**Lead Agency: ODOT**

**Project Description:**

**Construct to American Disabilities Act (ADA) standards, curbs and ramps at multiple locations along ~~OR99E~~ and US30BY to reduce mobility barriers and make state highways more accessible to disabled persons**

**Identifications/Key Consistency Check Areas:**

- Lead Agency: ODOT
- ODOT Key Number: **22469**
- MTIP ID#: 71259
- RTP ID: 12095
- Proof-of Funding/Fiscal Constraint Demonstrated: Yes
- Conformity Status: Exempt from air quality analysis and transportation demand modeling requirements
- OTC approval required: No.
- Performance Measurements applicable: Yes, Safety
- Special Amendment Performance Assessment Required: No.
- Were overall RTP Consistency checks achieved and satisfactory? Yes
- UPWP approved project: No
- Can the required changes be made to the MTIP without issues? Yes

**Description of Changes**

PBOT will use Lombard as a pilot project for streamlining and expediting ADA permitting. As a result, Key 22469's scope, name, and funding are being adjusted. An additional \$1.6 million is being pulled from the ADA program to address the revised cost to US30BY locations. The OR99E segment is being removed from through the amendment. The cost increase which is well above the 30% threshold along with the scope update triggers the need for a formal amendment.





## APPROVAL STEPS AND TIMING

Metro's approval process for formal amendment includes multiple steps. The required approvals for the January FFY 2023 Formal MTIP amendment (JA23-05-JAN) will include the following:

<u>Action</u>	<u>Target Date</u>
• TPAC Agenda mail-out.....	December 30, 2022
• Initiate the required 30-day public notification process.....	January 4, 2023
• TPAC notification and approval recommendation.....	January 6, 2023
• <b>JPACT approval and recommendation to Council.....</b>	<b>January 19, 2023</b>
• Completion of public notification process.....	February 2, 2023
• Metro Council approval.....	February 9, 2023

### Notes:

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

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

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

<u>Action</u>	<u>Target Date</u>
• Final amendment package submission to ODOT & USDOT .....	February 15 ,2023
• USDOT clarification and final amendment approval.....	Early to mid-March 2023

## ANALYSIS/INFORMATION

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

## RECOMMENDED ACTION:

**TPAC was provided their official notification January 6, 2023 and approved staff's recommendation. TPAC now request JPACT approve Resolution 23-5308 consisting of the**

**five amended projects enabling further required UPWP updates to occur and allow ODOT to move forward with their US30BY ADA project.**

No Attachments



## **4.2 Consideration of the December 15, 2022, JPACT Minutes**

*Consent Agenda*

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023



600 NE Grand Ave.  
Portland, OR 97232-2736  
[oregonmetro.gov](http://oregonmetro.gov)

JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION (JPACT)

Meeting Minutes

December 15,

2022

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Shirley Craddick (Chair)  
Juan Carlos González  
Christine Lewis  
Temple Lentz Travis  
Stovall  
Anne McEnerny-Ogle  
Paul Savas  
Kathy Hyzy Nafisa  
Fai  
Jessica Vega Pederson  
Carley Francis  
Rian Windsheimer  
Sam Desue  
Jo Ann Hardesty  
Ali Mirzakhali  
Steve Callaway

AFFILIATION

Metro Council  
Metro Council  
Metro Council  
Clark County  
Cities of Multnomah County  
City of Vancouver Clackamas  
County  
Cities of Clackamas County  
Washington County Multnomah  
County  
Washington State Department of Transportation  
Oregon Department of Transportation  
TriMet  
City of Portland  
Oregon Department of Environmental Quality Cities of  
Washington County

MEMBERS EXCUSED

Curtis Robinhold

AFFILIATION

Port of Portland

ALTERNATES PRESENT

Chris Ford JC  
Vannatta  
Chris Warner Emerald  
Bogue

AFFILIATION

Oregon Department of Transportation TriMet  
City of Portland Port  
of Portland

OTHERS PRESENT: Annadiana, Allison Boyd, Brenda Bartlett, Chris Deffabach, Chris Ford, Cody Fields, Dave Roth, Don Odermott, Dwight Brasher, Dave Roth, Eric Hesse, Glen Bolen, Jamie Lorenzini, Jean Senechal Biggs, John Mermin, Julies Gustafson, Karen Buehrig, Kate Hawkins, Katie Selin, Katherine Kelly, Lisa Hunrichs, Lucia Ramirez, Laurie Lebowsky, Mark Dorn, Mark Ottenad, Matchu Williams, Mathew Hampton, Mel Krnjaic Hogg, Mike McCarthy, Neelam Dorman, Nick Fortey, Scott Langer, Sarah Paulus, Shawn Donaghy, Shoshana Cohen, Tara

STAFF: Ally Holmqvist, Andy Shaw, Anne Bussini, Brianna Dolbin, Caleb Winter, Craig Beebe, Grace Cho, Jaye Cromwell, John Mermin, Kim Ellis, Lake McTighe, Malu Wilkinson, Marielle Bossio, Michelle Bellia, Matt Bihn, Ramona Perrault, Ted Leybold, Tom Kloster, Connor Ayers, Carrie MacLaren, Margi Bradway.

**1. CALL TO ORDER AND DECLARATION OF A QUORUM**

JPACT Chair Shirley Craddick (she/her) called the virtual Zoom meeting to order at 7:30 am. Chair

Craddick called the role and declared a quorum.

**2. PUBLIC COMMUNICATION ON AGENDA ITEMS**

There were none.

**3. UPDATES FROM THE CHAIR**

Metro Staff Margi Bradway (she/her) shared the names and ages of traffic victims during the month of December:

Feliciano Cruz Marales, 30, Dalton Nathan Scott Stevens, 31, Michael Charles Davis, 82, Donna Lee De La Rosa, 80, Ku Nay Htoo, 55, Morgan Ashley Martin, 34, Leo Edward Vanderzanden, 70, Eric Daniel Echtenaw, 63, and 5 unidentified victims.

**4. CONSENT AGENDA**

**MOTION:** Commissioner Fai moved to approve the consent agenda seconded by Mayor McEnerny-Ogle.

**ACTION:** With all in favor, consent agenda passed.

Rian Windsheimer requested the 11/17/22 minutes be removed from the consent agenda to add clarifying language.

Carrie recommended that members of JPACT read the proposed revision from Rian and if all approve, accept the edits to avoid editing the minutes live.

Commissioner Savas expressed approval with the revision Rian requested.

Councilor Lewis explained she had staff listen back to the 11/17/22 meeting and that Rian's request does match what he had said.

Councilor Lewis moved to approve the amendment to the 11/17/22 JPACT minutes seconded by Mayor McEnery-Ogle.

**ACTION:** With all in favor, the amendment passed.

## **5. Action Items**

### **5.1 Recognizing Congressman Peter DeFazio**

Chair Craddick thanked Congressman Peter DeFazio for his accomplishments and interest in transportation.

Chair Craddick asked JPACT members to approve the letter provided in the meeting packet.

Commissioner Hardesty moved to approve the motion seconded by Commissioner Saves.

**ACTION:** With all in favor, the amendment passed.

### **5.2 Resolution No. 22-5302 For the Purpose of Completing a HIP Fund Exchange with ODOT for Less Restrictive Federal Funds Allowing them to be Applied as Supplemental Funding Support to Seven Metro Regional Flexible Fund Allocation Funded Projects to Help Offset Inflation Cost Increase Impacts.**

Chair Craddick introduced Ted Leybold, Metro and Ken Lobeck, Metro

*Key elements of the presentation included*

Ken discussed the Highway Infrastructure Program (HIP) funds exchange and allocation, how inflation has impacted project costs, and how applications have attempted to address cost gaps due to inflation. Ted explained how staff decided the one-time allocation of HIP funds should be used to address the cost gaps in current projects to meet deadlines. He then conveyed the process of collaboration with ODOT to exchange the funds, including identifying projects, implementation objectives, and funding recommendations. He explained the 7 projects identified through this process, with a \$3.8 million allocation.

Emerald Bogue expressed the Port of Portland's support and appreciation for the 40 Mile Loop: Blue Lake Park -Sundial & Harlow Rd project.

Ali Mirzakhali asked why the funds still have a time obligation, being that the HIP funds were swapped with other federal funds.

Ted explained that ODOT still must meet time obligations with their funds and Metro did not want to put extra pressure on them to pick up their responsibility.

**MOTION:** Commissioner Savas moved to approve the motion, seconded by Commissioner Hardesty (she/her).

**ACTION:** With all in favor, the motion passed.

### **5.3 2023 Regional Transportation Plan Call for Projects Policy Framework - Recommendation to Metro Council**

Chair Craddick introduced Kim Ellis (she/her), Metro, Ted Leybold (he/him), Metro

#### *Key elements of the presentation included*

Kim explained the action staff is seeking as part of their presentation which is accepting the RTP Call for Projects Policy Framework. Kim discussed the project timeline, and project next steps. She highlighted who is involved in the Call for Projects process, what is updated and added to the projects, and why the project is important. She then explained projects identified in the 2018 RTP will act as a starting point for the 2023 RTP, the policy framework for the 2023 RTP, draft vision and goals for the 2023 RTP, key project dates, and the 12/2/22 TPAC recommendation to JPACT that asks members to accept the RTP Call for Project Policy Framework.

Commissioner Savas stated he submitted a friendly amendment to revise the vision statement that speaks to achieving regional balance for travel options.

Commissioner Hardesty thanked Metro for their work on the RTP update and appreciated the fact that the RTP is working through an outcome based approach.

Ali Mirzakhali asked what the process of choosing projects is.

Kim explained staff will report back to JPACT in April and the system analysis will be available in late April and early May, with additional discussions in June about the proposed projects.

Carrie MacLaren, Metro Attorney, clarified the language that Commissioner Savas moved to amend.

Ali Mirzakhali asked what commissioner Savas means by “regionally balanced”.

Commissioner Savas explained that “regionally balanced” would mean investments would be focused in areas where there is very little transportation options.

Commissioner Hardesty explained that not all places in the region are at the same place at the same time. Expressing that all projects that come through require local jurisdictional dollars and stating, waiting would not help the region become safer and would act as a barrier.

Mayor McEnery-Ogle explained that the city of Vancouver supports the amendment because it frames support of funding across the region, which ultimately results in more opportunity and access for an increased amount of people.

**MOTION:** Commissioner Savas (he/him) moved to amend the motion, seconded by Mayor McEnery-Ogle (she/her).

**ACTION:** Commissioner Jessica Vega Pederson- no, Commissioner Nafisa Fai- no, Commissioner Paul Savas- yes, Commissioner Jo Ann Hardesty- no, Mayor Travis Stovall- yes, Mayor Steve Callaway- yes, Council President Kathy Hyzy- yes, Rian Windsheimer- yes, Sam Desue- yes, Emerald Bogue- abstain, Ali Mirzakhali- no, Councilor Juan Carlos González- no, Councilor Christine Lewis- yes, Carley Francis- abstain, Mayor Anne McEnery-Ogle- yes. With 8 yes, 6 No, 2 abstentions the amendment fails.

Commissioner Savas expressed concern for the assumption that Green House Gas (GHG) emissions will be reduced by congestion pricing. He agreed that measuring GHG in terms of vehicle miles traveled and vehicle hours travel is the correct measurement but is concerned with the lack of alternative transportation options, increasing GHG by implementing congestion pricing.

Margi explained the high-level policy statement is based on two years of work and Metro’s regional congestion pricing study. She explained the extensive analysis, model runs, and the expert panel review processes. She stressed that through all this work they found pricing mechanisms reduced GHG because it desensitized individuals from driving.

Ali Mirzakhali asked how much the plan is cognizant of other complementary measures such as the clean fuel program.

Kim explained changes in fleet will be accounted for in their analysis.

**MOTION:** Commissioner Hardesty (she/her) moved to approve the motion, seconded by Commissioner Vega Peterson (she/her).

**ACTION:** Paul Savas – No. With all else in favor, the amendment passed.

## **6 Information/Discussion Items**

### **6.3 Ultra-High Speed Ground Transportation update**

Chair Craddick introduced Ally Holmqvist, Metro, Jennifer Sellers, ODOT, Adam Leuin, WSDOT

*Key elements of the presentation included:*

Ally Described the Memorandum of Understanding (MOU) signed by Washington, Oregon, and British Columbia in November of 2021, and the relationship between the Regional Transportation Plan (RTP) and the Oregon State Rail Plan.

Jennifer explained ODOT's update to the Oregon State Rail Plan.

Adam described the current state of the Ultra-High Speed Ground Transportation program (UHSGT), which is in the initiation phase, key attributes required for the program to be successful, and relationship requirements for success. He then provided a summary of the UHSGT, benefits it would provide, recent developments in the process, 2022 legislative direction and priorities.

Ally described the work of the policy and technical committee including agencies from across the corridor.

Adam explained the corridor identification, development process, and corridor proposals.

Council President Hyzy described the consequences for Milwaukie being bisected by train tracks. She asked how staff plans to engage local communities and freight through the development of the project.

Ally explained staff has submitted a list of communities and organizations that need to be included in engagement.

## **7 UPDATES FROM JPACT MEMBERS**

Chair Craddick recognized and thanked the following out going JPACT members: Commissioner Hardesty, Commissioner Vega Peterson, and Council President Hyzy.

Commissioner Savas acknowledged Chair Craddick and her service to JPACT.

Commissioner Hardesty thanked Chair Craddick and all the JPACT members.

Councilor Lewis thanked JPACT members for their service.

Commissioner Vega-Pederson thanked the outgoing members of JPACT.

Council President Hyzy thanked Chair Craddick.

Mayor Callaway acknowledged Chair Craddick and JPACT members.

Councilor Gonzalez acknowledged the outgoing JPACT members.

Ali Mirzakhali thanked Chair Craddick and the other JPACT members.

Chair Craddick shared that Councilor Gonzalez will be the next JPACT chair.

## **8 ADJORN**

Chair Craddick adjourned the meeting at 9:30 am. Respectfully

Submitted,

Brianna Dolbin Recording  
Secretary



**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF October 20, 2022**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT NO.</b>
3.0	Presentation	12/15/2022	Fatal Crash Slide	12152022-01
5.1	Presentation	12/15/2022	HIP Fund Exchange and Allocation	12152022-02
5.2	Presentation	12/15/2022	2023 Regional Transportation Plan	12152022-03
6.1	Presentation	12/15/2022	Ultra-High Speed Ground Transportation update	12152022-04

## **5.1 JPACT Overview (7:55 AM)**

*Information/Discussion Item*

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023

# Memo

Date: January 13, 2023

To: Joint Policy Advisory Committee on Transportation (JPACT)

From: Margi Bradway, Deputy Director, Planning, Development and Research

RE: 2023 workplan for JPACT

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## Background

Metro is the federally mandated Metropolitan Planning Organization (MPO) authorized by Congress and designated by the governor to coordinate and plan investments in the transportation system for the greater Portland tri-county urban area. As the MPO, Metro works collaboratively with cities, counties and transportation agencies to develop a long-range transportation plan, decide how to invest federal highway and transit funds that Congress sends directly to MPOs, and program federal funds spent in the region.

MPO decisions for planning, investment and programming are shared between the Metro Council and JPACT. JPACT recommends priorities for investing and programming federal funds and development of transportation plans for the region, and the Metro Council either approves them without changes or refers them back to JPACT. Federal regulations further define the role of the “policy advisory committee” in terms of providing oversight and guidance to the MPO on these activities. The Transportation Policy Alternatives Committee (TPAC) serves as a technical and advisory committee to JPACT.

The [Regional Transportation Plan](#) (RTP) is a blueprint to guide investments for all forms of travel. The RTP identifies current and future transportation needs, investments needed to meet those needs, and which funds the region expects to have available over the plan’s time horizon to make those investments a reality. The RTP includes a wide range of policies on topics from safety, equity, climate, and congestion management, to pricing, freight, transit, and active transportation. In 2022, JPACT oversaw many of the activities in the implementation chapter ([Chapter 8](#)) of the 2018 RTP, such as Regional Congestion Pricing Study and Mobility Policy Update.

Looking forward, the update of the RTP is the major body of work before JPACT in 2023. In 2022, JPACT developed a policy framework and identified five goal areas: equity, climate, safety, mobility, and economy. In 2023, the policies, plans and projects will be brought together in the final RTP.

The work items for JPACT’s consideration fall in three major categories:

- Regional transportation planning and policy
- Regional transportation programs and resources
- Corridor plans and major transportation projects

In addition, JPACT also plays an important role in developing and informing federal and state legislative priorities. JPACT has a long history of working together to take regional positions and regional communications on key federal and state legislative efforts.

### Work items before JPACT in 2023

Below is a list of both essential and potential work items that will come before JPACT this year for each of the three categories. This list is subject to change. The work items that are starred (\*) are deemed essential in that Metro has already committed to JPACT, TPAC, and/or our partners via an IGA, MOU or project charter on the timeline with JPACT's input. In other words, it is JPACT's role to provide input, guidance and oversight of those policies, plans, programs and projects. This workplan aims to balance the agenda between those three areas.

Work items before JPACT in 2023			
Work items		Description	Status
Planning and Policy	<a href="#">Regional Transportation Plan*</a>	<p>The Regional Transportation Plan (RTP) is the foundation and blueprint for transportation plans, programs and projects in the region. The 2023 RTP Update is underway. The RTP process includes several key steps:</p> <ul style="list-style-type: none"> <li>• Data and Policy Analysis: vision, goals and policies</li> <li>• Revenue and Needs Analysis: revenue forecast and complete needs analysis</li> <li>• Call For Projects process: project list priorities, evaluate performance and seek community feedback</li> <li>• Draft Plan and Investment Strategy: prepare public review draft plan and investment strategy.</li> <li>• Public review</li> </ul> <p>The 2023 RRTP includes several focus areas:</p> <ul style="list-style-type: none"> <li>• <i>Emerging Trends</i> – report complete</li> <li>• <i>Congestion Pricing Policy</i> – draft policy complete</li> <li>• <i>Urban Arterials Strategy</i> – draft strategy complete</li> <li>• <i>Mobility Policy Update</i> – draft policy complete</li> <li>• <i>Equitable Finance</i> – research paper complete</li> <li>• <i>High-Capacity Transit Study</i> - draft underway</li> </ul> <p>These focus areas will inform the updated policies and the investment strategy, which will be a major focus in 2023.</p> <p>RTP Project Manager: Kim Ellis</p> <p>RTP lead staff: Lake McTigue, Eliot Rose, Ally Holmquist, John Mermin, Thaya Patton</p>	Update is underway, started in 2022 and continuing through 2023; will be adopted in November 2023.

Work items		Description	Status
	<a href="#">Regional Freight Delay and Commodity Movement Study*</a>	<p>The Regional Freight Delay and Commodity Study will be coming before JPACT in 2023. A committee of freight and business experts are studying data and models to better understand the movement of goods in the Portland Region and how to facilitate the movement of goods in the region.</p> <p>Project Manager: Tim Collins</p>	Drafty study developed in 2022; compiling findings and report in 2023.
	<a href="#">Climate Smart Strategy*</a>	<p>Transportation and land use are key to meeting the region's climate goals. Metro Council and JPACT developed and adopted a regional strategy with broad regional support in 2014. The strategy was approved by LCDC in 2015 and affirmed in 2018 when the Climate Smart Strategy and greenhouse gas emissions targets were incorporated into the Regional Transportation Plan (RTP). Metro continues to implement the Climate Smart Strategy. In 2020, DLCD initiated <a href="#">Climate-Friendly and Equitable Communities rulemaking</a> to update the statewide Transportation Planning Rule in response to <a href="#">Executive Order 20-04</a>.</p> <p>Metro leads: Margi Bradway, Kim Ellis</p>	Ongoing implementation; DLCD's TPR rulemaking completed in 2021.
	<a href="#">Transit Planning</a>	<p>In 2018, JPACT adopted a Regional Transit Strategy which is a shared vision to make transit more frequent, convenient, accessible and affordable for everyone in the region. The strategy called for more investment in a wide range of transit improvement and service.</p> <p>Metro lead: Ally Holmquist</p>	On-going implementation.

*\*Plans, programs or projects that are tied to federal MPO responsibilities of JPACT (and may be tied to the federal calendar) and/or JPACT and Metro have made contractual agreements related to the timeline and role of JPACT pursuant IGAs, MOUs and/or consultant contract.*

Work items		Description	Status
Programs and Resources	<a href="#">Metro Transportation Implementation Program (MTIP)*</a>	<p>The MTIP manages and programs all the federal funding for transportation in the Portland region. JPACT's responsibility to manage is ongoing, with major updates every three years. The MTIP is also the basis for which JPACT and Metro Council collaborate and weigh-in on the Statewide Transportation Improvement Program (STIP) developed by the Oregon Transportation Commission and ODOT.</p> <p>Metro Program leads: Ted Leybold, Grace Cho, Ken Lobeck, Jodie Kotrlík</p>	Ongoing adoption/implementation
	<a href="#">Regional Flexible Funds Allocation (RFFA)*</a>	<p>Every 3 years, JPACT allocates Regional Flexible Funds (RFFA) to implement the Regional Transportation Plan. In 2022, adopted the 2025-27 RFFA list of projects and programs.</p> <p>Metro Project Manager: Daniel Kaempff</p>	Implementation
	<a href="#">Transportation Regional System Operations (TSMO)</a>	<p>The Transportation System Regional and Operations program updated the TSMO Strategic Plan in 2022. In 2023 the program will focus on implementation of the plan.</p> <p>Metro Program Manager: Caleb Winter</p>	Implementation
	<a href="#">Clean Air*</a>	<p>Metro, as an MPO is legally required to comply with the Clean Air Act. Metro and DEQ have an IGA to work towards both agencies' shared goals for clean air as it relates to reducing transportation-related pollution. Metro, in collaboration with DEQ, developed, updated, and implemented the Portland area State Implementation Plan (SIP) to achieve status as attainment area in 2017.</p> <p>Metro Program Manager: Grace Cho</p>	Ongoing implementation
	<a href="#">Regional Travel Options (RTO)</a>	<p>The RTO program funds and supports transportation demand management strategies to increase use of travel options and reduce pollution. RTO will be ____</p> <p>RTO team: Daniel Kaempff, Marne Duke, Grace Stainbeck, Noel Mickelberry</p>	Ongoing

Work items		Description	Status
	<a href="#">Safe Routes to School</a>	<p>Metro created the Regional Safe Routes to School program as part of our Regional Travel Options program, which strives to create healthy and vibrant neighborhoods. During COVID, the program has focused its efforts on helping schools serve students who need food security.</p> <p>Metro Program Manager: Noel Mickelberry</p>	Ongoing
	<a href="#">Regional Transportation Safety Program</a>	<p>Metro's Transportation Safety Program implements, coordinates and monitors implementation of the 2018 Regional Transportation Safety Strategy through policies, programs and projects. In 2021, Metro will provide an annual safety report as well as updates on our regional progress towards Vision Zero.</p> <p>Metro Program Manager: Lake McTighe</p>	Ongoing; regular updates provided to JPACT
	Enhanced Transit Concepts/Corridors	<p>Metro launched a successful program with TriMet in 2018 to work with our local partners to plan, design and implement enhanced transit concepts. This program continues to provide technical support and guidance to implement ETC throughout the region.</p> <p>Metro Program Manager: Matt Bihn, Alex Oreschak</p>	Implementation

*\*Plans, programs or projects that are tied to federal MPO responsibilities of JPACT (and may be tied to the federal calendar) and/or JPACT and Metro have made contractual agreements related to the timeline and role of JPACT pursuant IGAs, MOUs and/or consultant contract.*

Work items		Description	Status
<b>Major Projects</b>	<a href="#">Tualatin Valley Highway Corridor Study/Project*</a>	<p>TV Highway is a corridor of regional significance identified in the 2018 RTP. Metro secured an \$850,000 FTA grant to convene jurisdictional partners and community-based organizations to develop a preferred alternative for a transit project, define an equitable development strategy, and assess potential for bus electrification. Metro partners with TriMet, Washington County and the Cities of Washington County on this study. JPACT will likely be adopting a Locally Preferred Alternative (LPA) in 2023.</p> <p>Metro Project Manager: Jess Zeb</p>	Underway
	<a href="#">82<sup>nd</sup> Avenue Transit Project</a>	<p>Metro is leading the planning is to improve safe access and transit travel time while connecting people to essential jobs, education facilities, shopping and community services from Clackamas Town Center to the Roseway/Sumner area in Northeast Portland. Metro is partnering with City of Portland and Clackamas County. JPACT will likely be adopting a Locally Preferred Alternative (LPA) in 2023.</p> <p>Metro Project Manager: Elizabeth Mros Ohare</p>	Planning underway
	<a href="#">Westside Multi-Modal Study</a>	<p>The Westside Multi-modal Study is a joint partnership between ODOT and Metro. The 2018 RTP called out the need for further study and corridor development on US 26 from Portland to Hillsboro (Sunset Highway).</p> <p>Metro Project Manager: Kate Hawkins</p> <p>ODOT Project Manager: Stephanie Millar</p>	Almost complete
	<a href="#">I-5 Bridge Replacement Project*</a>	<p>The I- 5 Bridge Replacement project that is co-led and co-funded by ODOT and WSDOT. In addition to partnering with the DOTs on the Supplemental EIS, JPACT has responsibility to manage the federal funds allocated to the project. In 2023, the project will be completing the Supplemental Environmental Impact Statement (SEIS).</p> <p>ODOT/WSDOT Project Director: Greg Johnson</p> <p>Metro staff lead: Alex Oreschak</p>	Receive regular updates from IBR Project Team.



Work items		Description	Status
	<a href="#">Rose Quarter Improvement Project</a>	<p>ODOT is leading the Rose Quarter Improvement Project to improve mobility in the context of the City of Portland's N/NE Quadrant Plan in the Albina Vision area. In 2023 the project continuing to study and design improvements to I-5 between I-84 and I-405 in Portland.</p> <p>ODOT lead: Megan Channel</p> <p>Metro lead: Eliot Rose</p>	Ongoing updates
	<a href="#">I-205 Abernethy Bridge</a>	<p>I-205 Abernethy Bridge Project is an ODOT-led project that continues to move forward in design, aiming for 60% design by 2021. The issue that may be before JPACT is the financial plan and/or tolling.</p> <p>ODOT lead: Mandy Putney</p>	Ongoing updates
	<a href="#">Earthquake Ready Burnside Bridge</a>	<p>Metro is a Participating Agency in the Burnside Bridge Project and contributes to the NEPA and design processes. Multnomah County staff will share potential bridge design options and timeline for project and will be asking JPACT to consider adopting the locally preferred alternative into the RTP.</p> <p>Multnomah County lead: Megan Neill</p> <p>Metro leads: Alex Oreschak</p>	Ongoing updates

*\*Plans, programs or projects that are tied to federal MPO responsibilities of JPACT (and may be tied to the federal calendar) and/or JPACT and Metro have made contractual agreements related to the timeline and role of JPACT pursuant IGAs, MOUs and/or consultant contract*

**5.2 2023 RTP: Finding from the Equitable Transportation Funding Research Project  
(8:25 AM)**

*Information/Discussion Items*

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023

# JPACT Worksheet

**Agenda Item Title:** 2023 RTP: Findings from the Equitable Transportation Research Report

**Presenters:** Lake McTighe, Principal Planner, Metro

Theresa Carr, AICP, Principal, Nelson Nygaard (tcarr@nelsonnygaard.com)

Aria Wong, Associate, Nelson Nygaard

**Contact for this worksheet/presentation:** Lake McTighe, lake.mctighe@oregonmetro.gov

## Purpose/Objective

Present findings and recommendations from the Equitable Transportation Funding Research Report to members of JPACT and interested parties and receive input from members of JPACT on the recommendations in the report. The report was developed by Metro and Nelson Nygaard to support the narrative of the Financial Chapter (Chapter 5) of the 2023 Regional Transportation Plan (RTP) and equity goals in the RTP, and to inform future regional transportation funding discussions and decisions. The report is informational and does not set policy in the RTP.

Objectives of the research are to increase understanding of how the greater Portland regional transportation system is funded today, illuminate how transportation revenue collection and disbursement of those funds may contribute to transportation inequities in the region, and provide recommended actions to address and reduce inequities in ongoing and future transportation funding decisions.

The report includes an inventory and equity assessment of existing, emerging and potential revenue sources for transportation. The assessment examines the equity impacts of current revenue collection and disbursement of funding on people with lower income and communities of color, in particular on the most vulnerable members of the community.

## Outcome

Members of JPACT are aware of the research, findings and recommendations to improve equity in transportation funding. Members of JPACT are aware of how the report will be used to develop the narrative of Chapter 5 (the Financial Plan) of the 2023 RTP.

**What has changed since JPACT last considered this issue/item?** This item has not been previously presented to JPACT.

**What packet material do you plan to include?** Equitable Transportation Funding Research Report (October 27, 2022); available here:

<https://www.oregonmetro.gov/sites/default/files/2022/11/16/Equitable-Transportation-Funding-Research-Report-11142022.pdf>



Metro

# Equitable Transportation Funding Research Report

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

*Final Version: October 27, 2022*

Prepared by:  
Nelson\Nygaard Consulting Associates



# Acknowledgements

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

Margi Bradway

Lake McTighe

Kim Ellis, AICP

Ted Leybold

Tom Kloster

Alex Oreschak

Josh Harwood

Metro hired a **Nelson\Nygaard consultant team** to support research, technical analysis, and process for this work:

Theresa Carr, AICP

Esther Needham

Aria Wong

Eryn Rosenblum

Sam Huffman

Metro wishes to thank the **Transportation Policy Alternatives Committee (TPAC)**, who reviewed and provided comments for the draft report.

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## Executive Summary

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

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

The key questions being asked are:

*Who does revenue collection burden and benefit the most?*

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

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

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

## Recommendations to Improve Equity Outcomes

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

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

## Laying a Foundation to Advance Equity Outcomes

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

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



## Offering Fair and Accessible Opportunities for Meaningful Public Engagement and Input

Offering ample opportunities for meaningful public engagement and input<sup>1</sup> is critical to hearing diverse perspectives on equity-based goals, projects, and policies. Several recommendations related to public engagement include:

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

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

## Equitable Revenue Collection

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

- Restructuring fines so they are non-compounding and do not impact credit scores or employment eligibility.
- Prorating (based on income or item value) payment structures for parking, license and registration fees, violation fines, and tolling and congestion charges.
- Providing alternate options to paying fines, including in lieu of programs and split-payment plans.
- Continuing the line of good work being done by TriMet<sup>2</sup> and others to restructure diversion programs for fare evasion to be more lenient.
- Consider eliminating fare evasion programs to avoid severely impacting those with the least ability to pay.
- Allowing license and registration renewal for people with unpaid fines.
  - Removing remaining barriers to acquiring reduced or free transit fares can make it possible for individuals with limited access to documents, identification, or internet able to receive these benefits.<sup>3</sup>

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

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

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

## Equitable Revenue Disbursement

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

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

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

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## List of Abbreviations

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

## Purpose and Overview

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

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

The key questions being asked are:

*Who does revenue collection burden and benefit the most?*

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

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

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

## How We Talk About Equity and Project Goals

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

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

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

### Defining Equity as a Metric for Transportation Funding

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

#### Equity Assessment Measures for Revenue Sources

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

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

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

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

## Report Organization

This report is comprised of five main sections.

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

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

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

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

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



## 01 Outcomes of Discriminatory Planning

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

### History of Discriminatory Planning in the Greater Portland Region

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

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

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

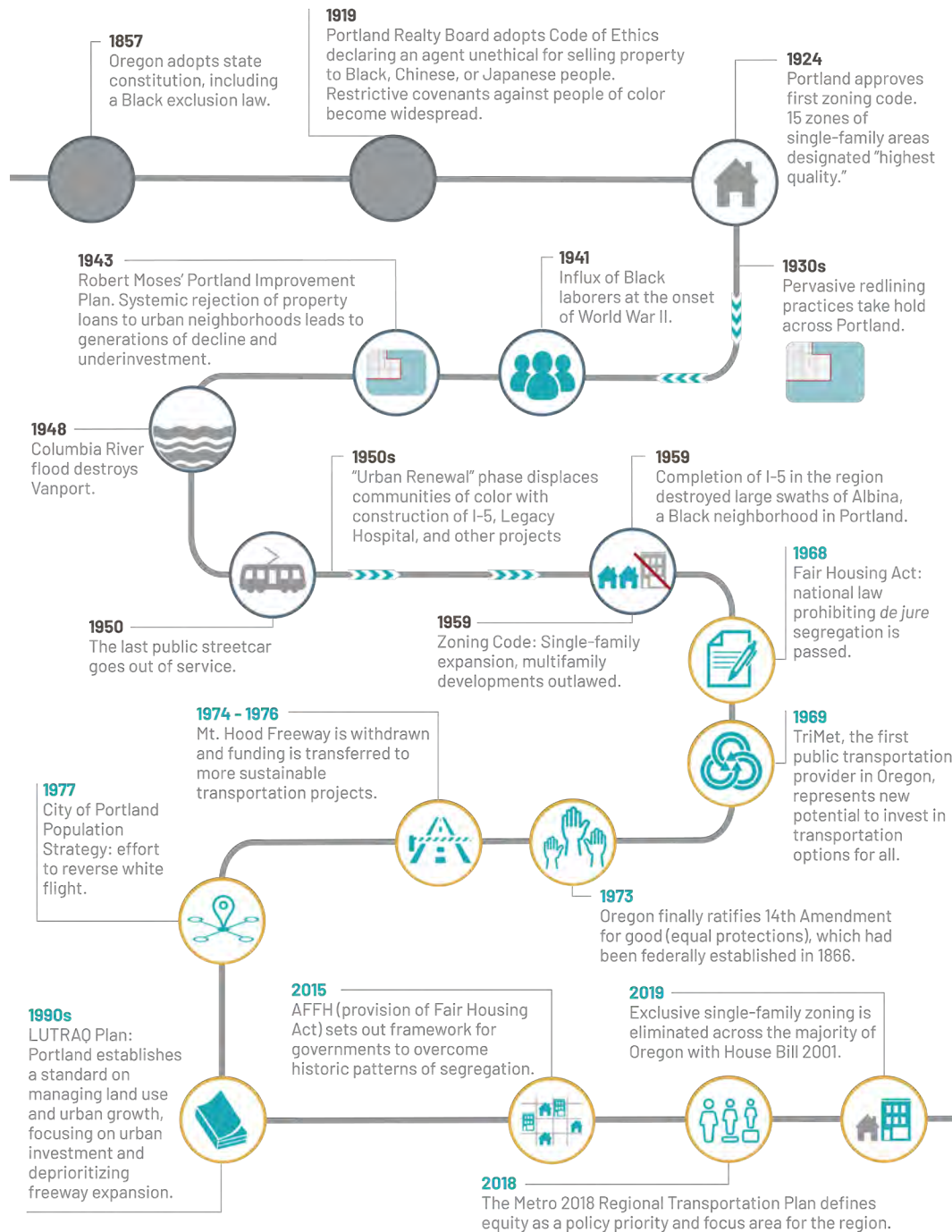
<sup>9</sup> [Oregon Metro. \(2022\). "2023 Regional Transportation Plan Update: Work Plan."](#)

<sup>10</sup> [https://www.oregonencyclopedia.org/articles/blacks\\_in\\_oregon/#.Y0mqhXbMJPY](https://www.oregonencyclopedia.org/articles/blacks_in_oregon/#.Y0mqhXbMJPY)

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

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

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



<sup>12</sup> Hughes, Jena. (2019). "Historical Context of Racist Planning." *Bureau of Planning and Sustainability*.

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

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

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

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

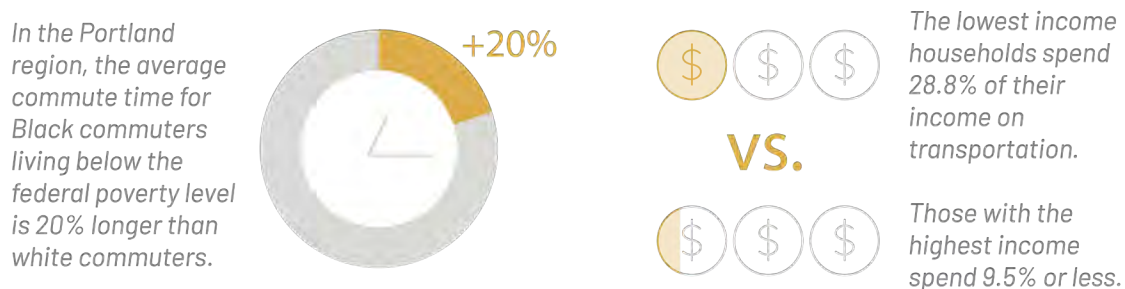
<sup>14</sup> Much of the existing academic literature and subsequent discussions are around the City of Portland, however the patterns of exclusion and discrimination are well established to have been rampant across the country, Oregon, and the greater Portland region.

## Regional Demographics Today

The greater Portland region is growing. By 2040, 600,000 new residents are expected to move into the region, and the BIPOC population is growing at an even faster rate. In 2015, 10% of people living in the average Census tract were people of color<sup>15</sup> and that number grew to 12% in 2020.<sup>16</sup> Population growth puts new pressures on housing and infrastructure. New development and gentrification can lead to displacement, of which people of color and low-income households are disproportionately affected by. As housing and transportation costs increase, households are being forced to move to areas with less transit service and other transportation options.<sup>17</sup>

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

Figure 2 Transportation Cost Burden and Commute Times



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

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

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

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

<sup>19</sup> [Bureau of Transportation Statistics. \(2020\). "Household Spending on Transportation." U.S. Department of Transportation.](#)

Moreover, it is well established that proximity to heavily auto-centric infrastructure is correlated with worsened health outcomes; the National Equity Atlas rated Black households in the greater Portland region with an air pollution exposure index of 73, six points higher than white households at 67. This index indicates the exposure risk to both carcinogenic and non-cancerous air pollutants, and Black households here in Portland face a higher risk than 73% of census tracts nationwide.<sup>20</sup> One can only imagine the 'hidden' cost burden of transportation that results from this exposure, in the form of medical bills and chronic illness treatments. The way the transportation system is funded can play a key role in reshaping how infrastructure and its associated upkeep can help narrow this disparity in health outcomes.

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<sup>20</sup> [National Equity Atlas. \(2019\). "Air pollution: Healthy neighborhoods are free of pollution and toxins that undermine safety, health, and well-being."](#)

## 02 Foundation of Current Work

Development of this report drew from regional and local documents and plans. This section provides a brief description of each of these documents and how they relate to this report.

### Regional Desired Outcomes

In 2008, the Metro Council and the Metro Policy Advisory Committee adopted six desired outcomes for the greater Portland region. These outcomes are equity, vibrant communities, economic prosperity, safe and reliable transportation, clean air and water, and climate leadership. The 2018 Regional Transportation Plan (RTP) identifies the next steps to continue working towards achieving these desired outcomes. The 2023 update to the RTP will build upon this. The desired outcomes particularly focus on equity for current and future residents and how people's lives are impacted by transportation planning decisions. They create an outcomes-based framework for Metro's work and set the stage for forthcoming plans and research, including prioritizing equitable transportation system funding.

### Metro's Strategic Plan

Metro's 2016 Strategic Plan<sup>21</sup> demonstrates an ongoing and future commitment to advancing racial equity, diversity, and inclusion in their projects. Metro set a framework for equitable transportation funding, through identifying which communities have faced and continue to face greater barriers to access. This report builds on the Strategic Plan principles to purposefully engage and account for historic and current disadvantaged populations. Like the Strategic Plan, equitable transportation funding will achieve their objectives by leading with race, targeted universalism, building infrastructure, generating support, partnering with communities of color, and measuring progress. The Metro Planning & Development Department's Strategic Action Plan, updated in 2018, supports the continuous work in equity and in addressing projects through a racial equity lens.

### 2023 Regional Transportation Plan (RTP) Update

The RTP was adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro in 2018 and equity was a core priority, with goals of 44% of total transportation projects to take place in Metro's Equity Focus Areas by 2040.<sup>22</sup> The RTP is the blueprint that guides investments for all forms of travel – driving, transit, biking and walking – and the movement of goods and services throughout greater Portland. It identifies urgent and long-term transportation needs, investments to meet those needs, and the funds the region

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<sup>21</sup> [Oregon Metro. \(2016\). "Strategic plan to advance racial equity, diversity and inclusion."](#)

<sup>22</sup> [Oregon Metro. \(2019\). "Advancing racial equity, diversity and inclusion in regional planning."](#)

expects to have available over the next 20 years. The plan is updated every five years with input from community members, business and community leaders and governments. The next update is expected by December 2023.

## 2023 RTP Financial Plan

To develop the equitable transportation funding report, RTP finance plans, planned projects, projected revenues, and other relevant sources were reviewed to understand where and how the transportation system is funded and what the equity implications are as a result. This report will help inform the development of the 2023 RTP financial plan and can be used by decision makers to inform future funding discussions on the mechanisms, revenue sources, and strategies to increase the equitable funding of transportation.

## Pricing Policy Work

As part of the 2023 RTP, Metro and its jurisdictional partners identified six pricing policies to advance the region's mobility, climate change, and equity goals. These policies address mobility, equity, safety, diversion, climate and air quality, and technology and user experience. Each policy has a set of action items to guide implementation of pricing programs and projects.

## Findings from Public Outreach

Metro has conducted extensive public outreach since the 2018 RTP update.<sup>23</sup> The focus has been on people of color, people with low incomes, and other groups that have historically been excluded from public engagement.<sup>24</sup> This outreach has informed the 2020 regional transportation funding measure, the Regional Mobility Policy update, and other processes. The work has consistently found that these groups desire safer and more accessible transportation options. Some of the community themes that rose to the top include:

- Focus on people and address racial, social, and economic disparities and historic disinvestment and transportation decisions that have harmed communities.
- Travel options, including a variety of modes, and a well-connected, integrated, and seamless system.

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<sup>23</sup> [Oregon Metro. \(2020\). "Regional Mobility Policy.": Oregon Metro. \(2022\). "2023 Regional Transportation Plan: Public Input."](#)

<sup>24</sup> Groups who have been denied access and/or suffered past institutional discrimination in the United States. This includes people who are Black, Indigenous, multi-racial, and people of color, people who may speak a language other than English, people with low-income, youth, older adults, and people with disabilities, who may face challenges accessing employment and other services ([Oregon Metro. \(2018\). "2018 Regional Transportation Plan."](#)).

- Quality transit service that is fast, frequent, reliable, and serves all types of trips (including off-peak travel times).
- Affordable transportation options, especially more affordable transit that connects people to the places and things they need to thrive.
- Investments in communities underserved by the current transportation system while protecting against involuntary displacement. And investments that are context sensitive and contribute to a sense of place and community identity.

These themes and priorities directly relate to how the transportation system is funded, both in how the revenue is generated and is disbursed. Revenue generation that does not overburden community members with the lowest incomes and investments that provide more affordable transportation options are vital to creating a more equitable system.

## Regional Congestion Pricing Study

In 2021, Metro completed the Regional Congestion Pricing Study (RCPS). Directed by JPACT and the Metro Council in the 2018 RTP, the study evaluated a variety of pricing strategies to understand if the region could benefit from pricing. Results from the study demonstrated that pricing can be an effective strategy for reducing drive-alone trips and overall VMT, but its impacts can vary widely by geography and demographics, as well as by what specific strategy is implemented and how it is implemented. The RCPS helped illustrate the limitations and risks to people with low-income if pricing programs and projects are implemented without considerations of equity from the outset.

## Pricing Options for Equitable Mobility (POEM) Task Force Final Report

Portland Bureau of Transportation's Pricing Options for Equitable Mobility (POEM) explored if and how new pricing strategies could be used in the City of Portland to improve mobility, address the climate crisis, and advance equity for people historically underserved by the transportation system. In October 2021, Portland City Council accepted the POEM Task Force final recommendation report.<sup>25</sup> This recommendation report includes principles of pricing for equitable mobility, nearer-term pricing strategies, longer-term pricing recommendations, and a suite of complementary strategies to advance alongside pricing. POEM provided guidance to understanding equitable pricing strategies to be used in the Portland area.<sup>26</sup>

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<sup>25</sup> [City of Portland, Oregon. \(2021\). "Task Force Recommendations and Next Steps."](#)

<sup>26</sup> [City of Portland, Oregon. \(2022\). "Pricing Options for Equitable Mobility \(POEM\)."](#)



## Equity and Mobility Advisory Committee (EMAC) Shaping an Equitable Toll Program

The Oregon Department of Transportation (ODOT)'s Equity and Mobility Advisory Committee (EMAC) was created to directly advise the Oregon Transportation Commission (OTC) and ODOT on how tolls on Interstate 205 (I-205) and Interstate 5 (I-5), in combination with other demand-management strategies, can include benefits for populations that have been historically and are currently underrepresented or underserved by transportation projects. The purpose of the committee is to address four equity pillars: full participation of impacted populations and communities, affordability, access to opportunity, and community health. EMAC goals specify that equity and mobility strategies must go beyond pricing revenue and show reinvestments into better functioning transportation infrastructure and a decrease in personal car usage. These goals directly align with the goals of equitable transportation funding.<sup>27</sup>

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<sup>27</sup> [Oregon Department of Transportation. \(2022\). "Equity and Mobility Advisory Committee: Shaping an Equitable Toll Program."](#)

## 03 Funding the Transportation System

Transportation involves multiple levels of government, each of which has separate revenue collection and distribution methods. Revenues flow through a variety of programs, redistributions, and formulae before being invested in the greater Portland region's local and regional transportation networks. The diagram below (Figure 3) illustrates annual revenue flows for the Regional Transportation Plan.

The **left side of Figure 3** shows the different types of funding sources that comprise local, state, and federal revenues for transportation. For example, the gray box denoting "Federal Sources \$57 billion" describes the total revenues that are collected at the federal level (such as federal income taxes and gas taxes). These funds are not typically directly allocated by the federal government, but instead are disbursed to state and local governments who then prioritize the projects for funding in the 2018 Regional Transportation Plan.

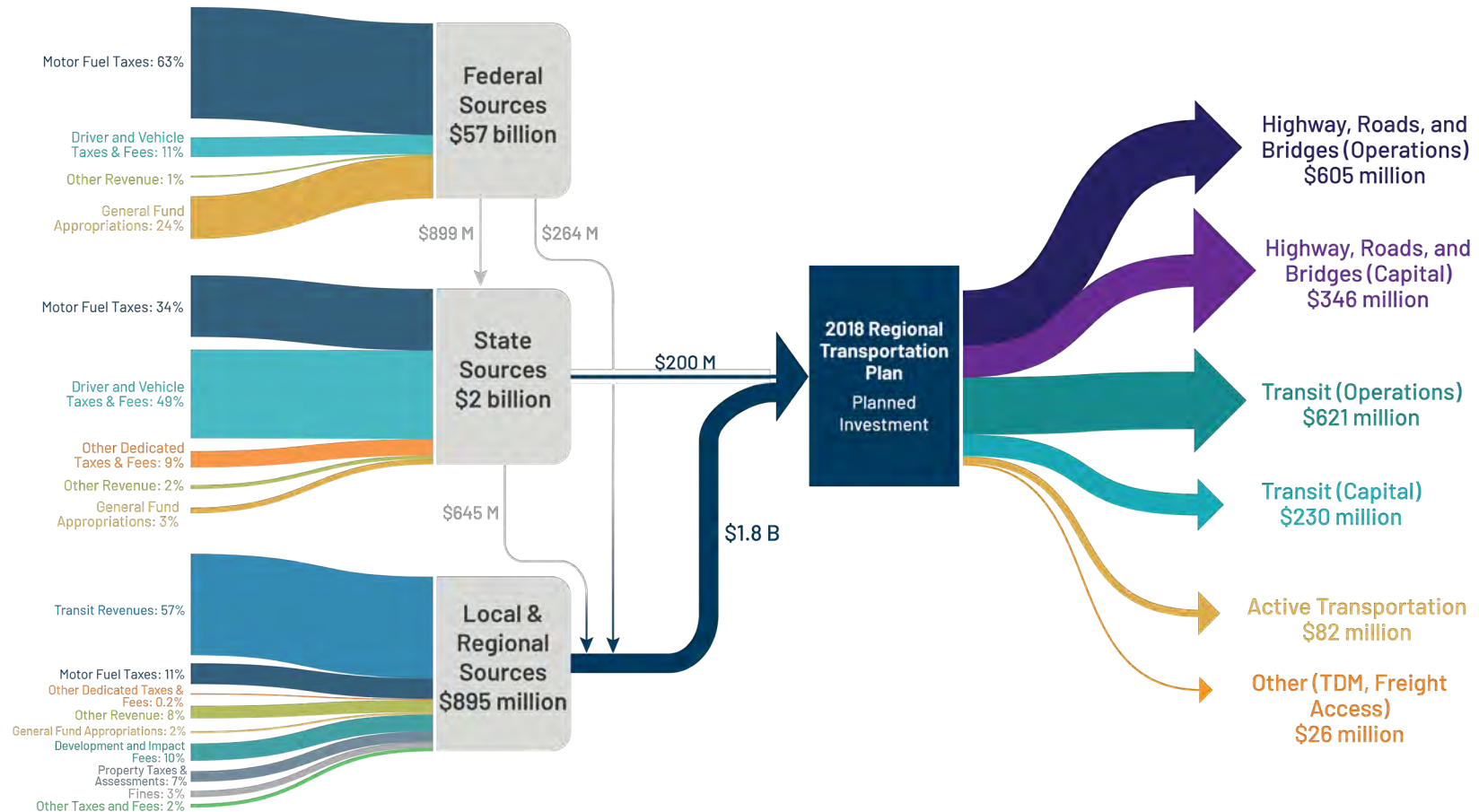
The **gray arrows** illustrate transfer of funds between federal, state, and local levels, also known as intergovernmental transfers, or suballocations. Transfers are combined with local and regional own-source revenues to fund the programmed projects, as shown with **blue arrows**.

Finally, the **right side of the chart** shows the types of projects that are proposed for funding in the Regional Transportation Plan.

Transportation revenues can be classified along two main categories:

1. **User Fees:** costs that are levied on users of goods and services, such as motor fuel taxes (paid by users of motor fuels) and weight-mile taxes (paid by heavy vehicle owners).
2. **General Taxes:** paid to the government as a blanket levy without clear explanation of where the money is distributed. Income taxes, property taxes, and sales taxes can all contribute in some part to transportation funding, but they are subject to extensive policymaking and decisions before allocations are determined.

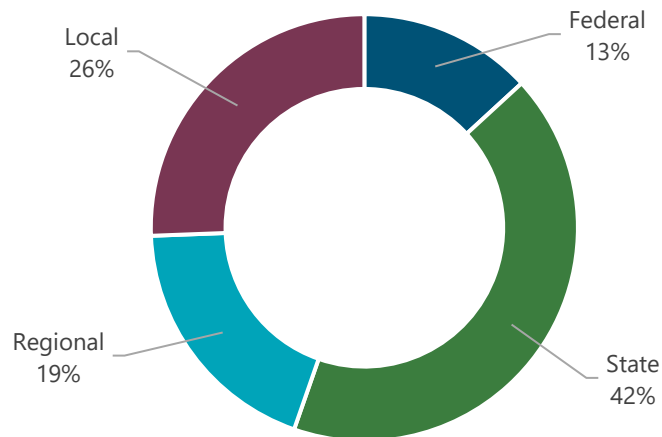
Figure 3 Annual Transportation Revenue Flow to the 2018 RTP Projects and Programs<sup>28</sup>



<sup>28</sup> [Tax Policy Center. \(2021\). "Briefing Book: A citizen's guide to the fascinating \(though often complex\) elements of the federal Tax System.";](#) [Oregon Department of Transportation. \(2021\). "2021-2023 Legislatively Adopted Budget report.";](#) Oregon Metro and other agencies. (2018). Local Revenue Summary Reports and 2018 Revenue Projections.; [TriMet. \(2022\). "Adopted Budget 2022-2023.";](#) [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)

The following figures summarize revenue sources by the government level that originally collects the revenue, before any suballocations are made to other entities. Figure 4 breaks down the total pool of funding that went into the 2018 RTP by level of government at the time of collection, prior to any regional suballocations.

Figure 4 Revenue Sources to 2018 RTP Projects and Programs by Government Level<sup>29</sup>



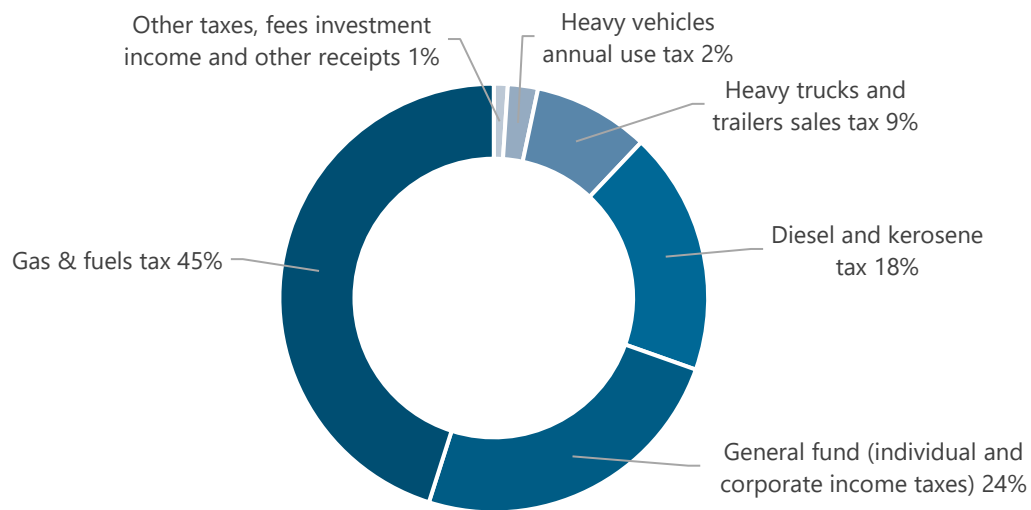
Thirteen (13) percent of the revenues in the RTP financial plan are collected at the federal level. The funds are primarily comprised of:

- Funds disbursed by the Federal Highway Administration (FHWA) Highway Trust Fund (HTF) for roadway capital and maintenance efforts
- Funds disbursed by the Federal Transit Administration (FTA) for transit capital and maintenance efforts
- Funds disbursed through the Oregon Department of Transportation (ODOT) for capital projects and improvements
- Funds disbursed through ODOT for roadway maintenance and operations

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<sup>29</sup> [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)

Figure 5 Federal Transportation Revenue Sources<sup>30</sup>



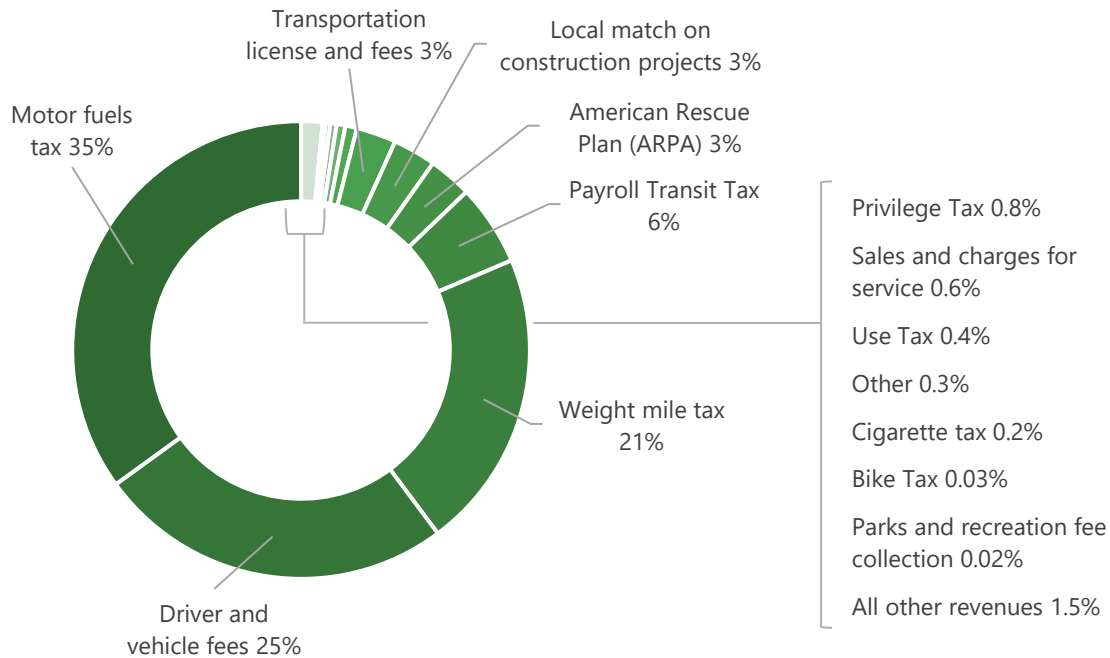
The Federal Highway Trust Fund (HTF) is funded primarily by the federal gas tax, a key revenue source that has seen decreasing returns in recent years. Between changing travel behaviors, inflation, and the rising demand for infrastructure, the HTF has increasingly relied on general revenue transfers to cover its deficit. A portion of this revenue goes to states specifically to maintain federal roadways—Interstate Highways and U.S. Highways—and the remainder is further distributed to various states and localities for their local transportation needs, through formula and grant programs. Figure 5 above provides a breakdown of the revenue sources that make up the Highway Trust Fund.

State funds comprise 42% of the Regional Transportation Plan’s financial plan. These revenues fund transit, roadway capital and maintenance projects. Figure 6 shows the breakdown of revenue sources collected at the state level that contribute to ODOT’s budget. Roughly 28% of ODOT transportation revenues are from driver, vehicle, and other transportation license fees. ODOT also levies a weight-mile tax on commercial vehicles with a gross weight over 26,000 pounds, to account for their heavier toll on road conditions.<sup>31</sup>

<sup>30</sup> [Tax Policy Center. \(2020\). “Briefing Book: A citizen’s guide to the fascinating \(though often complex\) elements of the federal Tax System.”](#)

<sup>31</sup> [Oregon Department of Transportation. \(2022\). “Report Your Taxes.”](#)

**Figure 6 State Transportation Revenue Sources, Oregon<sup>32</sup>**



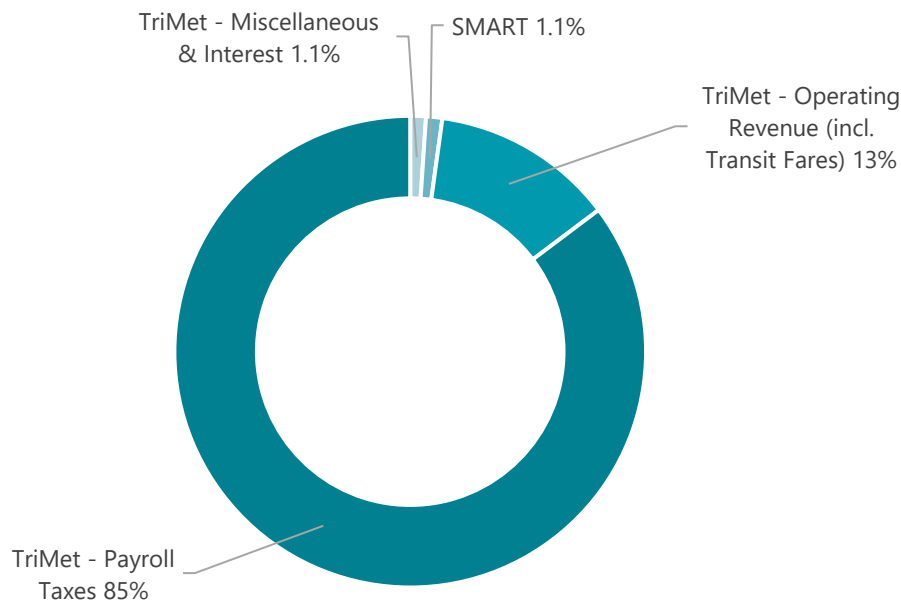
Regional transit sources represent 19% of transportation revenues in the Regional Transportation Plan. Figure 7 shows the composition of regional transit revenues, which are generated by TriMet and SMART. Most of these revenues (85%) come from TriMet via payroll taxes, while 13% is generated by operating revenues from transit service.

About one quarter (26%) of transportation revenues in the Regional Transportation Plan are collected from local sources, such as property taxes, parking fees and fines, and local gas taxes. The prevalence of local revenue sources reflects how local funding can play a significant role in influencing equitable outcomes.

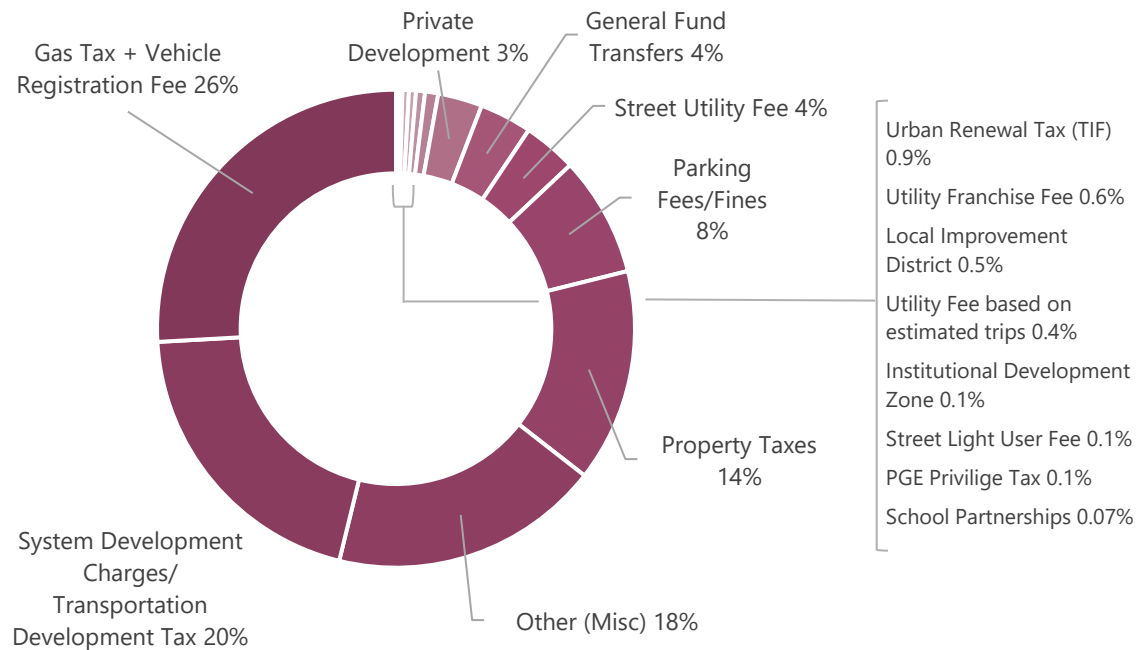
Figure 8 illustrates local own-source revenues, which were drawn from local budget documents. It should be noted that each jurisdiction within the greater Portland region experiences a different proportional breakdown. For example, the City of Portland's Bureau of Transportation (PBOT) brings in roughly \$31 million each year in parking fees and fines, which account for a noticeably greater portion of its transportation revenues than other municipalities with lower density and parking demand. As such, parking fee policies in the City of Portland carry more weight in the equity discussion than would similar strategies deployed in less populous areas of the greater Portland region.

<sup>32</sup> [Oregon Department of Transportation, \(2021\). "2021-2023 Legislatively Adopted Budget."](#)

**Figure 7** Regional Transportation Revenue Sources, TriMet and SMART <sup>33</sup>



**Figure 8** Local Transportation Revenue Sources, greater Portland region<sup>34</sup>



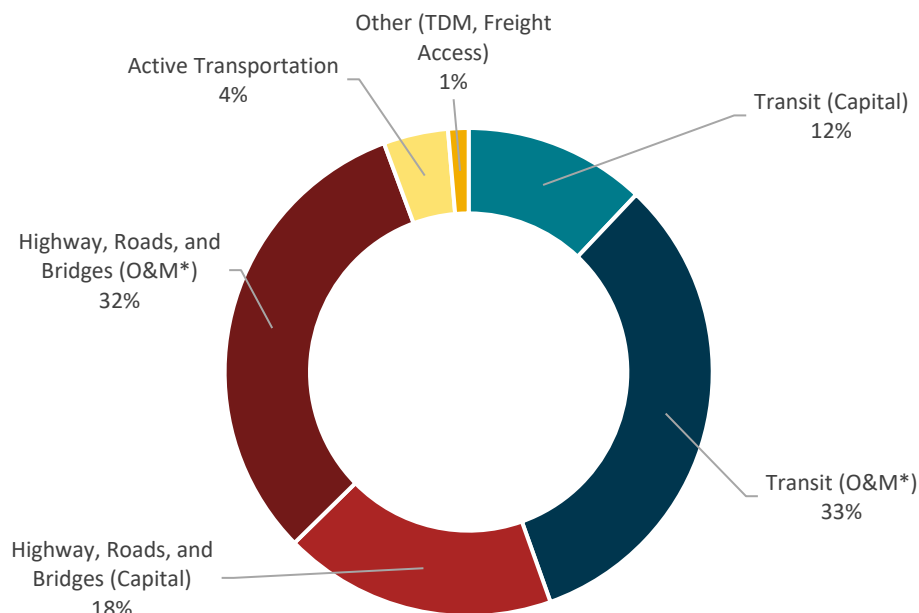
<sup>33</sup> [TriMet. \(2022\). "Adopted 2022-2023 Budget."](#)

<sup>34</sup> Oregon Metro and other agencies. (2018). Local Revenue Summary Reports and 2018 Revenue Projections.

## Revenue Allocation

Depending on the jurisdiction, legal constraints are placed on the usage of certain funding sources. In Oregon, revenue generated from motor vehicles is constitutionally limited for exclusive use on roadway projects. This means state motor fuel taxes and heavy vehicle fees, which are two of the most prominent funding sources at the state and local level, cannot be allocated for public transit or separated bicycle trails, as examples. Federal gas taxes are not subject to similar constraints. Figure 9 provides an overview of how transportation revenues identified for the 2018 RTP are allocated.

Figure 9 Planned Transportation Funding Allocations within the Greater Portland Region (2018-2040)<sup>35</sup>



*\*O&M stands for Operations and Maintenance.*

<sup>35</sup> [Oregon Metro. \(2018\). "2018 Regional Transportation Plan: Chapter 5: Our Transportation Funding Outlook."](#)



## 04 Key Findings and Equity Challenges

The region's transportation system is funded through a variety of revenue sources and financing mechanisms, each originating at different jurisdictional levels. There are many societal benefits to funding the ongoing maintenance, operations, and continued improvement of the transportation system. The goal of the Equity Assessment (Appendix A) is to evaluate the present funding of the greater Portland region's transportation system and how it impacts low-income households and people of color, informing recommendations on how to make the transportation funding processes more equitable.

The sources of funding and how and where that funding is invested play a key role in the equity of the region's transportation system. The Equity Assessment evaluates revenue sources for six different measures of equity.<sup>36</sup> Each measure looks at the impacts of equity from a different perspective: the cost burden of the source, whether it is tiered, whether people with lower-income and people of color are likely to see greater benefits, if the payment methods create barriers for under or unbanked households, and the potential for penalties that can lead to debt and legal repercussions.

### Equity Assessment Measures for Revenue Sources

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

The revenue sources are organized by government levels, broken down by status (existing, emerging, future), and rated on a scale of Good, Fair, or Poor, based on the five key metrics. The findings from this work, and an explanation of the rating scale, are provided in full in Appendix A.

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<sup>36</sup> The Equity Assessment (Appendix A) includes many, but not all, of the existing revenue sources at the federal, state, and local levels. The focus of the assessment is on sources which collect revenue from individuals, businesses, or commercial operations. It does not include revenue that is gathered from financing mechanisms like bonds or from passive revenue sources like transit advertising, rent, loan repayment, land use planning fees or other similar sources. The last section of the Equity Assessment lists identified revenue sources which were excluded from this analysis.

Of the 30 existing sources that were assessed:

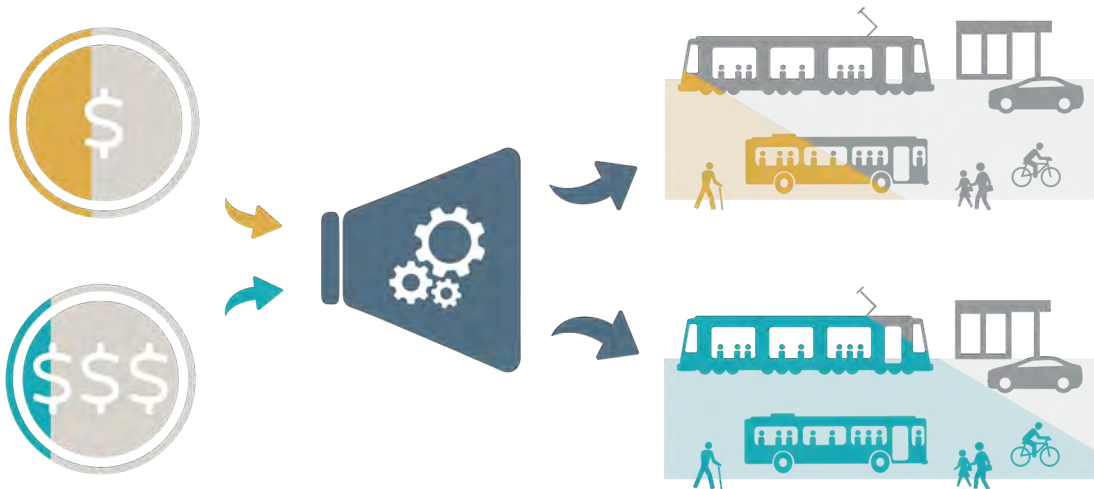
- 9 were rated 'Good,' 5 were 'Fair,' and 16 were 'Poor' for how equitable the **share** of costs are across income levels;
- 6 were rated 'Good,' 7 were 'Fair,' and 17 were 'Poor' for the extent of measures that could alleviate these unfair cost **burdens**.

This disparity highlights how lower income individuals and households in the greater Portland region face larger cost burdens for their transportation needs under the status quo. There are twice as many regressive revenue sources than those with costs equitably distributed. While certain programmatic elements (such as how a tax or fee is tiered and scaled) can alleviate and subsidize how low-income households experience these costs, not all of what they pay goes directly into transportation infrastructure that benefits them. For example, fines for traffic violations and parking penalties that are collected on roadways are disproportionately levied on people of color but are typically not reinvested into the transportation system.

Figure 10 Disparity in Burden of Transportation Costs versus Benefits from Transportation Investment

People with **lower incomes** spend more of their income on transportation costs than people with **higher incomes**...

...but lower-income communities are **less likely** to benefit from spending on transportation projects.



The following section highlights and explores some of the key trends identified during the equity-oriented analysis of transportation revenue sources. These discussions factor in key statistics relevant to the region, illuminating some of the reasoning behind how ratings were reached in the equity assessment.

## The Disproportionate Burden and Worsening Inequities for Low-Income Households

As shown in Figures 5 through 8, some revenue sources play larger roles in funding the transportation system than others, confirming that these sources likely have significant cost burdens and negative impacts on equity. Motor fuel taxes, transportation system development charges, property taxes, and cannabis and alcohol taxes are key funding streams that have compounding and regressive impacts on lower-income communities. These implications are explored below.

### Motor Fuel Taxes

Transportation revenue sources that are most relied upon often disproportionately burden low-income and marginalized households, exacerbating existing inequities. As previously discussed, motor fuel taxes comprise a significant proportion of transportation revenue collected at every level of government. Motor fuel taxes are a form of excise tax; a sales tax targeted on specific products determined by quantity purchased rather than a consumer's ability to pay. In the case of transportation, which is relatively inelastic, access to mobility options is often needed regardless of one's income (e.g., for school, work, errands etc.). This means that the out-of-pocket cost to low-income individuals and households inevitably consume a bigger proportion of their income.

Motor Fuels Taxes Equity Snapshot	
Share:	Poor
Burden:	Poor
Tiers:	Poor
Benefits:	Fair
Payment:	Good
Penalties:	Good

The necessity to own, drive, and maintain a personal vehicle exacerbates this burden. Residents of the greater Portland region spend more on transportation than any other household expenditures besides housing; in 2020, residents spent more than \$10,000 on transportation expenses per person.<sup>37</sup> Data from the U.S. Bureau of Labor Statistics reveals that nationally, the top 20% of income earners on average spend less than 2% of their after-tax income on motor fuel, contrasted with the lowest 20% who spend 8.2%. In periods of inflation (as seen at the time of this writing), this proportion can inflate to as much as 12%, although the tax-specific burden largely remains unchanged.<sup>38</sup>

<sup>37</sup> [U.S. Bureau of Labor Statistics. \(2022\). "Portland Area Economic Summary." United States Department of Labor.](#)

<sup>38</sup> [Peck, Emily. \(2022\). "Percentage of after-tax income spent on gas, by income bracket." Axios.](#)

Figure 11 Share of Individual Income Spent on Motor Fuel in the United States, 2019<sup>39</sup>



The per-unit cost of the gas tax particularly penalizes low mileage efficiency vehicles, which are also heavily represented amongst low-income and rural populations. Where more affluent households increasingly transition to electric or newer more fuel-efficient vehicles, diminishing the tax base, the transportation system's continued reliance on motor fuel taxes for revenue thus falls heavier upon financially vulnerable and low-income communities. The Federal Highway Trust Fund (HTF) has not fully funded the nation's surface transportation needs since 2001, and the revenue deficit has only continued to worsen.<sup>40</sup> Discussions surrounding increasing the tax rate to “fix” this revenue source are problematic from an equity perspective, as the incidence would fall heavily upon long distance commuters and low-income populations. These complexities are thus reflected as “Poor” ratings under the “Share” and “Burden” categories in Appendix A, especially as there are no quick or obvious fixes to the inequity of motor fuel taxes. To tackle the declining efficacy of motor fuel revenues equitably and holistically, other revenue sources will need to be taken into consideration.

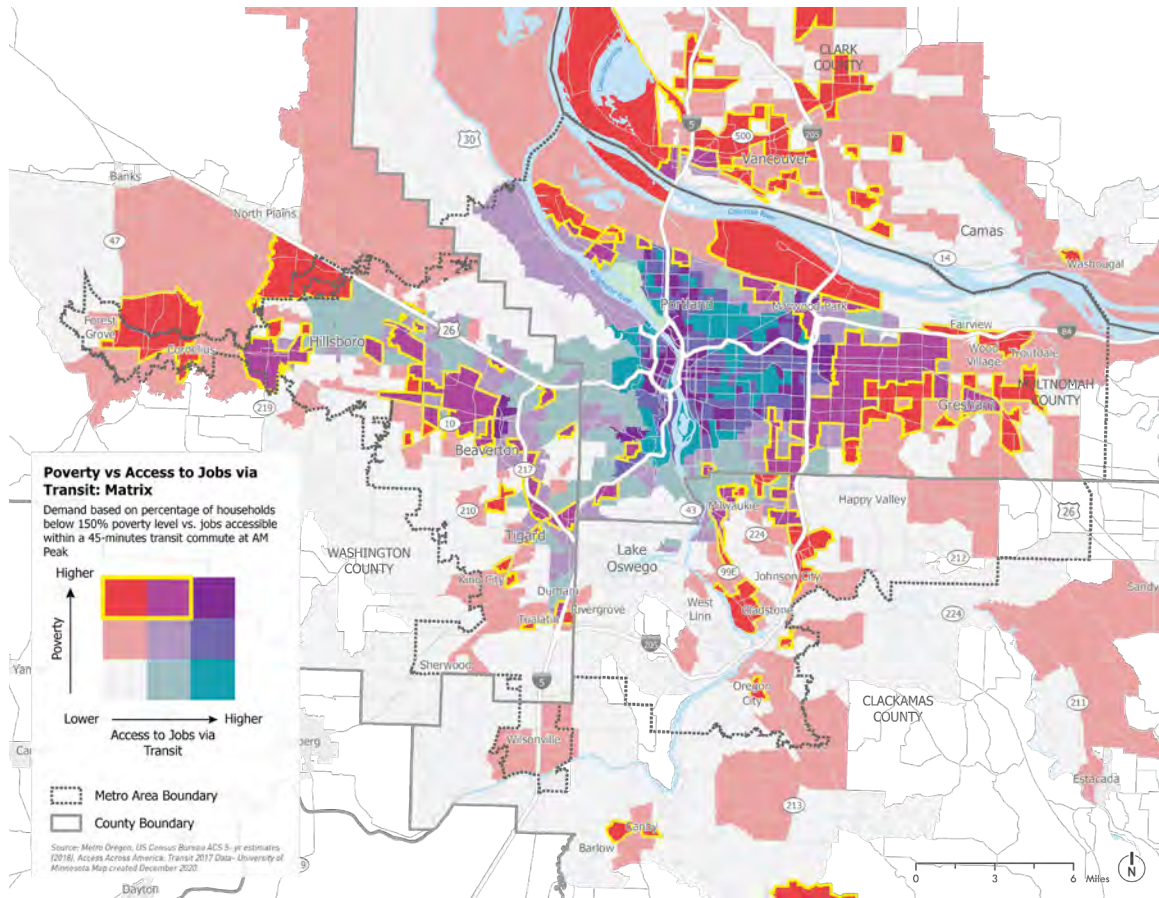
Oregon has in recent years explored the feasibility of expanding Road User Charges (RUCs), as an emerging alternative to declining motor fuel tax revenues. RUCs are charged by the mile for use of the state's public roads and highway network, and depending on program design can treat different types of vehicles equally (i.e. EVs, combustion engine, hybrid). Oregon's OReGO is the nation's first RUC program, having begun operations in 2015. The existing program was found by ODOT to still impose a disproportionate burden on lower-income households, however the RUC program design has greater flexibility and potential for targeted exemptions that could mitigate this outsized burden.<sup>41</sup>

<sup>39</sup> [Peck, Emily. \(2022\). “Percentage of after-tax income spent on gas, by income bracket.” \*Axios\*.](#)

<sup>40</sup> [Congressional Research Service. \(2020\). “Funding and Financing Highways and Public Transportation.”](#)

<sup>41</sup> [Oregon Department of Transportation. \(2022\). “Road Usage Charging: Vehicle Ownership & Socioeconomic Equity”.](#)

Figure 12 Communities with High Levels of Poverty and Limited Access to Jobs via Transit<sup>42</sup>



Another possible means of alleviating the motor fuel tax burden is through the provision of alternative methods of transportation, namely public transit and active transportation. The greater Portland region has made substantial investments into public transit and street design over the past two decades; the availability of these alternatives has allowed Portland to enjoy 25% fewer vehicle miles driven per year than other US metropolitan areas.<sup>43</sup> These investments have been predominantly concentrated in central urban areas, and issues of regional coverage and service frequency due to available funding are a limitation to growing transit use. Figure 12 illustrates the lingering disparities in access to employment opportunities via public transportation.

<sup>42</sup> [Oregon Metro. \(2021\). "Regional Congestion Pricing Study."](#) ; data sourced from US Census Bureau ACS 5-Year Estimates (2018) and University of Minnesota "Access Across America: Transit 2017 Data". TriMet has since made service changes since the creation of this map. An assessment of TriMet service and future network concepts can be found at <https://trimet.org/forward/>.

<sup>43</sup> [Small, Rebecca. \(2016\). "You are here: A snapshot of how the Portland region gets around." Metro News.](#)



While more transit services are needed, the most significant funding sources do not incentivize transit investment. For example, the federal gas tax rate is currently 18.3 cents-per-gallon, of which only 2.86 cents-per-gallon goes towards the mass transit account.<sup>44</sup> The Oregon state constitution dictates the exclusive use of motor vehicle-related revenues for the upkeep of highway rights-of-way (ROW).

Figure 13 The Equity of Transportation Spending Allocations<sup>45</sup>



## Transportation System Development Charges (TSDCs)

Transportation System Development Charges (TSDCs) are a popular means of financing infrastructure improvements at the local level, and account for 20% of locally collected transportation revenues, the second largest source of local revenue. These charges, also commonly known as Transportation Development Taxes, are one-time fees levied on new development such as buildings to cover the cost of new public infrastructure capacity needed to service said development. Eligible projects can include new bicycle lanes, transit infrastructure, and roadway improvements, all of which are explicitly stated to meet the anticipated capacity needs of the area after property development is completed. TSDCs are an upfront cost to most developers, which are compounded by other System Development Charges (SDCs) such as stormwater and sewage SDCs.

<b>TSDC/DTTs</b>	
<b>Equity Snapshot</b>	
Share:	Poor
Burden:	Fair
Tiers:	Poor
Benefits:	Poor
Payment:	Good
Penalties:	Good

<sup>44</sup> [United States Department of Transportation Federal Highway Administration. \(2017\). "FAST Act Fact Sheets – Highway Trust Fund and Taxes".](#)

<sup>45</sup> [Oregon Metro. \(2021\). "Regional Congestion Pricing Study."](#)

The equity and cost burden of TSDCs vary significantly by programmatic design, and policies often differ by municipality. Many cities in the greater Portland region utilize uniform or flat tax rates with some differentiation by use type such as residential or commercial. The City of Portland offers tax subsidies for projects with affordable housing components, and dollar-for-dollar credit for projects that incorporate infrastructure improvements on the city's project list.<sup>46</sup>

Studies have shown that holistic assessment methodologies are needed to better estimate a new building's per unit infrastructural impacts, factoring density and availability of transportation demand management (TDM) programs, among other factors, to ensure the right incentives are put in place.<sup>47</sup> On the other hand, TSDC rates that are set too low can hinder a city's ability to complete the necessary requisite infrastructure projects. The City of Portland's TSDC model generally only covers 30% of projected project costs; this informs the "Poor" rating assessed to the Benefits Received criteria in the Equity Framework (see Appendix A).<sup>48</sup>

Furthermore, TSDCs are taxes on the supply-side of an economy, which means that the tax incidence can be shifted onto consumers. In this case, the higher cost of development can lead to higher rents, and renters will suffer the costs of worsened housing affordability. As low-income individuals and households are more likely to be renters, the cascading cost burdens on financially vulnerable communities are highly inequitable. To offset or alleviate the share of these costs, a reevaluation of TSDCs should be conducted to better understand if a programmatic redesign or fundamental policy change is needed.<sup>49</sup>

## Property Taxes

Property taxes can be regressive and vary based on the assessed value of each property, even though on the surface property tax rates are flat. The tax becomes regressive when lower-value homes are valued at higher effective rates. In Oregon, the 1997 state ballot Measure 50 locked property values at 1995 rates, with annual increases capped at 3%. Actual property values have risen much more than 3%, and the greater Portland region has seen actual home values triple since 1995.<sup>50</sup> This linear tax model results in an effective tax rate that can vary

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<sup>46</sup> [City of Portland, Oregon. \(2022\). "Transportation System Development Charges."](#)

<sup>47</sup> [Oregon Metro. \(2007\). "System Development Charges."](#)

<sup>48</sup> [City of Portland, Oregon. \(2022\). "Transportation System Development Charges."](#)

<sup>49</sup> [League of Oregon Cities. \(2020\). "System Development Charges Survey Report." Pages 12, 125;](#) [Portland Housing Bureau. \(2022\). "HOU-3.03 – System Development Charge \(SDC\) Exemption Home Ownership Program." City of Portland, Oregon.](#)

<sup>50</sup> [Nius, Elliot. \(2018\) "Property tax rates in Oregon's 36 counties, ranked". \*The Oregonian\*.](#)

significantly between similar properties depending on their time of sale, creating equity concerns.

As property tax rates and revenues become more detached from real home values, lower-income homeowners may end up paying a higher proportion of their real value in taxes due to overvalued property. On the other side, higher-value properties may be undervalued, allowing for wealthier individuals to pay a lower proportion of their real value in taxes. A University of Chicago study on nationwide property value assessment disparities found that in Multnomah County, 82% of the lowest value homes are over-valued compared with only 35% of the highest value homes. From 2007 to 2019, the study determined the least expensive homes to have had an effective tax rate 1.63 times the rate applied to the most expensive homes.<sup>51</sup> This property tax burden falls disproportionately on Black and Latinx communities, due to the cumulative effects of discriminatory planning practices, including redlining, that have stagnated property values while tax rates inflate. Despite living in the same location and having the same tax rates, these populations were reported to face a 10-13% higher tax burden than other households.<sup>52</sup>

Property Taxes Equity Snapshot	
Share:	Fair
Burden:	Poor
Tiers:	Good
Benefits:	Good
Payment:	Fair
Penalties:	Poor

Property taxes are not scaled by a homeowner's financial situation (such as their income). Equity disparity arises in circumstances where low-income earners are living in high-value properties. The correlation between household income and assessed property values is not direct, as they are separately influenced by factors such as inequitable value assessments and the labor market. The penalties for those who struggle to pay the taxes out of pocket are severe, ranging from additional fines to foreclosure of the property. The negative equity implications of property taxes might be mitigated through alternative assessment approaches or changing the process of determining tax rates.

### Cannabis and Alcohol Taxes (Excise Taxes)

The cannabis tax, like most sales taxes, is fundamentally regressive and thus rated 'Poor' for its share of cost in the Equity Assessment (Appendix A). Therefore, addressing inequities in the allocation of the tax is especially important.

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<sup>51</sup> [Berry, Christopher. \(2022\). "An Evaluation of Property Tax Regressivity in Multnomah County, Oregon." \*The University of Chicago - Center for Municipal Finance\*.](#)

<sup>52</sup> [Avenancio-León, Carlos and Troup Howard, \(2020\). "The Assessment Gap: Racial Inequalities in Property Taxation", \*Washington Center for Equitable Growth\*.](#)



The relationship between revenues from taxing alcohol and cannabis and transportation safety leads to fascinating discourse from an equity perspective. Most tax revenues from the sales of cannabis and alcohol are not used for transportation infrastructure or program purposes. However, nearly 40% of fatal crashes involve drugs and/or alcohol. A portion of tax revenues from alcohol and cannabis are spent on policing, recovery and public health programs; uses that impact the safety of the transportation system. While minimizing driving under the influence through public health interventions is an upstream approach to public safety, funding police with these taxes can exacerbate racial and income inequities. Since 2014, the State of Oregon has levied a 17% excise tax on recreational cannabis, and municipalities in Oregon can voluntarily elect to levy an additional 3% tax at the point of sale. The state and municipal legislatures respectively determine how these revenues are allocated for spending. For example, the City of Portland dedicated nearly half of the cannabis tax revenue (over \$3 million) to its Vision Zero safety program in FY 2017-2019, recognizing the relationship of drugs and traffic crashes.<sup>53</sup>

## Long-Term Community Impacts of Fines and Penalties

Fines and penalties have the potential to be major sources of debt, especially when citations are paid late or not at all. Of the revenue sources evaluated on their penalties in the Equity Assessment, (Appendix A), 10 had 'Poor' and 6 had 'Fair' ratings. Poor or Fair ratings were given for sources that had potential to bring in sizable revenue, but could lead to significant penalties, legal repercussions, or snowballing debt if left unpaid or paid late. Examples of these revenue sources include parking fines, income taxes, property taxes amongst others. Revenue sources with the lowest or no chance of penalties (thus rated 'Good') are those that collect at the point of sale (excise taxes). These include items like gas taxes or vehicle or bicycle purchase taxes, which do not offer options to defer payment of the tax. Using penalties to hold businesses or commercial operations accountable was also found to be more equitable.

### The System of Penalties

In Portland, parking citations issued by the Portland Bureau of Transportation (PBOT) must be paid within 30 days. If left unpaid, the citation becomes delinquent. At a minimum, the dollar amount of a delinquent citation will double. A court may also decide to issue a warrant for immobilization or impoundment of the vehicle, enter a judgement and impose a fine up to the maximum allowed by law, or send the citation to collections.<sup>54</sup> Debts in collections will

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<sup>53</sup> [Portland City Auditor, City of Portland. \(2019\). "Recreational Cannabis Tax: Greater transparency and accountability needed" and 2023 RTP Transportation Needs Assessment and analysis of 2016-2020 ODOT crash data.](#)

<sup>54</sup> [City of Portland, Oregon. \(2022\). "Pay and/or contest a parking ticket."](#)

see added fees and may harm a person's credit score. Credit scores impact an individual's ability to access financing and resources or obtain a job. Accounts in collections, or other negative marks from late payments, will generally stay on a credit report for seven years.<sup>55</sup>

In Oregon, the State can seize debt from tax returns for unpaid citations or court-imposed fees, and these debts stay on the books for 20 years. Low-income households are more likely to be burdened by citations and often rely on tax refunds to make ends meet. In Multnomah County, from 2019 to 2021, 61% of tax refunds seized on behalf of state courts occurred in ZIP codes with household incomes below the county's overall median household income, and 33% of these seized refunds occurred in five ZIP codes that have some of the lowest median household incomes and highest portions of people of color in the county.<sup>56</sup>

### Racial Disparities in Enforcement and Penalties

Parking tickets, traffic citations, and fare evasion fines are levied on Black individuals at a higher rate than white individuals.<sup>57</sup> In Multnomah County, Black individuals are charged three to thirty times more often than white residents for the same violations. Individual citations are also given at skewed rates. Black individuals are charged fifteen times more often for failing to cross the street at a right angle, eight and a half for jaywalking, three for failing to use vehicle lights, six for disabled vehicle parking violations, and five and a half for walking in the road. While not all of these violations are related to revenue sources that fund transportation, it in no uncertain terms highlights the pervasiveness of racial inequity.<sup>58</sup>

There is also a gap in the fines levied against Blacks than their white counterparts. Default judgements may be to blame, which occur when the defendant does not perform a court-ordered action—typically appearing at court for a hearing—and the judge by default rules in the plaintiff's favor.<sup>59</sup> The gap in fines between Black and white people in Multnomah County are as follows:<sup>60</sup>

- Jaywalking: \$379 compared to \$280
- Disabled parking: \$317 compared to \$183
- Failure to wear a seatbelt: \$142 compared to \$106

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<sup>55</sup> [Pyles, Sean. \(2021\). "How do Collections Accounts Affect your Credit?" Nerd Wallet.](#)

<sup>56</sup> [Iboshi, Kyle. \(2022\). "Oregon garnishes millions in tax refunds to collect old, unpaid parking tickets and court fees." KGW8.](#)

<sup>57</sup> US Commission on Civil Rights. (2017). "Targeted Fines and Fees against Communities of Color – Civil Rights & Constitutional Implications." While this research was conducted at the national level, the trends and patterns of prejudice are undoubtedly echoed throughout local regions.

<sup>58</sup> [Budnick, Nick \(2017\), "The High Costs of Disparities for People of Color in Multnomah County"](#)

<sup>59</sup> [Legal Information Institute. \(2022\). "Default Judgment." Cornell Law School.](#)

<sup>60</sup> [Budnick, Nick \(2017\), "The High Costs of Disparities for People of Color in Multnomah County"](#)

- TriMet fare violations: \$384 compared to \$225
- Speeding: \$190 compared to \$162

## The Criminal Justice System and Compounding Impacts of Fines

A majority of transportation related fines do not directly fund the transportation system despite their occurrence on the public right-of-way. In the region, only parking tickets and TriMet fare evasion fines are put back into the transportation system. All other motor vehicle, pedestrian, and cycling related fines typically go to general funds, policing, and the criminal justice system. The City of Portland's fixed-speed camera program is an exception, dedicating any remaining revenue not used for maintaining the program to traffic safety. However, since the program began in 2016, there has yet to be excess revenue.

People with low-income and people of color disproportionately bear the burden of policing and suffer from well-documented racial bias in police forces around the country, including the greater Portland region.<sup>61</sup> Fines are not applied based on a person's ability to pay. This means that people with low-income receive a harsher punishment than those with high income, for the same violation. Moreover, fines can compound which leads to debt and cyclic consequences for those least able to pay or navigate the system. Such systemic incidents where individuals face disproportionate and compounding consequences over minor offences, have seen recent documentation and analysis in the media.<sup>62</sup>

Fines, especially those collected for minor offences, are not only an inequitable source of government revenue, but they are inefficient. Research has demonstrated that the costs of court activities, collecting and enforcing payments, and jailing those unable to pay can use 70% to 115% of the revenue raised through such efforts.<sup>63</sup> This system has a cascading impact throughout society. It creates and ingrains patterns of racialized indebtedness and cycles of poverty, extracts financial resources from the community, undercuts the ability to build intergenerational wealth, supports predatory lending and other exploitative financial practices, and reproduces systems of inequality for individuals and communities.<sup>64</sup>

The City of Portland is developing an in-depth report on the current state and impact of this system, titled *Fines, fees, and traffic-camera enforcement in Portland, Oregon*. The report

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<sup>61</sup> [Griggs, Taylor. \(2022\). "Despite police directive, Portlanders of color still overrepresented in traffic stops." \*Bike Portland\*. Greene, Emily \(2018\). "The poorer you are the more you owe <https://www.streetroots.org/news/2018/11/09/unpaid-fine-poorer-you-are-more-you-owe>." \*Street Roots\*.](#)

<sup>62</sup> [Ramakrishnan, Jayati. \(2022\). "She skipped a \\$2.50 TriMet fare. She spent 183 days in custody." \*The Oregonian\*.](#)

<sup>63</sup> [Menendez, Matthew. Lauren-Brooke Eisen, Noah Atchison, and Michael Crowley. \(2019\). "The Steep Costs of Criminal Justice Fees and Fines." \*Brennan Center for Justice\*.](#)

<sup>64</sup> Fines, fees, and traffic-camera enforcement in Portland, Oregon – work not yet published

provides recommendations for Portland's fixed speed-camera program and the system of fines and fees in general. The recommendations provide level of effort and estimated impacts for each recommendation. The recommendations include better instructions that accompany traffic camera tickets, reducing minimum fine rates, creating ability-to-pay parameters in Oregon state law to guide payment plan decisions, eliminating credit reporting for accounts referred to collections, and many other similar recommendations to make Oregon's fine and fee system more equitable.<sup>65</sup>

## The Burden of Being Underbanked or Unbanked

As shown in Appendix A, 18 sources were ranked 'Good' for the accessibility of their payment methods, 8 were 'Fair,' and 4 were 'Poor.' This means that most existing revenue collection methods do not overwhelmingly burden those without access to banking or digital payment services. Many revenue sources are collected at the point of sale or are levied from businesses and industries that already have the financial means. However, this should not overshadow the potential equity implications for individuals who are unbanked (those without access to a bank account with an insured institution) and/or underbanked (those who do not have the ability to use a bank account).<sup>66</sup> An FDIC study in 2019 reported a 2.5% Unbanked Rate across the Portland-Vancouver-Hillsboro Metropolitan Statistical Area (MSA).<sup>67</sup> They remain a vulnerable demographic as payment collection methods shift towards digital platforms.

Parking fees and fines are a significant sector of transportation revenue that can heavily burden the unbanked. Parking fees can be paid at meters and pay stations using a mobile app, credit card, or coins. However, cash payments must be exact since change is not offered. The Oregon Judicial Department (OJD) requires all parking citations to be paid using checks, money orders, or credit cards, either online or by phone. The only way to pay with cash is to visit the court in person, which is a heavier burden to bear by way of commute time and costs.<sup>68</sup> Some jurisdictions across the nation have sought different strategies to alleviate this burden; in 2020, Arizona

<b>Parking Fees and Fines</b> <i>Equity Snapshot</i>	
Share:	Poor
Burden:	Poor
Tiers:	Good
Benefits:	Fair
Payment:	Poor
Penalties:	Poor

<sup>65</sup> Fines, fees, and traffic-camera enforcement in Portland, Oregon – work not yet published

<sup>66</sup> [Chicago Metropolitan Agency for Planning. \(2021\). "Equity in Transportation Fees, Fines, and Fares."](#)

<sup>67</sup> [Federal Deposit Insurance Corporation. \(2019\). "How America Banks: Household Use of Banking and Financial Services."](#)

<sup>68</sup> [Oregon Judicial Department. \(2022\). "Parking Citations."](#)

partnered with retail chains such as 7-Eleven to provide a "PayNearMe" service, where residents can pay traffic and parking fines at their local store.

Collecting transit fares can also create accessibility challenges especially for people who are unbanked, as many systems embrace contactless payment systems. TriMet most recently reported that their Hop Fastpass digital fare system accounted for 83.5% of fares collected on fixed route services, which means the remaining 16.5% relied on cash payments on buses and trains.<sup>69</sup> Moreover, a 2022 review of transit rider surveys found that 37% of those aged 55+ in Portland/Gresham did not have a smartphone, and another 30% did not have a mobile data plan for their phones; 20% of riders aged 35 and below were unbanked, which is the highest amongst all age groups.<sup>70</sup> Although these statistics reflect only the circumstances of a portion of the region's ridership, and TriMet has taken steps to make the system more accessible for them, it still serves as a critical reminder that technological innovations in fare collection systems cannot, and do not, solve all equity issues for transit riders. TriMet does maintain some options to serve riders who rely on paying for rides with cash. For example, riders can purchase and reload a Hop card at close to 400 retail locations in the region by cash.<sup>71</sup>

Transit Fares Equity Snapshot	
Share:	Good
Burden:	Fair
Tiers:	Good
Benefits:	Good
Payment:	Fair
Penalties:	Fair

## Revenue Allocation Constraints

Funding constraints determine where and how revenue can be spent and are applied at the revenue source, fund, or program level. Appendix B lists the various revenue sources evaluated and their allocation constraints as applied in Oregon. State and local motor fuel taxes all are subject to the constitutional requirement for exclusive spending on roadways, prohibiting the use of those funds for capital transit investments. While motor fuel tax funds and other motor vehicle revenue sources are collected by users of roadways, restricting these

<sup>69</sup> [TriMet. \(2021\). "Business Plan: FY2022 – FY2026."](#)

<sup>70</sup> [Aaron Golub et al. \(2022\). "Equity and exclusion issues in cashless fare payment systems for public transportation." \*Transportation Research Interdisciplinary Perspectives\*.](#)

<sup>71</sup> [Hop Fastpass. \(2022\) "Home"](#). TriMet has implemented various measures to make purchasing tickets more accessible. Riders can: use cash to purchase a paper ticket on all buses and use cash to purchase a Hop ticket at light rail stations; purchase and reload a Hop card using cash at retail locations. Additionally, TriMet partners with CBOs to issue grant-funded free fares to riders and to sign up those who qualify for the Honored Citizen Program.

funds to pay for further roadway improvements raises equity issues.<sup>72</sup> These restrictions encourage further use and funding of roadway networks that require access and ability to use a personally owned vehicle. The cost of owning and maintaining a personal vehicle is \$9,500 dollars annually,<sup>73</sup> while the cost of an adult, unlimited TriMet transit pass is \$1,200 dollars per year, with one month free if you pay in advance.<sup>74</sup> Personal vehicles also require the physical ability to drive, which can be a barrier for those of old age, severe illness, or disability.

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<sup>72</sup> State and local vehicle registration and driver's license fees are included, See Appendix B for more information about constraints and allocation per revenue source.

<sup>73</sup> [Bureau of Transportation Statistics. \(2022\). "Average Cost of Owning and Operating an Automobile."](#)

<sup>74</sup> [TriMet. \(2022\). "Fares."; Trimet. \(2022\). "1-Year Pass"](#). TriMet's 1-Year Pass is only \$308 per year for Honored Citizens and Youth.

## 05 Recommendations to Improve Equity Outcomes

Transportation needs in the greater Portland region exceed existing revenue capacity. This report uses an equity lens to explore the benefits and costs of the funding sources that the greater Portland region relies on; it considered how revenues are collected and who pays, and how revenues are distributed and who benefits. We have identified several recommendations that we believe will be helpful to policy makers and transportation providers. These recommendations are directed at the state, regional and local transportation agencies responsible for collecting and distributing revenues in the greater Portland region, and are intended to be applied in a variety of ways and contexts by the relevant policy and decision makers. Furthermore, they are also intended to be used as a tool by community-based organizations with an interest in advancing equity. They are not directed at any one plan or process; rather, they serve as background considerations to inform processes where needed. For example, the following approaches can be referenced when new revenue sources are being considered, or when the allocation of existing revenues are being decided in state, regional and local plans and programs, or when funding programs are being created and refined.

### Laying a Foundation to Advance Equity Outcomes

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

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

equitable outcomes. Adopting a policy stating that future revenue collection and disbursement should lead to more equitable outcomes is a central recommendation to this work and establishing standards for revenue collection that does not disproportionately burden marginalized and low-income groups is one of the key starting points to equitable revenue collection.

## Offering Fair and Accessible Opportunities for Meaningful Public Engagement and Input

Offering ample opportunities for meaningful public engagement and input<sup>75</sup> is critical to hearing diverse perspectives on equity-based goals, projects, and policies. Several recommendations related to public engagement include:

- Opportunities should be offered in-person and online, at a variety of locations and times, and available for individuals of varying English proficiency and non-English speakers. Participants should also be compensated for their time.
- Public outreach and involvement must be meaningful and intentional. Working with the community organizations that the agency has relations with will impact trust and participation.
  - Include a broad array of community members before, and during, the early planning phase; this builds trust and ensures that more voices are heard.
  - Utilize the relationships that the agency has with community-based organizations, groups, and trusted figures.
  - Hire trusted community members to do engagement work. Make sure to recruit several community members who are active in different areas.

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<sup>75</sup> The Climate Friendly and Equitable Communities Rules, adopted in July 2022, provide updated rules and add new rules for public engagement focused on advancing equity. These are located at [https://www.oregon.gov/lcd/LAR/Documents/CFEC\\_NoticeFilingTrackedChanges.pdf](https://www.oregon.gov/lcd/LAR/Documents/CFEC_NoticeFilingTrackedChanges.pdf). The rules define traditionally underserved populations to include "Black and African American people, Indigenous people, People of Color, people with limited English proficiency, people with disabilities, low-income Oregonians, youth and seniors, and more. They require mapping of traditionally underserved populations, local consideration of a set of anti-displacement actions should decisions contribute toward displacement, centering the voices of underserved populations in decision-making, and regular reporting on efforts to engage traditionally underserved populations." (<https://www.oregon.gov/lcd/CL/Documents/SixPageOverview.pdf>). The updated rules pertinent to engagement are: OAR 660-012-0120 (Transportation System Planning Engagement), OAR 660-012-0125 (Underserved Populations), OAR 660-012-0130 (Decision-making with Underserved Populations), and OAR 660-012-0135 (Equity Analysis).



- Communities affected by specific policies, funding efforts, or developments must be key contributors to the planning process. This results in an inclusive and iterative process where the communities affected by and benefiting from initiatives—like congestion pricing—are helping shape the program.

## Equitable Revenue Collection

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

- Restructuring fines so they are non-compounding and do not impact credit scores or employment eligibility.
- Prorating (based on income or item value) payment structures for parking, license and registration fees, violation fines, and tolling and congestion charges.
- Providing alternate options to paying fines, including in lieu of programs and split-payment plans.
- Continuing the line of good work being done by TriMet<sup>76</sup> and others to restructure diversion programs for fare evasion to be more lenient.
- Consider eliminating fare evasion programs to avoid severely impacting those with the least ability to pay.
- Allowing license and registration renewal for people with unpaid fines.

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<sup>76</sup> In 2017, HB2777 gave TriMet the authority to resolve fare citations outside of the court system <https://news.trimet.org/2017/06/new-law-gives-trimet-authority-to-offer-some-fare-evaders-a-second-chance-to-stay-out-of-court-system/>. In 2018 the TriMet Board approved changes to fare evasion penalty charges <https://news.trimet.org/2018/02/trimet-board-of-directors-approves-fare-evasion-penalty-changes/>, and separately approved a revision to TriMet fare code to make fare evasion a non-criminal offense <https://news.trimet.org/2018/11/trimet-board-approves-revision-to-trimet-code-to-clarify-proof-of-payment-required-to-ride/>.

- Removing remaining barriers to acquiring reduced or free transit fares can make it possible for individuals with limited access to documents, identification, or internet able to receive these benefits.<sup>77</sup>
- Reduce reliance on regressive tax strategies and encourage more progressive taxes and fees, such as TNC fees to ease the burden on transit users.
- Adjust the gas tax according to inflation.
- Explore financial assistance programs for low-income households that could be applied to costs of fees and transportation services. For example, the City of Portland is currently running a Transportation Wallet Affordable Housing Pilot, offering a package of free transportation options (transit passes, bike-share credits, taxi ride credits, etc.) for residents of selected affordable housing sites.<sup>78</sup>

## Equitable Revenue Disbursement

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

- Allocate revenues from pricing to safety, transit, and active transportation projects in equity focus areas.
- Major transportation investment can lead to an increase in cost of living and rent rates. Incorporate anti-displacement policies in plans and programs to mitigate the potential for displacement.
- Explore using revenues from any new transportation funding sources to offset transportation taxes and fees for low-income households. Covering taxes and fees would reduce a portion of the cost of living for low-income households, ultimately allowing them greater financial flexibility.
- Encourage and incentive environmentally friendly investments in mid- and low-income households to provide financial benefits for the household and reduce the

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<sup>77</sup> As an example, currently obtaining a TriMet Honored Citizen Fare Card requires proof of income and government-issued ID to be uploaded to an online portal for the card to be mailed to them upon approval (see <https://trimet.org/income/index.htm>). Alternatively, enrollment locations are available for on-the-spot visits and the applicant can receive a card at that time, but these locations are only open during business hours on weekdays. For someone who may not have a valid license, or works throughout those hours, and/or someone with limited internet access, this card may be difficult to obtain.

<sup>78</sup> [City of Portland. \(2022\). "Transportation Wallet Affordable Housing Pilot".](#)

overall carbon footprint. Examples of this could include: Offer discounts and rebates to households that want to invest in electric vehicles, in solar panels, or transit passes.

## **Next Steps**

Improving equity in transportation is a key concern in the greater Portland region. Inequities in transportation funding are wide-ranging and systemic. Leaders around the region may use the findings from this study to inform policies, including the development of the 2023 RTP and future RTPs and support transportation providers as they discuss current and future funding programs.

## Glossary

BIPOC	Black, Indigenous, and People of Color. Those who identify as Black, Native American and Alaska Native, Native Hawaiian and Pacific Islander, Central and South American Indigenous, Asian, Hispanic/Latinx/a/o, and/or one or more non-white races or marginalized ethnic groups.
Direct Spending	Project spending led by agencies at each level.
Diversion Program	An alternative pathway for individuals in the criminal justice pipeline to exit from the system and resolve their outstanding penalties without incurring a criminal record.
Equity Lens	A critical thinking approach to undoing racial and economic disparities by evaluating burdens, benefits, and outcomes to underserved communities.
Funding Program	The requirements and conditions that dictate how revenues are spent. Federal, state, regional and local governments establish criteria and guidelines that define the eligibility, purpose of the program, desired outcomes, etcetera. Revenues from different sources may be combined into one program; one revenue source may also be spent through a variety of programs.
Inequities	A particular kind of disparity that is not only of concern for being potentially unfair, but which is believed to reflect injustice.
Intergovernmental Transfers	The funds that agencies at the federal, state, and local levels are sending to other levels of government for use on their respective projects.
Low Income	Persons or households with incomes 150% below the federal poverty level.
Older Adults	Individuals 65 years old or older.
Own-Source Revenue Flows	The funds raised by transportation agencies themselves at the federal, state, and local levels.
People Living with Disabilities	People who have a physical or mental impairment that substantially limits one or more major life activities, people who have a history or record of such an impairment, or a person who is perceived by others as having such an impairment.
Race	The social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (particularly color),

ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic and political needs of a society at a given period of time. Racial categories subsume ethnic groups.

Regressivity/ Regressive Tax	Refers to programs or tax policy designs that do not account for people's ability to pay, thus imposing a heavier cost burden upon those with lower incomes.
Revenue	A government organization's annual income from which public expenses are met.
Revenue Collection	The processes by which a government body gathers its income from public or private sources, via payments, sales, or other methods.
Revenue Disbursement	The processes that government bodies use to allocate revenues after collection, either in reallocation to other government organizations or for direct spending.
Split Payment Plans	A payment option to settle a single amount of payment via multiple different transactions and payment methods
Systemic Racism	The system of interrelated policies, practices, and procedures that work to advantage and position white people and communities over people of color. It can result in discrimination in criminal justice, employment, housing, health care, political power, and education, among other issues.
Transportation Network Company (TNC)	Also known as ride-hail or ridesharing companies; a transportation service model where passengers pay a fee to prearrange a trip through an online, network-enabled platform.
Unbanked	Households where no member has access to a checking or savings account.
Underbanked	Households that have a checking or savings account with an insured institution, but do not have the ability to use the account or have used alternative financial services in the past 12 months such as money orders, payday loans, pawn shop loans, check cashing, etcetera.
Underserved	The people and places that historically and currently have not had equitable resources or access to infrastructure, healthy environments, housing choice, etc. Disparities may be recognized in both services and in outcomes.

## **Appendices**

### **Appendix A: Equity Assessment Framework for Transportation Revenue Sources**

## EQUITY ASSESSMENT OF REVENUE SOURCES

The transportation system in the region is funded through a variety of revenue sources and financing mechanisms, each originating at different jurisdictional levels. There are many societal benefits to funding the ongoing maintenance, operations, and continued improvement of our transportation system. The goal of this assessment is to evaluate the impacts of the way the system is currently funded on low-income households and people of color in order to inform recommendations to improve equity in our funding processes.

The sources of funding and how and where that funding is invested play a key role in the equity of the region's transportation system. This assessment aims to evaluate revenue sources for six different measures of equity. Each measure looks at the impacts of equity from a different perspective: the cost burden of the source, whether it is tiered, whether people with lower-income and people of color are likely to see greater benefits, if the payment methods create barriers for under or unbanked households, and the potential for penalties that can lead to debt and legal repercussions.

The first table below details the equity assessment for existing sources of revenue. These sources were drawn from the revenue forecast data developed for the 2018 Regional Transportation Plan, federal, state, and local budget documents, and other sources. Specific sources are noted in the footnotes.

The second table includes an assessment of emerging and potential future revenue sources. These sources are drawn from the Regional Congestion Pricing Study, the One Oregon report and other sources. The list is intended to be illustrative. The equity assessment for many of these sources are listed as variable. More information about each source and what types of program design may lead a potential future source to be more or less equitable is included in the rating details tables which follow the summary tables. Information about potential future sources will help guide recommendations for a more equitable funding system.

This assessment includes many, but not all, of the existing revenue sources at the federal, state, and local levels. The focus of this assessment is on sources which collect revenue from individuals, businesses, or commercial operations. It does not include revenue that is gathered from financing mechanisms like bonds or from passive revenue sources like transit advertising, rent, loan repayment, land use planning fees or other similar sources. The last section of this report lists identified revenue sources which were excluded from this analysis.

### Equity Ratings

**Variable:** Equity impacts dependent on program design and guiding policies

**Poor:** Negative impact on people with lower income or people of color

**Fair:** Some negative impact on people with lower income or people of color, balanced by benefits provided

**Good:** Does not negatively impact people with lower income or people of color

**Equity Evaluation of Existing and Emerging Revenue Sources**  
Metro

**Existing Revenue Sources – Summary Table<sup>1</sup>**

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
<b>Federal</b>							
Fuels tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Heavy trucks and trailers sales tax	Good	Good	Good	Good	Fair	Good	Good
Heavy vehicles annual use tax	Good	Good	Good	Good	Fair	Good	Good
Individual income taxes, corporate income taxes (General Fund transfer)	Fair	Good	Fair	Fair	Fair	Poor	Poor
<b>State</b>							
Motor Fuels Tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Weight Mile Tax	Good	Good	Good	Good	Fair	Good	Good
Driver and Vehicle Fees	Poor	Poor	Poor	Fair	Poor	Good	Fair
Transportation License and Fees	Good	Good	Good	Good	Fair	Good	Good
Cigarette Tax	Fair	Poor	Poor	Fair	Good	Good	Good
Bike Tax	Poor	Poor	Poor	Fair	Good	Fair	Fair
Privilege Tax	Fair	Fair	Poor	Good	Good	Good	Good
Statewide Transit Tax (employee paid)	Fair	Fair	Poor	Fair	Good	Fair	Poor
Income Tax (General Fund Transfer)	Poor	Poor	Fair	Fair	Fair	Poor	Poor
Lottery Revenues	Fair	Poor	Poor	Fair	Good	Good	Good
<b>Local (differs by municipality)</b>							
Transit Payroll Tax (employer paid)	Good	Good	Good	Good	Good	Fair	Fair
Transit Fares (Passenger Revenues)	Good	Good	Fair	Good	Good	Fair	Fair

<sup>1</sup> The revenue sources represented in this table are not an exhaustive list of all sources of funding in the region. See the Revenue Sources Not Included in Assessment section of this document for more details.



**Equity Evaluation of Existing and Emerging Revenue Sources**  
Metro

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Gas Tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Vehicle Registration Fees	Poor	Poor	Poor	Poor	Fair	Good	Fair
Transportation System Development Charges	Fair	Poor	Fair	Poor	Poor	Good	Good
Trip-Based Utility Fees	Fair	Fair	Fair	Good	Good	Fair	Poor
Franchise Fees	Fair	Fair	Fair	Poor	Fair	Good	Good
PGE Privilege Tax	Poor	Poor	Poor	Poor	Fair	Good	Poor
Parking Fees and Fines	Poor	Poor	Poor	Good	Fair	Poor	Poor
Urban Renewal	Poor	Poor	Poor	Good	Good	Fair	Poor
Street Light User Fee	Poor	Poor	Poor	Good	Fair	Good	Poor
Property Taxes	Fair	Fair	Poor	Good	Good	Fair	Poor
TNC Fee	Fair	Good	Poor	Good	Good	Poor	Fair
Local Improvement District Tax	Poor	Poor	Poor	Fair	Poor	Fair	Poor
Heavy Vehicle Use Tax	Good	Good	Good	Fair	Fair	Good	Good
Cannabis Tax	Fair	Poor	Fair	Fair	Fair	Good	Good
Total: 30							

**Emerging and Potential Future Revenue Sources – Summary Table**

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
<b>Emerging</b>							
Freeway Tolling	Variable	Variable	Variable	Variable	Variable	Poor	Variable
Vehicle Miles Traveled Fee/Road User Charges	Variable	Poor	Variable	Variable	Variable	Poor	Variable
Cordon Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable
Roadway Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable

**Equity Evaluation of Existing and Emerging Revenue Sources**  
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Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
Parking Pricing	Variable	Variable	Variable	Variable	Variable	Poor	Variable
<b>Potential Future</b>							
Carbon Fee	Variable	Variable	Variable	Poor	Variable	Variable	Variable
Regional Gas Tax	Fair	Poor	Poor	Poor	Good	Good	Good
Gas Tax Indexing	Fair	Poor	Poor	Poor	Poor	Good	Good
Studded Tire Fee	Variable	Fair	Variable	Poor	Variable	Variable	Good
Regional Vehicle Registration Fee / Electric Vehicle Fee	Variable	Variable	Variable	Variable	Fair	Fair	Fair
First-time Title Fee on New Vehicles	Variable	Fair	Variable	Fair	Fair	Fair	Fair
General Sales Tax	Variable	Poor	Poor	Poor	Variable	Poor	Good
Targeted Sales Tax	Variable	Variable	Variable	Variable	Variable	Variable	Good
Business Income Tax	Variable	Variable	Variable	Variable	Variable	Poor	Fair
Corporate Activities Tax	Variable	Good	Fair	Good	Fair	Fair	Fair
Zero-Emission Zone (ZEZ) / Low Emission Zone (LEZ)	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Curb Use Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
First/Last Mile Delivery Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Vehicle Rental Fees	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Traffic Fines	Poor	Poor	Poor	Poor	Poor	Poor	Poor
Public-Private Partnerships	Variable	Variable	Variable	Variable	Variable	Variable	Variable
Naming Rights or Sponsorships	Variable	Good	Good	N/A	Variable	N/A	N/A
Allowance of Use of ROW for Rest Areas/Privatization	Variable	Good	Good	N/A	Variable	N/A	N/A
Overweight Truck and SUV Personal Tax	Variable	Fair	Fair	Fair	Fair	Variable	Variable

## Measures and Methods Defined

This assessment relies on six measures, defined below. These measures aim to target different attributes about a given revenue source that impact equity. This ranges from whether low-income households pay a higher share of their income to whether the source has the potential, if unpaid or paid late, to cause additional penalties or legal repercussions. The measures were developed through research and literature review, including the One Oregon report<sup>2</sup>, Chicago's Improving equity in transportation fees, fines, and fares report<sup>3</sup>, and Metro's Regional Congestion Pricing Study<sup>4</sup>.

This is a qualitative assessment. The methods for assigning ratings (poor, fair, good) to each measure for each revenue source are based on research of available information online, information known to Metro, and review of local budget documents. Researchers searched for indications of exemptions and penalties, for example, and based the ratings on the degree to which these items would appear to impact low-income households negatively or positively. Therefore, this assessment has some gray area and users of this report are urged to read the details of each revenue source in the rating details tables.

### Measures

- **Share:** Do lower-income<sup>5</sup> households pay a higher share of their income?
- **Burden:** Does the source provide targeted exemptions or subsidies to avoid an unfair burden for households below an income threshold? If yes, does obtaining the targeted exemption of subsidy place substantial burden of proof on applicants?
- **Tiered:** Is the fee or tax tiered based on the value of the priced item, like vehicles?
- **Benefits Received:** Are low-income households and people of color directly benefitting?
- **Payment Methods:** Does the payment method of the fee or tax provide options for unbanked and underbanked individuals? Is the payment method burdensome?
- **Penalties:** Do unpaid fines, fees, or taxes trigger penalties or legal repercussions? Can the fines or penalties compound to become a major source of debt for people with lower income?

### Overall Rating Methodology

While each measure is important for describing the potential for equity impacts, an overall rating per revenue source was useful for summarizing the information. Though the assessment is qualitative, the simplest way to create an overall rating while remaining objective was to take a quantitative approach. The approach is described below. Numerical

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<sup>2</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

<sup>3</sup> [Chicago Metropolitan Agency for Planning. \(2021\). "Improving equity in transportation fees, fines, and fares."](#)

<sup>4</sup> [Oregon Metro and Nelson\Nygaard. \(2021\). "Metro Regional Congestion Pricing Study."](#)

<sup>5</sup> Lower-income households are defined by Metro as 150% of the federal poverty level.

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points were assigned to each rating, and the overall sum of available points, were used to organize the information and are meant to be relative to one another. The ratings for the Share and Burden measures were weighted times three. This weight was given to reflect the importance of these measures and their outsized impacts on equity. If a revenue source is scaled based on household income and offers appropriate exemptions and subsidies, the impact of the other measures is lessened.

For example: The impact of penalties is diminished if a revenue source is based on an individual's ability to pay. This would greatly reduce the number of people which find themselves unable to afford to pay in the first place, mitigating the possibility of them being drawn into the criminal justice system. Hence the Share metric is weighted more strongly.

### Steps to create the overall rating:

- Step 1: Poor = 1, Fair = 2, Good = 3
- Step 2: Share and Burden are weighted times 3
- Step 3: Sum all of the points achieved for each revenue source.
- Step 4: Find the percentage of the points achieved compared to the total available points. For example, if the revenue source gets 15 weighted points, and the total available is 30, the revenue source is achieving 50% of its available points. Total available points is the sum of points across measures if each measure received a good rating.
- Step 5: Assign the overall rating based on thresholds for point percentage achieved.
  - Poor = 50% or less
  - Fair = 75% or less
  - Good = greater than 75%

## REVENUE SOURCES RATING DETAILS

### Federal

#### Fuels Tax

Fuels tax includes gasoline, diesel, and kerosene. Gasoline for motor vehicles is taxed at \$0.184 per gallon. Diesel is taxed at \$0.244 per gallon. Flat tax on a per gallon rate rather than as a general fuel sales tax limits the impact of inflation and price adjustments on the tax burden.

<b>Share</b>	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commute times to work but may drive less for leisure activities. <sup>6</sup> However, lower income households still pay a greater percentage of their income than a higher income household. <sup>7</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. <sup>8</sup>
<b>Benefits Received</b>	Fair	Road users are paying the tax which supports the Highway Trust Fund. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. <sup>9</sup> The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. More people with low income and people of color rely on transit. <sup>10</sup> The majority of the Highway Trust Fund supports roadways. A higher percentage of the gas tax supporting transit would provide a more positive impact for the people with the greatest needs.

<sup>6</sup> [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

<sup>7</sup> [Axios. \(2022\). "High gas prices hit low-income Americans the hardest."](#)

<sup>8</sup> [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

<sup>9</sup> [Congressional Research Service. \(2021\). "Federal-Aid Highway Program \(FAHP\): In Brief."](#)

<sup>10</sup> [U.S. Department of Transportation Federal Highway Administration. \(2017\). "Highway Trust Fund and Taxes."](#)

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		The federal gas tax has not kept pace with inflation and has not been increased since 1993. It has also seen declining revenues due to electric vehicles. Since 2008, revenues in the Highway Trust Fund have not been enough to cover the costs of surface transportation spending. <sup>11</sup>
<b>Payment Methods</b>	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>11</sup> [Congressional Research Service. \(2020\). "Funding and Financing Highways and Public Transportation."](#)

### Heavy Trucks and Trailers Sales Tax

A 12% tax is applied to the sale of automobile truck chassis and bodies, truck trailer and semitrailer chassis and bodies, and tractors of the kind chiefly used for highway transportation in combination with a trailer or semitrailer.<sup>12</sup> The tax only applies to vehicles which have a gross vehicle weight (GVW) over 33,000 pounds and trailers with a GVW over 26,000. Vehicles of this weight are typically commercial vehicles.

<b>Share</b>	Good	Tax rates are not based on household income; however, the tax is for commercial operations and is less likely to impact low-income households.
<b>Burden</b>	Good	No targeted exemptions or subsidies provided; however, the tax is for commercial operations and is less likely to impact low-income households.
<b>Tiered</b>	Good	The sales tax is 12%, higher cost vehicles pay more in tax.
<b>Benefits Received</b>	Fair	The tax supports roadway maintenance and improvements through the Highway Trust Fund <sup>13</sup> and is levied on heavy vehicles that do the most damage. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
<b>Payment Methods</b>	Good	Payment is collected at point of sale. The sales tax is included in the price of the vehicle and an individual without the ability to purchase an eligible vehicle would not be impacted. Additionally, the tax is only eligible for commercial operations and therefore is less likely to impact unbanked individuals.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>12</sup> [Cornell Law School Legal Information Institute. \(2000\). "Imposition of tax on heavy trucks and trailers sold at retail."](#)

<sup>13</sup> [United States Environmental Protection Agency. \(2022\). "Learn About Federal Excise Tax Exemption."](#)

## Heavy Vehicles Annual Use Tax

An annual fee is levied on heavy vehicles operating on public highways, with exemptions for specific groups or types of vehicles such as mass transit authorities. Heavy vehicles are defined as exceeding 55,000 pounds.<sup>14</sup> The maximum tax is \$550 per year.

<b>Share</b>	Good	Everyone pays the same tax regardless of income. However, this tax generally applies to commercial vehicles or companies and is less likely to impact individual household incomes.
<b>Burden</b>	Good	The tax provides exemptions for several groups and vehicle categories, including public transit authorities, the American Red Cross, nonprofit volunteer fire departments, ambulance associations, or rescue squads, Indian tribal governments for vehicles used in essential tribal government functions. This tax is more relevant for commercial vehicles or companies; however, these exemptions include a number of nonprofits and historically marginalized communities. <sup>15</sup>
<b>Tiered</b>	Good	The tax is tiered based on two weight categories. This ties directly to the damage higher weight vehicles do to roadways.
<b>Benefits Received</b>	Fair	The tax supports roadway maintenance and improvements through the Highway Trust Fund <sup>16</sup> and is levied on heavy vehicles that do the most damage. However, research has shown that the heaviest vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. <sup>17</sup> Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
<b>Payment Methods</b>	Good	Payments are made through submission of IRS Form 2290 along with payment via credit or debit card, electronic funds withdrawal, or via the Electronic Federal Tax Payment System. <sup>18</sup> This tax generally applies to commercial vehicles or companies and is less likely to impact unbanked individuals.
<b>Penalties</b>	Good	Penalties for non-compliance can be high and states also suspend the registration of vehicles that have not produced proof of payment. For those actively evading the tax, penalties can include fines and incarceration. While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

<sup>14</sup> [U.S. Department of Transportation Federal Highway Administration. \(2020\). "Heavy Vehicle Use Tax."](#)

<sup>15</sup> [Congressional Research Service. \(2020\). "Funding and Financing Highways and Public Transportation."](#)

<sup>16</sup> [U.S. Department of Transportation Federal Highway Administration. \(2016\). "The Heavy Vehicle Use Tax."](#)

<sup>17</sup> The U.S. Department of Transportation in its most recent Highway Cost Allocation Study estimated that light single-unit trucks, operating at less than 25,000 pounds, pay 150 percent of their road costs while the heaviest tractor-trailer combination trucks, weighing over 100,000 pounds, pay only 50 percent of their road costs. [FHWA. The Heavy Vehicle Use Tax.](#) and [The Hill. \(2017\). "Feds could pay for road improvements by charging big trucks by the mile."](#)

<sup>18</sup> [IRS. \(2022\). "About Form 2290, Heavy Highway Vehicle Use Tax Return."](#)



### Individual income taxes, corporate income taxes (General Fund transfer)

To maintain solvency of the Highway Trust Fund, transfers from the General Fund have been authorized by Congress every year since FY 2008. In total \$114.7 billion has been transferred to the Highway Account and \$28.9 billion to the Mass Transit Account. The General Fund collects revenue from personal income tax and corporate income tax, among other sources.

<b>Share</b>	Good	Personal income tax brackets increase the tax rate progressively as incomes increase. Low-income households pay a smaller percentage on taxable income than higher income households. The corporate income tax is progressive. The majority of its burden is carried by high-income households via taxes on income from dividends, capital gains, and other forms of capital income. <sup>19</sup>
<b>Burden</b>	Fair	The IRS offers a number of deductions and credits for personal income tax. <sup>20</sup>
<b>Tiered</b>	Fair	Personal income and corporate income taxes are based on the amount of income. However, income is grouped into brackets which can have a wide range.
<b>Benefits Received</b>	Fair	The personal income tax is paid by most Americans who also benefit from the transportation system. Corporations also rely on the transportation system to do business. While there is not a direct connection between the personal and corporate income tax and the transportation system, the ability to access jobs, goods, and services relies on the transportation system. The General Fund supports the Highway Trust Fund which funds roadways, transit, and bike and pedestrian infrastructure. Transit and bike and pedestrian projects help to support people with the greatest needs.
<b>Payment Methods</b>	Poor	Filing taxes can be an onerous process and often requires access to the internet or the time and money to research and access forms or to hire a tax preparer. It is possible to pay in cash but can only be done so via an authorized Cash Processing Company. <sup>21</sup>
<b>Penalties</b>	Poor	The IRS charges penalties for late filings, incorrect payment, and incorrect returns. The penalties can be eliminated if there is a “reasonable” cause which puts the burden on lower-income households. Black and lower-income households are more likely to be audited than high-income households, resulting in more penalties. <sup>22</sup>

<sup>19</sup> [Tax Policy Center. \(2020\). “Are federal taxes progressive?”](#)

<sup>20</sup> [USAGov. \(2022\). “Tax Credits and Deductions.”](#)

<sup>21</sup> [IRS. \(2022\). “Pay with Cash at a Retail Partner.”](#)

<sup>22</sup> [Inequality.org. \(2022\). “Whither the Wealth Squad?”](#)

# State Transportation Revenues

## Motor Fuels Tax

The motor fuels tax category includes the state gas tax and aviation fuel taxes. Gasoline for motor vehicles is taxed at \$0.38 per gallon as of 2022.<sup>23</sup> A portion of revenues are from fuel purchases for non-automotive purposes (such as fuel purchased for boats, lawn mowers, etc.); these gas tax revenues are not bound by the constitutional restriction that they be used on road projects. A portion of these funds are allocated to the State Transportation Improvement Fund program for transit.

Share	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. <sup>24</sup> However, lower income households still pay a greater percentage of their income than a higher income household. <sup>25</sup>
Burden	Poor	There are no targeted exemptions or subsidies available. Oregon state law provides for motor fuels tax refunds for the purchase of gasoline for uses other than travel on public roadways. Refunds are not based on income and require burden of proof. <sup>26</sup> House Bill 3055, passed in 2021, provides an exemption for federally recognized Indian tribes, tribal entities, and tribal member owned entities. However, the new law requires that the tribal entities levy a tax on motor vehicle fuels at the same rate as the Oregon state motor vehicle fuels tax. <sup>27</sup>
Tiered	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. <sup>28</sup>
Benefits Received	Fair	Gas tax revenue is deposited into the State Highway Fund. Under state law, the Highway Fund must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.

<sup>23</sup> [Oregon.gov. \(2022\). "Current Fuel Tax Rates."](#)

<sup>24</sup> [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

<sup>25</sup> [Axios. \(2019\). "Percentage of after-tax income spent on gas, by income bracket."](#)

<sup>26</sup> [OregonLaws. \(2021\). "Motor Vehicle and Aircraft Fuel Taxes."](#)

<sup>27</sup> [Oregon.gov. \(2022\). "Indian Tribal Exemption."](#)

<sup>28</sup> [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

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		Fuel tax revenue is not always used in the same geographic location as collected. State statute dictates that 40% of the State Highway Fund, which includes the motor fuels tax as a major source of revenue, must be distributed to cities and counties. <sup>29</sup>
<b>Payment Methods</b>	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>29</sup> [Oregon.gov. \(2022\). "Transportation Funding in Oregon."](#)

## Weight Mile Tax

A tax per mile driven in Oregon for motor carriers operating vehicles in commercial operations on public roads with a gross weight over 26,000 pounds.<sup>30</sup>

<b>Share</b>	Good	Tax rates are not based on household income; however, the tax is for commercial operations and is less likely to impact low-income households.
<b>Burden</b>	Good	The tax provides limited exemptions for government, charitable, private, or off-road operations. The tax is for commercial operations and is less likely to impact low-income households.
<b>Tiered</b>	Good	The tax is tiered based on weight of vehicle and miles driven within Oregon. <sup>31</sup>
<b>Benefits Received</b>	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the tax funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
<b>Payment Methods</b>	Good	The tax is only eligible for commercial operations and is therefore less likely to impact unbanked individuals.
<b>Penalties</b>	Good	ODOT may suspend an operator's account if they fail to file, do not pay the tax, do not pay on time, or fail to file or comply with other rules. Suspension results in all OR DOT plates and tax-enrolled vehicles to be invalid which makes operating illegal and can result in further citations, fines, and penalties. While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

<sup>30</sup> [Oregon Department of Transportation. \(2020\). "Motor Carrier Educational Manual – Weight-Mile Tax."](#)

<sup>31</sup> [Oregon Department of Transportation. \(2022\). "Mileage Tax Rates."](#)

## Driver and Vehicle Fees

Includes driver license fees, vehicle registrations, title fees for passenger vehicles, buses, trailers, motorcycles, and others. This category contains many fees for various areas from snowmobile titles to specialty license plates. This analysis will focus on driver license, vehicle registration, and title fees.

<b>Share</b>	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set at a flat rate.
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Fair	Driver license fees for non-commercial operations are the same regardless of personal vehicle owned. Vehicle registration and title fees are tiered based on the age of the vehicle. Electric vehicles do not have age-tiered fees and are currently required to pay \$192 while the maximum non-electric vehicle fee is \$116. <sup>32</sup> Electric vehicles are charged a higher fee because they do not contribute to funding the transportation system via revenues gained through the gas tax. People with lower income are less likely to own an electric vehicle due to their relative higher cost and more likely to drive an older vehicle which would be subject to lower fees.
<b>Benefits Received</b>	Poor	Drivers and owners of vehicles pay the fees; however, the amount of the fees is not based on the amount that a driver operates a vehicle or the number of miles a particular vehicle is driven. Driver license and vehicle fees are deposited into the State Highway Fund. Under state law, the Highway Fund must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.
<b>Payment Methods</b>	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. <sup>33</sup>
<b>Penalties</b>	Fair	Driver license and vehicle registration and title fees must be paid to receive the license or registration. Penalties may be incurred for driving without a license or for operating an unregistered vehicle. <sup>34</sup> People of color are more likely to be charged. In Multnomah County, Black people are charged three to 30 times more often than white people for the same violations. Black people also pay higher fines for the same violations. <sup>35</sup>

<sup>32</sup> [Oregon.gov. \(2022\). "Vehicle Title, Registration & Permit Fees."](#)

<sup>33</sup> [Oregon.gov. \(2022\). "DMV Fees."](#)

<sup>34</sup> [Oregon Judicial Department. \(2021\). "Schedule of Fines on Violations."](#)

<sup>35</sup> [Investigate West. \(2017\). "The High Costs of Disparities for People of Color in Multnomah County."](#)

## Transportation License and Fees

Includes heavy vehicle registrations, vehicle and Sno-Park permits. This analysis will focus on the heavy vehicle registration fee. Heavy vehicle registration fees are tiered based on the weight category of the vehicle and generally begin at 8,000 pounds.<sup>36</sup>

<b>Share</b>	Good	Everyone pays the same fee regardless of income. However, this fee generally applies to heavy commercial vehicles and is less likely to impact low-income households.
<b>Burden</b>	Good	No targeted exemptions or subsidies provided. However, this fee generally applies to heavy commercial vehicles and is less likely to impact low-income households.
<b>Tiered</b>	Good	The fee is tiered based on weight of vehicle.
<b>Benefits Received</b>	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the fee funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
<b>Payment Methods</b>	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. <sup>37</sup> The fee generally applies to commercial operations and is therefore less likely to impact unbanked individuals.
<b>Penalties</b>	Good	The fee must be paid in order to receive the registration. Penalties may be incurred for operating an unregistered vehicle. <sup>38</sup> While penalties for low-income households who cannot afford certain taxes or fees have a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

<sup>36</sup> [Oregon Driver and Motor Vehicle Services. \(2022\). Fee Schedule – Heavy Motor Vehicles and Buses.](#)

<sup>37</sup> [Oregon Driver & Motor Vehicle Services. \(2022\). “DMV Fees.”](#)

<sup>38</sup> [Oregon Judicial Department. \(2021\). “Schedule of Fines on Violations.”](#)

## Cigarette Tax

The cigarette tax is \$3.33 per stamp. Every pack of cigarettes sold in Oregon must have a stamp.<sup>39</sup>

<b>Share</b>	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. Cigarette taxes are generally regarded as regressive. <sup>40</sup> Some smokers may change their behavior, but many will not or cannot and cigarette smoking disproportionately impacts people with low-income. <sup>41</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Fair	The tax is the same regardless of the cost of an individual pack of cigarettes, but the amount paid is based on the price.
<b>Benefits Received</b>	Good	The costs are paid by smokers regardless of their use of the transportation system and the revenue source does not have a direct connection to transportation. However, a portion of the revenue is dedicated to transit services for seniors and disabled people which has a positive equity component. <sup>42</sup> Seniors and disabled people are more likely to live in low-income households.
<b>Payment Methods</b>	Good	Payment is collected at point of sale. Payment options vary by vendor, but many locations accept cash as a form of payment.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>39</sup> [Oregon.gov. \(2022\). "Cigarette Tax Overview."](#)

<sup>40</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

<sup>41</sup> [National Library of Medicine. \(2004\). "Poor Smokers, Poor Quitters, and Cigarette Tax Regressivity."](#)

<sup>42</sup> [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

**Bike Tax**

The Oregon Bicycle Excise tax is a flat tax of \$15 that is levied on bicycles purchased for \$200 or more.<sup>43</sup>

<b>Share</b>	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. While the tax is only applied to new bicycles, the threshold of \$200 is quite low compared to current new bicycle costs.
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies. Nonprofits and state agencies are not exempt, federal agencies are exempt. While the tax is only applied to new bicycles, the threshold of \$200 is quite low compared to current new bicycle costs.
<b>Tiered</b>	Fair	The fee is not tiered but bicycles costing less than \$200 are not taxed.
<b>Benefits Received</b>	Good	The tax is paid by people buying bicycles and is intended to provide funding for bike and pedestrian projects. Supporting bike and pedestrian infrastructure can have a positive equity impact.
<b>Payment Methods</b>	Fair	Payment is generally collected at point of sale. However, if a consumer is not charged the tax they must pay separately later and are provided with an online option for payment.
<b>Penalties</b>	Fair	Payment is generally collected at point of sale. However, if not and the consumer is responsible, there is a 5 percent late penalty and a 20 percent penalty if not filed within 30 days of due date. Interest is added to any unpaid tax.

<sup>43</sup> [Oregon Department of Revenue. \(2022\). "Bicycle Excise Tax."](#)



### Privilege Tax

The vehicle privilege tax is a tax for the privilege of selling vehicles in Oregon. The tax is .005 percent on the retail price of any taxable vehicle. Taxable vehicles are those that are purchased from a dealer in Oregon, have been driven less than 7,500 miles, and are less than 26,000 pounds.<sup>44</sup>

<b>Share</b>	Fair	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household. However, taxes on new vehicles are generally considered to be less regressive than other revenue sources. <sup>45</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies.
<b>Tiered</b>	Good	The tax is based on the sale price of the vehicle.
<b>Benefits Received</b>	Good	The tax is paid by vehicle owners. The funds are deposited into Connect Oregon. Connect Oregon is restricted to projects outside the road right-of-way but funds active transportation, rail projects, and the Zero-Emission Incentive Fund which have a positive equity component. <sup>46</sup>
<b>Payment Methods</b>	Good	Payment is collected at point of sale.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>44</sup> [Oregon Department of Revenue. \(2022\). "Vehicle privilege and use taxes."](#)

<sup>45</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

<sup>46</sup> [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

## Statewide Transit Tax

The statewide transit tax is imposed on the wages of each employee. The tax is .001% from wages of Oregon residents or non-residents who perform services in Oregon.<sup>47</sup>

<b>Share</b>	Fair	The tax is a percentage based on wages, so low-income earners do not pay the same amount as high-income earners. However, they are considered to be more regressive than employer payroll taxes. <sup>48</sup>
<b>Burden</b>	Poor	Employees who aren't subject to regular income tax withholding due to high exemptions, wages below the threshold for income tax withholding, or other factors are still subject to statewide transit tax withholding, impacting low wage earners.
<b>Tiered</b>	Fair	The tax is calculated based on the employee's wages.
<b>Benefits Received</b>	Good	There is no direct connection to revenue source and use because employees working and living in areas without transit or good transit will pay but not directly benefit. The tax is deposited into the Statewide Transportation Improvement Fund and is limited to investments and improvements in public transportation services, except for those involving light rail. Funding transit has a positive equity component.
<b>Payment Methods</b>	Fair	Payments can be made by cash, check, money order, or EFT. However, if an employee's employer does not withhold the tax, the burden is on the employee to file the appropriate paperwork and pay the tax.
<b>Penalties</b>	Poor	If an employee does not file or pay on time, they may be subject to penalties and interest.

<sup>47</sup> [Oregon Department of Revenue. \(2022\). "Statewide transit tax."](#)

<sup>48</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

### Income Tax (General Fund Transfer)

The Oregon General Fund is primarily made up of state personal and corporate income taxes. Personal income tax is the largest share of revenue at 86% of projected revenue for the 2019-2021 adopted budget.<sup>49</sup> This analysis focuses on the personal income tax in Oregon.

<b>Share</b>	Poor	Oregon's personal income tax is progressive, with high-income earners paying a higher portion of their annual income than low-income earners. <sup>50</sup> However, the tax rate begins at 4.75% and tops out at 9.9%. The gap between the brackets for the lower rates is small. A couple filing together that makes \$18,400 will pay the same tax rate as a couple earning \$200,000. <sup>51</sup>
<b>Burden</b>	Fair	Oregon provides a refundable Earned Income Tax Credit.
<b>Tiered</b>	Fair	The amount of tax owed is based on the amount of wages earned. However, as stated above, the brackets can include a wide range of income.
<b>Benefits Received</b>	Fair	While there is not a direct connection between the personal income tax (which is paid by most Oregonians) and the transportation system, the ability to access jobs, goods, and services relies on the transportation system.
<b>Payment Methods</b>	Poor	Filing taxes can be an onerous process and often requires access to the internet or the time and money to research and access forms or to hire a tax preparer. Oregon accepts online payments, checks, or money orders. <sup>52</sup>
<b>Penalties</b>	Poor	Oregon does not allow an extension to pay taxes. Late payments incur a 5% penalty. Payments more than three months late receive a 20% late-filing penalty. There are additional penalties for not filing at all or other types of tax avoidance. <sup>53</sup>

<sup>49</sup> [Oregon Secretary of State Shemia Fagan. \(2022\). "Government Finance: State Government."](#)

<sup>50</sup> [Institute on Taxation and Economic Policy. \(2018\). "Who Pays? A Distributional Analysis of the Tax Systems in All 500 States."](#)

<sup>51</sup> [Oregon Center for Public Policy. \(2021\). "8 things to know about Oregon's tax system."](#)

<sup>52</sup> [Oregon Department of Revenue. \(2022\). "Payments."](#)

<sup>53</sup> [Oregon Department of Revenue. \(2022\). "Penalties and interest for personal income tax."](#)

Lottery Revenues

A portion of funds from the Oregon Lottery are deposited into Connect Oregon.

Share	Poor	Participating in the lottery will cost the same across income groups and is generally regarded as regressive. <sup>54</sup> Research has found that low-income people disproportionately participate in the lottery and that lottery retailers are more highly concentrated in minority and low-income neighborhoods. <sup>55</sup>
Burden	Poor	No exemptions or subsidies for discounted lottery tickets or games are provided.
Tiered	Fair	The cost of the lottery is dependent on how much one participates and what games or tickets are purchased.
Benefits Received	Good	Lottery revenue is deposited into fund rebates for electric vehicles and Connect Oregon which funds active transportation, rail projects, and the Zero-Emission Incentive Fund which have a positive equity component. <sup>56</sup>
Payment Methods	Good	There is a wide array of options to pay for lottery tickets or games.
Penalties	Good	Payment for lottery service is due at point of sale.

<sup>54</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

<sup>55</sup> [CBS News. \(2022\). "State lotteries transfer wealth out of needy communities, investigation finds."](#)

<sup>56</sup> [Oregon.gov. \(2022\). "Connect Oregon."](#)

## Local Transportation Revenues

### Transit Payroll Tax (Employer paid)

The mass-transit tax is a tax on the wages earned by employees and the net earnings from self-employment for services performed within specified transit district boundaries. It is a tax on employers, not employees, based on the amount of payroll and includes all salaries, commissions, bonuses, fees, payment to a deferred compensation plan, or other items of value.<sup>57</sup> The TriMet District Boundary has a tax of 0.7837%<sup>58</sup> and the Wilsonville Transit District, which funds SMART, has a tax of 0.005%.<sup>59</sup>

Share	Good	The tax is a percentage based on wages, so low-income earners do not pay the same amount as high-income earners. The tax is paid by the employer.
Burden	Good	There are no targeted exemptions or subsidies, but it is a tax paid by employers. Nonprofits are still subject to the tax.
Tiered	Good	The tax is calculated based on the employee's wages.
Benefits Received	Good	Only employers with employees working in the TriMet district pay the tax. The tax helps fund mass transportation in the TriMet district. <sup>60</sup> Some people may have better access to transit than others. However, funding transit has a positive equity component.
Payment Methods	Fair	Filings can be online or through paper forms. <sup>61</sup>
Penalties	Fair	If an employer does not file or pay on time, they are subject to penalties and interest.

<sup>57</sup> [Oregon Department of Revenue. \(2022\). "Oregon Transit Payroll Taxes for Employers."](#)

<sup>58</sup> [TriMet. \(2022\). "Payroll and Self-Employment Tax Information."](#)

<sup>59</sup> [Wilsonville Oregon. \(2022\). "Transit Payroll Tax Information."](#)

<sup>60</sup> [Oregon Department of Revenue. \(2021\). "TriMet Self-Employment Tax."](#)

<sup>61</sup> [Oregon Department of Revenue \(2022\). "Payroll tax basics."](#)

### Transit Fares (Passenger Revenues)

Fares are charged by TriMet for each passenger. The fares make up 7% of TriMet’s FY2023 Budget.<sup>62</sup>

<b>Share</b>	<b>Good</b>	Fares are a flat rate and low-income households would pay a larger share of their income, however, TriMet offers discounted fares to youth, elders, and people with low income. Additionally, TriMet’s Fare Relief Program provides reduced fares to people that do not meet the requirements for the income-based fare Honored Citizen program, or those who are in need of immediate assistance. <sup>63</sup> TriMet is also one of the few agencies in the country to adopt fare capping. With fare capping, riders who pay per ride are not charged additional fares once they incur the equivalent cost of an unlimited transit pass. This ensures that riders who can’t afford the upfront cost of a weekly or monthly pass no longer pay more than riders who can.
<b>Burden</b>	<b>Fair</b>	TriMet offers an Honored Citizen Fare and a Youth Fare, which are half the price of a full adult fare, to Seniors 65+, people on Medicare, with disabilities, with qualifying incomes, youth ages 7-17, and students in high school or pursuing a GED. Qualifying incomes include people enrolled in the Oregon Health Plan, SNAP, or TANF and people with household income less than double the federal poverty level. <sup>64</sup> The Honored Citizen Fare requires proof of eligibility and a valid photo ID. Both may be barriers for qualified people. <sup>65</sup> The Youth Fare does not require advance application, but riders must carry proof of age or student status when riding TriMet, which may also be a barrier. <sup>66</sup>
<b>Tiered</b>	<b>Good</b>	Tiered fares for transit are not desirable. Distance-based fares make prices difficult to discern and are inequitable for people with lower income that need to travel longer distances. Transfer fees, which could be considered a type of tiering, are also inequitable for similar reasons, where lower-income long distance commuters are disproportionately disadvantaged. <sup>67</sup> TriMet has a flat-rate, easy to understand system and no charge for transfers.
<b>Benefits Received</b>	<b>Good</b>	Fares are paid by riders and the funds go directly back to the transit system. Funding transit has a positive equity component.
<b>Payment Methods</b>	<b>Fair</b>	TriMet accepts cash, tickets, or electronic payment. To pay with cash for the MAX, tickets must be pre-purchased, which serves as a barrier especially for those who are trying to make unplanned trips. <sup>68</sup>

<sup>62</sup> [TriMet. \(2022\). “Adopted Budget 2022-2023.”](#) Page 44, passenger revenue % of TriMet FY2023 budget

<sup>63</sup> [TriMet. \(2022\). “Access Transit: Fare Relief Program”](#)

<sup>64</sup> [TriMet. \(2022\). “Honored Citizen Fare.”](#)

<sup>65</sup> [TriMet. \(2022\). “Reduced Fare for Riders Who Qualify Based on Income.”](#)

<sup>66</sup> [TriMet. \(2022\). “Youth Fare.”](#)

<sup>67</sup> [TransitCenter. \(2019\). “A Fare Framework: How transit agencies can set fare policy based on strategic goals.”](#)

<sup>68</sup> [TriMet. \(2022\). “Using cash on buses and MAX.”](#)

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Penalties	Fair	TriMet has worked with the state legislature to resolve fares directly with riders, omitting police involvement. Fare evasion can result in financial penalties or community service. Penalties may be waived if a person accused of fare evasion is qualified for and enrolls in the Honored Citizen Fare. While these penalties are an improvement over resolving fare evasion through the court system, the penalty for the first offense is \$75. <sup>69</sup> For people with low or no income, that could represent a significant burden. Additionally, progressive changes to fare evasion penalties only apply for adults over 18. <sup>70</sup>
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<sup>69</sup> [TriMet. \(2022\). “Fares and Fare Enforcement on TriMet.”](#)

<sup>70</sup> For youth under 18 a fare evasion citation must still be resolved in court. The presumptive fine will be \$175 and the maximum fine will be \$250. For more, see <https://citation.trimet.org/hc/en-us>

# Gas Tax

Motor Vehicle Fuels Tax in counties and cities in the Portland region.<sup>71</sup>

<b>Share</b>	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. <sup>72</sup> However, lower income households still pay a greater percentage of their income than a higher income household. <sup>73</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available. Oregon state law provides for motor fuels tax refunds for the purchase of gasoline for uses other than travel on public roadways. Refunds are not based on income and require burden of proof. <sup>74</sup>
<b>Tiered</b>	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to drive older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. <sup>75</sup>
<b>Benefits Received</b>	Fair	Under state law, gas tax revenue must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.  In Portland, heavy vehicles (over 26,000 lbs.) are exempt from the tax but are levied the Heavy Vehicle Use Tax in replacement. <sup>76</sup>
<b>Payment Methods</b>	Good	Payment is collected at point of sale. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
<b>Penalties</b>	Good	Payment is collected at point of sale.

<sup>71</sup> [Oregon.gov. \(2022\). "Current Fuel Tax Rates."](#)

<sup>72</sup> [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

<sup>73</sup> [Axios. \(2019\). "Percentage of after-tax income spent on gas, by income bracket."](#)

<sup>74</sup> [OregonLaws. \(2021\). "Motor Vehicle and Aircraft Fuel Taxes."](#)

<sup>75</sup> [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

<sup>76</sup> [City of Portland Bureau of Transportation. \(2022\). "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)



Vehicle Registration Fee

A vehicle registration fee that is collected by the state for local jurisdictions. Fee amount varies by municipality

Share	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set as a flat rate.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Poor	The fee is not tiered based on age or value of vehicle.
Benefits Received	Fair	Under state law, motor vehicle fee or tax revenue must be spent in the road right-of-way, including roadways, bikeways, and walkways. While supporting bike and pedestrian infrastructure can have a positive equity impact, the majority of this funding is spent on improvements for motor vehicles. A higher share of funding supporting bike and pedestrian infrastructure would provide a more positive impact for the people with the greatest needs.
Payment Methods	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services. <sup>77</sup>
Penalties	Fair	Vehicle registration fees must be paid in order to receive the registration. Penalties may be incurred for operating an unregistered vehicle. <sup>78</sup>

<sup>77</sup> [Oregon Driver & Motor Vehicle Services. \(2022\). "DMV Fees."](#)

<sup>78</sup> [Oregon Judicial Department. \(2021\). "Schedule of Fines on Violations."](#)

## Transportation System Development Charges

The majority of the region’s cities and counties have transportation system development charges (TSDCs). TSDCs are one-time fees levied on new development, usually at the time a building permit is issued, that are meant to recoup a fair share of the cost of additional infrastructure capacity required to serve the development.<sup>79</sup> In Oregon, state law requires that revenue only be spent on capital projects.<sup>80</sup> Local municipalities may have additional requirements on use of revenue.

<b>Share</b>	Poor	The fee is levied on developers; however, the cost may be passed on to residents. As mentioned in the “nexus” and “tiered” measures, biases in assessing the amount of TSDCs owed by developments may reduce the amount of development of dense and more affordable housing.
<b>Burden</b>	Fair	Portland offers exemptions and reductions of TSDCs for developers building affordable housing. <sup>81</sup> Policies differ by municipality.
<b>Tiered</b>	Poor	Most infrastructure impact/finance methodologies fail to account for variations in the characteristics of a unit and its impact on the overall infrastructure system. Middle housing has a lesser per unit impact on infrastructure systems in comparison to single-family detached dwellings, yet most infrastructure planning and finance methodologies assume similar per unit impacts, regardless of the characteristics of the unit or local context of development, both of which significantly affect the actual infrastructure impact of a particular development. <sup>82</sup>
<b>Benefits Received</b>	Poor	The developer, and potential residents, paying the fee will benefit from improved infrastructure. The fee is levied to cover the costs of additional infrastructure capacity required by the development. However, this dynamic biases TSDC estimates against smaller and higher-density developments, precludes housing development where the demand is greatest, and decreases the affordability of housing. <sup>83</sup>
<b>Payment Methods</b>	Good	The fee is paid by the developer who is unlikely to be unbanked. Portland allows for payment by cash, check, money order, or credit card. <sup>84</sup>
<b>Penalties</b>	Good	The fee is paid by the developer, typically at the time the City issues the building permit.

<sup>79</sup> [Metro. \(2007\). “System Development Charges.”](#)

<sup>80</sup> [Oregon Legislature. \(2021\). “Local Improvements and Works Generally.”](#)

<sup>81</sup> [Portland Housing Bureau. \(2022\). “System Development Charge \(SDC\) Exemption Program.”](#)

<sup>82</sup> [National Housing Conference. \(2022\). “NHC Housing policy Guide, Common Revisions to Impact Fees.”](#)

<sup>83</sup> [National Housing Conference. \(2022\). “NHC Housing policy Guide, Common Revisions to Impact Fees.”](#)

<sup>84</sup> [Portland.gov. \(2022\). “Systems Development Charges \(SDCs\).”](#)

## Trip-Based Utility Fees

Several local jurisdictions levy a trip-based utility fee that funds transportation.<sup>85 86 87 88 89</sup>

<b>Share</b>	Fair	Dependent on the jurisdiction. Everyone pays the same fee regardless of income. But some jurisdictions offer qualified low-income households the opportunity to waive the fee, which does help balance the higher proportion of income that low-income households would have to pay.
<b>Burden</b>	Fair	Dependent on the jurisdiction. Utility assistance programs are available but may have limited funds and may only cover assistance once annually.
<b>Tiered</b>	Good	Dependent on the jurisdiction. In some locations rates are tiered based on property type, the benefit a property will receive from improvements, and the estimated number of trips a property generates.
<b>Benefits Received</b>	Good	Dependent on the jurisdiction. Rates are partially set based on the estimated number of trips a property generates. Properties that will receive a greater benefit pay a higher rate. Fees are generally spent locally on street maintenance, active transportation projects, or ADA improvements.
<b>Payment Methods</b>	Fair	Dependent on the jurisdiction. Payments options are available with cash, check, money order, online payment, or credit/debit card. In-person cash payments may be limited depending on the location or fee that must be paid.
<b>Penalties</b>	Poor	Dependent on the jurisdiction. Late payments may result in fees or penalties. Non-payment may result in termination of utility services.

<sup>85</sup> [Milwaukie, Oregon. \(2022\). "Transportation Utility Rates."](#)

<sup>86</sup> [City of Sherwood Oregon. \(2022\). "Current Service Rates."](#)

<sup>87</sup> [City of Tualatin Oregon. \(2022\). "Usage Rates."](#)

<sup>88</sup> [City of Sherwood Oregon. \(2022\). "Low Income/Hardship Assistance."](#)

<sup>89</sup> [City of Milwaukie. \(2022\). "Other Ways to Pay."](#)

Franchise Fees

Utility franchise fees that fund transportation are collected in Beaverton, Milwaukie, and West Linn. Utility franchise fees are paid by utility providers, such as NW Natural Gas, to the municipality for use of the right-of-way. In Beaverton, the tax is 5% of gross revenue.<sup>90</sup>

Share	Fair	Fees paid by utility companies. Fees may be passed on to consumers.
Burden	Fair	No targeted exemptions or subsidies provided.
Tiered	Poor	The tax is a set percentage regardless of the value of the service.
Benefits Received	Fair	The companies paying the fees benefit from the use of the right-of-way. Collection is based on use of the right-of-way and funds return to the transportation system.
Payment Methods	Good	Payment is through utility providers who are not unbanked.
Penalties	Good	Right-of-way permits will not be granted without payment of the fee.

<sup>90</sup> [Beaverton Oregon. \(2022\). "Rights of Way."](#)

### PGE Privilege Tax

Portland General Electric (PGE) privilege tax is collected in Milwaukie. It is a 1.5% tax on total PGE revenues in the city. The tax is passed to customers of PGE as an itemized charge on electricity bills.<sup>91 92</sup>

<b>Share</b>	Poor	Everyone pays the same tax regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
<b>Burden</b>	Poor	There are targeted exemptions or subsidies available to qualified customers, but funding is limited and there is no guarantee that assistance will be granted. <sup>93</sup>
<b>Tiered</b>	Poor	The tax is the same regardless of energy consumption per person.
<b>Benefits Received</b>	Fair	All consumers of electricity pay the tax regardless of their use of the transportation system, but funds are spent locally on street repair and maintenance.
<b>Payment Methods</b>	Good	PGE accepts cash, account transfer, and credit or debit card as payment for services. <sup>94</sup>
<b>Penalties</b>	Poor	Late-payment charges may be applied if a bill is not paid in full. <sup>95</sup>

<sup>91</sup> [City of Milwaukie. \(2006\). "Street Surface Maintenance Program."](#)

<sup>92</sup> [City of Milwaukie. \(2013\). "Milwaukie PGE Privilege Tax."](#)

<sup>93</sup> [Portland General Electric. \(2022\). "Energy Assistance Programs \(OEAP, LIHEAP Oregon & More\)."](#)

<sup>94</sup> [Portland General Electric. \(2022\). "Billing & Payment Options."](#)

<sup>95</sup> [Portland General Electric. \(2022\). "Understanding My Bill."](#)

### Parking Fees and Fines

Portland charges for parking in a set of districts across the city, including Downtown and the Lloyd District, amongst others. Parking costs vary from \$1 to \$2 per hour depending on the district. Parking is generally charged a fee during the day on weekdays with some districts offering free parking on one or both weekend days.<sup>96</sup>

<b>Share</b>	Poor	Low-income drivers pay the same amount in fees as high-income drivers. Fees are set as a flat rate.
<b>Burden</b>	Poor	No targeted exemptions or subsidies available.
<b>Tiered</b>	Good	Parking fees are based on time of day and location, approximating the value of the parking space.
<b>Benefits Received</b>	Fair	The funds return to the transportation system but do not always fund parking or vehicle-related improvements; Parking fee revenue is general discretionary transportation revenue at PBOT. <sup>97</sup>
<b>Payment Methods</b>	Poor	Parking is paid for via app or at a meter via credit or debit card. Citations may be paid with check, money order, online, or credit or debit card.
<b>Penalties</b>	Poor	Drivers may receive a citation if they do not pay to park or stay past the paid period. Penalties may occur for unpaid or paid late citations. <sup>98</sup>

<sup>96</sup> [Portland Bureau of Transportation. \(2022\). "Public parking in Portland."](#)

<sup>97</sup> [Portland Bureau of Transportation. \(2021\). "Adopted Budget FY 2021-2022, Volume 1 City Summaries & Bureau Budgets."](#) On-street parking meter revenues comprises one of the largest portions of discretionary (unrestricted) revenues at PBOT. Pg. 522.

<sup>98</sup> [Portland Bureau of Transportation. \(2022\). "Common Parking Violations and Bail Schedule."](#)

## Urban Renewal Tax

Urban renewal areas, also known as Tax Increment Financing (TIF) districts, receive funding in two different ways: the Urban Renewal Division of Tax and the Urban Renewal Special Levy. Division of tax funds are a portion of existing property taxes that are dedicated to a given TIF district, they are not an additional tax on residents. Special levies are additional taxes that are used to pay bonded indebtedness in special districts that receive a limited amount of “divide-the-tax” revenue. In Portland, there are three districts that receive special levy funds, all of which are set for repayment by 2025.<sup>99</sup> Portland taxes are collected through Multnomah County. Clackamas County has urban renewal districts but only relies on TIF funds that are generated through existing property taxes, not special levy funds.<sup>100</sup>

<b>Share</b>	Fair	Property taxes are based on the assessed value of a property, not the owner’s ability to pay. Lower income households may pay a greater percentage of their income than a higher income household. However, property taxes are less regressive than many other types of transportation revenue sources.
<b>Burden</b>	Poor	Multnomah County offers a limited tax exemption based on qualifying income and property. Exemptions and deferrals are also offered for senior citizens, disable citizens, active-duty military, and veterans. <sup>101</sup> Clackamas County does not appear to offer any income-based exemptions or subsidies.
<b>Tiered</b>	Good	Tax amounts are based on assessed value of the property. Higher-income earners typically, but not always, live in higher-valued homes.
<b>Benefits Received</b>	Good	Taxes are paid by all homeowners in a jurisdiction and revenue is spent on local transportation projects within specified districts. TIF districts can be used to fund improvements in historically underserved communities, including transportation projects and supporting transit and active transportation, which have a positive equity component.
<b>Payment Methods</b>	Fair	Payments can be made with direct transfer, credit or debit, or by check. Property taxes only impact property owners, which are less likely to be unbanked. <sup>102 103</sup>
<b>Penalties</b>	Poor	Interest accrues on past due payments at a rate of 16% annually. Property with three years of delinquent taxes may be subject to foreclosure. <sup>104 105</sup>

<sup>99</sup> [Prosper Portland. \(2021\). “Your property tax bill and urban renewal.”](#)

<sup>100</sup> [Clackamas County. \(2011\). “Urban Renewal in Clackamas County.”](#)

<sup>101</sup> [Multnomah County. \(2022\). “DART Special Programs.”](#)

<sup>102</sup> [Multnomah County. \(2022\). “Pay Property Taxes.”](#)

<sup>103</sup> [Clackamas County. \(2022\). “Payment Options.”](#)

<sup>104</sup> [Multnomah County. \(2022\) “Property Tax Payment FAQs.”](#)

<sup>105</sup> [Clackamas County. \(2022\). “Foreclosures.”](#)

### Street Light User Fee

Wilsonville charges a Street Light User Fee. The fee is based on the cost of street lighting and takes into consideration the type of pole and light fixture. The fee is included in the municipal utility bill.<sup>106 107</sup>

<b>Share</b>	Poor	Everyone pays the same fee regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
<b>Burden</b>	Poor	The City provides an annual grant to Wilsonville Community Sharing (WCS), a local community social-services agency. WCS provides assistance with utility bills for individuals that qualify based on income. Access to information about WCS is not apparent on the government's utility billing website. <sup>108</sup>
<b>Tiered</b>	Good	The fee amount is based on the type of fixture in the surrounding area.
<b>Benefits Received</b>	Fair	All units are charged a Street Light fee regardless of lighting for the location of service. Fees are used to exclusively fund the installment and maintenance of streetlights. <sup>109</sup>
<b>Payment Methods</b>	Good	The City accepts cash, check, Visa, Mastercard, or Discover for utility billing payments.
<b>Penalties</b>	Poor	Late fees for utility bills are 9% Per Annum or a Minimum of \$5.00 whichever is greater

<sup>106</sup> [Wilsonville Oregon. \(2022\). "Utility Billing Rates & Fees."](#)

<sup>107</sup> [Wilsonville Oregon. \(2022\). "City of Wilsonville Utility Billing."](#)

<sup>108</sup> [Wilsonville Community Sharing. \(2022\). "Utilizing our Services."](#)

<sup>109</sup> [Wilsonville Code of Ordinances. \(2022\). "Street Lighting Fund."](#)



## Property Taxes

Washington County partially funds their Major Streets Transportation Improvement Program (MSTIP) and Urban Road Maintenance District with property taxes.<sup>110</sup>

<b>Share</b>	Fair	Property taxes are based on the assessed value of a property, not the owner's ability to pay. Lower income households may pay a greater percentage of their income than a higher income household. However, property taxes are less regressive than many other types of transportation revenue sources. <sup>111</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available based on ability to pay. Exemptions and deferrals are offered for senior citizens, citizens with disabilities, and veterans.
<b>Tiered</b>	Good	Tax amounts are based on assessed value of the property. Higher-income earners typically, but not always, live in higher-valued homes.
<b>Benefits Received</b>	Good	Taxes are paid by property owners and revenue is spent on local transportation projects through the Major Streets Transportation Improvement Program (MSTIP). MSTIP funding improves the transportation system for bicyclists, pedestrians, drivers, and transit passengers. Funding transit and active transportation has a positive equity component.
<b>Payment Methods</b>	Fair	Payments can be made with direct transfer, credit or debit, or by check. Property taxes only impact property owners, which are less likely to be unbanked. <sup>112</sup>
<b>Penalties</b>	Poor	Interest accrues on past due payments at a rate of 16% annually. Property with three years of delinquent taxes may be subject to foreclosure.

<sup>110</sup> [Washington County Oregon. \(2022\). "Major Streets Transportation Improvement Program \(MSTIP\)."; "FAQ – Assessment and Taxation."; "Urban Road Maintenance District."](#)

<sup>111</sup> [State of Oregon Transportation Vision Panel. \(2016\). "One Oregon: A Vision for Oregon's Transportation System."](#)

<sup>112</sup> [Washington County Oregon. \(2022\). "Washington County Assessment and Taxation."](#)

## TNC Fee

Fees can be charged on trips provided by transportation network companies (TNCs) such as Uber and Lyft. Beginning in 2018, the City of Portland charges a \$.50 fee per TNC ride that the Portland Bureau of Transportation uses to fund programs like PDX WAV<sup>113</sup> to support on-demand transportation for users who require a wheelchair accessible vehicle. Airports also commonly charge a fee to TNCs. In October 2021, the Pricing for Equitable Mobility final report was released to modify the existing fee structure.<sup>114</sup>

<b>Share</b>	Good	All riders pay the same \$0.50 fee regardless of length of trip or household income. This could be beneficial for low-income riders who use the service from out of town.
<b>Burden</b>	Poor	Could impact the cost of TNCs which could impact people with lower income.
<b>Tiered</b>	Good	Typically, a flat fee.
<b>Benefits Received</b>	Good	This fee funds programs that help remove barriers to mobility. Program examples include Wheelchair-Accessible Vehicle program, Safe Ride Home Program, Taxi business incubator, and Transportation Wallet Initiative. In the POEM new recommendations, fees will also enhance driver working conditions. <sup>115 116</sup>
<b>Payment Methods</b>	Poor	TNCs do not typically take cash payment or not smart-phone ride requests.
<b>Penalties</b>	Fair	Riders would need to pay the fee to use the TNC. However, SB 1558 went into effect in June 2022, which could create inequitable debt for drivers.

<sup>113</sup> [BikePortland. \(2022\). "Ridesharing bill would preempt Portland plans for driving fees."](#)

<sup>114</sup> [City of Portland. \(2021\). "Pricing Options for Equitable Mobility."](#)

<sup>115</sup> [Portland Bureau of Transportation. \(2022\). "Private For-Hire Transportation & Regulations."](#)

<sup>116</sup> [Portland Bureau of Transportation. \(2019\). "City program offers discounted travel options for holiday revelers this Saturday, March 16."](#)

Local Improvement District Tax

A Local Improvement District (LID) is a mechanism for neighboring property owners to share the cost of improvements to infrastructure, where property owners agree to tax themselves (typically at least 51% of the property owners must be in favor). For transportation, it is often used to pave unimproved streets or build sidewalks. Typically, a government agency manages the design and construction of the project and often pays the indirect costs of the work. Property owners pay the direct costs, such as engineering, financing, and the payments to the contractor. Financing may be used, and individual property owners can select 5-, 10-, or 20-year financing terms. Most jurisdictions can create LIDs. Portland is the only jurisdiction in the region that included LIDs revenues in the RTP financial assumptions.<sup>117</sup>

Share	Poor	Assessed values for improvements are not based on income. Lower income households pay a greater percentage of their income than a higher income household. Portland only requires 51% of benefitting homeowners to be in support of a LID but all homeowners are required to share in the cost.
Burden	Poor	There are no targeted exemptions or subsidies available.
Tiered	Fair	The cost is based on the cost of the project, but it is not typically tiered based on property values.
Benefits Received	Poor	The cost is based on actual project design and construction costs. Property owners paying the cost are directly benefiting.
Payment Methods	Fair	Property owners make payments over time. LIDs only impact property owners, which are less likely to be unbanked.
Penalties	Poor	Non-payment may result in late interest based on the amount of past due installments, penalties equal to 5% of delinquent installments, and collection charges. If unpaid after a year, the city may enforce its property lien and foreclose and sell the property to collect the outstanding loan balance, this could exacerbate inequities for low-income property owners. <sup>118</sup>

<sup>117</sup> [Portland.gov. \(2022\). "Local Improvement District Projects."](#)

<sup>118</sup> [Portland.gov. \(2019\). "Assessment Loan Program Policy."](#)

## Heavy Vehicle Use Tax

The Portland Heavy Vehicle Use Tax (HVT) applies to individuals or businesses that operate one or more heavy vehicles on streets owned or maintained by the City of Portland. A heavy vehicle is considered any vehicle that is subject to the Oregon Weight-Mile Tax (over 26,000 lbs.). For 2020-2023 the tax is 3% of the taxpayer's total Oregon Weight-Mile Tax.<sup>119</sup> Heavy Vehicles pay this in lieu of the Portland local gas tax.<sup>120</sup>

<b>Share</b>	Good	Tax rates are not based on household income, however, the tax is for commercial operations and is less likely to impact low-income households.
<b>Burden</b>	Good	No targeted exemptions or subsidies provided, however, the tax is for commercial operations and is less likely to impact low-income households.
<b>Tiered</b>	Fair	The tax is not tiered based on weight of vehicle or miles driven within Portland. A tiered tax would more directly tie to the damage higher weight vehicles do to roadways and may enable higher taxes for certain vehicles.
<b>Benefits Received</b>	Fair	Heavy vehicles incur more damage on roadways than lighter vehicles and the tax funds roadway repair and maintenance which commercial vehicle operations rely on. However, research has shown that heavy vehicles do a disproportionate amount of roadway damage that is not made up for by the revenue they generate for the transportation system. Additionally, funding roadways does not always have a positive impact on the people with the greatest needs.
<b>Payment Methods</b>	Good	The tax is only eligible for commercial operations and is therefore less likely to impact unbanked individuals.
<b>Penalties</b>	Good	Failure to pay the tax or pay on time may result in penalties. While penalties for low-income households who cannot afford certain taxes or fees has a negative equity impact, holding businesses and commercial operations accountable for paying for their use and wear and tear of the transportation system is important.

<sup>119</sup> [Portland.gov. \(2022\). "Heavy Vehicle Use Tax."](#)

<sup>120</sup> [City of Portland Bureau of Transportation. \(2022\). "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)

## Cannabis Tax

The State of Oregon and many cities in the greater Portland region currently impose a tax on legal purchases of recreational use cannabis or cannabis products. The State currently levies a 17% excise tax on cannabis, and municipalities in Oregon can voluntarily elect to levy an additional 3% tax. Each government body makes their own decisions on where these revenues are directed for spending; transportation is one of many policy areas that are eligible. For example, voters in the City of Portland agreed to Ballot Measure 26-180, which dedicates part of the 3% cannabis tax revenue to public safety investments, for reducing the “impacts of drug and alcohol abuse” and “street infrastructure projects that improve safety”.<sup>121</sup> State Measure 110 which was passed in 2020 will shift most of this revenue to addiction treatment programs.

<b>Share</b>	Poor	Taxes on cigarettes, alcohol, and cannabis are generally regressive. Everyone pays the same tax per unit regardless of income. Lower income households pay a greater percentage of their income than a higher income household.
<b>Burden</b>	Fair	As the cannabis excise tax is targeted directly at recreational cannabis, medical cannabis purchases can be seen as ‘exempted’ from the levy. While no subsidies or other exemptions exist for recreational cannabis, the burden does not disproportionately impact those who rely on the substance for medical and health purposes.
<b>Tiered</b>	Fair	There is no tiered system on the cannabis tax, but the amount paid is based on the price of the product. Additionally, cannabis for medical use is not taxed in the State of Oregon.
<b>Benefits Received</b>	Fair	This tax is collected into a general fund, which is then allocated to a variety of spending programs by policy and legislature. However, depending on the program design by each municipal jurisdiction, this revenue is not necessarily required to be spent on transportation. Indirect externalities of the public safety and drug abuse mitigation programs that come out of cannabis tax revenue can include general roadway safety improvements and reduced incidents of reckless driving. <sup>122</sup>
<b>Payment Methods</b>	Good	Tax is collected at point of sale in the payment medium the sale is made in. Most retail locations offer cash options.
<b>Penalties</b>	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment. The tax is collected on every transaction.

<sup>121</sup> [City of Portland. \(2016\). “Notice of Measure Election 26-180”;](#) [Portland City Auditor, City of Portland. \(2019\). “Recreational Cannabis Tax: Greater transparency and accountability needed”.](#)

<sup>122</sup> [State of Oregon Transportation Vision Panel. \(2016\). “One Oregon. A Vision for Oregon’s Transportation System”.](#) See Appendix D: Funding Applicability Matrix.

## Emerging Transportation Revenue Sources

### Freeway Tolling

Drivers pay to drive on a particular roadway, the fee is a flat rate and not dependent on congestion or time of day.

Share	Variable	If the freeway tolling program subsidizes tolls under an income threshold, the fee is more progressive.
Burden	Variable	Freeway tolling that use transponders can be less equitable because while they can offer discounted tolls based on the vehicle traveling through, the discount can only be used after purchasing a transponder, which is a barrier to access. <sup>123</sup>
Tiered	Variable	Freeway tolling can be equitable if the fee is dependent on type of vehicle used to travel on the roadway.
Benefits Received	Variable	Tolling programs that use the revenue to pay for wear and tear on those roadways are less equitable than programs that use the revenue to fund transit infrastructure projects.
Payment Methods	Poor	The majority of roadway and toll pricing technology has evolved beyond physical toll booths which provide a cash option. Roadway and toll pricing typically relies on a variety of technologies to identify vehicles passing a certain point on roadways. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees
Penalties	Variable	Fees that are collected at point of sale are more equitable than fees that are charged at a later date and can compound into debt.

<sup>123</sup> [U.S. Department of Transportation Federal Highway Administration. \(2008\). "Income-Based Equity Impacts of Congestion Pricing."](#)

**Vehicle Miles Traveled (VMT) Fee/ Road User Charge (RUC)**

Drivers pay for every mile traveled, as known as a road user charge. In 2013, the Oregon State Legislature passed SB 810, which created the permanent voluntary RUC program known as OReGO. The program went live on July 1, 2015, and became the first fully functional VMT fee/ road user charge program in the nation. ODOT’s Road User Fee Taskforce has since conducted a tax equity review of the RUC.<sup>124</sup>

<b>Share</b>	Poor	Data from Oregon’s OReGO program (2009-2011 data) revealed that lower-income households pay a disproportionate percentage of their income to the RUC; the higher the household income, the smaller the percentage.
<b>Burden</b>	Variable	VMT fees and RUC programs can be designed to exempt certain demographics or target particular vehicle types, which can alleviate the regressivity.
<b>Tiered</b>	Variable	Again, variable by program design. Fees that are based on the price of the vehicle travelling on the roadway are more equitable.
<b>Benefits Received</b>	Variable	Fees that are linked to the type of roadway are more equitable because they ensure that revenue is generated to improve the areas where the payer is traveling. <sup>125</sup>
<b>Payment Methods</b>	Poor	VMT programs may implement different tracking mechanisms. Self-reporting and a cash option may be feasible but would present a burden. Oregon’s pilot program, OReGO, requires a bank card to open an OReGO account. <sup>126</sup>
<b>Penalties</b>	Variable	Variable by program design.

<sup>124</sup> [Oregon Department of Transportation. \(2022\). “Road Usage Charging: Vehicle Ownership & Socioeconomic Equity”.](#)

<sup>125</sup> Transportation Research Record. (2012). “Equity Evaluation of Fees for Vehicle Miles Traveled in Texas.”

<sup>126</sup> [OReGO. \(2022\). “Sign up for OReGO!”](#)

Cordon Pricing

Drivers pay to enter a designated area.

Share	Variable	Income based fees are more progressive. <sup>127</sup>
Burden	Variable	Fee exemptions, rebates, and discounts for low-income households are more equitable. <sup>Ibid.</sup>
Tiered	Variable	Vehicle- and mode-based fees are more progressive. <sup>Ibid.</sup>
Benefits Received	Variable	Pricing is equitable when revenue is reinvested in equitable and sustainable transportation options, like transit. <sup>Ibid.</sup>
Payment Methods	Poor	Cordon pricing typically relies on a variety of technologies to identify vehicles entering a priced area. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees. <sup>Ibid.</sup>
Penalties	Variable	Progressive fees are collected at point of sale.

<sup>127</sup> [Portland Bureau of Transportation. \(2020\). "Tolling: Background Memo."](#)



## Roadway Pricing

Drivers pay to drive on a particular roadway, the fee is variable based on congestion or time of day.

<b>Share</b>	Variable	Progressive fees vary depending on household income.
<b>Burden</b>	Variable	Pricing that subsidizes or target exemption fees under an income threshold is more equitable.
<b>Tiered</b>	Variable	Tiering payments based on time of day is beneficial to increasing the equity of a fee since “peak hour drivers have higher incomes.” <sup>128</sup>
<b>Benefits Received</b>	Variable	Fees that targeted transit, bike, and pedestrian reinvestment would be more progressive. <sup>129</sup>
<b>Payment Methods</b>	Poor	The majority of roadway and toll pricing technology has evolved beyond physical toll booths which provide a cash option. Roadway and toll pricing typically relies on a variety of technologies to identify vehicles passing a certain point on roadways. Bills may be sent directly to drivers or pre-pay systems may be set up. Though direct bills may have the potential to be paid by unbanked individual, using this method on an ongoing basis would be burdensome and introduce opportunities for unpaid fees
<b>Penalties</b>	Variable	Progressive fees are collected at point of sale.

<sup>128</sup> [City Commentary. \(2017\). “Transportation equity: Why peak period road pricing is fair”](#); University of Minnesota. (2015). “Integrated Public Use Microdata Series: Version 6.0.”

<sup>129</sup> [Oregon Metro. \(2021\). “Metro Regional Congestion Pricing Study.”](#)

Parking Pricing

Drivers pay to park in certain areas.

Share	Variable	Parking pricing that accepts vouchers, transit credits, or reduced fares depending on household income promotes equity.
Burden	Variable	Outcomes are dependent on program design. For example, the City of Portland is not currently able to put into place a parking meter discount or exemption program for low-income drivers. This will require better data, outreach, policy development and potentially technology changes. However, the City has identified an interim step in alignment with POEM recommendations, the transaction fee will allow PBOT to expand distribution of its affordable housing Transportation Wallet program, which provides households on lower incomes with passes and credits that can be used for transit, BIKETOWN, scooter-share, taxis, Uber and Lyft, and other options. It will also help support the BIKETOWN for All program that provides discounted bike-share memberships for Portlanders living on a low income. Finally, the fee will also fund greater research and policy development to inform more robust affordability protections in advance of any future rates increases, as well as outreach around existing affordability programs, such as the SmartPark swing shift reduced rates for people living on low incomes. <sup>130</sup>
Tiered	Variable	Tiered parking pricing based on household income promotes equity.
Benefits Received	Variable	Programs that reinvest revenue from parking fees to transportation affordability remove barriers to access active transportation options.
Payment Methods	Poor	The majority of parking meter technology has evolved beyond coin operated machines and relies on the use of a credit card. If a cash option is available, it would require additional steps for the driver to submit a form and payment.
Penalties	Variable	Progressive fees are collected at point of sale.

<sup>130</sup> [Portland.gov. \(2022\). "Parking Climate and Equitable Mobility Transaction Fee Overview."](#)

# Potential Future

## Carbon Fee

Emitters are charged for each ton of greenhouse gas emissions they emit. Also known as emissions fees, carbon fees can be applied to emitters directly or as a tax on goods or services that are greenhouse gas-intensive such as a carbon tax on gasoline.<sup>131</sup> The implementation of carbon fees are primarily conducted through two policy mechanisms, emissions trading (cap-and-trade); and emissions tax.

Share	Variable	On its own, the purely financial share of an emissions tax is generally regressive, meaning lower income households would pay a larger proportion of their income towards a carbon tax. This is due in many ways to how carbon-intensive technologies and consumption is cheaper than green technology. <sup>132</sup> However, parts of the carbon fee revenue can be used to offset income taxes for lower-income households, creating a net positive effect.
Burden	Variable	To offset the regressivity of an energy, emissions, or carbon tax, other forms of subsidies such as income tax credits can be helpful. However, the burden is placed upon lower income households to demonstrate need for and knowledge of potential rebates available to them.
Tiered	Poor	The carbon tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles.
Benefits Received	Variable	The benefits of a carbon tax are highly dependent on the program design, especially if additional measures such as rebates and tax credits are included. Although lower-income households are much more likely to change their behaviors as a result of a carbon tax, those who can afford the added cost may not necessarily change their behaviors. Once again, the actual net financial benefit for transportation funding and for vulnerable populations are largely variable and not immediately evident.
Payment Methods	Variable	Depending on what carbon or emissions sources are taxed, the payment methods could be as straightforward as a post-transaction addition (such as a sales tax on purchasing gas), or added to an energy bill. If the emissions fee is taxed upstream at the point of production, this cost might also be imposed upon consumers via price increases in the purchase of the energy goods themselves. As such, payment methods should be largely unchanged from the status quo.
Penalties	Variable	This is dependent on the payment method. Generally, an indirect sales tax or a price increase would not offer opportunities to not pay the cost of a carbon tax.

<sup>131</sup> [Center for Climate and Energy Solutions. \(2022\). "Carbon Tax."](#)

<sup>132</sup> [National Bureau of Economic Research. \(2010\). "How Regressive is a Price on Carbon?"](#)

## Regional Gas Tax

Taxes on motor fuels can be collected at multiple levels of government, including regionally. Metro, the Portland regional government does not currently collect motor fuel taxes.

<b>Share</b>	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households may have longer commutes to work but may drive less for leisure activities. <sup>133</sup> However, lower income households still pay a greater percentage of their income than a higher income household. <sup>134</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles and have fewer resources to invest in electric vehicles. Electric vehicles on average cost \$10,000 more than traditional gas-powered vehicles and often require installation of home charging stations. While the federal government offers a tax credit for electric vehicles of up to \$7,500, it requires purchasers to pay the upfront cost and the tax credit is reduced once a manufacturer has sold 200,000 vehicles. <sup>135</sup>
<b>Benefits Received</b>	Good	Road users would pay a tax collected and spent regionally, benefiting more directly than gas taxes collected at the state or federal level. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. <sup>136</sup>
<b>Payment Methods</b>	Good	Payment is collected at the pump and is included in the overall price of gasoline. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
<b>Penalties</b>	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

<sup>133</sup> [BikePortland. \(2016\). "Low-income households drive much less than high-income households."](#)

<sup>134</sup> [Axios. \(2022\). "High gas prices hit low-income Americans the hardest."](#)

<sup>135</sup> [Natural Resources Defense Council. \(2022\). "Electric vs. Gas Cars: Is It Cheaper to Drive an EV?"](#)

<sup>136</sup> [Congressional Research Service. \(2021\). "Federal-Aid Highway Program \(FAHP\): In Brief."](#)

## Gas Tax Indexing

Indexing the motor fuel tax to the Consumer Price Index or other index allows the tax rate to keep pace with the pace of inflation.<sup>137</sup>

<b>Share</b>	Poor	Everyone pays the same tax on gasoline regardless of income. Lower income households pay a greater percentage of their income than a higher income household. Lower income household may also have longer commutes to work and less access to transit.
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Poor	The fuel tax is the same regardless of the fuel-efficiency of the vehicle. Lower income households are more likely to driver older, less fuel-efficient vehicles.
<b>Benefits Received</b>	Good	Road users are paying the tax which supports the Highway Trust Fund. The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. <sup>138</sup> The majority of the Highway Trust Fund supports roadways. The fuel tax funds roadways, transit, and bike and pedestrian infrastructure. <sup>139</sup>
<b>Payment Methods</b>	Good	Payment is collected at the pump and is included in the overall price of gasoline. It is common practice for gas stations to provide a cash option which can support unbanked individuals, and which may be a lower posted cost than paying with credit.
<b>Penalties</b>	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

<sup>137</sup> [Mobility Investment Priorities. \(2022\). "Index Statewide Motor Fuels Tax."](#)

<sup>138</sup> [U.S. Department of Transportation Federal Highway Administration. \(2022\). "Fixing America's Surface Transportation Act or "FAST Act."](#)

<sup>139</sup> [Congressional Research Service. \(2021\). "Federal-Aid Highway Program \(FAHP\): In Brief."](#)<sup>v</sup>

### Studded Tire Fee

Studded tires increase wear to road surfaces, reducing pavement life. Charging a fee on new studded tires can offset some of the road maintenance costs.<sup>140</sup>

Share	Fair	Fees are set as a flat rate; however, not all drivers use studded tires. A studded tire fee disproportionately impacts drivers based on their geography, particularly areas that face heavier snowfall and treacherous driving conditions. Since rural areas are typically lower income per capita than urban areas (which often have snow-clearing services), a studded tire fee can potentially impact lower income households disproportionately.
Burden	Variable	This is dependent on program design (e.g., Washington State has exemptions for their studded tire fee). Exemptions based on time of year can help reduce year-round costs to users, and promotion of alternatives such as non-studded traction tires can help reduce the reliance on cheaper studded tires. Discouraging the use of safer tires can have fatal consequences, especially if drivers are forced to use regular tires due to cost.
Tiered	Poor	Fees are the same regardless of type of vehicle.
Benefits Received	Variable	This is dependent on program design. In most existing examples the fee is used to fund road maintenance costs caused by studded tires, which benefits all road users.
Payment Methods	Good	Payment is collected by the tire seller and is included in the overall price of the tire.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

<sup>140</sup> [Department of Revenue Washington State. "Tire fees and studded tire fees."](#)

## Regional Vehicle Registration Fees

A vehicle registration fee collected by the state and distributed to regional governments. A regional vehicle registration fee is not currently collected.<sup>141</sup> Vehicle registration fees can be tiered by classification of the vehicle, and is often applied heavily on electric vehicles to recover decreasing motor fuels tax revenue.

<b>Share</b>	Variable	This is dependent on program design and tiering. Fees are generally set at a flat rate for each tier. For example, if fuel efficiency is used, this can disproportionately impact lower-income households as older cars tend to have lower MPG ratings. By classification, EV specific fees shifts part of the lifetime cost of vehicle ownership upfront, which can further disincentivize purchase of EVs. Recurring ongoing costs are known to be less psychologically influential as a one-time, larger upfront cost.
<b>Burden</b>	Variable	This is dependent on program design and highly dependent on what other confounding priorities exist in transportation and urban policy. While exemptions for financially vulnerable demographics can alleviate the initial barrier to accessing an EV, the long-term tradeoff of reduced revenue will hurt infrastructure improvements that those very communities may rely on. In Multnomah County, veterans with disabilities are exempt from the fee. Other exemptions and reductions can be designed, including coordination with incentive programs for registering and purchasing new electric vehicles.
<b>Tiered</b>	Variable	This is dependent on program design. Fees can be applied higher or lower depending on size, fuel efficiency, or classification of a vehicle. Electric vehicles are charged a heavier fee in some states to recoup expected lost revenues from their lack of motor fuel purchases.
<b>Benefits Received</b>	Fair	Drivers and owners of vehicles pay the fees, however, the amount of the fees is not based on the amount that a driver operates a vehicle or the number of miles a particular vehicle is driven. Under state law, the vehicle registration fees must be spent in the road right-of-way, including roadways, bikeways, and walkways. Depending on program design, some states have appropriated parts of EV specific fees to pay for charging infrastructure, which will further incentivize EV purchase (and emissions reductions). The greatest benefit will go to those using the roadways the most.
<b>Payment Methods</b>	Good	The Oregon DMV accepts cash, check, money order, or credit or debit card as payment for services.
<b>Penalties</b>	Fair	Vehicle registration fees must be paid to receive the registration. Penalties may be incurred for operating an unregistered vehicle.

<sup>141</sup> [Eco-Northwest. \(December 2019\). "Metro Transportation Revenue Tool Analysis and Evaluation, Final Analysis."](#)

First-Time Title Fee on New Vehicles

A vehicle registration fee or vehicle title fee assessed at a higher rate for new vehicles. A first-time fee on new vehicles differs from the existing privilege tax. The privilege tax is a .005 percent tax on the retail price of any vehicle purchased from a dealer in Oregon, with a few exceptions. This fee would be an additional title fee for new vehicles. The difference would likely be that this would be a flat fee or a scaled fee based on vehicle value, but it would not exceed certain thresholds, unlike the privilege tax.<sup>142</sup>

Share	Fair	Lower-income households are more likely to buy used cars, but not exclusively.
Burden	Variable	This is dependent on program design. Administering agencies can opt to exempt different demographics based on the priorities of the agency, such as income or residential demographics.
Tiered	Fair	Dependent on program design but any new vehicle fee is tiered when not applied to used vehicles.
Benefits Received	Fair	Buyers of new vehicles pay the fees; however, the greatest benefit will go to those using the roadways the most. Under state law, vehicle fees must be spent in the road right-of-way, including roadways, bikeways, and walkways.
Payment Methods	Good	When collected at time of vehicle purchase.
Penalties	Fair	Vehicle registration and licensing fees must be paid to receive the registration. Penalties may be incurred for operating an unregistered vehicle.

<sup>142</sup> [Oregon Driver & Motor Vehicle Services. \(2022\). "Vehicle Title, Registration & Permit Fees."](#)



### General Sales Tax

Sales taxes are applied to the purchase of all or most goods and services as a percentage of the total sale.

<b>Share</b>	Poor	Everyone pays the same tax on items regardless of income. Lower income households pay a greater percentage of their income than a higher income household. General sales tax exemptions for items such as groceries and utilities that constitute a larger share of income for poorer taxpayers, or targeted low-income tax credits instead of exemptions are options to provide relief for low-income taxpayers and make the tax more progressive. <sup>143</sup>
<b>Burden</b>	Poor	There are no targeted exemptions or subsidies available.
<b>Tiered</b>	Poor	Sales is the same regardless of the purchases made.
<b>Benefits Received</b>	Poor	This is dependent on program design. General sales taxes have few direct connections to transportation projects.
<b>Payment Methods</b>	Good	Collected at point of sale in the payment medium the sale is made in.
<b>Penalties</b>	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

<sup>143</sup> [Institute on Taxation and Economic Policy. \(2011\). "Options for Progressive Sales Tax Relief."](#) "Exemptions and credits are both progressive options for low-income tax relief—but neither is sufficient to offset the basic regressivity of sales taxes. Sales tax exemptions and credits should each be part of a broader strategy for tax fairness that includes a progressive, graduated personal income tax, but sales tax breaks are likely to be insufficient on their own to eliminate the unfairness of state and local taxes."

### Targeted Sales Tax

Targeted sales taxes are applied to specific goods and services. Also known as an excise tax if it is levied at moment of manufacture rather than a sale.<sup>144</sup>

Share	Variable	This is dependent on the goods and services that are taxed. In general, lower income households pay a greater percentage of their income than a higher income household. Some products are taxed at multiple levels, which compounds regressivity and diminishes consumption. This can potentially lead to a decline in tax revenue at other levels of government.
Burden	Variable	This is dependent on program design, as well as the goods and services that are taxed. Targeting the tax on non-essential goods such as tobacco, alcohol, and betting can have potential in avoiding the blanket regressivity of a general sales tax, but can also exacerbate the financial struggles of long-term users. Excise taxes on luxury goods can be more equitable.
Tiered	Variable	This is dependent on program design. Exemptions could be made on certain tax-free days, such as back-to-school sales where school supplies are made exempt. This would be a form of time and product-based tiering.
Benefits Received	Variable	This is dependent on program design. Most taxation of this form rarely goes towards transportation projects.
Payment Methods	Good	Collected at point of sale in the payment medium the sale is made in.
Penalties	Good	Due to the payment method, there is no ability to have unpaid fines which result in negative outcomes or increase the cost of the revenue source due to lack of payment.

<sup>144</sup> [Multnomah County. \(2022\). "Excise Taxes."](#)

Business Income Tax

All businesses except partnerships file an annual federal income tax return, states can also levy income taxes on businesses.<sup>145</sup>

Share	Variable	This is dependent on program design, and what the thresholds are for each bracket. Whether this income tax is regressive, highly depends on how much small and local businesses pay relative to what national or multinational corporations are responsible for.
Burden	Variable	This is dependent on program design. Similar to personal income taxes, tax credits can be implemented to alleviate the burden on small businesses and local enterprises.
Tiered	Variable	This is dependent on how the tax brackets and thresholds are designed. Business income taxes can also be tiered by number of employees, and whether they qualify as small-and-medium-enterprises (SMEs).
Benefits Received	Poor	This is dependent on program design, but there is no direct connection to transportation projects.
Payment Methods	Good	Is paid by businesses directly.
Penalties	Fair	Penalties or fine could pose a burden for small businesses.

<sup>145</sup> [Internal Revenue Service. \(2022\). “Business Taxes.”](#)

Corporate Activities Tax

Applied in Oregon to business with \$1 million or more taxable commercial activity, the total amount a business realizes from transactions in Oregon. The funds are currently dedicated to student and education spending.<sup>146</sup>

Share	Good	Paid by businesses with a threshold of commercial activity.
Burden	Fair	Passed on in the price of commercial activity, but not directly levied on low-income residents.
Tiered	Good	Applies only to businesses above a threshold.
Benefits Received	Fair	All will benefit but some businesses may rely on transportation network more than others.
Payment Methods	Good	Is paid by businesses directly.
Penalties	Fair	Penalties or fine could pose a burden for small businesses.

<sup>146</sup> [Oregon Department of Revenue. \(2019\). "Corporate Activity Tax \(CAT\)."](#)

**Zero-Emission Zone (ZEZ) and Low Emission Zone (LEZ)**

Zero-Emission Zones (ZEZ) and Low Emission Zones (LEZ) are a similar concept to cordon-based congestion pricing, zones are identified and vehicles entering are charged a fee if they do not meet emissions and other requirements.<sup>147</sup> This approach can also apply to deliveries only.<sup>148</sup> Enforcement is generally conducted through traffic cameras, which run license plates through registration databases.

<b>Share</b>	Variable	Similar to emissions fees, these have potential to be regressive as highly pollutive vehicles are more likely to be represented in lower income households.
<b>Burden</b>	Variable	This is dependent on program design. ZEZ and LEZ should not be enforced in low-income neighborhoods. Low-income households should not need to pay ZEZ and LEZ fees, as these zones may house essential places for individuals, e.g., place of work, grocery, medical services.
<b>Tiered</b>	Variable	This is dependent on program design. A tiered fee based on income level would remove some barriers to accessibility.
<b>Benefits Received</b>	Variable	This is dependent on program design. Equitable ZEZ and LEZ fees would be invested into accessible transit to and from low-income neighborhoods.
<b>Payment Methods</b>	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
<b>Penalties</b>	Variable	This is dependent on program design. It would be most equitable to offer low-income households prepaid debit cards to use for entering ZEZ and LEZ.

<sup>147</sup> [The International Council on Clean Transportation. \(2021\). “A Global Overview of Zero-Emission Zones in Cities and Their Development Progress.”](#)

<sup>148</sup> [Los Angeles Cleantech Incubator. \(2022\). “Santa Monica Zero Emissions Delivery Zone Pilot.”](#)

Curb Use Fees

Fees can be charged to delivery vehicles, TNCs (e.g., Uber, Lyft), and other curb users who are regulated through additional fees such as the TNC fee described above. Charging all curb users a fee requires metering or other form of payment system.

Share	Variable	This is dependent on program design. For Uber, drivers make around \$30K less than the Portland median income <sup>149</sup> . As a result, TNC should pay for curb use fees or allow drivers to pay based on their income.
Burden	Variable	This is dependent on program design. To promote equity, TNC can subsidize fees for drivers below a certain income threshold.
Tiered	Variable	This is dependent on program design. Tiered pricing based on the value of the car would make the fees more equitable.
Benefits Received	Variable	This is dependent on program design. Equitable benefits would ensure fees went into transit access and installation.
Payment Methods	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
Penalties	Variable	This is dependent on program design. Penalties should not force drivers to lose their jobs or go into debt, as that would create an endless cycle.

<sup>149</sup> [Indeed. \(2022\). "Driver yearly salaries in the United States at Uber."](#)

### First/Last Mile Delivery Fees

The Zero Emission Zone (ZEZ) and Low Emission Zone (LEZ) (a similar concept to cordon-based congestion pricing, zones are identified and vehicles entering are charged a fee if they do not meet emissions and other requirements.<sup>150</sup> This approach can also apply to deliveries only<sup>151</sup>) as well as curb use fees that can be applied specifically to delivery to incentive more sustainable delivery and raise revenue. Electrifying First/Last Mile Delivery Fees can significantly decrease heavy-duty vehicle use. A fee for vehicles outside of ZEZ or LEZ can help incentivize the change.<sup>152</sup> To approach this equitably, the employer should be responsible for those fees or households on a tiered system could be responsible if they are high-income. Lower-income households should not be penalized for living outside the city center when the city center is too expensive to be livable. Additionally, if corridors provide EV charging stations, this creates more opportunity to drive in a ZEZ or LEZ.

<b>Share</b>	Variable	This is dependent on program design. TNC would need to cover the fees or low-income households would pay a proportionate fee to make the fee equitable.
<b>Burden</b>	Variable	This is dependent on program design; however, an equitable program would subsidize fees for households below an income threshold.
<b>Tiered</b>	Variable	This is dependent on program design, but equitable tiered fees would change depending on the weight and value of the vehicle entering the ZEZ or LEZ.
<b>Benefits Received</b>	Variable	This is dependent on program design. To make the program equitable, fees need to be reinvested in transit programs and access in low-income neighborhoods.
<b>Payment Methods</b>	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
<b>Penalties</b>	Variable	This is dependent on program design. Individuals should not be penalized for driving in ZEZ or LEZ even if they still have unpaid fees when they are working or accessing essential locations. If their fees cannot be paid, there should be a re-evaluation of the fee structure for the most equitable program.

<sup>150</sup> [The International Council on Clean Transportation. \(2021\). "A Global Overview of Zero-Emission Zones in Cities and Their Development Progress."](#)

<sup>151</sup> [Los Angeles Cleantech Incubator. \(2022\). "Santa Monica Zero Emissions Delivery Zone Pilot."](#)

<sup>152</sup> [The International Council on Clean Transportation. \(2022\). "Electrifying Last-Mile Delivery: A Total Cost of Ownership Comparison of Battery-Electric and Diesel Trucks in Europe."](#)

## Vehicle Rental Fees

Additional fee that renter pays to the jurisdiction that enacts the fee. Depending on the state and region, the fee will be reinvested into the surrounding area but not necessarily into transportation funding.<sup>153</sup>

<b>Share</b>	Variable	This is dependent on program design but would be most equitable if fees were paid by rental companies or charged depending on household income.
<b>Burden</b>	Variable	This is dependent on program design. To avoid regressive taxes/fees, fees should be eliminated for households below an income threshold, where various forms of proof are acceptable.
<b>Tiered</b>	Variable	This is dependent on program design. The value and weight of the vehicle that is rented should determine the exact amount paid by renter.
<b>Benefits Received</b>	Variable	This is dependent on program design. A general fund does not provide equitable benefits, nor do tourism-related events; however, fees that fund transportation projects allow for accessible and equitable opportunities.
<b>Payment Methods</b>	Variable	This is dependent on program design. An equitable payment method would provide accessible payment programs by cash, check, card, or loan system.
<b>Penalties</b>	Variable	This is dependent on program design. To eliminate any penalty structure or legal repercussion, fees should be included in initial cost and be available by loan system if necessary.

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<sup>153</sup> [Tax Foundation. \(2019\). "Reforming Rental Car Excise Taxes."](#)



### Traffic Fines

Fines incurred by the person driving a car for violating a variety of different regulations, ultimately determined by the police officer issuing the ticket. Black Oregonians have paid roughly \$5.6 million more than White Oregonians.<sup>154</sup>

<b>Share</b>	Poor	Lower-income households pay the same fines.
<b>Burden</b>	Poor	There are no exemptions. Payment plans can be set-up through calling the accounting department, but the exact details of the plans offered are not available.
<b>Tiered</b>	Poor	The fine does not vary.
<b>Benefits Received</b>	Poor	The first \$50 goes to the state, the last \$16 goes to the jail fund, and the remainder is split between the county and agency who issued the fine. About 30% of the revenue is invested into the city, which is does not specifically go towards active transportation projects.
<b>Payment Methods</b>	Good	Payment can be made in a variety of ways and both online and by mail.
<b>Penalties</b>	Poor	Fines can add up to a large debt and can also lead to warrants if unpaid. Research has shown that lower-income households ultimately owe more.

<sup>154</sup> [InvestigateWest. \(2017\). "The High Cost of Disparities For People of Color in Multnomah County."](#)

Public-Private Partnerships

Public-private partnerships (sometimes called P3s) can be used to finance, build, and operate projects. Private partners may have access to additional forms of financing or flexibility. P3s require a source of revenue to pay for the financing, it is not a source of funding.<sup>155</sup>

Share	Variable	This is dependent on program design. This could be equitable if private companies fund active transportation projects to go towards low-income households.
Burden	Variable	This is dependent on program design. Equitable P3s need to ensure they do not displace housing or remove transit access for low-income households.
Tiered	Variable	This is dependent on program design, but private companies that put forth large sums of money to invest in transit and pedestrian improvements are more equitable.
Benefits Received	Variable	This is dependent on program design. A good score would result from the growth of transit and pedestrian improvements and enhancements.
Payment Methods	N/A	
Penalties	N/A	

<sup>155</sup> [The World Bank. \(2022\). “How PPPs Are Financed.”](#)

**Naming Rights or Sponsorships**

Naming rights or sponsorships can generate revenue depending on the arrangement (e.g., Salesforce Transit Center in San Francisco).<sup>156</sup>

Share	Good	Only advertisers opt to pay.
Burden	Good	No monetary burden to residents.
Tiered	N/A	
Benefits Received	Variable	This is dependent on program design, but funds raised on advertising are typically spent on the systems being advertised to.
Payment Methods	N/A	
Penalties	N/A	

<sup>156</sup> [U.S. Department of Transportation Federal Highway Administration. “Advertising, Naming Rights, Sponsorships.”](#)

Allowance of Use of ROW for Rest Areas/Privatization

Excess right of way not being used for transportation can be used for rest areas or other developments. Transit agencies are best positioned to benefit from transit-oriented development on their land, development along large roads have noise and pollution challenges.<sup>157 158 159</sup>

Share	Good	Only developers opt to pay.
Burden	Good	No monetary burden to residents.
Tiered	N/A	
Benefits Received	Variable	Revenue that is used to increase transit-oriented-develop and invest in access to transit is a progressive fee.
Payment Methods	N/A	
Penalties	N/A	

<sup>157</sup> [Delaware Valley Regional Planning Commission. \(2020\). "SEPTA Transit-Oriented Development \(TOD\) Policy Research."](#)

<sup>158</sup> [U.S. Department of Transportation Federal Highway Administration. "Right-of-Way Use Agreements."](#)

<sup>159</sup> [Transportation Policy Research Center. \(2014\). "Public Use of Rail Right-of-Way in Urban Areas."](#)

### Overweight Truck and SUV Personal Tax

Multnomah County is exploring a tax for people purchasing vehicles over 6,000 pounds. In D.C., this tax is \$500 annually. This tax is created to help combat pollution and fatalities and serious injuries. Owners of EV vehicles that surpass the 6,000-pound mark will have a “1,000 pound credit”.<sup>160</sup>

<b>Share</b>	Fair	The tax is based on the weight of the vehicle, not household income. The initial price of this vehicle creates a barrier for lower income households to own this vehicle.
<b>Burden</b>	Fair	There are no subsidies or exemptions available, and this tax (as exemplified in D.C.) is still applicable whether the vehicle is personal use or needed for work.
<b>Tiered</b>	Fair	The tax is determined by weight, not value of the vehicle. However, vehicles that are over 6,000 pounds carry a higher value than those weighing less.
<b>Benefits Received</b>	Fair	Taxes would contribute to street safety enhancements. The tax is aimed to increase safety for vulnerable users, the majority of which are low-income.
<b>Payment Methods</b>	Variable	This is dependent on program design. Equitable payment methods would allow people to pay their fine over time, with no interest or penalties accrued for late payment.
<b>Penalties</b>	Variable	This is dependent on program design. Equitable penalties would enforce additional fines based on income levels and wave penalty fees if household is below poverty line.

<sup>160</sup> [Bloomberg. \(2022\). “A City Fights Back Against Heavyweight Cars.”](#)

## Revenue Sources not Included in Assessment

This list details items that were not included because the item was a financing mechanism rather than a revenue source or did not represent a significant equity impact based on available information. Many of these items are often grouped together under an 'other' category in budget documents and typically do not generate a large share of revenue.

- Bond Proceeds (revenues that generate bond proceeds (e.g., gas tax) are included in the equity assessment). Bonds are a financing mechanism, rather than a specific revenue source.
- Transit advertising. Transit advertising is ads or other forms of advertising, including digital media, placed on public transportation vehicles or areas, such as bus stops.
- Contract Revenue/Service Contracts are typically revenues paid from one agency to another, or one department to another for services rendered. For example, the City of Portland contracts with TriMet for operating personnel for the Portland Streetcar.
- Federal Other taxes, fees investment income and other receipts. This group includes penalties and fines imposed for violation of motor carrier safety requirements, penalties related to highway-user taxes, NHTSA motor vehicle safety penalties, and interest on invested balance.
- Various Revenues generated from government activities (sale of government property, interest income, loan repayment, rent and fines).
- Land Use Planning Fees are charged for each type of land use review. The fee includes portions that are allocated different government departments, including Transportation.
- Potential future Advertising Revenues (for use within ROWs or assets). Billboards on public land, naming rights of facilities, and advertisement on transit vehicles and at stops are some of potential sources of advertising revenue.
- Institutional Zone Development. Hospitals, universities, and other large institutions invest in transportation infrastructure improvements through their conditional use permits and/or Master Plans. The new Comprehensive Plan proposes to implement institutional zones which will remove the Conditional Use status for these institutions. We anticipate institutions will continue to invest in transportation improvements as a part of the new Institutional Zone Development process.
- School Partnerships. Funding included in a school bond measure for traffic safety improvements at schools. In Portland, the process developed in partnership between PPS and the City ensures that development fees are prioritized for safety improvements near the schools that need them the most.

## Appendix B: Allocation and Constraints by Revenue Source

Source	Category	Allocation and Constraints Description
Federal		
Fuels tax	Roadways, transit, bike, and pedestrian	Federal revenue sources fund the Highway Trust Fund (HTF). The HTF is made up of the Mass Transit Account and the Highway Account.  The Mass Transit Account receives 15.5% of the revenue generated by the gasoline tax and 11.7% of the revenue generated by the tax on diesel fuel. The remainder of the fuel tax is dedicated to the Highway Account. The Mass Transit Account funds transit projects while the Highway Account funds roadway, bike, and pedestrian projects. Federal funding from the HTF flows through state DOTs and to local agencies and is allocated using formula funds. <sup>79</sup>
Heavy trucks and trailers sales tax		
Heavy vehicles annual use tax		
Individual income taxes, corporate income taxes (General Fund transfer)		
State		
Motor Fuels Tax	Roadways, bike, and pedestrian within the right-of-way	These revenue sources fund the State Highway Fund. The State Highway Fund is restricted to funding construction, operation, and maintenance of roads, including bike and pedestrian projects in the right-of-way. <sup>80</sup> In 1971, ORS 366.514 dedicated at least 1% of highway funds to bicycle and pedestrian projects. <sup>81</sup>
Weight Mile Tax		
Driver and Vehicle Fees		
Transportation License and Fees		
Cigarette Tax	Transit	A portion of the Cigarette tax is dedicated to transit services for seniors and disabled people. <sup>82</sup>
Bike Tax	Bike	Revenue from the bicycle excise tax goes into Multimodal Statewide Investments Management Fund. It used to fund a bike and pedestrian program within Connect Oregon. <sup>83</sup>
Privilege Tax	Outside of right-of-way – aviation, rail, and marine	Funds are allocated to the Connect Oregon Fund and fund rebates for electric vehicles. The Connect Oregon Fund is restricted to projects outside the highway right-of-way. Historically these projects included active transportation but most recently funds are dedicated to aviation, rail, and marine projects. Any project that is eligible for funding from the State Highway Fund is not eligible for funding from Connect Oregon. <sup>84</sup>
Lottery Revenues		

<sup>79</sup> [U.S. Department of Transportation Federal Highway Administration. \(2017\). "Fixing America's Surface Transportation Act or "FAST Act.""](#)

<sup>80</sup> [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

<sup>81</sup> [Interpretation of ORS 366.514](#)

<sup>82</sup> [Oregon Department of Transportation. \(2022\). "Transportation Funding in Oregon."](#)

<sup>83</sup> [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

<sup>84</sup> [Oregon Department of Transportation. \(2022\). "Connect Oregon."](#)

Equitable Transportation Funding  
Oregon Metro

Source	Category	Allocation and Constraints Description
Payroll Transit Tax	Transit except light rail	The tax is deposited into the Statewide Transportation Improvement Fund and is limited to investments and improvements in public transportation services, except for those involving light rail. <sup>85</sup>
Income Tax (General Fund Transfer)	Variable	As state legislatively directed. In the past it has been used for capital projects such as light rail.
<b>Local</b>		
Mass-Transit (TriMet) Tax	Transit	The tax funds mass transportation in the TriMet district. <sup>86</sup>
Transit Fares (Passenger Revenues)	Transit	Fares fund the transit system. They make up 7% of TriMet's FY2023 Budget. <sup>87</sup>
Gas Tax	Roadways, bike, and pedestrian within the right-of-way.	Under state law, motor vehicle revenue is restricted to funding construction, operation, and maintenance of roads, including bike and pedestrian projects in the right-of-way.
Vehicle Registration Fee		
Transportation System Development Charges	Capital projects that increase or improve capacity	Fees are dedicated to recoup the cost of additional infrastructure projects required to serve new developments. <sup>88</sup> In Oregon, state law requires that revenue only be spent on capital projects. <sup>89</sup> Local municipalities may have additional requirements on use of revenue, such as specifically serving the impacted area and related parameters.
Street Utility Fees	Street repair and maintenance	Funds are spent locally on street maintenance.
Utility Fees based on estimated number of trips	Street repair and maintenance, Bike and Pedestrian Accessibility, ADA Transition	Revenue funds projects outlined in Milwaukie's Street Surface Maintenance Program, Bicycle and Pedestrian Accessibility Program, and the federal ADA Transition Plan. Funding transit, ADA improvements, and active transportation has a positive equity component.
Franchise Fees	Flexible	Franchise fees feed directly into the General Fund to support a portion of a city's transportation budget.
PGE Privilege Tax	Street repair and maintenance	Funds are spent locally on street maintenance.

<sup>85</sup> [Oregon Department of Revenue. \(2022\). "Statewide transit tax."](#)

<sup>86</sup> [TriMet. \(2021\). "Form OR-TM Instructions."](#)

<sup>87</sup> [TriMet. \(2022\). "Adopted 2022-2023 Budget."](#)

<sup>88</sup> [Oregon Metro. \(2007\). "System Development Charges."](#)

<sup>89</sup> [Oregon Legislature. \(2021\). "Chapter 223 – Local Improvements and Works Generally."](#)



Equitable Transportation Funding  
Oregon Metro

Source	Category	Allocation and Constraints Description
Parking Fees/Fines	Flexible, discretionary PBOT revenue	Parking fee revenue is general discretionary transportation revenue at PBOT. <sup>90</sup>
Urban Renewal	Flexible but must be spent within TIF districts	Taxes are paid by all homeowners in a jurisdiction and revenue is spent on local transportation projects within specified districts. Tax Increment Financing (TIF) districts can be used to fund improvements in historically underserved communities, including transportation projects. <sup>91 92</sup>
Property Taxes	Flexible, must be on major road.	For example, taxes are paid by local homeowners in Washington County and revenue is spent on local transportation projects through the Major Streets Transportation Improvement Program (MSTIP). MSTIP funding improves the transportation system for bicyclists, pedestrians, drivers, and transit passengers. Projects must improve safety, improve traffic flow or congestion, be on a major road, address needs for all travelers. <sup>93</sup>
TNC Fee	Flexible, funds programs	This fee has been used to fund programs that help remove barriers to mobility. Program examples include Wheelchair-Accessible Vehicle program, Safe Ride Home Program, safety inspections, and Transportation Wallet Initiative. <sup>94 95</sup>
Local Improvement District	Flexible, must be spent in the LID	A Local Improvement District (LID) is a mechanism for neighboring property owners to share the cost of improvements to infrastructure, where property owners agree to tax themselves (typically at least 51% of the property owners must be in favor). For transportation, it is often used to pave unimproved streets or build sidewalks.
Heavy Truck Fee	Street repair, maintenance, and safety	In Portland, the fee is allocated for 56% Street Repair/Maintenance and 44% Traffic Safety. Projects for both safety and maintenance should focus on streets important to freight movement. <sup>96</sup>

<sup>90</sup> [Portland Bureau of Transportation. \(2019\). "PBOT Financial Overview."](#)

<sup>91</sup> [Prosper Portland. \(2021\). "Your property tax bill and urban renewal."](#)

<sup>92</sup> [Clackamas County Development Agency. \(2011\). "Urban Renewal in Clackamas County."](#)

<sup>93</sup> [Washington County, Oregon. "Major Streets Transportation Improvement Program \(MSTIP\)."](#)

<sup>94</sup> [City of Portland, Oregon. "Private For-Hire Transportation & Regulations."](#)

<sup>95</sup> [Schafer, Hannah. \(2019\). "PBOT News Release: PBOT, Portland Police Bureau encourage Portlanders to take a Safe Ride Home on St. Patrick's Day." Portland Bureau of Transportation.](#)

<sup>96</sup> [Portland Bureau of Transportation. "Heavy Vehicle Use Tax \(HVUT\) Background and Projects."](#)

### **5.3 High Capacity Transit Strategy Update: Corridor Investment Readiness Tiers (8:45 AM)**

*Information/Discussion Items*

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023

# JPACT Worksheet

**Agenda Item Title:** High Capacity Transit Strategy Update: Corridor Investment Readiness Tiers

**Presenter:** Ally Holmqvist, Senior Transportation Planner, Metro

**Contact for this worksheet/presentation:** Ally Holmqvist, ally.holmqvist@oregonmetro.gov

## Purpose/Objective

Our region's current high capacity transit system — the nationally-recognized MAX system — exists today because decades ago partners worked together to establish a vision and roadmap for the future, including an identified pipeline of investments. Metro's first High Capacity Transit Plan in 2009 continued that work – supporting and identifying the connections that became the Green & Orange lines and Division Transit, and will soon be Southwest Corridor & Interstate Bridge light rail and 82nd Avenue & Tualatin Valley rapid bus. A new prospect — rapid bus — has provided an opportunity to think differently about what the region's high capacity transit network could look like in the future. Offering a more flexible and cost-effective solution, rapid bus also provides the potential to move more projects more quickly through the federal development process, providing great benefit to community with less impacts to neighborhood stability.

High capacity transit is the backbone of the Regional Transportation Plan (RTP) and Metro's 2040 Growth Concept, connecting town & city centers through corridors. The [High Capacity Transit \(HCT\) Strategy](#) will prioritize investments over the span of decades - categorizing corridors where high capacity service would provide the most benefit to the most people. As part of the larger 2023 RTP update process, Metro staff built on previous planning work and public input to identify and create a "pipeline" of corridor investments in the region competitive for federal funding. This pipeline provides the roadmap to realizing our vision for the future of high capacity transit in the region, clearly identifying where we need to focus efforts next to build in a way that advances regional goals and priorities.

## Action Requested/Outcome

JPACT provides feedback on 1) the refined network vision and identified priority corridors for high capacity transit investment in the 2023 RTP, 2) the engagement approach for identifying community priorities and readiness considerations, and 3) content to include in the draft report.

## What has changed since JPACT last considered this issue/item?

This fall, the Joint Policy Advisory Committee on Transportation (JPACT), along with other Metro and County coordinating committees and regional stakeholders, provided feedback to refine the draft policy framework, inform the approach to developing and shape the development of the regional high capacity transit network, and provide input on implementing the engagement strategy related to these milestones.

Since then, the Project Management Team (including staff from Metro and TriMet) has worked with the Working Group (including regional partners) to apply the approach discussed and incorporate stakeholder and community feedback to reimagine a stronger backbone for the transportation system in the greater Portland region that would support compact land development and create broader travel connections and mobility options. Building from the existing light rail network and first FX bus line, it calls for new and stronger high quality transit connections along north-south and east-west corridors in Multnomah, Clackamas, Washington and Clark Counties. Those include the corridors we're already working to advance as well as others we heard regional support for: Lombard/Killingsworth, Martin Luther King Jr. Blvd., Cesar Chavez, Clackamas to Columbia, Halsey,

Burnside, Powell, Hwy 212/Sunnyside, I-205, McLoughlin, WES/Route 76- Beaverton to Wilsonville, Hwy 26, 185<sup>th</sup> Avenue, and Hwy 99W. The envisioned system will provide better alternatives to driving that encourage new ridership in support of our climate goals while prioritizing those who depend on transit or lack travel options, particularly communities of color and other historically marginalized communities.

While all of the corridors in the vision are an important part of a broader system to meet our regional land use and transportation goals, they differ in their readiness for high capacity transit investment – not all are ready today. As such, the Project Management Team has done work to group the corridors by readiness into tiers to create a pipeline of investment priorities to inform the 2023 Regional Transportation Plan investment strategy – regional priority, emerging regional priority, developing, and future investment corridors. For some of the corridors that are ready today, we have already started work to plan for new high quality transit connections in the nearer-term. These first-tier corridors either have a project with an adopted locally-preferred alternative or are actively working toward one now: Southwest Corridor, Interstate Bridge, Montgomery Park Streetcar, 82nd Avenue, and Tualatin Valley Highway. Tier 1 corridors would support these previously-identified regional priorities for 2030 and 2045 constrained investments in the 2023 Regional Transportation Plan. These are not the only corridors that are ready for investment today. But we know that our region’s history of success with and capacity for the partnerships and work required to advance corridors through the Federal Project Development process is about one corridor every three years. As such, the second tier identifies corridors where planning activities for high capacity transit investments could begin as soon as the next five years. Tier 2 corridors would be opportunities for 2045 constrained and strategic investments in the 2023 Regional Transportation Plan.

Other corridors may first need additional development activity and/or other types of investments to help high capacity transit to be successful. These corridors demonstrate some readiness today and/or indicate strong readiness in the future, particularly where adopted land use and transportation plans and strategies promote a transit-supportive future. Additional work and/or time are needed to advance planning activities for these corridors and Better Bus improvements could provide a solution in the interim. Tier 3 corridors would be opportunities for additional 2045 strategic investments as feasible in the 2023 Regional Transportation Plan. Finally, some corridors may provide important future connections to support our 2040 Growth Concept vision that are not yet ready for this type of investment today. Many of the elements creating a supportive environment for the success of high capacity transit investment may not yet be present and/or fully established in adopted land use and transportation plans. Tier 4 corridors would continue to be identified in the transit vision rather than investment opportunities for the 2023 Regional Transportation Plan.

This winter, staff will be working with decision-makers, advisory committees stakeholders, and community organizations to refine the investment priorities and identify additional considerations for high capacity transit investment readiness. The next and final upcoming milestone for the update is the draft High Capacity Transit Strategy report in May, which is aligned with timing for development of the RTP investment strategy. In June, the HCT Strategy will be incorporated into the 2023 RTP document for public review in July and consideration for adoption in November.

#### **What packet material do you plan to include?**

1. Vision and Corridor Tiers Fact Sheet
2. Major Milestones and Meetings Outline (updated)
3. Readiness Approach Memo
4. Proposed Corridor Investment Tiers List and Map
5. Updated Policy Framework Memo



# HIGH CAPACITY TRANSIT STRATEGY UPDATE

## Key Meeting Dates and Engagement Activities for Project Milestones

### January 2023

**Outcome:** Review corridor investment tiers. Continue revenue discussion. Feedback on HCT report outline.

Date	Who
January 4	East Multnomah County Transportation Committee TAC
January 5	Clackamas County Coordinating Committee TAC
January 5	Washington County Coordinating Committee TAC
January 9	East Multnomah County Transportation Committee (policy)
January 9	Washington County Coordinating Committee (policy)
<b>January 11</b>	<b>Transportation Policy Alternatives Committee (TPAC)</b>
January 18	Clackamas County C-4 subcommittee (policy)
<b>January 18</b>	<b>Metro Technical Advisory Committee (MTAC)</b>
<b>January 19</b>	<b>Joint Policy Advisory Committee on Transportation (JPACT)</b>
<b>January 24</b>	<b>Metro Council (work session)</b>
<b>January 25</b>	<b>Metro Policy Advisory Committee (MPAC)</b>
January-February	<ul style="list-style-type: none"> <li>Project webpage updates <ul style="list-style-type: none"> <li>Vision &amp; Readiness Fact Sheets</li> <li>Storymap and Survey: Readiness and Investment Priorities</li> <li>Technical Memos</li> </ul> </li> <li>Stakeholder Meetings/Interviews: Corridor Investment Tiers (January): How do you think these tiers look for investment priorities? What changes would you like to see? Why? <ul style="list-style-type: none"> <li>TriMet TEAC 1/10 &amp; CAT (TBD)</li> <li>RTP CBO Contract – HCT corridor readiness and community priorities events (TBD)</li> <li>Focus groups (TBD): Small business organizations</li> </ul> </li> <li>TriMet 2023 Annual Service Plan Tabling Events – in partnership with CBOs <ul style="list-style-type: none"> <li>University of Oregon (NW Portland), St. Philip Neri (SE Portland), Rosewood Initiative (SE Portland), CCC Harmony (Milwaukie), Washington Street Conference Center (Hillsboro), Fairview City Hall, Muslim Educational Trust (Tigard)</li> </ul> </li> </ul>

### April/May 2023

**Outcome:** Feedback on the draft report. Discuss 2023 RTP investment strategy. Preview public review process.

Date	Who
<b>April 5</b>	<b>HCT Working Group #6: Draft Strategy Report and RTP Investment Strategy</b> <ul style="list-style-type: none"> <li>HCT Report</li> <li>RTP Investment Strategy</li> <li>RTP Public Review Preview</li> </ul>
<i>May 3 (tentative)</i>	<i>East Multnomah County Transportation Committee TAC</i>
<i>May 4 (tentative)</i>	<i>Clackamas County C-4 TAC</i>
<i>May 4 (tentative)</i>	<i>Washington County Coordinating Committee TAC</i>

<b>May 10</b>	<b>Transportation Policy Alternatives Committee (TPAC)</b>
<i>May 15 (tentative)</i>	<i>East Multnomah County Transportation Committee (policy)</i>
<i>May 15 (tentative)</i>	<i>Washington County Coordinating Committee (policy)</i>
<i>May 17 (tentative)</i>	<i>Clackamas County C-4 subcommittee (policy)</i>
<b>May 17</b>	<b>Metro Technical Advisory Committee (MTAC)</b>
<b>May 18</b>	<b>Joint Policy Advisory Committee on Transportation (JPACT)</b>
<b>May 24</b>	<b>Metro Policy Advisory Committee (MPAC)</b>
<b>May 30</b>	<b>Metro Council (work session)</b>
April-May	<ul style="list-style-type: none"> <li>Project webpage <ul style="list-style-type: none"> <li>MetroQuest Survey: HCT Strategy</li> <li>Send survey, follow-up documents and public review notice to engaged stakeholders</li> <li>Draft report documents</li> </ul> </li> <li>Fact Sheet #6: What is the region's strategy for HCT?</li> <li>RTP: Snapshot Story on Transit (importance of HCT- queue project list)</li> </ul>

## June/July 2023

**Outcome:** RTP Priorities and Public Review (including HCT).

Date	Who
TBD	TPAC
TBD	MTAC
TBD	JPACT
TBD	MPAC
TBD	Metro Council
June-July	<ul style="list-style-type: none"> <li>RTP Project webpage: Public review draft documents</li> <li>RTP Public Review Period</li> </ul>

## November 2023

**Outcome:** RTP adoption.

Date	Who
TBD	Metro Council Work Session discussion
TBD	TPAC/MTAC workshop discussion
TBD	JPACT discussion
TBD	MPAC discussion
TBD	TPAC recommendation to JPACT
TBD	MTAC recommendation to MPAC
TBD	JPACT recommendation to Metro Council
TBD	MPAC recommendation to Metro Council
TBD	Metro Council considers action on MPAC and JPACT recommendations
October-December	<ul style="list-style-type: none"> <li>RTP Public Hearings</li> <li>RTP Project webpage: Final documents</li> </ul>

# **Metro High Capacity Transit Strategy and Regional Transportation Plan Transit Update**

## **HCT Policy Framework – Regional Transit Network Policy Review**

December 2022 - **DRAFT**

**Parametrix**



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# METRO HCT POLICY FRAMEWORK - REGIONAL TRANSIT NETWORK POLICY REVIEW

## INTRODUCTION

In 2009, Metro adopted the first 30-year Regional High Capacity Transit (HCT) System Plan that guided investments in light rail, commuter rail, bus rapid transit and rapid streetcar in the Portland metropolitan region. The 2009 HCT Plan identified and ranked 16 corridors into four priority tiers using a multi-phase evaluation process and created the System Expansion Policy (SEP) framework for prioritizing future system expansion. The SEP framework is a process agreed to by Metro and local jurisdictions to advance high capacity transit projects as a regional priority. The framework:



- Identifies which corridors should move into the federal project development process
- Establishes a process for other corridors to advance toward development
- Measures a corridor's readiness for investment using targets such as transit supportive land use policies, ridership development plans, community support and financial feasibility.

In 2018 as part of the Regional Transportation Plan (RTP) update, the Regional Transit Strategy (RTS) was also updated and provided the following definition of HCT:

*Our high capacity transit (HCT) system operates with the majority or all of the service in exclusive guideway. The high capacity transit system is meant to connect to regional centers and carry more transit riders than the local, regional and frequent service transit lines. HCT could include rapid streetcar, corridor-based bus rapid transit, bus rapid transit, light rail or commuter rail.*

The 2018 RTS also revised the SEP with a streamlined set of HCT Assessment and Readiness Criteria and updated the corridors included on the Regional Transit Network map. Finally, the 2018 RTS introduced the Enhanced Transit Concept (ETC), which improves transit speed and reliability on the

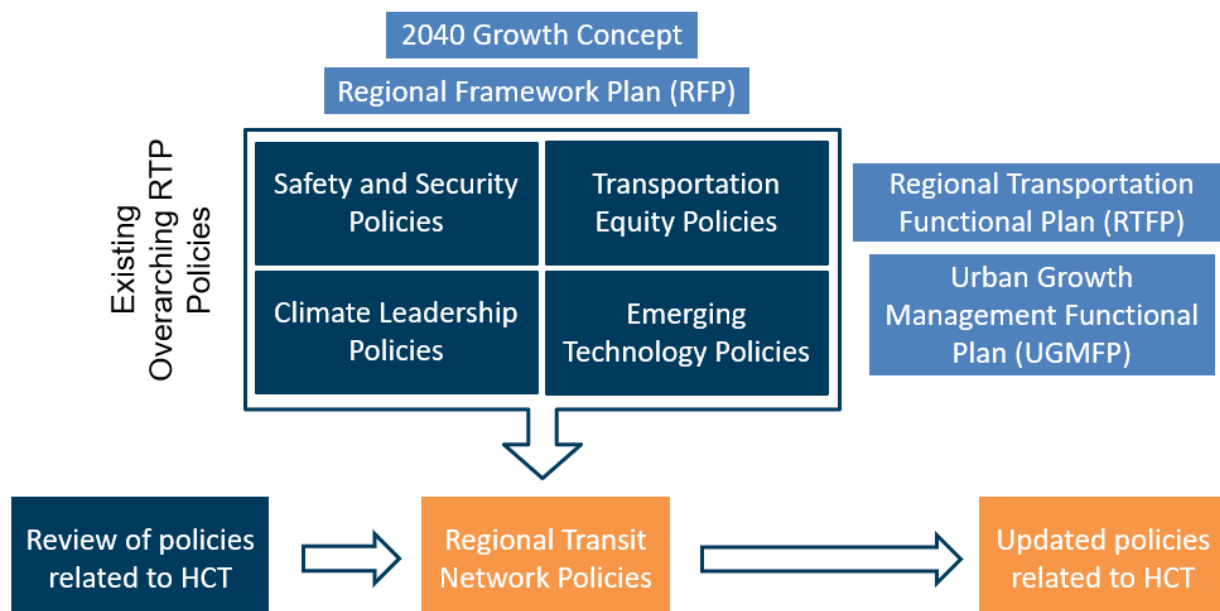
most congested existing and planned frequent service bus or streetcar lines. ETC is now known as “Better Bus.”

As part of the 2023 Regional Transportation Plan update, **this HCT Policy Framework memo** provides an important first step in updating the Regional High Capacity Transit Strategy, a component of the Regional Transit Strategy. This memo focuses on a review of local, regional, state and federal policies as they relate to High Capacity Transit and suggests policy updates to reflect the region’s current and future priorities and desired outcomes related to Equity, Safety, Climate and Mobility. To provide context and guidance as part of this policy review, this memo also identifies emerging trends impacting HCT and provides key takeaways from peer regions throughout the country. The suggested policy updates at the end of this memo will ultimately inform the evaluation criteria used to prioritize HCT corridors that will be included in the 2023 RTP update.

This memo focuses on reviewing and updating the existing transit-specific policies included in the Regional Transit Network, which will be an element of the 2023 Regional Transportation Plan. The 2023 RTP update continues to support the **2040 Growth Concept**, the region’s long-range land use and transportation plan for managing growth, and the **Regional Framework Plan (RFP)** identifies regional policies to implement the 2040 Growth Concept. As part of Metro’s code, two functional plans – the **Regional Transportation Functional Plan (RTFP)** and **Urban Growth Management Functional Plan (UGMFP)** – provide additional guidance to local jurisdictions to implement the policies in the RTP.

In addition to the transit-specific policies included as part of the Regional Transit Network, the RTP includes four overarching system policies related to **safety and security, transportation equity, climate leadership, and emerging technologies**. These policies will guide all other policies included in the RTP, including for High Capacity Transit. The relationship of each of the foundational plans that helped frame this policy review is summarized in **Figure 1** below.

Figure 1 Regional Transit Network Policies in Relation to the RTP and Other Metro Plans



The HCT Policy Framework memo is organized into the following sections:

- Existing Regional Transit Network Policies
- Regional, State, and Federal plans and policy review
- Local plans and policies related to HCT
- Current issues and trends, identified through regional, state, or federal plans or initiatives
- Long-range plans and policies in peer regions
- Other key issues and trends impacting transit infrastructure and investments

This memo concludes with suggested updates to the definition of HCT and considerations for updating and expanding the eight existing Regional Transit Network policies as they relate to HCT.

## PLAN AND POLICY REVIEW

### Existing Regional Transit Network Policies

This section provides a brief assessment of the existing RTP Regional Transit Network policies. **Figure 2** identifies:

- **A proposed “Headline” for each policy** that succinctly communicates the theme addressed.
- **Each policy’s relationship to 2023 RTP priority outcomes**, which include Equity, Safety, Climate, and Mobility.<sup>1</sup>
- **Each policy’s relationship to HCT**. The relationships are identified in one of three ways:
  - **Foundational to Role** of HCT in the region and the definition of HCT (Policy 4).
  - **Directs Investments** by directly influencing key evaluation/readiness measure(s) used for HCT decision making.
  - **Influences Outcomes** of HCT system investments.

Examples for how the policies were determined to relate to HCT include:

- Policy 1 can direct HCT investments to address disparities such as travel time for equity priority communities, through the criteria used to prioritize potential HCT projects. Policy 1 can also influence the outcomes of HCT projects through assessing displacement risk and putting into place partnerships and policies to prevent displacement.
- Policy 6 is not identified as directing HCT investments – using existing quality of the pedestrian and bicycling environment to prioritize investments may exclude projects that could help advance improvements. However, Policy 6 can influence HCT outcomes through improvements to walking and biking access around HCT stations in advance of or as part of a project.

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<sup>1</sup> Metro, 2023 Regional Transportation Plan Update Work Plan, May 2022

Based on this assessment of existing Regional Transit Network policies, those that are most directly relevant to identifying and prioritizing HCT investments – and thus the focus of this memo – include:

- Policy 1: **System Quality and Equity**
- Policy 2: **Maintenance and Resiliency**
- Policy 3: **Coverage and Frequency**
- Policy 4: **High Capacity Transit**

The following two Regional Transit Network policies influence outcomes but are not foundational to the role of HCT nor direct investments:

- Policy 5: **Intercity and Inter-Regional Transit**
- Policy 6: **Access to Transit**

Finally, the last two policies are important to the overall transit network but are neither foundational to the role of HCT, direct investments, nor influence overall outcomes:

- Policy 7: **Mobility Technology**
- Policy 8: **Affordability**

Figure 2 Existing Regional Transit Policies and Relationship to 2023 RTP Outcomes and to HCT

Existing Regional Transit Network Policy (2018 RTP)	Proposed Policy Headline(s)	2023 RTP Outcomes	Relationship to HCT
<b>Policy 1:</b> Provide a seamless, integrated, affordable, safe and accessible transit network that serves people equitably, particularly communities of color and other historically marginalized communities, and people who depend on transit or lack travel options.	Service Quality and Equity	<input checked="" type="checkbox"/> Equity <input type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes
<b>Policy 2:</b> Preserve and maintain the region's transit infrastructure in a manner that improves safety, security and resiliency while minimizing life-cycle cost and impact on the environment.	Maintenance and Resiliency	<input type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes
<b>Policy 3:</b> Make transit more reliable and frequent by expanding regional and local frequent service transit and improving local service transit options.	Coverage and Frequency*	<input type="checkbox"/> Equity <input type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes
<b>Policy 4:</b> Make transit more convenient by expanding high capacity transit; improving transit speed and reliability through the regional enhanced transit concept.	High Capacity Transit	<input type="checkbox"/> Equity <input type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input checked="" type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes
<b>Policy 5:</b> Evaluate and support expanded commuter rail and intercity transit service to neighboring communities and other destinations outside the region.	Intercity / Inter-Regional Transit	<input type="checkbox"/> Equity <input type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes
<b>Policy 6:</b> Make transit more accessible by improving pedestrian and bicycle access to and bicycle parking at transit stops and stations and using new mobility services to improve connections to high-frequency transit when walking, bicycling or local bus service is not an option.	Access to Transit	<input type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes
<b>Policy 7:</b> Use technology to provide better, more efficient transit service – focusing on meeting the needs of people for whom conventional transit is not an option.	Mobility Technology	<input checked="" type="checkbox"/> Equity <input type="checkbox"/> Safety <input type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes
<b>Policy 8:</b> Ensure that transit is affordable, especially for people who depend on transit.	Affordability	<input checked="" type="checkbox"/> Equity <input type="checkbox"/> Safety <input type="checkbox"/> Climate <input type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes

Note: \* A proposed change in policies would create a new policy around reliability

## Regional, State, and Federal Plans and Policies Related to HCT

This section identifies regional and statewide plans relevant to the HCT Policy Framework for the region. Similar to the previous section, each applicable policy in these plans is categorized by the Metro RTP outcomes (Equity, Safety, Climate, and Mobility) and its relationship to high capacity transit (HCT).

Other state or federal plans or initiatives that are relevant to the region's HCT Policy Framework were reviewed but were not included in the plan and policy review table:

- **Regional High Capacity Transit System Plan (2009).** This is the previous HCT plan for the Portland region, which is being updated through this effort, and is assumed to be reflected in more recent documents such as the Regional Transit Strategy (RTS).
- **Climate-Friendly and Equitable Communities (CFEC) Rulemaking (Ongoing).** Rulemaking by the Department of Land Conservation and Development (DLCD) to strengthen transportation and land use planning for regions including the Portland Metro area; key outcomes including equity, climate, and housing will be addressed in the issues/trends section.
- **USDOT Equity and Justice40 in Transportation Planning.** Federal initiative to address racial equity and climate priorities, including delivering 40% of federal investments to disadvantaged communities; will be addressed in the issues/trends section.

Figure 3 Regional, State, Federal Plan Hierarchy and Policy Summary

Plan	2023 RTP Outcomes	Relationship to HCT	Considerations for Updating Regional Transit Network Policies (Foundational Considerations Bolded)
Portland Metro Transportation System Management and Operations Strategy	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input checked="" type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>Harm reduction</li> <li>Alleviating transportation system disparities</li> <li><b>Connecting people to goods, services, and places</b></li> <li><b>Equitable transit reliability improvements</b></li> <li>Transit system resiliency</li> </ul>
Portland Metro and ODOT Regional Mobility Policy Update	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input checked="" type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>Land use and transit decision-making efficiency in movement of people and goods</li> <li><b>Seamless, well-connected, low-carbon, convenient, and affordable mode share</b></li> <li><b>Transit system travel predictability and travel time reasonableness</b></li> <li>Safe and comfortable mode share; equitable mobility experiences among Black, Indigenous, and People of Color (BIPOC) communities and people with low incomes, youth, older adults, and people living with disabilities</li> </ul>
Portland Metro Regional Freight Strategy	<input type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>Coordinating for seamless movement and better access, with less conflict with transit</li> <li>Delay reduction, with increases in reliability and improvements in safety, for reliable transit planning</li> <li>Integrating issues with planning and communicating movement issues</li> <li>Eliminating traffic fatalities and serious injuries caused with other modes</li> </ul>
Portland Metro Regional Transportation Safety Strategy	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input type="checkbox"/> Climate <input type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>Achieve Vision Zero goals using transit as a safety mechanism</li> <li>Safety investments to reduce speeds and speeding at high-risk areas, increase security, and reduce crime, with prioritization of vulnerable communities</li> <li>Equitable safety investments to benefit people with higher crash risk, such as vulnerable communities</li> <li>Safety increases across modes through planning, designing, constructing, operating, and maintaining the transit system with focus on speed reduction</li> <li>Avoidance of repeating and/or exacerbating safety issues</li> <li>Consideration of safety as an adequacy metric.</li> </ul>
Portland Metro Emerging Technology Strategy	<input checked="" type="checkbox"/> Equity <input type="checkbox"/> Safety <input type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>Accessibility, availability, and affordability of new technologies to progress equity</li> <li>Usage of new technologies to improve transit, providing shared modes regionwide, and supporting transit, biking, and walking</li> <li>Empowering travelers with data for planning, decision-making, and managing transit</li> <li>Advancing public interest by preparing for, learning from, and adapting to new technological developments</li> </ul>

# High Capacity Transit Strategy Update | Policy Framework – Regional Transit Network Policy Review - DRAFT

Portland Metro

Plan	2023 RTP Outcomes	Relationship to HCT	Considerations for Updating Regional Transit Network Policies (Foundational Considerations Bolded)
Portland Metro Strategic Plan to Advance Racial Equity, Diversity and Inclusion (Racial Equity Framework)	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input type="checkbox"/> Climate <input type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>▪ Engaging communities of color</li> <li>▪ Hiring, training, and promoting a racially diverse workforce</li> <li>▪ Creating safe, welcoming services, programs, and destinations</li> <li>▪ Allocating resources to advance racial equity</li> </ul>
Portland Metro Climate Smart Strategy	<input type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input checked="" type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>▪ <b>Making transit convenient, accessible, and affordable</b></li> <li>▪ Making walking and biking safe and convenient</li> <li>▪ Making streets safe, reliable, and connected</li> <li>▪ Using technology to manage transit</li> <li>▪ Providing information and incentives to increase mode share</li> <li>▪ Securing funding for transit</li> </ul>
Portland Metro Regional Active Transportation Plan	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>▪ Making walking and biking the most convenient, safe, and preferable choices for trips less than three miles</li> <li>▪ Developing well-connected regional pedestrian and bicycle routes integrated with transit to prioritize safe, convenient, accessible, comfortable pedestrian and bicycle access for all ages and abilities</li> <li>▪ Ensuring that regional transit and active transportation intersections equitably serve all people</li> <li>▪ Complete the regional active pedestrian and bicycle networks where transit transfers are common</li> <li>▪ Use data and analyses to guide transit and active transportation investments</li> </ul>



# High Capacity Transit Strategy Update | Policy Framework – Regional Transit Network Policy Review - DRAFT

Portland Metro

Plan	2023 RTP Outcomes	Relationship to HCT	Considerations for Updating Regional Transit Network Policies (Foundational Considerations Bolded)
ODOT Strategic Action Plan 2021-2023	<input checked="" type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>▪ Supporting equitable operations and policies and establishing an informed and inclusive culture</li> <li>▪ Promoting opportunities through transit investments, such as by working with BIPOC communities, women, and other historically and/or are currently marginalized communities</li> <li>▪ Utilizing the perspectives of people who reside in communities served by Metro and who are likely to be affected by Metro decision-making</li> <li>▪ Investing in the protection of vulnerable communities from environmental hazards</li> <li>▪ Preserving, maintaining, and operating a multimodal transportation system and achieving a cleaner environment</li> <li>▪ Ensuring the safety of transit riders and operators</li> <li>▪ Providing greater transit access and broader range of mobility options while addressing climate change</li> <li>▪ Investing in transit as a mechanism to manage and reduce congestion</li> <li>▪ Enhancing multimodal options</li> <li>▪ Implementing road usage charging to ensure revenue to maintain and improve the transit system and manage congestion</li> </ul>
ODOT Climate Action Plan 2021-2026	<input type="checkbox"/> Equity <input checked="" type="checkbox"/> Safety <input checked="" type="checkbox"/> Climate <input checked="" type="checkbox"/> Mobility	<input type="checkbox"/> Foundational to Role <input checked="" type="checkbox"/> Directs Investments <input checked="" type="checkbox"/> Influences Outcomes	<ul style="list-style-type: none"> <li>▪ Integrating climate change and emissions reductions considerations in policy and investment frameworks</li> <li>▪ Providing transit options to manage demand and reduce congestion</li> <li>▪ Transitioning to an efficient transit fleet, supporting adoption of alternative fuels</li> <li>▪ Maintaining and operating transit and recovering from climate impacts by using sustainable funding</li> <li>▪ Increasing efficiency through investments in safety, and operations practices</li> <li>▪ Utilizing sustainable products and fuels</li> <li>▪ Reducing energy consumption, and reducing Metro's carbon footprint</li> </ul>

## Local Plans and Policies Related to HCT

In addition to reviewing regional, state, and federal plans and policies, relevant plans from or related to Metro area cities and/or counties were reviewed at a high level to document any policies that should be considered as part of the HCT Policy Framework. As shown in **Figure 4**, these plans included local transportation system plans (TSPs), comprehensive plans, or transit development/master plans (TDPs/TMPs), or HCT-specific plans, including the Clark County/CTRAN High Capacity Transit System Plan.

Specific plans that have recently been completed (or are currently underway) that relate to HCT and/or ETC include:

- Clackamas County completed its TDP in 2021.
- Washington County is conducting a Transit Study (completion anticipated in 2023), which will integrate the County's recent TDPs and shuttle planning study.
- The City of Portland developed the Rose Lane Vision in 2020 and the Enhanced Transit Corridors Plan in 2018, which are advancing projects to provide bus and streetcar lines with additional transit priority and help achieve the City's climate and transportation justice goals.
- TriMet is conducting the Forward Together Comprehensive Service Analysis, which will recommend a revised bus network concept to reflect shifts in ridership and travel demand that have occurred since the COVID-19 pandemic. TriMet also completed an Express and Limited Stop Bus Study (2021) to identify where these services could improve ridership and access to jobs, including for equity priority populations. These studies will shape the agency's FY2023 Service Plan.
- TriMet is also completing its first FX (Frequent Express) line in the Division Street corridor; Metro, TriMet, and the City of Portland are working on planning for the 82<sup>nd</sup> Avenue corridor; and TriMet is leading the Tualatin Valley (TV) Highway BRT Study, connecting Beaverton, Hillsboro, and Forest Grove, where TriMet's Line 57 operates today.
- The Southwest Corridor project, connecting downtown Portland with SW Portland, Tigard and Tualatin, has a Locally Preferred Alternative and Record of Decision from the FTA.
- Metro and TriMet are continuing the ETC program, now known as Better Bus, to improve transit speed and reliability across the region. Where the previous implementation of this program focused on the most congested locations on the system with the highest ridership, the next phase will look at other locations across the region to improve bus operations.

Outside of the TriMet service district:

- The Interstate Bridge Replacement's Locally Preferred Alternative recommends a MAX Yellow Line extension from Expo Center across the Interstate Bridge to Evergreen in Vancouver, connecting to C-TRAN's Vine Bus Rapid Transit system.
- The City of Wilsonville (SMART) is updating its TMP (completion anticipated in 2023).

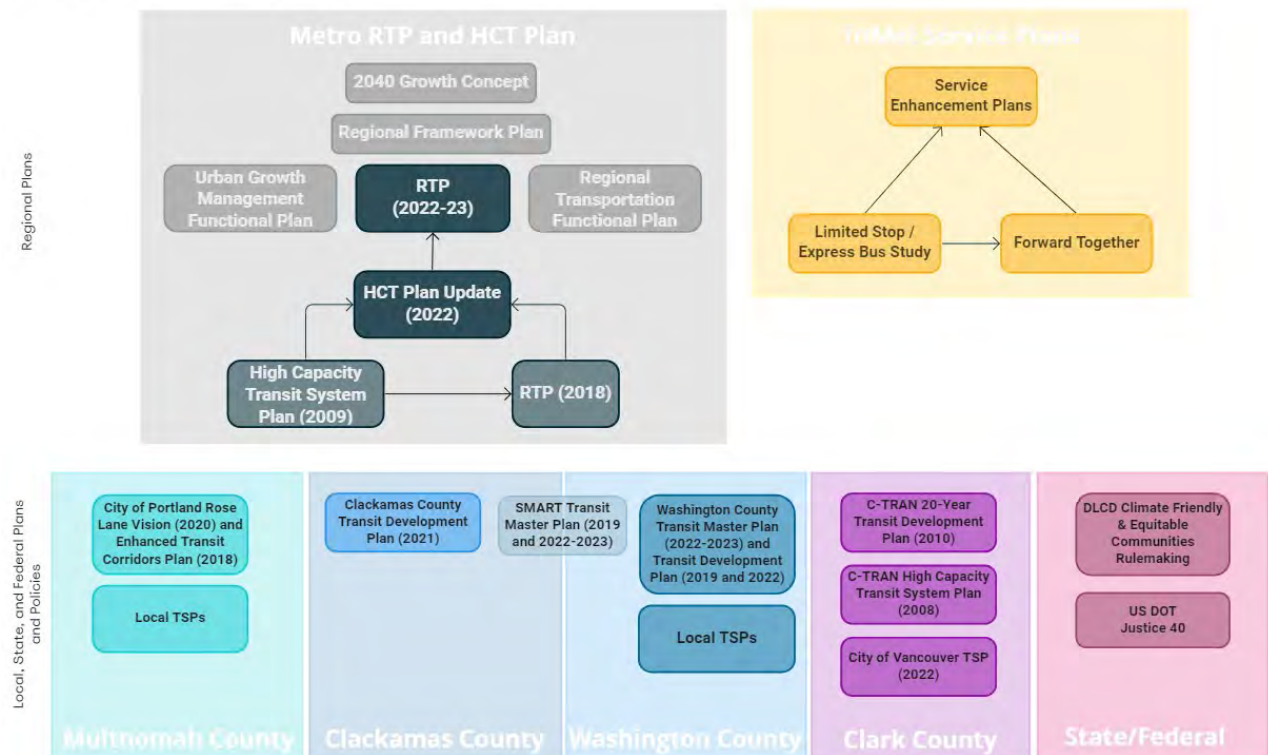
- The Clark County (C-TRAN) High Capacity Transit System Plan was completed in 2008; a TSP update for the City of Vancouver, which includes Enhanced Transit Corridors, is underway (completion anticipated in late 2022).
- C-TRAN has also completed development of several BRT corridors in recent years and others are in the planning stages.

As noted above, the Department of Land Conservation and Development (DLCD) has been conducting Climate-Friendly and Equitable Communities (CFEC) [rulemaking, filed on August 22, 2022](#), to help local governments revise plans to reduce greenhouse gas emissions. Similarly, the US DOT has undertaken the Justice 40 initiative with a goal of delivering 40% of the overall benefits of federal investments in climate and clean energy, including sustainable transportation, to disadvantaged communities.

In addition to informing the HCT policy framework, these plans and studies can also be consulted to validate the universe of potential HCT projects considered in the HCT Plan update as well as inform criteria used in the evaluation.

Figure 4 Regional Plan Hierarchy and Policy Summary

Local, State, and Federal Plans informing the Regional HCT Plan



RTP = Regional Transportation Plan, TDP = Transit Development Plan, TSP = Transportation System Plan

## Review of Plans and Policies from Peer Regions or other Agencies

This section includes a high-level review of long-range planning documents from peer regions. The purpose of the peer review is to inform the HCT Policy Framework, but key findings from the peer review could also be utilized in other dimensions of the HCT Plan and/or RTP updates, such as the development of corridor evaluation criteria.

### Peer Identification

Key criteria for selecting the peer regions or agencies included:

- Preference for plans/policies developed after 2020 that address current issues and trends such as recovery from the COVID-19 pandemic.
- Identify high capacity transit in their goals and policies.
- Include/address multiple HCT modes (e.g., rail and bus).
- Potential HCT lessons learned related to RTP investment priorities (safety, equity, climate and mobility).
- Geographic distribution.

Thirteen regions were identified in **Figure 5** below (See also **Figure A-1 in Appendix A** for more detail). These were narrowed to seven for high-level consideration and the project team then focused on four peers for more detailed review.

Figure 5 Selected Peers

Region	Agency	Document	Year Published	HCT Modes
Seattle	Puget Sound Regional Council (PSRC), and/or Sound Transit (ST)	<a href="#">Regional Transportation Plan (2022-2050)</a>	2021	Link and RapidRide
	King County Metro	<a href="#">Metro Connects Long-Range Plan</a>		
San Francisco	Metropolitan Transportation Commission (MTC) and/or SFMTA/ConnectSF	<a href="#">Plan Bay Area 2050</a>	2021	BART, LRT (e.g., Muni Metro), BRT and RapidBus (e.g., Muni Rapid)
Los Angeles	LA County MTA (Metro)	<a href="#">Long Range Transportation Plan</a>	2020	BRT and LRT
Minneapolis-St. Paul	Metropolitan Council	<a href="#">Transportation Policy Plan</a>	2020	LRT and BRT
Austin	Capital Area MPO (CAMPO)	<a href="#">2045 Transportation Plan (and Regional Transit Study)</a>	2020	LRT MetroRail) and BRT (MetroRapid)
Boston	Metropolitan Area Planning Council (MAPC), Massachusetts Bay Transportation Authority (MBTA), The Greater Boston BRT Study Group	<a href="#">MetroCommon 2050</a>   <a href="#">Better Rapid Transit for Greater Boston</a>   <a href="#">Focus40</a>	2015-2021	BRT (Silver Line and additional prioritized corridors) and LRT and Heavy Rail (Commuter Rail, Blue, Green, Orange, and Red Lines)
Philadelphia	Delaware Valley Regional Planning Commission	<a href="#">Connections 2050</a>   <a href="#">StoryMap</a>   <a href="#">Policy Manual</a>   <a href="#">Process and Analysis Manual</a>   <a href="#">Major Regional Projects</a>	2021	BRT, Streetcar, LRT, Heavy Rail, High-Speed Rail
	City of Philadelphia, Southeastern Pennsylvania Transportation Authority	<a href="#">The Philadelphia Transit Plan</a>		

## Summary of Common Themes and Key Takeaways

Common themes and notable examples from the peer review are summarized below, organized by the four RTP priority outcomes. Examples include cases where policy shifts had a clear impact of prioritization criteria and plan outcomes.

- **Equity considerations for vulnerable communities and transit riders**
  - All peer regions have goals or objectives regarding the transit needs of women, people of color, people with low incomes, or people experiencing houselessness.
  - Direct feedback from community groups representing vulnerable populations (such as the Equity Cabinet for King County Metro) was critical in identifying specific policy areas to address in plan updates.
  - Many regions are also addressing affordability, such as through implementation of a means-based fare for low-income transit riders in the Boston region, funded with legislative support for consistent funding for operations.
  - All regions address how equity can be achieved by transit investments for priority communities, such as how communities access transit and destinations via transit.
  - In the City of San Francisco's ConnectSF program, the pandemic refocused investment priorities on serving essential trips citywide, including through quick-build capital improvements to maximize scarce resources. Model-based criteria used to prioritize investments (including access to jobs and services, ridership, cost-effectiveness, and travel time) looked at both equity priority communities and at low-income households earning below 200% of the federal poverty level, in addition to overall performance citywide.
- **State of good repair and safety / HCT system maintenance and reliability**
  - All regions seek to achieve safety goals in terms of how people wait for, access, or experience transit, some with a focus on Vision Zero targets systemwide.
  - 6 of 7 regions emphasize the need for transit infrastructure maintenance, preservation, reliability, or lifecycle expansion.
  - Prioritizing equity outcomes in the greater Philadelphia region included universal design and user experience, such as implementation of full ADA access, all-door boarding, safer and cleaner services, and better amenities at stops and for passengers.
- **System-level climate goals or objectives**
  - All regions specify climate goals or objectives that are part of other climate-related goals, such as stewardship or safety. Five regions prioritize a net-zero emissions transit fleet, such as procuring battery-electric buses and implementation of associated charging infrastructure, with a policy goal to achieve procuring 100% renewable electricity.

- All regions prioritize VMT reduction goals, with Los Angeles and Philadelphia introducing concepts for VMT fees to generate revenue for transit investments and lower the dependence on the federal gas tax.
- The urgency of addressing climate change was an impetus and key message around prioritizing transit improvements and related programs and initiatives, to attract additional trips to transit and other sustainable modes. For example, greater Boston has a goal to achieve a net-zero carbon region, which has an objective that all land travel is by carbon-free modes, such as walking, biking, and electrified public transit
- **Quality of service and mobility improvements for bus or rail**
  - All regions are pursuing bus or rail expansions or infrastructure improvements; for example, Seattle, Los Angeles, Boston, and greater Philadelphia have specific HCT and ETC enhancement goals, such as increasing the capacity of the transit fleet for new and existing services, expanding the HCT network to meet and respond to changing needs, or adding bus lanes and other features to speed up service and eliminate delay.
  - All regions emphasize the importance of transit and transportation system integration to expand travel choices and mode share; enhance local and regional transit connectivity; or improve transit frequencies, operations, or safety.

## Peer Review Details

Please see **Appendix A** for additional peer review details.

## Additional Key Issues and Trends

In addition to exploring how peer regions have structured their long-range transportation plans focused on HCT, it is important to note that several recent issues and trends have emerged over the past five years that are directly impacting local, state, and federal transportation policies. Metro and TriMet have recently summarized some of these issues and trends in separate but related memos: Metro Emerging Trends and TriMet Forward Together Emerging Trends. In addition, very recent policies related to climate change and the economy continue to shape how regions will adapt their transportation policies in the coming years.

The following is a summary of these issues and trends that were considered when conducting the HCT Policy Framework analysis:

- Transit service and ridership declines, including the decrease in peak commute demand
- Inequities and social justice
- Sustained reliance or preference for remote work
- Continued expansion of e-commerce
- Continued advancements in vehicle electrification (EVs and e-bikes)
- Issues with personal safety, especially for BIPOC riders
- Increases in severe and fatal crashes
- Increases in recreational cycling
- Challenges associated with agency recovery and innovation
- Continued gentrification and affordability issues, including people experiencing houselessness
- Inflation and increases in fuel prices
- Staffing shortages across many industries, including transit



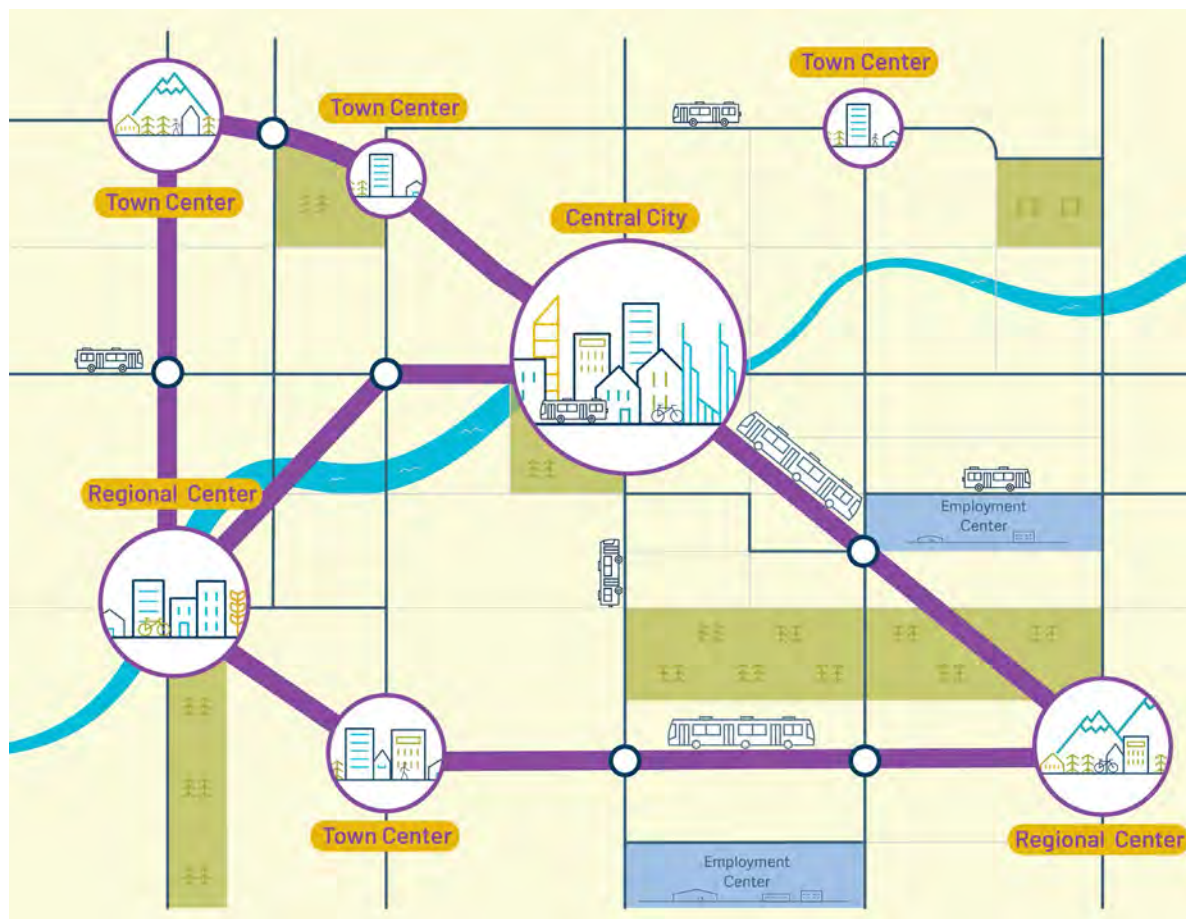
# HCT DEFINITION AND POLICY GAP ANALYSIS

The HCT Policy Framework Analysis concludes with considerations for how High Capacity Transit is defined in our region as well as considerations for updating the eight Regional Transit Network policies. This analysis considers not only the review of local, regional, state, and federal policies, but also key findings from the peer regions, as discussed above.

## High Capacity Transit Definition Considerations

The 2040 Growth Concept sets forth a vision for connecting the central city to regional centers like Gresham, Clackamas, and Hillsboro with fast and reliable high capacity transit (HCT), helping the region concentrate development and growth in its centers and corridors. High capacity transit carries high volumes of passengers quickly and efficiently, and serves a regional travel market with relatively long trip lengths to provide a viable alternative to the automobile in terms of convenience and travel time.

Figure 6 Regional Transit Network Concept

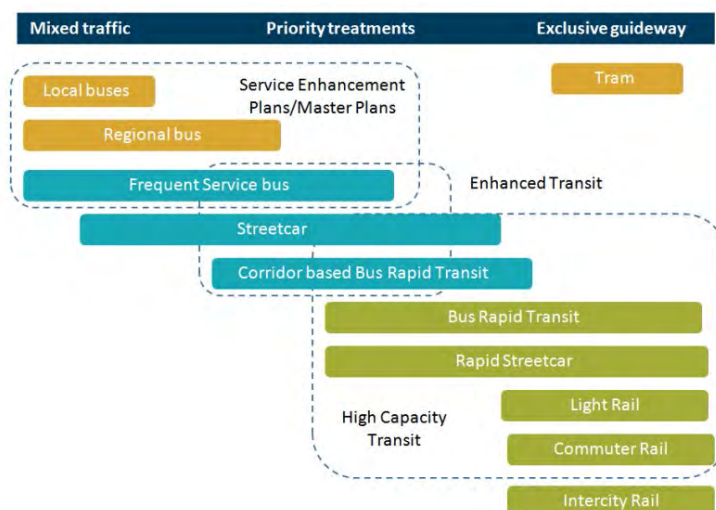


High capacity transit is defined in multiple places in the 2018 Regional Transportation Plan, including in the System Policies chapter (pages 3-77, 3-88), in Glossary of Terms (page G-4), and in the multiple sections of the separate Regional Transit Strategy. While there are minor differences in how HCT is defined, the following introductory paragraph is perhaps the most direct at defining HCT (from page 4-10 of the Regional Transit Strategy):

**“Our high capacity transit (HCT) system operates with the majority or all of the service in exclusive guideway. The high capacity transit system is meant to connect to regional centers and carry more transit riders than the local, regional and frequent service transit lines. HCT could include rapid streetcar, corridor-based bus rapid transit, bus rapid transit, light rail or commuter rail.”**

As illustrated in the following graphic (from page 4-6 of the Regional Transit Strategy), there is also some overlap between

Enhanced Transit and HCT, where some streetcar or corridor-based Bus Rapid Transit applications could be considered either High Capacity Transit or Enhanced Transit. Other modes, including Commuter Rail, Light Rail, Rapid Streetcar and Bus Rapid Transit are exclusively defined as HCT. It is important to note that the term “corridor-based Bus Rapid Transit” is not fully defined in the 2018 RTP.



To clarify how we define High Capacity Transit, the following considerations are offered for this update of the High Capacity Transit Strategy:

- Consider leading with the *purpose* of HCT in the regional transit network, and to integrate equity into the definition by emphasizing that it connects *people* to regional centers
- Consider stating that HCT is *high-quality transit* (i.e., fast, frequent, safe, and reliable) before its physical attributes (operating with the majority or all of the service in exclusive guideway)

The first half of the HCT definition in **blue** could be updated as follows:

**“The high capacity transit system is meant to serve as the backbone of the transportation network, connect people to**

**regional centers and major town centers with high-quality service (fast, frequent, safe and reliable), and carry more transit riders more comfortably than the local, regional and frequent service transit lines. HCT operates in exclusive guideway, to the greatest extent possible, and could include light rail, commuter rail, rapid streetcar, streetcar, bus rapid transit, and corridor-based bus rapid transit”**

The last half of the definition in **green** emphasizes that HCT provides the needed capacity to serve the region’s highest demand corridors with a variety of modes and levels of transit priority, ranging from light rail or BRT with “majority exclusive guideway” to corridor-based BRT or streetcar modes that have a mix of exclusive and shared right of way (such as the FX2-Division high capacity bus service).

### **Enhanced Transit Concept (ETC) / Better Bus**

Another important part of defining High Capacity Transit and reviewing the Regional Transit Network policies related to HCT is clarifying the role of the Enhanced Transit Concept (ETC), now known as Better Bus. ETC was introduced in the 2018 Regional Transit Strategy and is defined as follows (from page 4-9 of the RTS):

***The purpose of ETC is to improve transit speed and reliability on our most congested existing and planned frequent service bus or streetcar lines.***

The RTP Glossary further clarifies that:

- “Enhanced transit is a set of street design, signal, and other improvements that improve transit capacity, reliability and travel time along major Frequent Service bus lines...” (RTS page G-9)
- “...Enhanced Transit encompasses a range of investments comprised of capital and operational treatments of moderate cost. It can be deployed relatively quickly in comparison to larger transit capital projects, such as building light rail.” (RTS page G-9)

While no changes to how ETC is defined are suggested, several policy considerations are provided to strengthen and clarify the role of ETC in the Regional Transit System.

## Transit Mode Characteristics and Relationships to Land Use

The graphic below identifies the transit modes that are part of the regional transit system, including their general service quality characteristics, and the land use density that is typically appropriate to warrant a capital investment in building a HCT project. The graphic identifies the characteristics of regional transit modes (both HCT and other modes serving the region) and shows which modes fall into the high-capacity transit category. It includes:

- **Transit Modes:**
  - HCT Modes: Commuter Rail, Light Rail, BRT, Corridor-Based BRT (e.g., RapidBus), Rapid Streetcar, and Streetcar; Streetcar may be considered HCT depending on the context
  - Non-HCT Bus Modes: Frequent Bus, Regional Bus
  - Other modes:
    - Aerial Tram, Intercity Rail
    - Vanpool, microtransit, etc. are included as potential modes to be considered in the future Metro Access to Transit Study.
- **Transit Characteristics:**
  - Level of Transit Prioritization (e.g., Speed & Reliability), Frequency, Market Demand, Passenger Capacity, Transit Access Shed, Stop/Station Amenities, Capital Cost (per passenger), Operating Cost (per passenger)

The following graphic illustrates the essential characteristics of high-capacity transit that work together to provide high-quality connections around the region, consistent with the HCT definition and vision.

Figure 6 What is High Capacity Transit?

### High Capacity Transit...

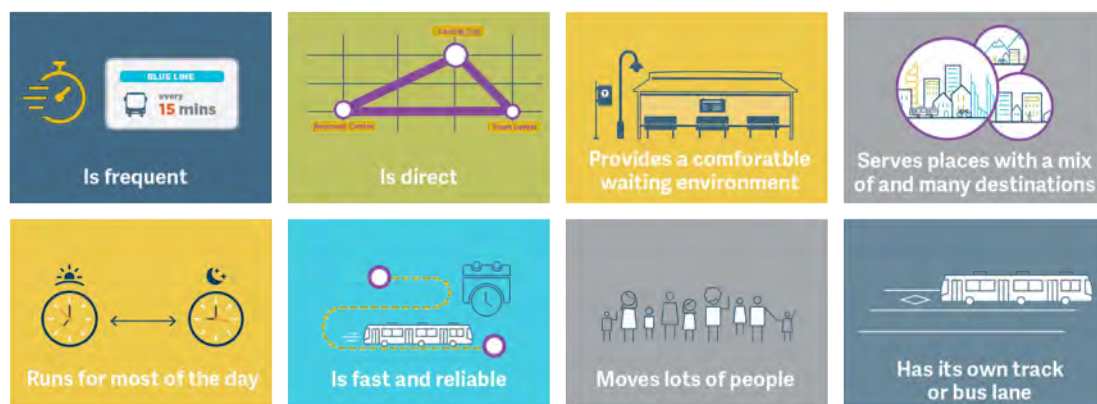
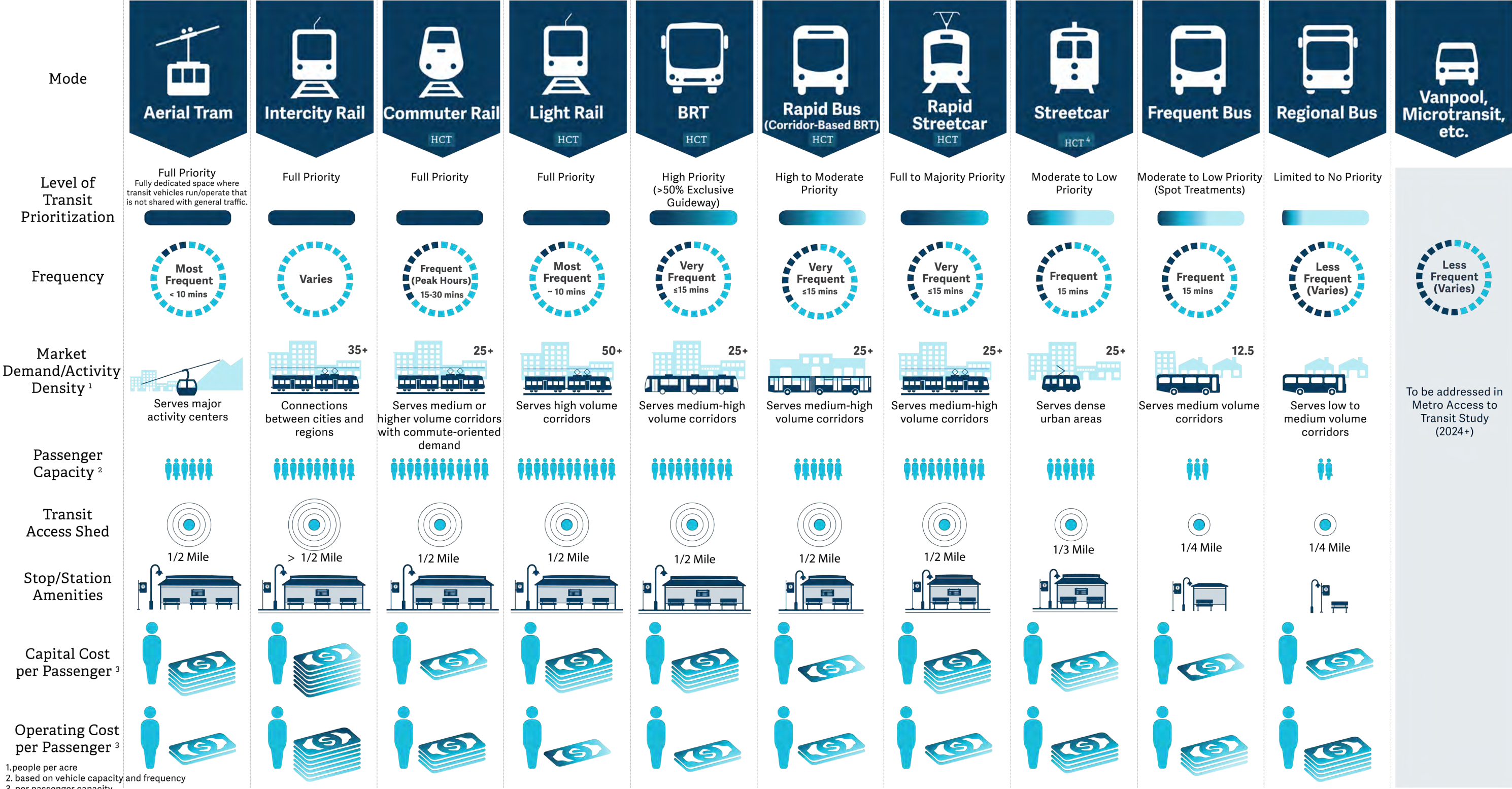




Figure 7 Characteristics of High-Capacity Transit



1. people per acre  
2. based on vehicle capacity and frequency  
3. per passenger capacity  
4. depending on context

## Regional Transit Network Policy Considerations

Based on the review of local, regional, state, and federal plans and policies, as well as the peer review and overview of key issues and trends, several areas have emerged as a focus of the Regional Transit Network policy updates:

- **System Quality and Equity.** Equity has long been a priority in making transportation planning decisions in the region and was one of the overarching policies included in the 2018 RTP. The 2023 RTP includes equity as one of the four desired outcomes and all network policies will be updated to further strengthen equity as a regional priority. The importance of dignified, high-quality service should also be emphasized to make transit work for everyone. As such, **Policy 1: Service Quality** is updated and clarified; **Policy 2: Equity** is updated and separated into a new policy.
- **Climate change.** While climate leadership is one of the overarching policies from the 2018 RTP, and one of the desired outcomes for the 2023 RTP update, there are no specific Regional Transit Network policies focused exclusively on sustainability and the environment. A new policy (**Policy 3: Climate Change**) is proposed focusing on how the Regional Transit Network should address climate change.
- **Maintenance and Resiliency.** Reliability is integrated into **Policy 4: Maintenance and Resiliency** to better integrate it as a key outcome of a system that is preserved and maintained in a state of good repair.
- **HCT and ETC.** The current **Policy 4: High Capacity Transit** (renumbered to Policy 5) includes both HCT and ETC in a single policy. To strengthen and clarify the role of both HCT and ETC in the regional transit network, creating **Policy 7: Reliable and Enhanced Transit** addresses the separate role of ETC as a tool for increasing reliability of the transit system.
- **Clear policy headlines.** All of the suggested modifications to the Regional Transit Network policies focus on a primary theme, so simple headlines are offered for each.

**Figure 8** below lists each of the 2018 Regional Transit Network policies and provides suggested updates to the policies most related to high capacity transit.

Figure 8 Policy Framework Gap Analysis

Existing #	Revised #	Proposed Headline	Existing Policy Text	Gaps / Considerations Addressed	Updated Policy Text Considerations
1	1	System Quality	<i>Provide a seamless, integrated, affordable, safe and accessible transit network that serves people equitably, particularly communities of color and other historically marginalized communities, and people who depend on transit or lack travel options.</i>	<ul style="list-style-type: none"> <li>Separated existing Policy 1 into two policies</li> <li>Aligned with overarching Transportation Equity Policy 3</li> <li>Integrated quality of service into policy language</li> </ul>	Provide a high-quality, safe, and accessible system that makes transit a convenient and comfortable transportation choice for everyone to use.
	2	Equity			Ensure that the regional transit network equitably prioritizes service to those who rely on transit or lack travel options; makes service, amenities, and access safe and secure; improves quality of life (e.g., air quality); and proactively supports stability of vulnerable communities, particularly communities of color and other historically marginalized communities. <sup>2</sup>
N/A	3	Climate Change	N/A	<ul style="list-style-type: none"> <li>Strengthen policies to focus on transit's role in addressing climate change</li> </ul>	Prioritize our investments to create a transit system that encourages people to ride transit rather than drive alone and to support transitioning to a clean fleet that aspires for net zero GhG emissions, enabling us to meet our state, regional, and local climate goals.
2	4	Maintenance and Resiliency	<i>Preserve and maintain the region's transit infrastructure in a manner that improves safety, security and resiliency while minimizing life-cycle cost and impact on the environment.</i>	<ul style="list-style-type: none"> <li>Incorporated reliability into State of Good Repair</li> </ul>	Preserve and maintain the region's transit infrastructure in a manner that improves safety, reliability, and resiliency while minimizing life-cycle cost and impact on the environment.

<sup>2</sup> Historically marginalized communities are areas with high concentrations (compared to regional average) of people of color, people with low-incomes, people with limited English proficiency, older adults and/or young people.

# High Capacity Transit Strategy Update | Policy Framework – Regional Transit Network Policy Review - DRAFT

Portland Metro

Existing #	Revised #	Proposed Headline	Existing Policy Text	Gaps / Considerations Addressed	Updated Policy Text Considerations
4	5	High Capacity Transit	<i>Make transit more convenient by expanding high capacity transit; improving transit speed and reliability through the regional enhanced transit concept.</i>	<ul style="list-style-type: none"> <li>Align with equity and climate outcomes and HCT definition</li> <li>Reframe “convenient” around equity</li> <li>Revise description of capacity</li> </ul>	Complete and strengthen a well-connected high capacity transit network to serve as the backbone of the transportation system. Corridors should generally be spaced at least one half-mile to one mile or more apart and serve mobility corridors with the highest travel demand. High capacity transit prioritizes transit speed and reliability to connect regional centers with the Central City, link regional centers with each other, and link regional centers to major town centers. <sup>3</sup>
3	6	Coverage and Frequency	<i>Make transit more reliable and frequent by expanding regional and local frequent service transit and improving local service transit options.</i>	<ul style="list-style-type: none"> <li>Moved reliability and the Enhanced Transit Concept to a new policy (see Policy 7)</li> </ul>	Complete a well-connected network of local and regional transit on most arterial streets – prioritizing expanding all-day frequent service along mobility corridors and main streets linking town centers to each other and neighborhoods to centers.
3 and 4	7	Reliability	<i>See Policy #4</i>	<ul style="list-style-type: none"> <li>Created a separate policy focused on reliability that clarifies the role of ETC in the regional transit network</li> </ul>	Through the Better Bus program, prioritize capital and traffic operational treatments identified in the Enhanced Transit Toolbox in key locations or corridors to improve transit speed and reliability for frequent service.
5	8	Intercity / Inter-Regional Transit	<i>Evaluate and support expanded commuter rail and intercity transit service to neighboring communities and other destinations outside the region.</i>	<ul style="list-style-type: none"> <li>No proposed changes</li> </ul>	

<sup>3</sup> The regional “mobility corridor” concept refers to a network of integrated transportation corridors that moves people and goods between and within subareas of the region. These transportation corridors influence the development and function of the land uses they serve and are defined by the major centers set forth in the Region 2040 Growth Concept. High capacity transit, along with frequent bus service and pedestrian/bicycle connections to transit, play an important role in moving people in these corridors. (2018 Regional Transportation Plan, Section 3.4.1)



# High Capacity Transit Strategy Update | Policy Framework – Regional Transit Network Policy Review - DRAFT

Portland Metro

Existing #	Revised #	Proposed Headline	Existing Policy Text	Gaps / Considerations Addressed	Updated Policy Text Considerations
6	9	Access to Transit	<i>Make transit more accessible by improving pedestrian and bicycle access to and bicycle parking at transit stops and stations and using new mobility services to improve connections to high-frequency transit when walking, bicycling or local bus service is not an option.</i>	<ul style="list-style-type: none"> <li>▪ No proposed changes</li> </ul>	
7	10	Mobility Technology	<i>Use technology to provide better, more efficient transit service – focusing on meeting the needs of people for whom conventional transit is not an option.</i>	<ul style="list-style-type: none"> <li>▪ No proposed changes</li> </ul>	
8	11	Affordability	<i>Ensure that transit is affordable, especially for people who depend on transit.</i>	<ul style="list-style-type: none"> <li>▪ No proposed changes</li> </ul>	

Notes:

Green – proposed update or addition

## TECHNICAL MEMORANDUM

**DATE:** November 17, 2022  
**TO:** Ally Holmqvist, Metro  
**FROM:** Ryan Farncomb, Kirsten Pennington (KLP Consulting), Oren Eshel (Nelson\Nygaard)  
**SUBJECT:** Approach to assessing HCT corridor readiness, modes, and tiering  
**CC:** Metro High Capacity Transit (HCT) Strategy Update

This memorandum documents the proposed approach to determining high capacity transit (HCT) corridor “readiness,” corridor ranking, and discussion of factors that will influence future mode choice in each corridor. Metro will use this assessment to shape the HCT Strategy update, including identifying which corridors are priorities for implementation. The approach in this memo builds on the evaluations conducted previously for the 2009 and 2018 iterations of the HCT Strategy.

### CORRIDOR READINESS EVALUATION

The prior *Revised Corridor Evaluation Memorandum* describes the overall approach to identifying the preliminary vision of possible HCT corridors and evaluating them through a two-step process. Corridors that emerge from this “Level 1” screening, including previously identified corridors from 2009 and 2018 HCT system planning work that have not yet advanced, will be evaluated with this Level 2 screening. The Level 1 evaluation identified the preliminary HCT vision corridors that are subject to further screening and evaluation. Corridors with existing regional commitments – such as Southwest Corridor LRT, 82<sup>nd</sup> Avenue, and the Interstate Bridge Project, will not be evaluated further and are assumed to be included in the final vision as “Tier 1” corridors (see Corridor Ranking section below).

This memo describes the Level 2 screening which focuses on corridor “readiness,” meaning, whether the right conditions are in place to support advancing a given corridor for HCT investment. The Level 2 criteria are shown in Table 1. Attachment A shows an example evaluation using these criteria. These criteria are refined based on the 2018 evaluation and include criteria related to climate and equity, among other RTP policy priorities, and federal funding. The project team added these criteria to reflect regional policy priorities.

The federal funding criteria are based on the Federal Transit Administration’s (FTA) Capital Investment Grants (CIG) program. This program is the most substantial non-local source for HCT funding in the Portland-Vancouver region and has funded many HCT investments, including much of the existing LRT system. Because of the outsize influence this program has on funding viability, the Level 2 screening criteria were revised to reflect the CIG program’s criteria, thereby helping to ensure readiness of project corridors.

**Table 1. Level 2 Corridor Evaluation Criteria**

Criteria	Measure	Data Source/Notes	Methodology
Transit Travel Time Benefit	Ratio of personal vehicle travel time to transit travel time	HCT Plan (2018) Core Criteria Meets Section 5309 Capital Investments Grants (CIG) Small Starts Program “Mobility Improvements”	The team will compare the average travel time at 3:00 PM on a typical weekday for personal vehicles versus transit; the higher this ratio, the greater the opportunity to improve transit travel times.

Criteria	Measure	Data Source/Notes	Methodology
		Travel model data	
Productivity + Cost Effectiveness	Existing boardings per revenue hour in a given corridor Capital Cost per Rider (range to account for modal options)	HCT Plan (2018) Core Criteria Input to 5309 Capital Investments Grants (CIG) Program "Cost Effectiveness" measure	Boardings per revenue hour will be calculated based on 2019 and modeled 2040 boardings and transit revenue hours. Capital cost per rider will be presented as a range, based on average per-mile costs for two HCT modes (LRT and BRT).
Environmental Benefit	Change in GHG emissions associated with HCT investment in a given corridor.	"Reduction in emissions" meets HCT Plan (2018) Core Criteria VMT used as key performance measure in Metro 2021 TSMO Strategy	Using established transit elasticities, estimate the change in ridership that is likely occur in a given corridor by investing in HCT and the corresponding change in auto VMT that would be expected. Convert this change in VMT to GHG emissions using an average fleet emissions factor for year 2030.
Equity Benefit	Access to employment – Essential Jobs and Essential Services by Census Block within ½ mile of corridors Relative proportion of historically marginalized populations in each corridor, based on Metro's Focus Areas	TriMet and Metro Essential Destinations data. Remix Online Tool for Existing Routes Consider specific impact to in-person jobs in the region (data from TriMet <i>Forward Together</i> project)	The team will rely on data from TriMet's Forward Together program. Forward Together included location analysis of in-person jobs in the Metro region. The team will assess the relative number of in-person jobs within ½ mile of corridors using 20th percentiles. The relative proportion of historically marginalized populations within ½ mile of each corridor will be reported.
Land Use Supportiveness and Market Potential	2040 Population Density by TAZ within ½ mile of corridors 2040 Employment Density by TAZ within ½ mile of corridors Presence of higher education institutions, multi-family and affordable housing	Metro Travel Model HCT Plan (2018) Core Criteria "Land Use Supportiveness and Market Potential" Meets Section 5309 Capital Investments Grants (CIG) Small Starts Program "Land Use" and "Economic Development" criteria	Using existing 2040 Metro travel model data, the team will develop population densities within ½ mile of each corridor and rank by 20 <sup>th</sup> percentiles. The project team will also provide for purposes of comparison the average density within 1/2 mile of (1) the average existing frequent service bus line and (2) average light rail line. The same approach will be applied for total employment within ½ mile of the corridors. The presence of multi-family and affordable housing, and higher education institutions will be applied as an additional land use check.

## Jurisdictional Readiness Evaluation

After screening the corridor with the quantitative criteria, the project team will conduct a “jurisdictional readiness” evaluation to provide additional context. This next evaluation will be conducted on those corridors that score highly on the quantitative evaluation. This evaluation will be qualitative and based on the following factors:

- **Documented community support**, as determined by inclusion of a given corridor in local plans, supportive language in local Comprehensive Plans, etc.
- **Political support**, as determined by an identified jurisdictional “champion” for a given corridor. HCT corridors require strong political support and usually a local agency(s) that is strongly supportive of the project and that will maintain that support over the long-term.
- **Transit-supportive local policies**, such as those encouraging multifamily housing, minimum land use densities, mixed uses, affordable housing, employment, and other areas.
- **Local anti-displacement strategies or policies**
- **Identified local funding** for implementation (either as match or as a locally-funded project).
- **Physical conditions in the corridor**, looking at the likely availability of ROW broadly within a given HCT corridor or the need for mobility solutions that could require additional ROW within a high travel and constrained corridor; known environmental constraints, and presence of sidewalks and cycling facilities. Corridors with major physical constraints would score lower relative to this criterion. However, a major influx of funding could influence the readiness of corridors with major physical constraints.
- **Assessment of work conducted to-date**, meaning, the level and amount of planning, design, environmental, or other work that has been completed to define and advance the HCT investment in a given corridor.

## CORRIDOR RANKING

After both evaluation steps have been completed, the project team will conduct an initial sort of corridors into one of four tiers based on their performance. These tiers are based on the original 2009 HCT System Plan Report:

- **Tier 1 – Regional Priority Corridors:** these include corridors with an adopted Locally Preferred Alternative (LPA) under the National Environmental Policy Act (NEPA), or those where determination of the LPA is already underway (such as 82<sup>nd</sup> Avenue). These corridors are likely to score well with respect to the Federal Transit Administration’s (FTA) Capital Investment Grant (CIG) program. These corridors already have regional consensus and so were not evaluated with the Level 2/readiness criteria described above.
- **Tier 2 – Emerging Regional Priority Corridors:** Tier 2 includes corridors that score highest based on the quantitative and qualitative assessment where additional policy or planning actions may elevate the corridor to advance within the next five years. With steps taken to advance regional discussion on these corridors and/or some changes in the corridor itself, Tier 2 corridors may score well with respect to the Federal Transit Administration’s (FTA) Capital Investment Grant (CIG) program.
- **Tier 3 – Developing Corridors:** corridors that scored in the middle relative to others based on the quantitative evaluation and where the qualitative assessment shows multiple issues or needs that must be addressed, or where land use or employment and population density is marginal for HCT investment. These corridors likely require more time before advancing.
- **Tier 4 – Future Corridors:** these corridors score lowest on the quantitative and qualitative evaluation and lack policy or land use conditions that warrant near-term HCT investments.

**Funding considerations will be an important “lens” applied to the initial tiering that emerges from this assessment.** Available funding is fundamental to the number of corridors the region is able to advance in the

near-term and as such is an important final screen on the initial tiering. The project team will also conduct a final “policy check” to ensure the corridors that emerge from the analysis align with the HCT policy framework and the intended regional outcomes. The final funding and policy check reviews are qualitative in nature; limited modifications, additions, removals, or changes in assigned Tier may result.

Finally, the project team will describe conditions that are likely to influence future discussions on the appropriate HCT mode for each corridor. A specific mode may not be assigned to corridors, given that further study and evaluation is required to determine the appropriate mode in each corridor, as well as the final corridor routing, as part of further studies outside of this process. The team will review the following factors that contribute toward mode selection, including:

- Existing corridor ridership.
- The personal vehicle to transit travel time ratio, determined for each corridor previously (Table 1). The greater this ratio, the greater the need for corridor investment in transit priority or other interventions (e.g., stop consolidation) to improve travel times.
- Existing roadway capacity and available right-of-way: this qualitative assessment will look at the likely availability of ROW broadly within a given HCT corridor or the need for mobility solutions that could require additional ROW within a high travel and constrained corridor. This assessment aims to understand the relative difficulty of implementing HCT.

These criteria will be used to determine if they likely require <50% priority or >50% priority.

However, the project team will assign a **representative corridor and mode** for purposes of modeling corridors only to understand the high-level impacts of HCT investments on regional transit ridership and mode split. The project team will determine these representative modes based on ridership and connections to the existing HCT system. Future corridor refinement studies will make alignment and mode determinations.

## AREAS SUBJECT TO FURTHER REFINEMENT

This evaluation will result in high-level information useful for confirming the vision for HCT and ranking corridors based on readiness to advance. However, identifying and tiering corridors is the first step toward advancing HCT. Detailed study and public involvement is required to advance corridors through the various phases of project development, design, construction, and implementation. An **important early step** in advancing corridors is a detailed look at alignments, potential termini, and segmentation to further define the corridor and project; it may be that only part of a corridor is ready to proceed, or that segmenting a given corridor is the preferred approach to move forward. Additional work that would occur outside of the HCT Strategy Update process and would define elements of the project further includes:

- Mode and vehicle type
- Exact alignment and termini
- Level of transit priority needed
- Station locations
- Roadway design
- Pedestrian and bicycle facilities
- Integration with the broader transportation system, including first/last mile considerations, park and rides, traffic impacts, etc.

# High capacity transit vision & corridor investment priorities

*A new vision for high capacity transit identifies faster and reliable transit connections that will connect more people in the greater Portland region to the places they need to go. Now, the region must prioritize where to invest first.*

## What is the vision for high capacity transit?

New high capacity transit will strengthen the backbone of the transportation system in the greater Portland region as the area continues to grow and change. High capacity transit is public transportation that moves a lot of people quickly and often – think light or commuter rail or bus rapid transit. It can efficiently move the highest number of people along regional routes where the most people need to travel quickly, reliably, and comfortably. The vision for high capacity transit builds from the existing light rail network and Division Street Frequent Express (FX) bus line and calls for new and stronger high quality transit connections in Multnomah, Clackamas, Washington and Clark counties.

The envisioned high capacity transit system will provide better alternatives to driving that encourage new ridership in support of the region's climate goals. The expanded system will prioritize those who depend on transit or lack travel options.

### What is a "corridor"?

*Corridors are routes that are heavily used by people and freight to connect to major destinations throughout the region. A corridor might include a large roadway with multiple transit lines and nearby smaller roadways and bikeways.*



## How will the corridors be prioritized?

Not all the corridors identified in the vision are ready for high capacity transit today. To be prioritized for high capacity transit in the near-term, corridors must already have:

- many and a balanced mix of jobs and housing that creates places where activity occurs most of the day,
- essential destinations within short, walkable distances of each other,
- well-designed streets and buildings that encourage walking and rolling and give transit priority,
- funding available for investments and high cost-effectiveness of those investments, and
- community needs and priorities.

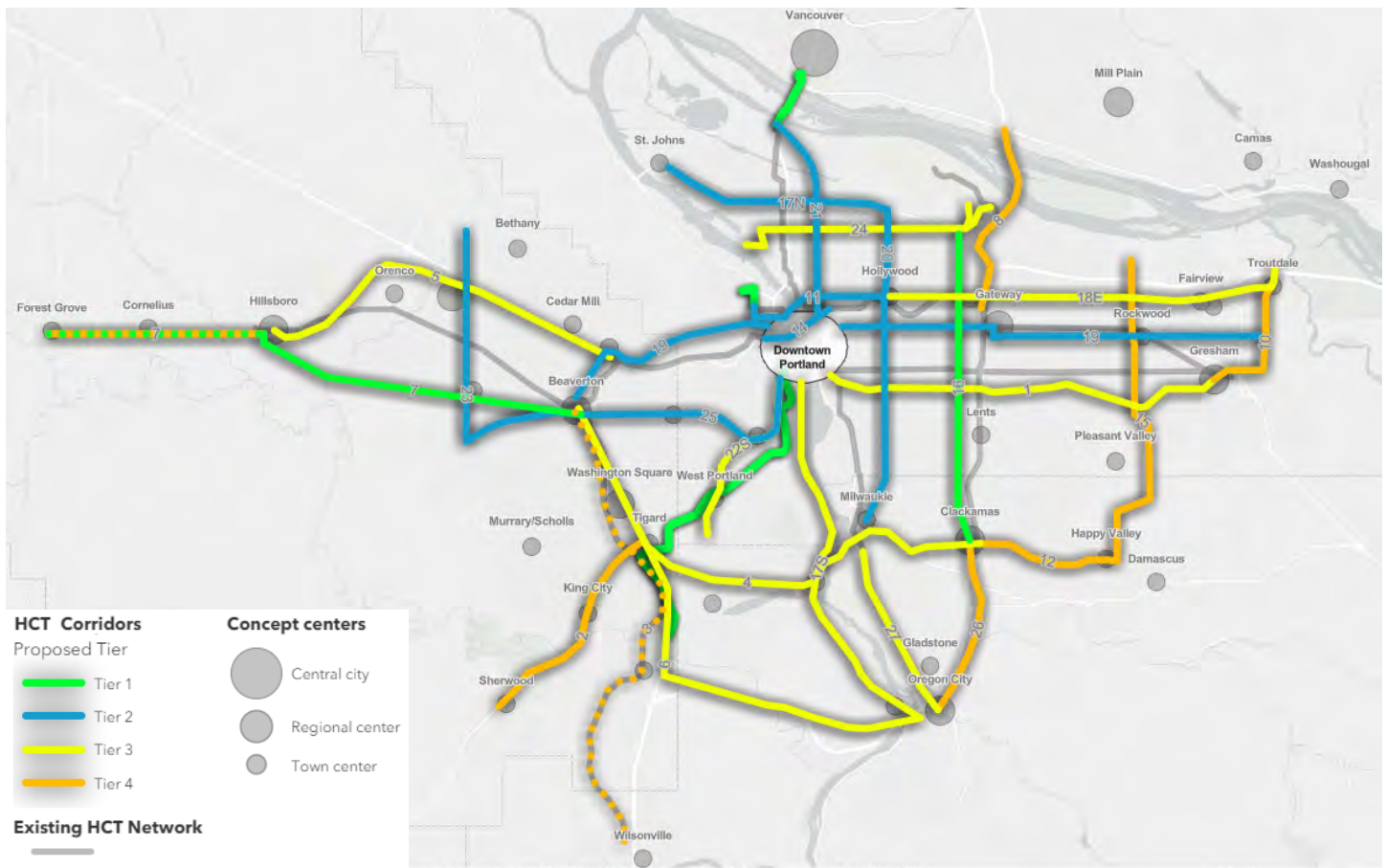
Together, these considerations help identify where there is the greatest need for and most potential benefit in making high quality transit investments. Grouping the corridors by levels of readiness, referred to as tiers, creates a plan that will support the cost-effective use of regional resources to build a high capacity transit system.

- **Tier 1:** Corridors that are ready and where new high capacity transit connections are currently planned for the near-term.
- **Tier 2:** Corridors where planning for high capacity transit investments could start as soon as the next five years.
- **Tier 3:** Corridors where other investments are needed to help high capacity transit to be successful
- **Tier 4:** Important future connections that are not yet ready for high capacity transit in the near-term.



Metro





## HCT Investment Tiers

**Tier 1:** Where investments are currently being planned

- Southwest Corridor MAX
- 82nd Avenue FX Bus
- TV Highway FX Bus
- Interstate Bridge MAX
- Montgomery Park Streetcar

**Tier 2:** Where planning could start in five years

- 14 Central City Tunnel (improving MAX speed and reliability)
- 19 Burnside Beaverton to Gresham
- 11 NW Lovejoy to Hollywood
- 21 MLK Blvd Hayden Island to Downtown
- 23 185th Bethany to Beaverton
- 25 Hwy 10 Beaverton to Portland
- 22N St Johns to Portland
- 20 Cesar Chavez Portland to Milwaukie

**Tier 3:** Where corridors are getting ready for investments

- 1 Portland to Gresham (Powell)
- 22S Capitol Hwy PCC Sylvania to Portland
- 5 Hwy 26 Sunset TC to Hillsboro
- 24 Swan Island to Parkrose
- 17S Portland to Oregon City
- 18E Hollywood to Troutdale
- 27 McLoughlin Park Avenue MAX to Oregon City
- 6 Beaverton to Oregon City
- 4 Beaverton to Clackamas TC

**Tier 4:** Important corridors not yet ready for investment

- 9 Hillsboro to Forest Grove
- 10 Gresham to Troutdale
- 2 Hwy 99W Tigard to Sherwood
- 3 WES Corridor Improvements
- 15 Clackamas to Columbia
- 12 Clackamas TC to Damascus
- 26 Clackamas TC to Oregon City
- 8 I-205 Gateway to Clark County

## What's Next?

In winter and spring 2023, the project team will work with community members and organizations, businesses, agency partners and elected officials to hear more about their investment priorities. Discussion will focus on what else the corridors need to be ready for high quality transit service.

## Stay in touch with the 2023 Regional Transportation Plan Update.

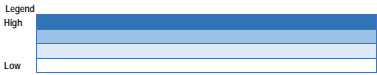
[oregonmetro.gov/rtp](https://oregonmetro.gov/rtp)

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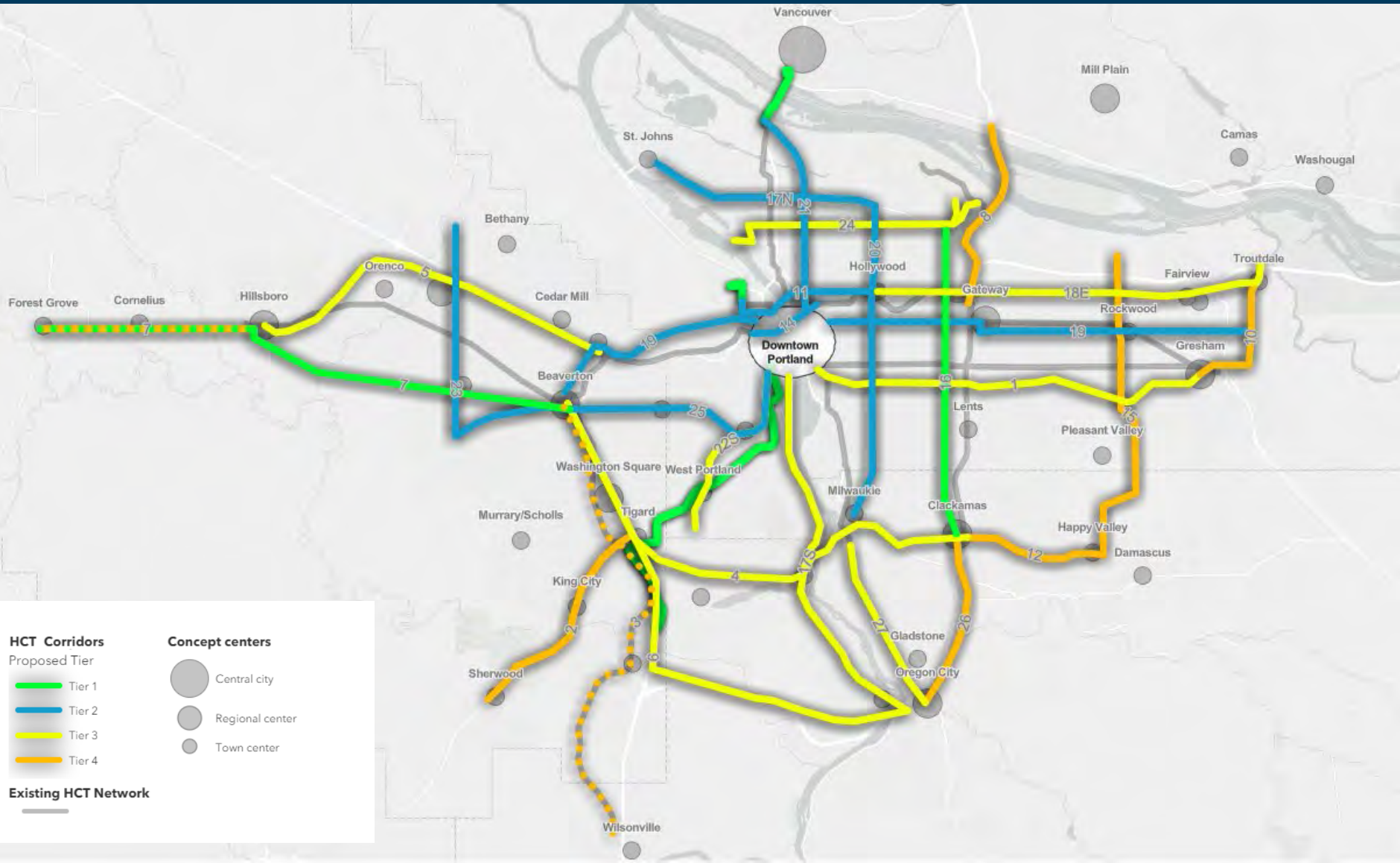
Map ID	Potential Project and Representative Corridor	Mobility	Productivity and Cost Effectiveness		Environmental Benefit	Equity Benefit		Land Use Supportiveness and Market Potential				Level 2 Evaluation Total Score	Documented Support			Physical Conditions in the Corridor			Implementation Complexity		Readiness Total Score	Total Score
		Transit Travel Time to Car Travel Time Ratio	Boardings per Revenue Hour	Capital Cost per Rider	GHG Reduction Benefit, Annual CO2e	Key Destinations within 1/2 Mile, Normalized	Share of Marginalized Populations within 1/2 Mile	Population Density	Employment Density	Number of Affordable Housing Units, Normalized	Presence of Higher Education		Community Support	Transit Supportive Land Use Policies	Work completed to-date	Physical Space	Miles of Sidewalks within 1/2 mile of Corridor, Normalized	Miles of street with Bike Facility Present within 1/2 mile of Corridor, Normalized	Corridor Length	Freight Corridor		
11	NW Lovejoy to Hollywood via Broadway/Weidler	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
14	Central City Tunnel	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
19	Beaverton - Portland - Gresham via Burnside	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
21	Hayden Island - Downtown Portland via MLK	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
23	Beaverton to Beaverton via Farmington/SW 185th	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
25	Beaverton to Portland via Hwy 10 (BH Hwy)	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
22N	St Johns - Downtown Portland via Vancouver/Williams, Rosa Parks	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
20	St. Johns - Milwaukie via Cesar Chavez	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
1	Portland to Gresham in the vicinity of Powell Corridor	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
225	PCC Sylvania to Downtown Portland via Capitol Hwy	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
5	Sunset Transit Center to Hillsboro via Hwy 26/ Evergreen	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
24	Swan Island to Parkrose	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
175	Oregon City to Downtown Portland via Hwy 43	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
186	Hollywood to Troutdale	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
27	Park Ave MAX Station to Oregon City via the McLoughlin Corridor	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
6	Beaverton - Tigard - Tualatin - Oregon City	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
4	Beaverton - Tigard - Lake Oswego - Milwaukie - Clackamas Town Center	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
9	Hillsboro to Forest Grove	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
10	Gresham to Troutdale	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
2	Tigard to Sherwood via Hwy 99W Corridor	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
3	Beaverton to Wilsonville in the vicinity of WES	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
15	Happy Valley to Columbia Corridor via Pleasant Valley	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
12	Clackamas Town Center to Damascas	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
26	Clackamas Town Center to Oregon City	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
8	Gateway to Clark County in the vicinity of I-205 Corridor	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>



Proposed Tier	Geography / Jurisdiction
2	Portland/Multnomah
2	Portland/Regional
2	Washington/Portland/Multnomah
2	Portland
2	Washington
2	Washington/Multnomah
2	Portland
2	Multnomah
3	Portland
3	Washington
3	Portland
3	Clackamas/Multnomah
3	Portland/Multnomah
3	Clackamas
3	Clackamas/Washington
3	Clackamas/Washington
4	Washington
4	Multnomah
4	Washington
4	Washington
4	Multnomah/Clackamas
4	Clackamas
4	Clackamas
4	Multnomah/Clark



# Corridor Tiers



## **5.4 Carbon Reduction Program Introduction & Proposal (9:10 AM)**

Joint Policy Advisory Committee on Transportation  
Thursday, January 19, 2023

# JPACT Worksheet

**Agenda Item Title:** Carbon Reduction Program Overview

**Presenters:** Margi Bradway, Ted Leybold, Grace Cho (tentative), Suzanna Carlson (ODOT Climate Office)

**Contact for this worksheet/presentation:** Grace Cho, Ted Leybold

## **Purpose/Objective**

Provide JPACT members an overview of the new Carbon Reduction Program (CRP) fund program and gather feedback on the proposed Climate Smart Strategy investment areas to develop an allocation proposal for Carbon Reduction Program funds.

## **Outcome**

JPACT members have an understanding of the following:

- The basic premise and details of the Carbon Reduction Program
- The Climate Smart Strategy serving as the policy direction to guide the allocation of Carbon Reduction Program funds
- Timelines and process for the allocation of Carbon Reduction Program funds

JPACT members provide input to help shape draft allocation proposals for further discussion in February.

## **What has changed since JPACT last considered this issue/item?**

Not applicable at this time. January 19<sup>th</sup> JPACT meeting will be the first time JPACT will be briefed on the Carbon Reduction Program

## **What packet material do you plan to include?**

Please find attached memorandum to JPACT

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: Friday, January 6, 2023  
To: Joint Policy Alternatives Committee on Transportation (JPACT) and Interested Parties  
From: Grace Cho, Senior Transportation Planner - Metro  
Ted Leybold, Resource Development Manager - Metro  
Subject: Carbon Reduction Program Overview and Direction for Fund Allocation

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## **Purpose**

Provide JPACT members an overview of the new Carbon Reduction Program (CRP) fund program and gather feedback on the proposed Climate Smart Strategy investment areas to develop an allocation proposal for Carbon Reduction Program funds.

## **Introduction**

In November 2021, President Biden signed into law the Bipartisan Infrastructure Law (BIL). The BIL authorized five years of transportation funding and the largest transportation infrastructure investment program in its history. As part of BIL, several new funding programs were created and existing funding programs received additional funding.

The Carbon Reduction Program is a new funding program established by the BIL and administered through the Federal Highway Administration (FHWA). The State of Oregon is to receive an estimated \$82.5 million total in Carbon Reduction Program funding. The Oregon Department of Transportation (ODOT) will administer approximately \$53.9 million at the state level of the \$82.5 million total. Whereas the three large metropolitan organizations in Oregon – Portland, Eugene, and Salem – receive a direct suballocation of the Carbon Reduction Program funds based on formula. Metro's portion of the Carbon Reduction Program funding is approximately \$18.8 million total for the five federal fiscal years.

## **Carbon Reduction Program Requirements and Timeline**

The federal aim of the newly created Carbon Reduction Program is “to reduce transportation emissions through the development of State carbon reduction strategies and fund projects designed to reduce transportation emissions.” As part of implementing the new federal program, states and metropolitan planning organizations must complete two requirements:

- States, in consultation with metropolitan planning organizations and local governments, must develop statewide carbon reduction plans aimed specifically at the transportation sector.
- The statewide carbon reduction plan includes the projects and programs funded with Carbon Reduction Program funds (referred to as “CRP” funds).

Per the federal requirements of the new program, state carbon reduction plans with identified allocation of CRP funds are due to federal partners by November 2023.

Because of the Statewide Transportation Strategy (STS) and the Climate Smart Strategy, Metro and ODOT are well positioned to meet the first requirement of the new program quickly and can begin developing allocation processes for the new Carbon Reduction Program funds. The Oregon Department of Transportation (ODOT) already began to convene stakeholders to discuss and prioritize STS policy areas to include in the required Carbon Reduction Plan and guide the allocation of CRP funds for all parties. ODOT will conduct a funding allocation for the approximate \$53.9 million CRP funds it receives, whereas the three larger metropolitan planning organizations

in Oregon – Portland, Eugene, and Salem – will conduct their own independent allocations separate from the state allocation process.<sup>1</sup>

### **Portland Metropolitan Region Carbon Reduction Program – Policy Direction for Allocation**

Adopted in 2014, the Climate Smart Strategy is the Portland region’s action plan to reduce greenhouse gas emissions from light duty trucks and passenger vehicles through a combination of land use and transportation efforts. The Climate Smart Strategy identifies ten actions for the region to meet the state mandated greenhouse gas emissions reduction target. These are:

1. Implement adopted local and regional land use plans
2. Make transit convenient, frequent, accessible, and affordable
3. Make biking and walking safe and convenient
4. Make streets and highways safe, reliable and connected
5. Use technology to actively manage the transportation system
6. Provide information and incentives to expand the use of travel options
7. Make efficient use of vehicle parking and land dedicated to parking
8. Support Oregon’s transition to cleaner fuels and more fuel-efficient vehicles
9. Secure adequate funding for transportation investments
10. Demonstrate leadership on reducing greenhouse gas emissions

The Portland region made initial progress with the implementation of the Climate Smart Strategy in the years immediately after adoption and saw a boost in efforts with the Oregon legislature passing a statewide transportation investment package (HB 2017) that provided on-going funding for transit operations. However, in recent years, state mandated monitoring reports show the region and the state are behind and/or off track to meet greenhouse gas emissions reduction targets. While multiple cycles of Metro’s Regional Flexible Funds have invested into Climate Smart Strategy areas and a statewide transportation package has created new revenue streams to further invest, additional revenue is needed. In recognition of the region’s current implementation progress and the funding need, the Climate Smart Strategy will serve as the policy direction and guide the Carbon Reduction Program fund allocation for the Portland region.

### **Carbon Reduction Program Fund Allocation – Proposed Climate Smart Strategy Investment Areas**

The newly created federal Carbon Reduction Program is a limited opportunity targeted towards transportation infrastructure investments or activities with the express purpose of reducing greenhouse gas emissions. Therefore, the region’s aim for the Carbon Reduction Program is to implement the Climate Smart Strategy by investing into one or more of the investment areas identified.<sup>2</sup> The varied mix of strategies outlined in Climate Smart provides a wide span of options to invest CRP funds on the regional transportation system.

Based on initial feedback from the 2023 RTP workshop and discussion with the Metro Council, regional leadership has ... that investing and focusing on the following three Climate Smart Strategies to meet the region’s greenhouse gas emissions reduction goals.<sup>3</sup>

- Make transit convenient, frequent, accessible, and affordable

<sup>1</sup> The Portland metro region portion of Carbon Reduction Program funds is approximately \$18.8 million.

<sup>2</sup> After considering federal funding eligibility requirements, state Carbon Reduction Plan priorities, regional opportunities, and other factors

<sup>3</sup> See attachment 1.

- Make biking and walking safe and convenient
- Use technology to actively manage the transportation system

Based on this initial feedback, Metro staff proposes to use these three Climate Smart Strategies as the initial starting point for the development of one or more proposals for allocating CRP funds.

### **Allocation Process**

The region completed the 25-27 Regional Flexible Fund Allocation (RFFA) in October 2022. The 25-27 RFFA was a two-year multistep process to determine the program direction, identify the criteria for evaluating candidate projects, conducting the solicitation, and selecting candidate projects for funding. To the degree possible, Metro integrated increases in federal surface transportation funding due to BIL into the 25-27 RFFA process. However, due to it being a new funding program, coordination requirements, and awaiting congressional appropriations, the Carbon Reduction Program was not integrated into the 25-27 RFFA process. At the end of the 25-27 RFFA process, Metro staff asked partners if there is interest in another competitive allocation for the CRP. The overwhelming feedback was fatigue coming off the 25-27 RFFA decision and a desire to do a different process.

Recognizing the time constraints for submitting allocations of CRP funds for inclusion in the state Carbon Reduction Plan, the amount of funding available, and the desire for a different process, Metro staff will develop one or more allocation proposals for the CRP funds for regional discussion. The allocation proposals will be based on:

#### **Policy Direction**

- Climate Smart Strategy investment areas
  - Potential for greenhouse gas emissions reduction
- Ability to advance additional Regional Transportation Plan objectives, including Equity, Safety, and Mobility in addition to Climate
- Ability to address Climate Friendly Equitable Communities and other state, regional, or local climate change related objectives
- Consistency with state Carbon Reduction Plan priorities

#### **Administrative**

- Federal funding eligibility requirements
  - Including those specific to the Carbon Reduction Program
- Carbon Reduction Program requirements
  - Submission deadlines, timing of obligation of funding, and other limitations
- Program implementation needs
  - Evaluation tools and capacity, reporting, communications, policy refinement

#### **Other**

- ODOT's allocation and priorities for Carbon Reduction Program funds and other investments in reducing carbon emissions
- Funding leverage opportunities
  - Especially funding opportunities presented from BIL

#### **Committee Input and Feedback**

- Feedback received at:

- November 10 Metro Council and JPACT workshop for the 2023 RTP on the Climate Smart Strategy
- December 13 Metro Council work session
- January 6 TPAC
- January 19 JPACT

Metro staff will return to TPAC and JPACT at the February 2023 committee meetings with one or more specific project and/or program proposals with CRP funding levels. Following review of the proposal(s), Metro staff will seek gather a recommendation in early spring 2023 with the aim to adopt the allocation of CRP funds in mid to late spring 2023.

**Questions for JPACT**

- What questions do JPACT members have about the Carbon Reduction Funding program?
- What thoughts do JPACT members have about the three Climate Smart Strategies for emphasis for Carbon Reduction Program funds?

## **Attachment 1 – Summary – Initial Feedback and Direction for Carbon Reduction Program Allocation**

The following are recent meetings where the discussions focused on the prioritization of the Climate Smart Strategies and/or the new Carbon Reduction Program funds. The summary of these discussions will inform Metro staff developed proposals brought forward for regional discussion.

### 2023 RTP Workshop

At the November 10 Metro Council and JPACT workshop on the 2023 RTP, Metro staff provided a refresher on the Climate Smart Strategy. Since the Climate Smart Strategy has been integrated into subsequent regional transportation plans (2014 RTP, 2018 RTP) after its adoption, the 2023 RTP presents an opportunity to update related policies in the Plan and develop a long-term transportation investment strategy which will bring the region back on track to meet the greenhouse gas emissions reduction target set forth by the state.

At the workshop, regional leaders participated in a set of exercises ranking the different Climate Smart investment areas for: 1) further implementation; 2) greatest benefit to people living in the Portland metropolitan region; and 3) preference on ambitiousness in pursuing. Under the three different ranking exercises, the following three ranked in the top in each exercise. Across all three exercises, “Making transit convenient, frequent, accessible, and affordable,” was the top ranked Climate Smart investment area in each.

- Make transit convenient, frequent, accessible, and affordable – through increased transit service, including high-capacity transit
- Make biking and walking safe and convenient – through new active transportation connections
- Use technology to actively manage the transportation system – through system management and operations

These non-binding results indicate that the region’s leaders are interested in advancing Climate Smart Strategies/investment areas for implementation.

### Metro Council Work Session

Following the 2023 RTP workshop, Metro and ODOT Climate Office staff jointly presented information about the federal Carbon Reduction program at the Metro Council work session. The presentation outlined the new program and provided insight into the priority investment areas for ODOT’s allocation. ODOT emphasized the need for partnerships to achieve Oregon’s greenhouse gas emissions reduction goal and making complementary investments. Metro staff outlined three potential Climate Smart Strategy investment areas to emphasize with CRP funds. These three areas include:

- Transit
  - Capital transit investments
  - Improvements in the right-of-way to increase speed and reliability of buses and MAX
- Active Transportation
  - New biking and walking connections to schools, downtowns, jobs, and other community places



- Completes the regional active transportation network and supports the 2040 growth concept
- System Management and Operations
  - Variable message signs and speed limits
  - Transit signal priority, bus pullouts
  - Signal timing and ramp metering

The Metro Council were asked to provide feedback and direction on the potential Climate Smart Strategy investment areas as well as other wishes the Council would like to see as part of the allocation of CRP funds. Feedback from the Metro Council included:

- Continue to support and leverage the planning work undertaken as part of the Transportation Funding Measure in 2020, in areas that would be eligible for CRP funds
- Invest into our current corridor projects, including Tualatin Valley Highway and 82<sup>nd</sup> Avenue
- Make a regional investment with the limited dollars presented with CRP, but also be context sensitive to the different counties in the region
- Accelerate implementing community plans that seek to reduce greenhouse gas emissions
- Leverage other funding opportunities presented with the BIL and with other partners
- Support microtransit and transit services which better serve communities not well reached by traditional transit providers.

### TPAC

Metro staff in conjunction with ODOT Climate Office staff provided an overview of the Carbon Reduction Program at the January 6, 2023, TPAC meeting. In the presentation, Metro staff outlined the details of the new federal funding program and the staff proposed Climate Smart Strategy investment areas to shape allocation proposals for discussion. The following is feedback from TPAC to help shape and inform the next steps for staff to develop Carbon Reduction Fund allocation proposals for discussion in February and potentially for communication to ODOT for the allocation of their Carbon Reduction Program funds.

- Agree with leveraging the work and consensus building undertaken as part of the transportation funding measure in 2020, but not constrained by what was included in the package which went before voters. Consider some of the corridors/candidate projects which did not make the final package put forward to voters.
- Have the allocation proposal reflect regional balance
- Consider those projects which can meet eligibility requirements from the 25-27 Regional Flexible Fund cycle which were not awarded grant funds
- Consider adding the Climate Smart Strategy - Provide information and incentives to expand the use of travel options – or transportation demand management (TDM) as part of the CRP allocation proposal
- Work actively with local jurisdictions on identifying candidate projects for the allocation proposal developed by Metro staff. Following a process similar to the earmark process would be positive.
- Consider quantifying greenhouse gas emissions reduction for candidate projects and have it inform the final allocation proposal. At a minimum, have allocation efforts be informed by emissions reduction potential.
- Prioritize allocating Carbon Reduction Program funds to projects and programs which do not have other sources of funding. For example, while electric vehicles and infrastructure

are an eligible activity for new funding program, there is also another federal funding program exclusively available for electrification.

- Focus on “doable” projects that can show off the success of the Carbon Reduction Program. This can help support the program’s continuation into the future.
- In considering potential transportation system management and operations (TSMO) project candidates, work with the Transport sub-committee of TPAC to identify a project or technology update which would have wide reaching regional or systemic benefit in lieu of smaller site-specific project(s).
- Consider focusing Carbon Reduction Program funds on projects in areas with high vehicle miles traveled and a lack of transportation options.
- Consider adding to the allocation proposal projects which accelerate the transition of transit fleet vehicles to alternative fuels
- While the Carbon Reduction Program funds focus on greenhouse gas emissions reduction, consider candidate projects in the allocation proposal which result in greater safety. In particular, projects which complete the pedestrian and bicycle network in areas of high crashes provide the dual benefit of emissions reduction and safety.
- Use updated information from efforts like the City of Portland’s VisionEval work to help inform which types of projects will be an effective use of Carbon Reduction Program funds and get the most emissions reduction cost-benefit.
  - Consider investing funds to advance the region’s capabilities in understanding, measuring, and advancing how to best reduce carbon emissions.

TPAC also requested additional information on use of the \$1.8 million proposed for program implementation. TPAC also asked ODOT’s climate office to keep the MPO table (i.e., TPAC, JPACT, Metro Council) and the R1ACT informed on the allocation process for the state Carbon Reduction Program funding as there is interest in knowing more about providing input to the state allocation process.

## Attachment 2 – Timeline

The following is an anticipated timeline of activities for the allocation of CRP funds and submission for inclusion in the state Carbon Reduction Plan. The dates are subject to change.

Activity	Draft Timeframe
Finalize statewide Carbon Reduction Program draft strategies & priorities to guide MPO and state allocations	October 2022
2023 RTP workshop #5 on the Climate Smart Strategy <ul style="list-style-type: none"> <li>JPACT and Metro Council participate in Climate Smart</li> </ul>	November 2022
Metro Council – introduction, discussion, feedback, and direction	December 2022
Develop proposal for allocation of Carbon Reduction Program	December 2022 – Spring 2023
TPAC and JPACT – introduction, discussion, feedback, and direction	January 2023
TPAC and JPACT – introduce CRP allocation proposal(s)	February 2023
TPAC and JPACT recommendation	March and/or April 2023
Metro Council adoption of Carbon Reduction Program allocation	April or May 2023
Statewide Carbon Reduction Program allocation check-ins	February – April 2023
Prepare Carbon Reduction Program allocation entries for submission <ul style="list-style-type: none"> <li>Also prepare for 21-24 and/or 24-27 MTIP and STIP entries</li> </ul>	April – June 2023
Submissions of Carbon Reduction Program fund allocations to ODOT	May – August 2023
Carbon Reduction Plan with fund allocations due to federal partners <ul style="list-style-type: none"> <li>If necessary, conduct 24-27 MTIP and STIP amendments to include programming of Carbon Reduction Program funds</li> </ul>	November 2023



Materials following this page were distributed at the meeting.

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

Penny A. Griffith, 68, walking, Division St & SE 168th Ave, Portland Multnomah, 1/6

Lourdes Turcios Garcia, 40, walking, 19th Ave & Hawthorne St, Forest Grove, Washington, 1/5

Unidentified, driving, SE 125th Ave near Division St, Portland, Multnomah, 1/1

Unidentified, 92, walking, SW Allen Blvd near SW Murray Blvd, Beaverton, Washington, 12/30

Unidentified, walking, W Burnside & NW 22nd St, Portland, Multnomah, 12/28

Paula Chamu Sanchez, 20, driving, I-84, Multnomah, 12/27

Isreal Gonzales Sanchez, 65, walking, I-84, Multnomah, 12/20

Deanna Dixon, 60, walking, OR 213, Cascade Highway, Portland, Clackamas, 12/20

Unidentified, walking, NE Sandy Blvd, Portland, Multnomah, 12/19

David Belen, 48, walking, Marquam Bridge, Portland, Multnomah, 12/19

David W. Northcutt, 50, walking, N Columbia Blvd & N Interstate Pl, Portland, Multnomah, 12/18

Christopher Alexander Rios, 18, driving, SE 148th Ave., south of SE Main St., Portland, Multnomah, 12/17

Unidentified, walking, NE MLK Blvd. & NE Halleck St, Portland, Multnomah, 12/14

Unidentified, motorcycling, Division St E of SE 154th Ave, Portland, Multnomah, 12/12

David Joseph Lamb, 39, driving, SE 118th Ave & SE Division St. Multnomah, 12/9

*\*ODOT initial fatal crash report as of  
1/10/23, police and news reports*







## **MPO Overview & JPACT Workplan for 2023**

Margi Bradway

Deputy Director

Planning, Development and Research Department

# Agenda

## **Overview of the Purpose and Function of an MPO**

- What is in an MPO?
- What is JPACT?

**Look back:** 2022 Accomplishments

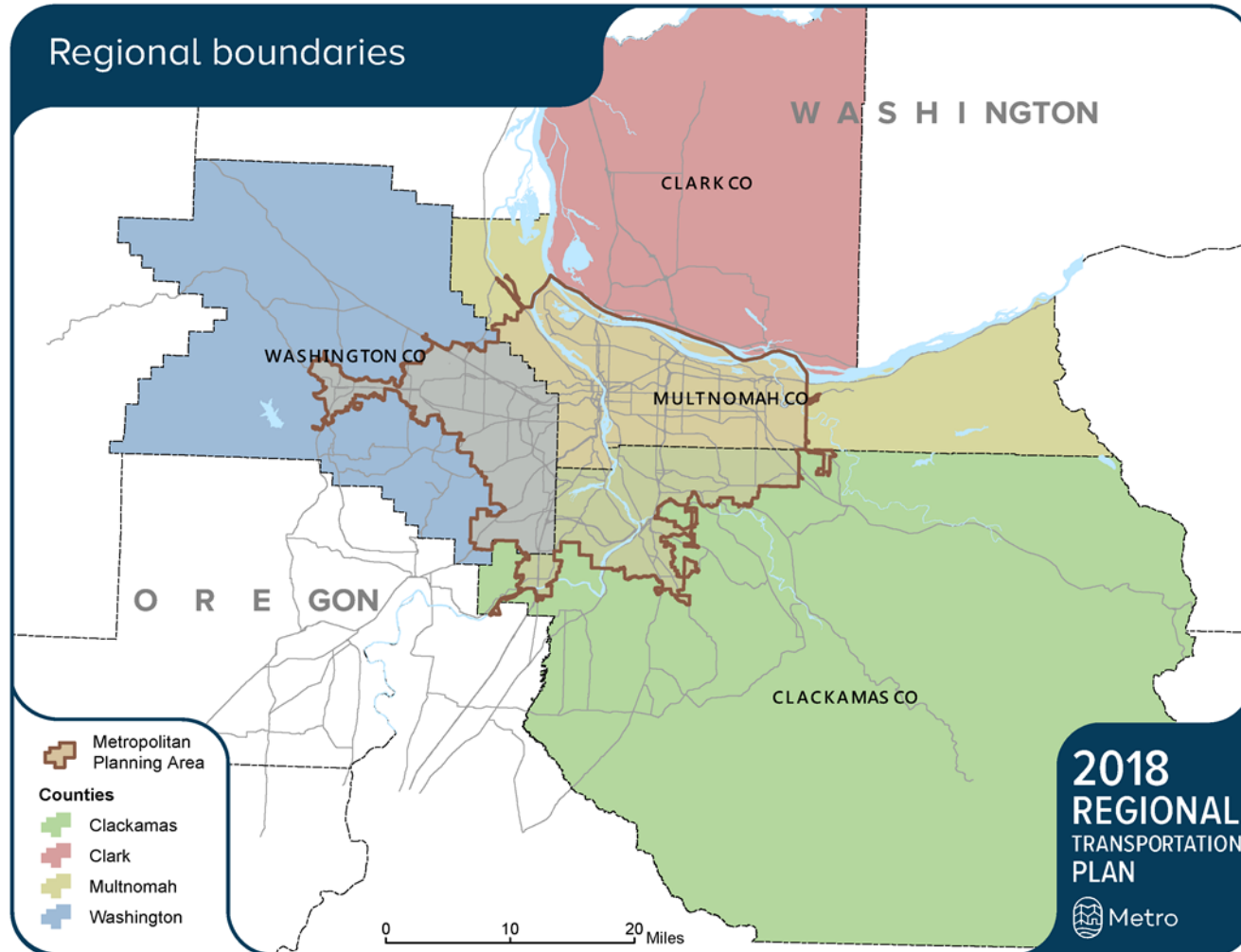
**Looking forward:** Workplan for 2023



# Metropolitan Planning Organization (MPO)

- The MPO is **created by federal law** and designated to carry out the metropolitan transportation planning process.
- An urbanized area with a population over 200,000, as defined by the Bureau of the Census and designated by the Secretary of the U.S. Department of Transportation (DOT), is called a **Transportation Management Area (TMA)**.
- As described in 49 U.S.C. 5303(k), and in recognition of the greater complexity of transportation issues in large urban areas, an MPO in a TMA has a stronger voice in setting priorities for implementing projects listed in the transportation improvement program and are responsible for regional transportation plans.
- In Oregon, MPOs are also responsible for complying with **state transportation and land use law**.

# Metropolitan Regional Boundary



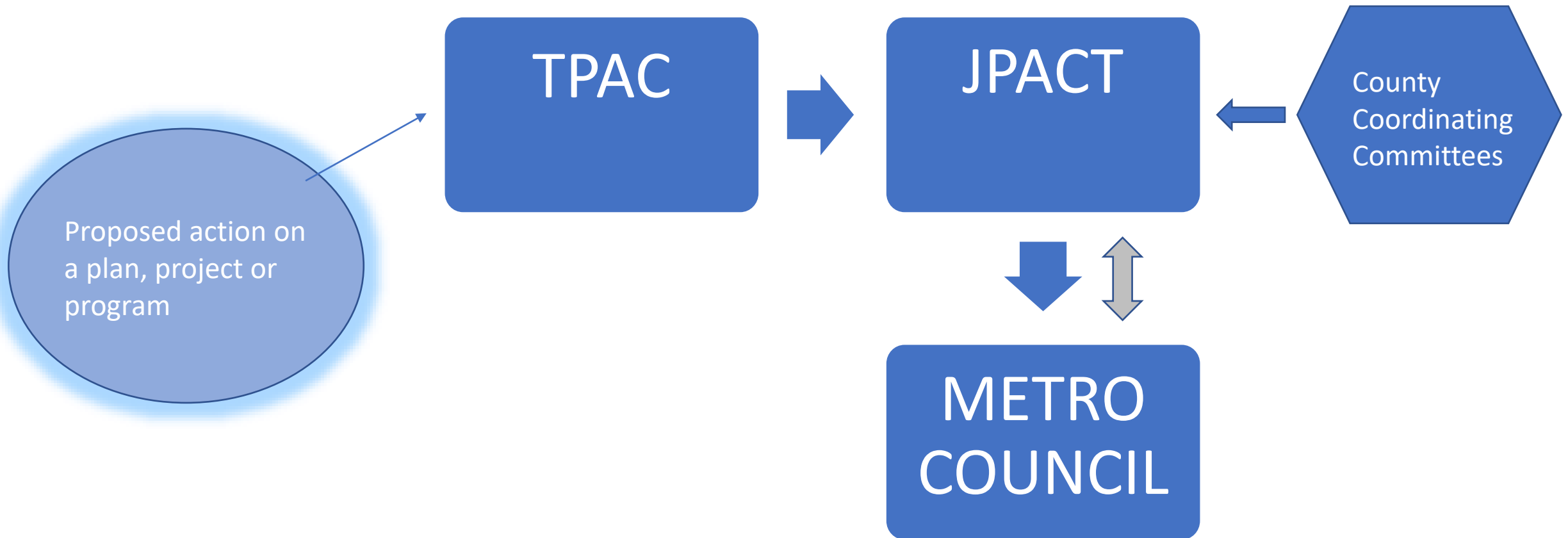
The boundary of an MPO is based on the census and established by the Governor of Oregon.

- 24 cities
- 3 counties
- Bi-state region
- More than 1.6 million people (today)
- More than 2 million people (by 2040)

# The role of the Joint Policy Advisory Committee (JPACT)

- Federal law, MAP-21, requires TMAs to have a **decision-making structure** that incorporates input from local elected officials, transit agencies, appropriate state officials, and others.
- JPACT serves as the “**policy advisory committee**” as defined by the federal regulations.
- MPO decisions for planning, investment and programming are **shared between the Metro Council and JPACT**.
- The **Transportation Policy Alternatives Committee (TPAC)** serves as a technical and advisory committee to JPACT.

# Metro MPO Committee Process



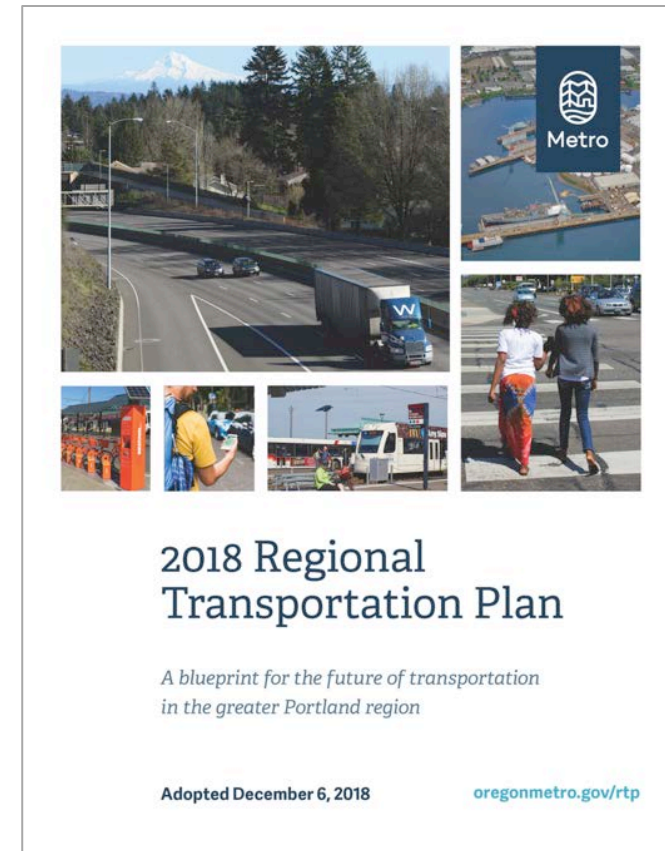
# Functions of a Metropolitan Planning Organization (MPO)

Primary functions of the Metro MPO:

- **Regional Transportation Planning** - development of the Regional Transportation Plan (RTP), long-range planning and the Unified Planning Work Plan (UPWP)
- **Metropolitan Transportation Improvement Program (MTIP)** – management and allocation of federal funds and coordination of federal funding in MPO area
- **Congestion Management Process** – development of a CMP and coordinating implementation; demonstrate compliance with Clean Air Act, federal laws
- **Climate Smart Strategy** – planning and coordination of implementation of Climate Smart to reduce greenhouse gases, required by state law

# Regional Transportation Plan

- 20-year plan
- Blueprint to guide planning and investment in the region's transportation system
- Includes policies, plans and projects
- Coordinates local, regional, and state investments
- Establishes priorities for state and federal funding



# Metropolitan Transportation Improvement Program

- Detailed list - regionally significant projects & programs
- Process - align investments to regional goals
- Administrative procedures



# Climate Smart Strategy

State law that applies to Metro

Set of policies, plans, programs and short-term actions to reduce GHG from transportation and land use.

First adopted in 2014 and updated every RTP cycle

Alignment with the *new* Climate-Friendly and Equitable Communities (CFEC) rulemaking



Climate Smart Strategy  
for the Portland metropolitan region  
[www.metro.gov/climatestrategy](http://www.metro.gov/climatestrategy) 2014



# Regional Coordination on Federal and State Priorities



# Major work accomplished by JPACT 2022

- **Regional Flex Fund Allocation (25-27)**
- **Approved LPA for I-5 Bridge Replacement Project**
- **Congestion Pricing Policy**
  - I-205 Tolling Amendment
  - Regional Congestion Pricing
- **Regional Mobility Policy Update**
- **2023 Regional Transportation Plan, *including but not limited to:***
  - Emerging Trends
  - Urban Arterials Strategy
  - Equitable Financing - *underway*
  - High-Capacity Transit study – *underway*
- *Identified priority projects for federal funding including earmarks and federal grants*



# Joint Policy Advisory Committee (JPACT) & Metro Council Workshop



August 2022



Metro

2023

# REGIONAL TRANSPORTATION PLAN WORKSHOP 1

We Have Been Asked for...

A Better Future for  
Transportation



SAFETY

Listen, Learn, Collaborate

CONVENIENCE

CLIMATE

EQUITY

ACHIEVE

COMMUNITY

RELIABILITY

SHARED  
PROSPERITY

HEALTHY PEOPLE & ENVIRONMENT

WHAT

CHOICE

WE WANT



# 2023 RTP Call for Projects Policy Framework

## Draft vision and goals for 2023 RTP



### Vision →

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

*Developed in 2022 by JPACT and Metro Council with input from MPAC*

# 2023 RTP Call for Projects Policy Framework

## Draft Goals for 2023 RTP

### **EQUITABLE TRANSPORTATION**

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

### **CLIMATE ACTION AND RESILIENCE**

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

### **SAFE SYSTEM**

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



### **MOBILITY OPTIONS**

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

### **THRIVING ECONOMY**

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

*Developed in 2022 by JPACT and Metro Council with input from MPAC*

# Major work ahead in 2023

## **Regional Transportation Plan (RTP)**

- Policy update
- Call for Projects
- Public comment on draft
- Final adoption

## **Climate**

- Climate Smart Strategy - update
- Implementation of CFEC Rules
- Climate Modeling
- Climate Reduction Program (CRP) allocation

## **Metropolitan Transportation Implementation Plan (MTIP) 2024-27**

## **Bus Rapid Transit (BRT) and Transit Planning**

- High-capacity Transit Strategy
- TV Highway Corridor Plan
- 82<sup>nd</sup> Avenue Transit Plan
- Scoping the Access to Transit Plan

## **Bridges**

- Burnside Bridge
- I-5 Bridge Replacement

# Questions?

Margi Bradway  
Deputy Director  
Planning and Development Department  
[Margi.bradway@oregonmetro.gov](mailto:Margi.bradway@oregonmetro.gov)



# Carbon Reduction Program – Overview

JPACT

January 19, 2023



# Bipartisan Infrastructure Law (BIL)

- Over \$567B investment across all modes over 5 years
  - Increased formula funding
  - Created new programs
- Majority of funding allocated to states and MPOs by formula
  - Remaining funding available through discretionary grant programs



# BIL – New Formula Programs

New formula programs allocated by ODOT at the state level, examples:

- Bridge Investment Program (BIP)
- Electric Vehicle (EV) Charging and Fueling Infrastructure
- **Carbon Reduction Program**

New formula program allocated at the MPO level:

- **Carbon Reduction Program**

# Carbon Reduction Program (CRP)





# BIL – Carbon Reduction Program

Federal Objective: “to reduce transportation emissions through the development of State carbon reduction strategies and fund projects designed to reduce transportation emissions.”

## Federal Requirements

- Develop statewide carbon reduction plan/strategy
  - Strategy should be appropriate to the population density and context
- Fund projects and programs that implement the strategy and reduces greenhouse gas emissions



# IIJA CARBON REDUCTION PROGRAM

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SUZANNE CARLSON – ODOT CLIMATE OFFICE

# OREGON CARBON REDUCTION PROGRAM - FUNDING

## CRP Funding FY22-FY26

TMA (Portland, Salem, and Eugene)	\$29.5 million
Small Urban and Rural Areas	\$26.8 million
Statewide	\$29.8 million
<b>Total:</b>	<b>\$86.1 million</b>

\*Local match is required. Federal-aid requirements for project delivery apply.







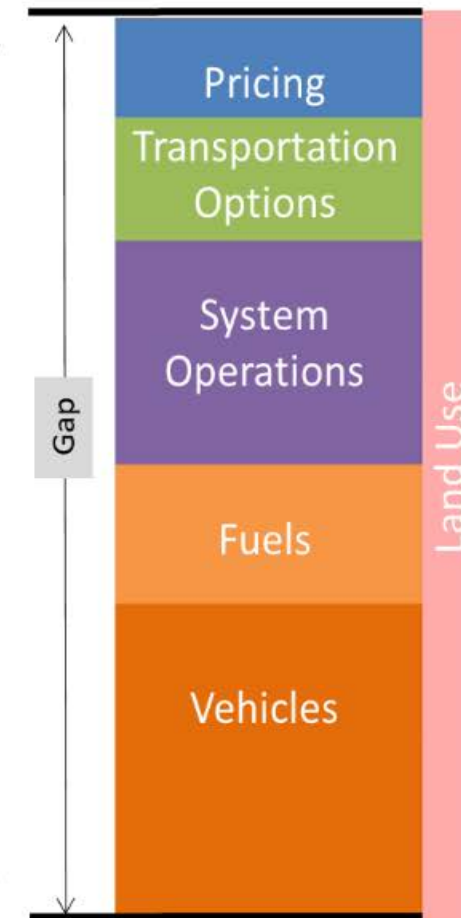
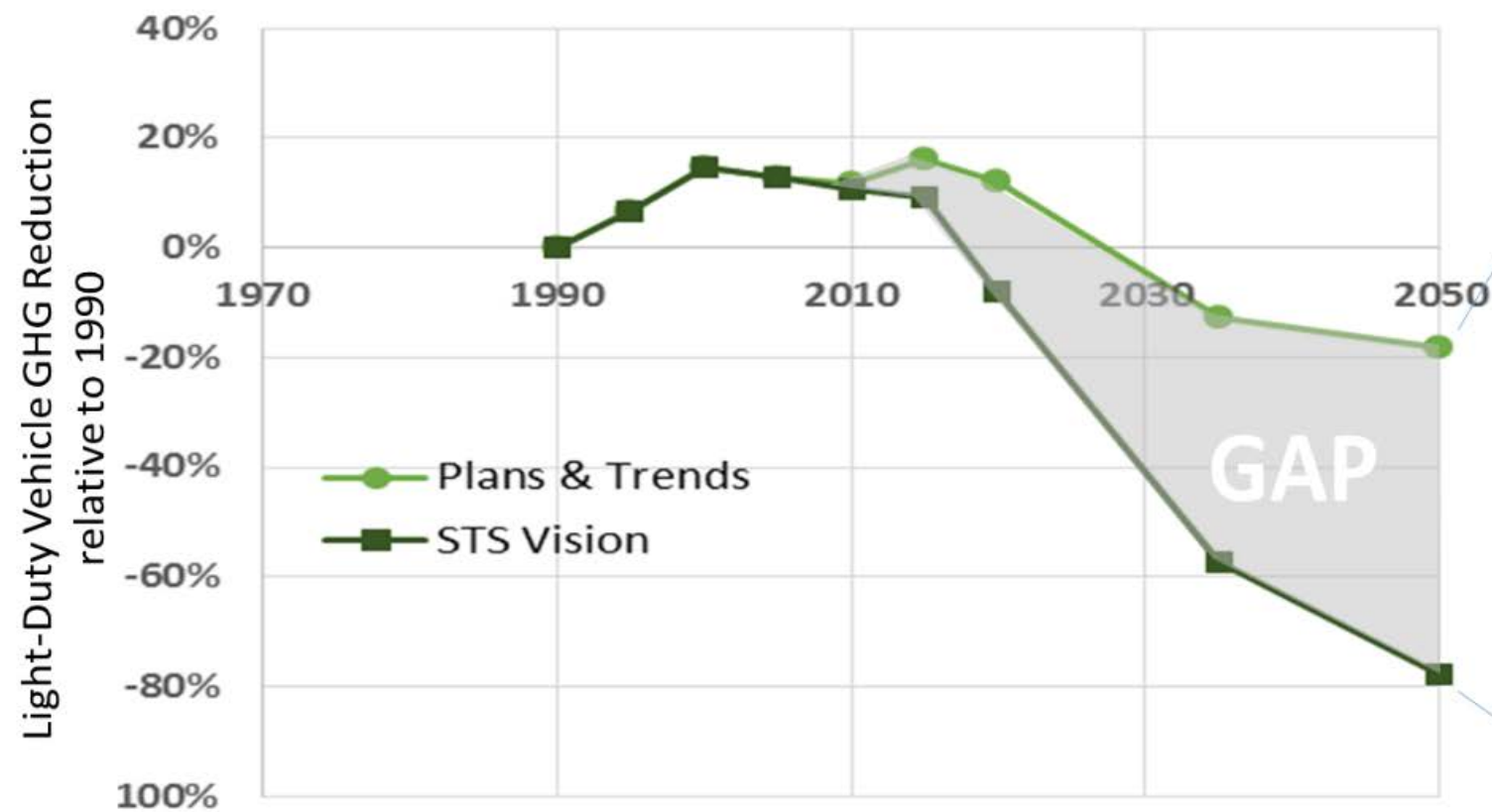
# CARBON REDUCTION PROGRAM STRATEGY

- Federal Requirement to identify strategies and projects to reduce GHG emissions
- ODOT developed a strategies and priorities based on the existing *Statewide Transportation Strategy: 2050 GHG Vision (STS)*
  - Consultation group of TMAs, MPOs and stakeholders
- Four priority areas
  - Vehicle and Fuel Technology
  - Transportation Options
  - System & Agency Operations
  - Pricing





# STS 2050 VISION





# Partnering to Reach Goals





# OREGON CARBON REDUCTION PROGRAM – PROJECT SELECTION

- TMAs identify projects using existing outreach and selection methods
- ODOT, in consultation with MPOs and stakeholders, developing an application to select Small Urban and Rural projects
  - Guidelines
  - Selection criteria and weighting
- ODOT will identify projects for the Statewide allocation





# Contact Us



[Suzanne.Carlson@odot.oregon.gov](mailto:Suzanne.Carlson@odot.oregon.gov)



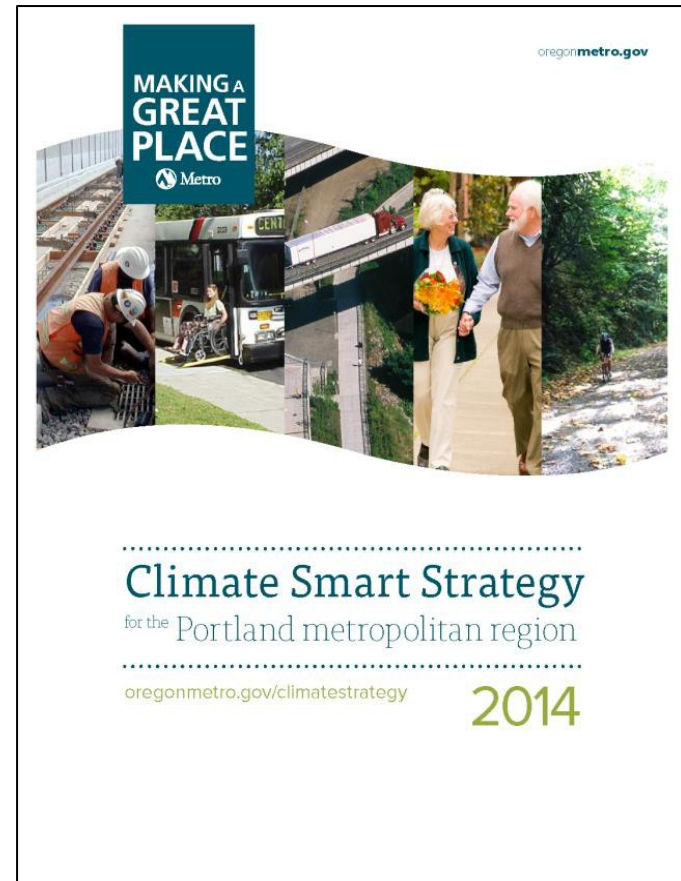
[www.oregon.gov/odot/climate/Pages/default.aspx](http://www.oregon.gov/odot/climate/Pages/default.aspx)

# Portland Region – Carbon Reduction Program (CRP)

Opportunity for Metro to implement the Climate Smart Strategy

Estimated funding available:

- \$18.8 million (5-year total)
  - **\$17 M** for carbon reduction projects
  - \$1.8 M for Climate Smart program implementation, including monitoring, data and communication

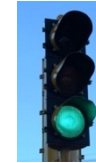




# CRP Policy Framework: Climate Smart Strategy



*Adopted in 2014 and approved by LCDC in 2015*



# CRP: Proposed Investment Areas

## Three Climate Smart Strategies:



### **Transit (Investment)**

- Expanded transit coverage
- Expanded frequency of service
- Improvements in right-of-way to increase speed and reliability of buses and MAX



### **Active Transportation (Investment)**

- New biking and walking connections to schools, jobs, downtowns and other community places



### **System Management and Operations (Investment)**

- Variable message signs and speed limits
- Signal timing and ramp metering
- Transit signal priority, bus-only lanes, bus pull-outs
- Incident response detection and clearance

# Carbon Reduction Program Timeline

## Define Program

- Introduce program
- Climate Smart refresher
- Outline priority areas/themes
- Propose process

## Allocation

- Public
- Coordinate w/the state
- Program analysis

## Program Coordination

- Program projects and programs in MTIP
- Coordinate w/the state
- Program analysis

## Submission

Carbon Reduction Program allocation due to FHWA

**Autumn-Winter 2022   Winter- Spring 2023   Summer-Autumn 2023   November 2023**





# Discussion Questions

JPACT questions, thoughts and/or comments on:

1. BIL, Carbon Reduction Program
2. Proposed Climate Smart investment areas
3. Timeline



# Next Steps

- TPAC & JPACT Introduction – January 2023
- TPAC Discussion on Proposals – Spring 2023
- TPAC & JPACT Carbon Reduction Program Funds Allocation Recommendation – Spring 2023
- Metro Council Adoption – Spring 2023

**oregonmetro.gov**



**– EXTRA SLIDES FOR Q & A**

## Comparison of FAST Act and IIJA

	FAST Act	IIJA
Length	5 years	5 years
Funding	\$305 billion	\$567.5 billion
Average Annual Funding	\$61 billion	\$113.4 billion
Total Highway Funding	\$226.3 billion	\$351.3 billion
Total Transit Funding	\$61.1 billion	\$91.1 billion

*This table compares key transportation funding categories between the FAST Act and IIJA. The FAST Act expired in 2020 and was extended through 2021.*

# BIL – New Discretionary Programs

Over \$100 billion available in competitive programs, including (examples, not exhaustive):

- National Infrastructure Project Assistance (\$10B)
- Reconnecting Communities (\$1B)
- Safe Streets for All (\$5B)
- PROTECT Discretionary (\$1.4B)
- Safe Streets for All



January 19, 2023

# Equitable Transportation Funding

**JPACT Presentation**

Margi Bradway and Lake McTighe, Metro

Theresa Carr and Aria Wong, Nelson\Nygaard



Metro



NELSON  
NYGAARD

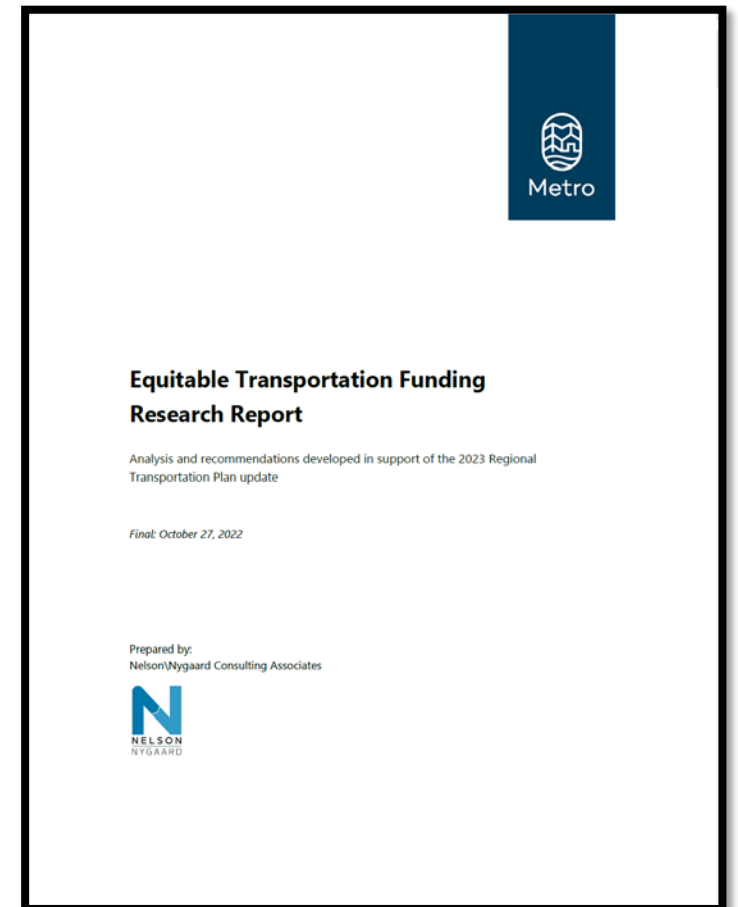
# Equitable Transportation Funding Research Report

Developed to support the 2023 RTP focus on equity

Provides an inventory of existing, emerging and potential revenue sources for transportation

Illuminates how revenue collection and disbursement may contribute to transportation inequities

Provides more transparency and clarity about how the regional transportation system is funded





# Defining Equity and Equitable Transportation Funding

We are defining **transportation equity** as the elimination of barriers and disparities relating to transportation

**Equitable transportation funding** considers the collection and disbursement of revenues in relation to a larger community context

With the goal is to address past harms and avoid further burdens for people with lower income and communities of color

Leading with race recognizes that racism is the foremost, deeply pervasive factor contributing to unequal access, opportunities, and health outcomes that persist today for all people that are negatively impacted

# The report addresses two key questions

1. *Who does revenue collection burden and benefit the most?*
2. *How can the revenue collection and disbursement be balanced to address inequities?*

# Burden and Harm

Transportation planning and funding practices disproportionately burden and harm low-income households, people of color, and people with disabilities.

People with **lower incomes** spend more of their income on transportation costs than people with **higher incomes**...



...but lower-income communities are **less likely** to benefit from spending on transportation projects.

# Inequities in Commute Times

# Inequities in Burden of Cost



**VS.**

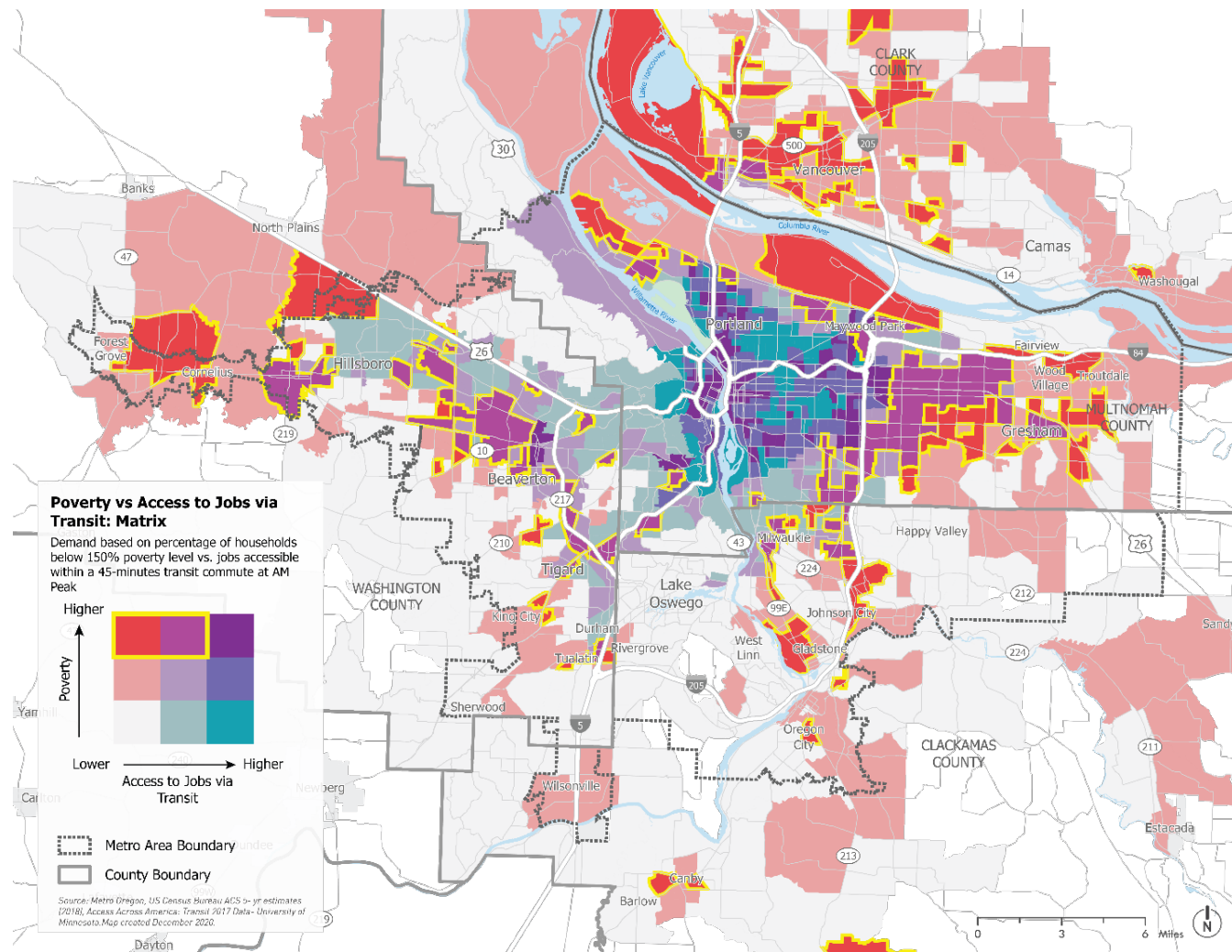


*The lowest income households spend 28.8% of their income on transportation.*

*Those with the highest income spend 9.5% or less.*

# Communities with Higher Levels of Poverty and Limited Access to Jobs Via Transit.

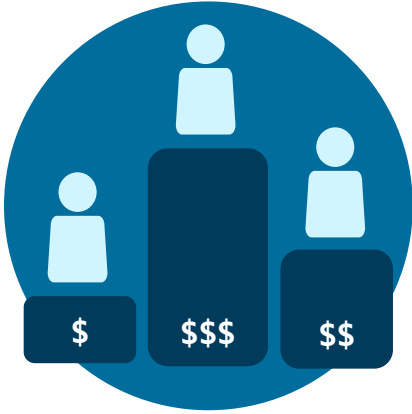
*There are lingering disparities in access to employment opportunities via public transportation in areas with higher levels of poverty*



# Key Findings and Equity Challenges



# How We Assessed Equity by Revenue Source



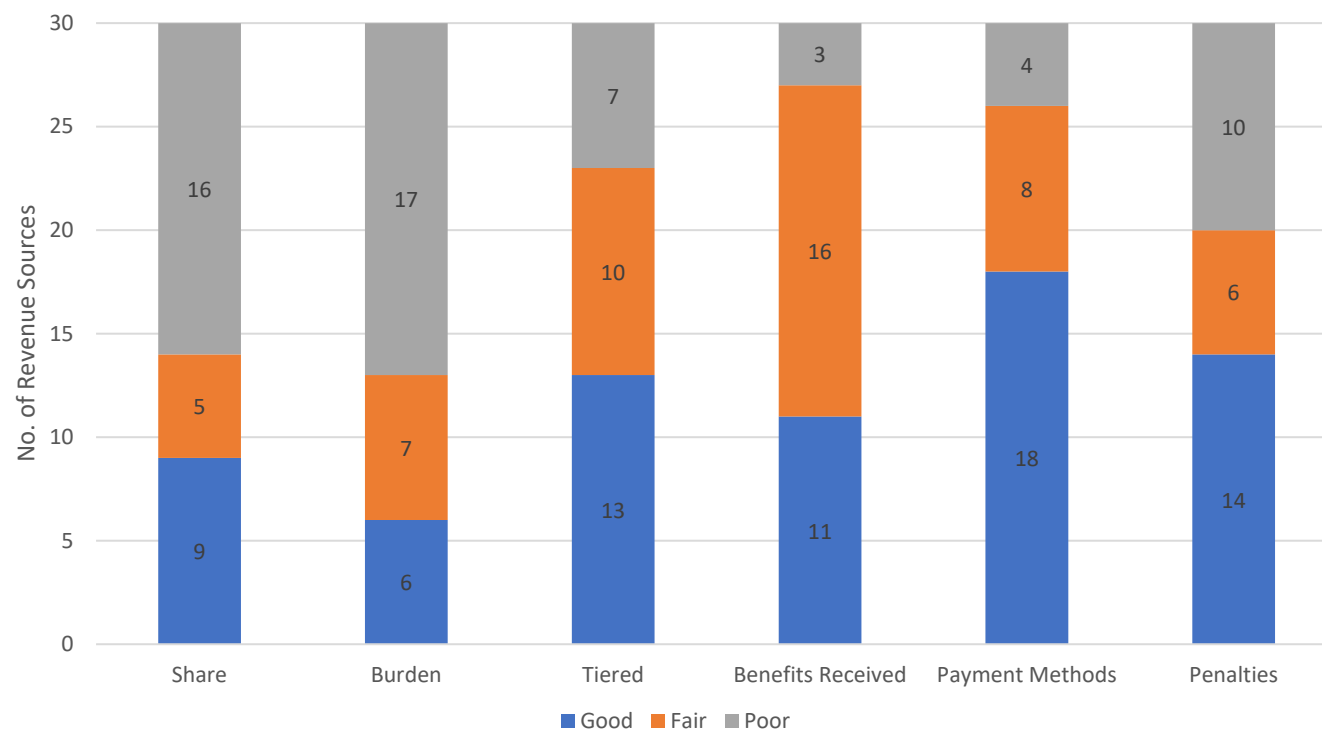
- **Share:** Do lower-income households pay a higher share of their income?
- **Burden:** Does the source provide subsidies or exemptions to alleviate unfair burdens?
- **Tiered:** Is the fee or tax graduated based on the value of the item?
- **Benefits:** Are low-income households and people of color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



# Summary of Ratings

- Of the 30 existing sources that were assessed, **Share and Burden** received the most “**Poor**” ratings.
- These two measures represent how much of a **financial burden** a given revenue source represents for low-income households.
- Many revenue sources offer **alternative payments methods**. This measure received the most “**Good**” ratings.

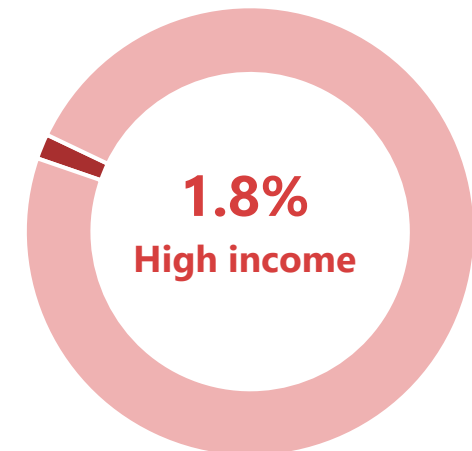
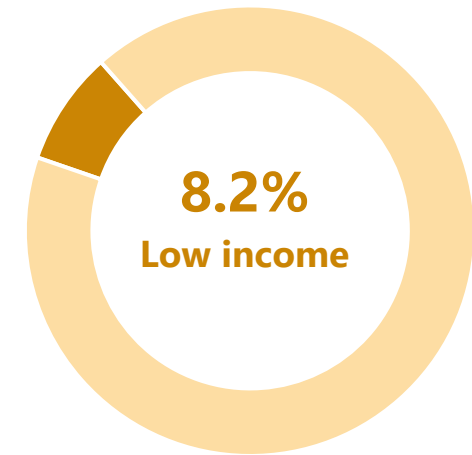
## Summary of Rankings by Measure



# Disproportionate Burden and Worsening Inequities

- Some revenue sources play larger roles in funding the transportation system. They have an outsize impact on individuals and so their equity ratings are especially important.
- **Motor fuel taxes, transportation system development charges, and property taxes** are key revenue sources that have a disproportionate burden for share or burden of costs.

Share of Income Spent on Motor Fuel in the United States



# Long-Term Community Impacts of Fines and Penalties

- Fines and penalties have the potential to be **major sources of debt**, typically impacting those with the lowest incomes if paid late or not at all. Revenue sources with the lowest or no chance of penalties are those collected at the point of sale.
- **10** revenue sources received “Poor” ratings and **6** received “Fair.”
- Revenue sources with a “Good” rating that have the potential for penalties were taxes or fees levied on businesses or commercial operations.
- Fines disproportionately harm low-income households and people of color. People of color are given citations at a higher rate than white people.

# Burden of Being Underbanked or Unbanked

*\* Underbanked: those without access to a bank account with an insured institution.*

*Unbanked: those who do not have the ability to use a bank account.*

- Payment methods received the **most “Good” ratings (18)**, with 8 “Fair” ratings and 4 “Poor” ratings.
- Many revenue sources offer alternative payment methods by cash or money order that allow underbanked or unbanked individuals\* to participate.
- However, this group is vulnerable as payment methods shift towards digital platforms, including digital transit payment.
- Parking fees can burden the under or unbanked. Cash payments must be exact change. Unpaid parking fees have the potential to result in citations and debt.

# Recommendations to Improve Equity Outcomes



# Foundational Principles

- No one solution
- Transparency is key
- Elevate community voices
- Put it into policy

# Fair and Equitable Public Outreach

- Provide ample opportunities for meaningful public engagement and input
- Opportunities should be offered in-person and online, at a variety of locations and times, and available for individuals of varying English proficiency and non-English speakers
- Work with community organizations
- Communities affected by specific policies, funding efforts, or developments must be key contributors to the planning process

# Equitable Revenue Collection

- Restructuring fines so they are non-compounding and do not impact credit scores or employment eligibility
- Prorate payment structures for parking, license and registration fees, violation fines, and tolling and congestion charges
- Provide alternatives to paying violation fines, such as split-repayment plans
- Continue to restructure diversion programs for fare evasion, offer repayment plans or alternative forms of payment
- Allow license and registration renewal for people with unpaid fines



# Equitable Revenue Collection, cont.

- Remove remaining barriers to acquiring Honored Citizen Fare Cards
- Reduce reliance on regressive tax strategies / encourage more progressive taxes and fees
- Adjust the gas tax according to inflation
- Explore unified financial assistance system models

# Equitable Revenue Disbursement

- Redistribute congestion pricing revenue towards investments focused on safety, transit, and active transportation in equity focus areas
- Incorporate anti-displacement policies to mitigate displacement risk
- Explore using revenues from new funding sources to offset taxes and fees for low-income households
- Encourage and incentivize environmentally friendly investments in mid- and low-income households (e.g. discounts/rebates on electric vehicles, transit passes)

# Thank you!



Lake McTighe, [Lake.McTighe@oregonmetro.gov](mailto:Lake.McTighe@oregonmetro.gov)  
Theresa Carr, [tcarr@nelsonnygaard.com](mailto:tcarr@nelsonnygaard.com)  
Aria Wong, [awong@nelsonnygaard.com](mailto:awong@nelsonnygaard.com)

# Supporting the 2023 RTP Update



## Equitable Funding Report

- Assessment of revenue sources
- Assessment of allocations
- Equitable funding recommendations

## RTP Financial Plan

- Revenue forecast (including tolling)
- Equitable funding research
- Future funding options

## Congestion Pricing

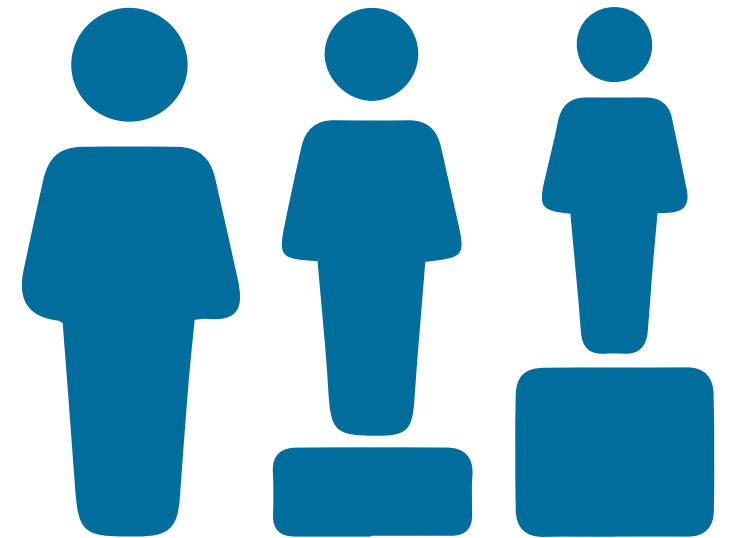
- Policy to create an equitable funding framework

## Future Work

- Potential recommendations for future equitable funding strategies in RTP Chapter 8

# Defining Equity

- We are defining **transportation equity** as the elimination of barriers and disparities relating to transportation
- Addressing inequities means providing access to safe, affordable, convenient, and reliable transportation and opportunities
- It also requires listening to and working with the communities that are disenfranchised and supporting them to access more power to change systems



# Defining Equitable Transportation Funding

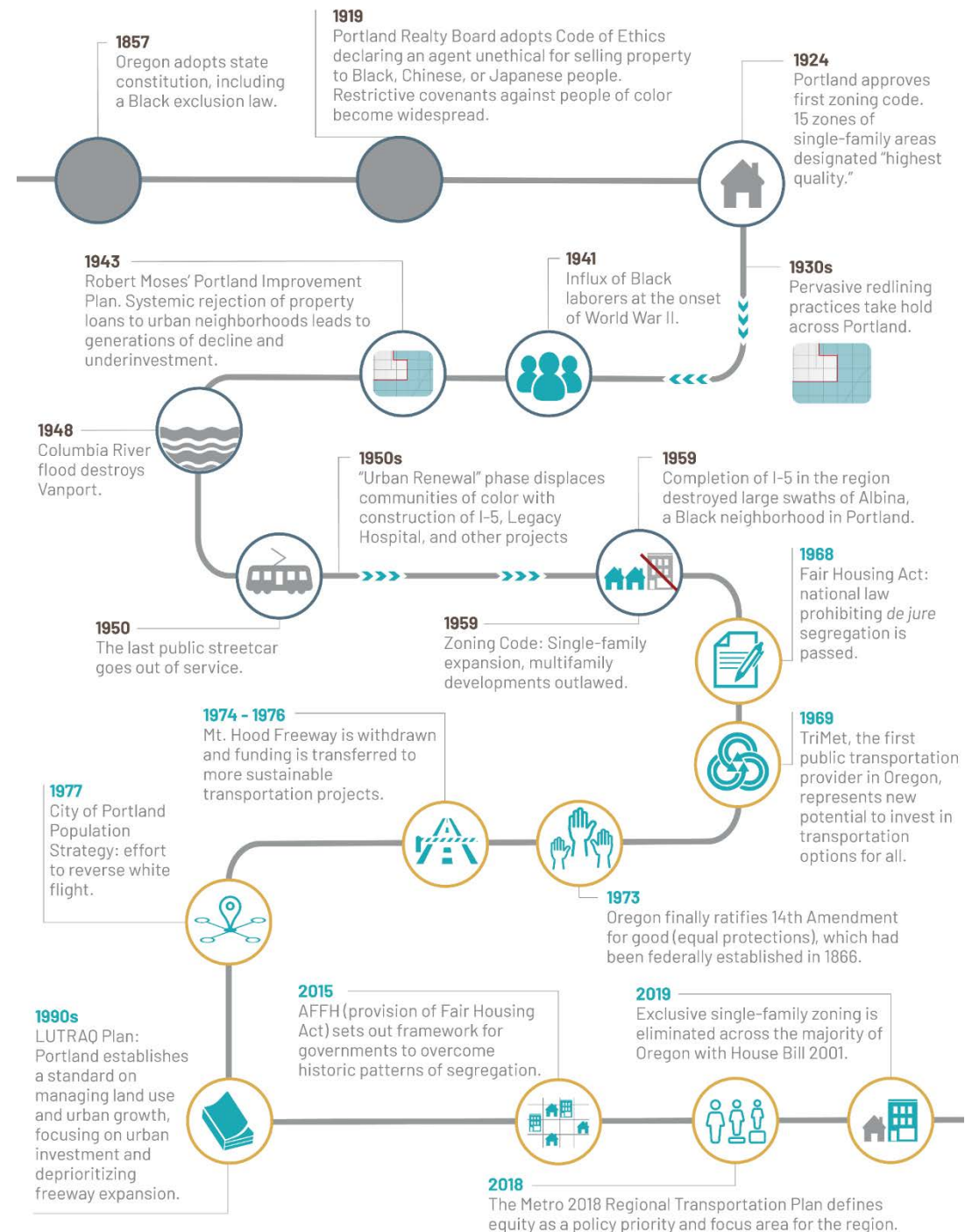
**Equitable transportation funding** considers the collection and disbursement of revenues in relation to a larger community context

With the goal to address past harms and avoid further burdens for people with lower income and communities of color

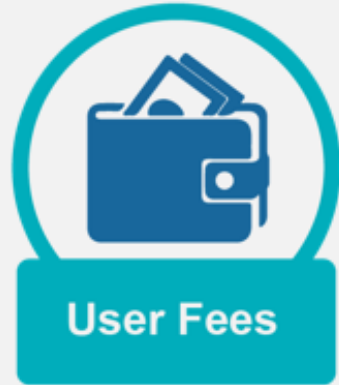
Leading with race recognizes that racism is the foremost, deeply pervasive factor contributing to unequal access, opportunities, and health outcomes that persist today for all people that are negatively impacted

# Timeline of Discrimination and Planning

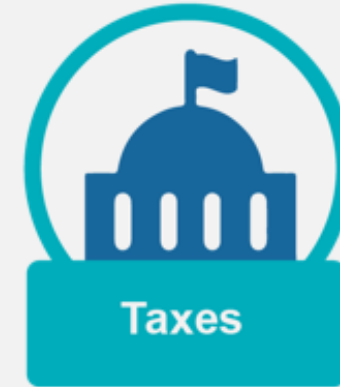
- The greater Portland region has a long history of discrimination in planning
- Since the late 1960s efforts to undo the damage have **made progress**, but more work is needed



# Types of Revenue Sources



- Includes license fees, vehicle taxes and fees, tolls, fares, and gas taxes
- Many of these fees are paid on a per-use basis rather than a flat fee
- Households with different ranges transportation options to meet their needs will also have different ability to manage the impact of these fees



- Paid at federal, state and local levels
- Some taxes are dedicated for transportation, while other taxes are put into a general fund and are later appropriated for transportation purposes
- The ultimate purpose of these funds may be less visible to the payer



# Revenue & Funding From Many Levels



## Federal

- Federal motor fuel tax, which funds FTA and FHWA programs
- General funds (mostly collected as personal income tax, corporate income tax, and payroll tax)



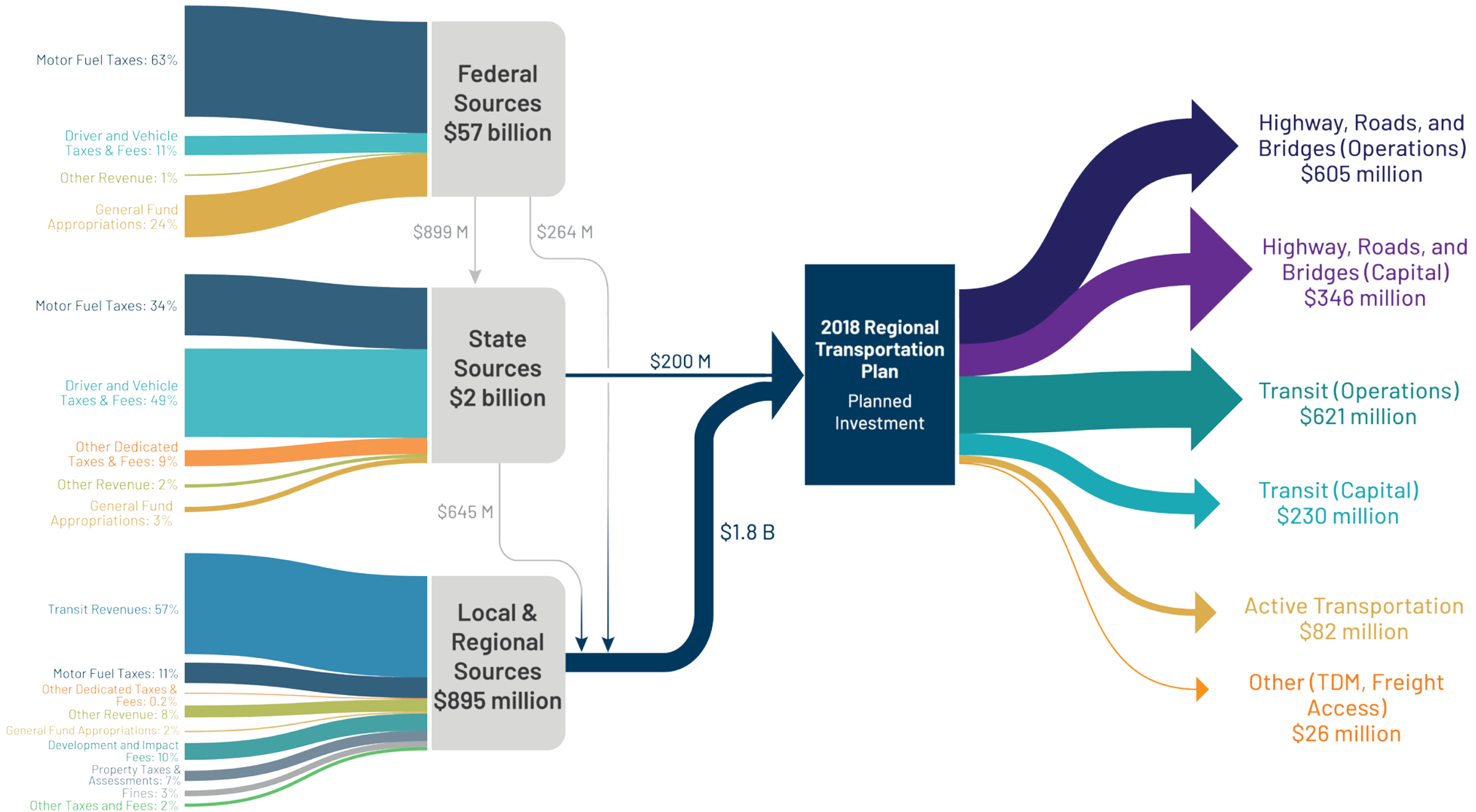
## State

- State motor fuel tax
- Driver and vehicle and fees
- Weight mile tax
- Other taxes and fees including payroll tax, sales tax, and license fees



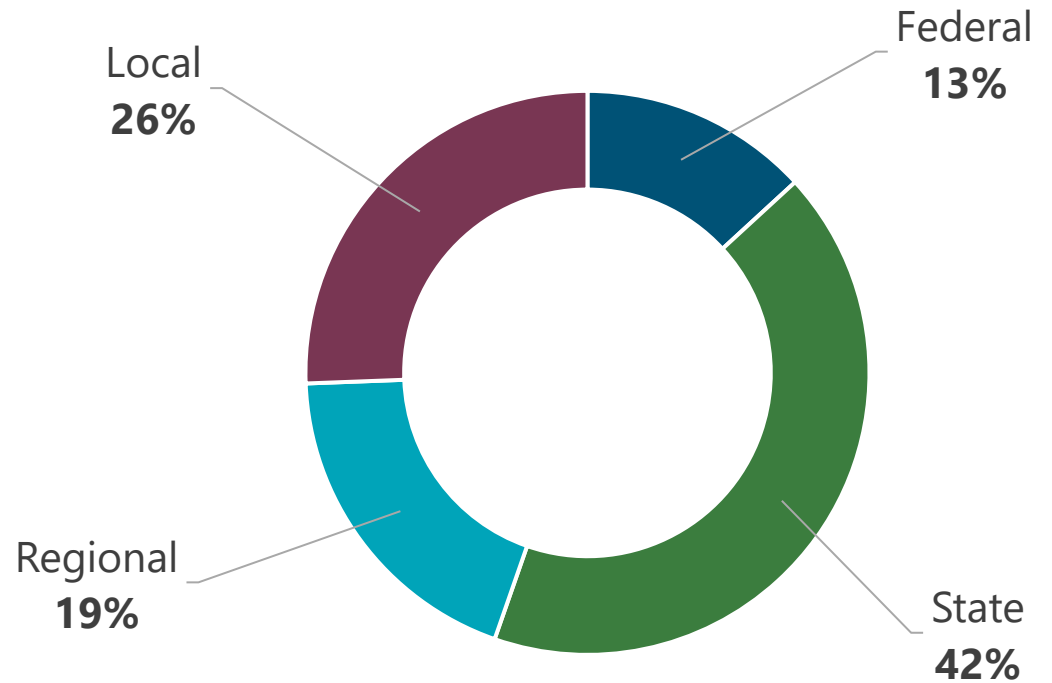
## Local

- Transit revenues
- Motor fuel taxes
- Variety of local funding sources including development impact fees, property taxes, general funds, taxes, fees, and general fund appropriations



# 2018 RTP Revenue Sources *by government level*

*Almost half of revenues  
in the RTP financial plan  
are **local** or **regional***

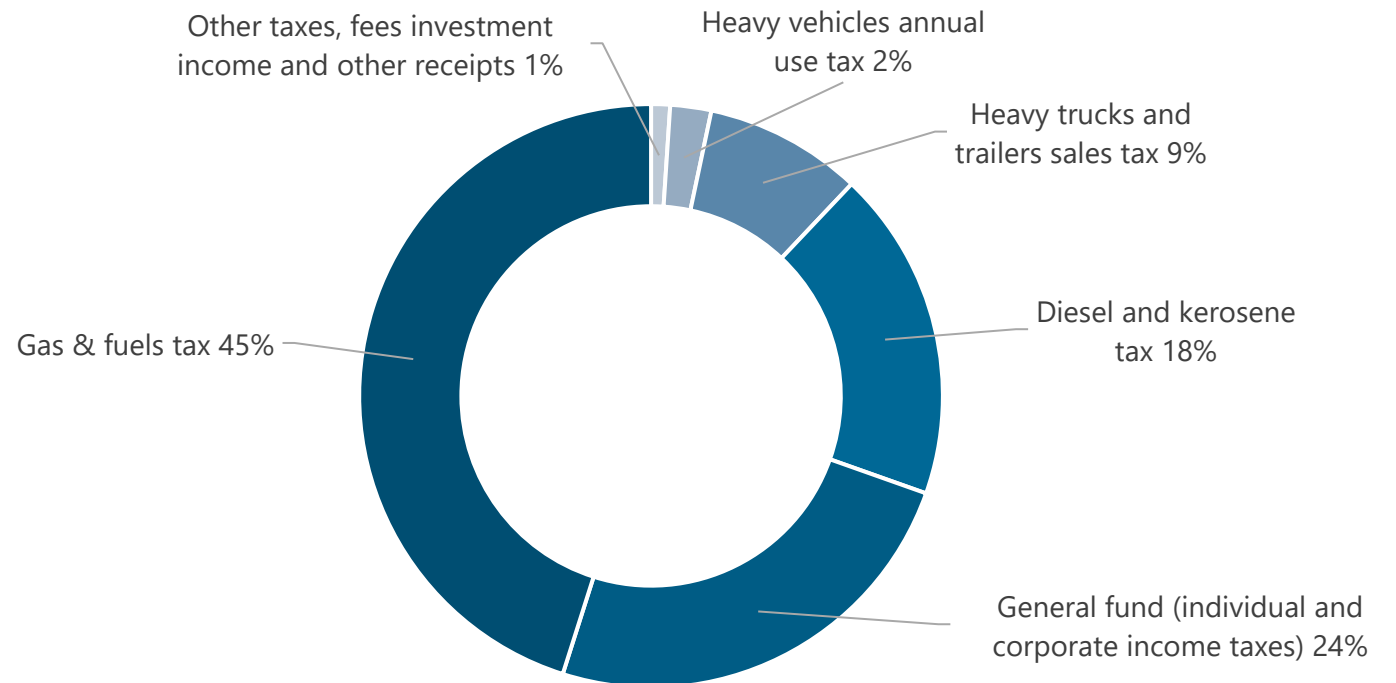


# Transportation Revenue Sources

## Federal

*Gas and fuels tax contribute the largest portion*

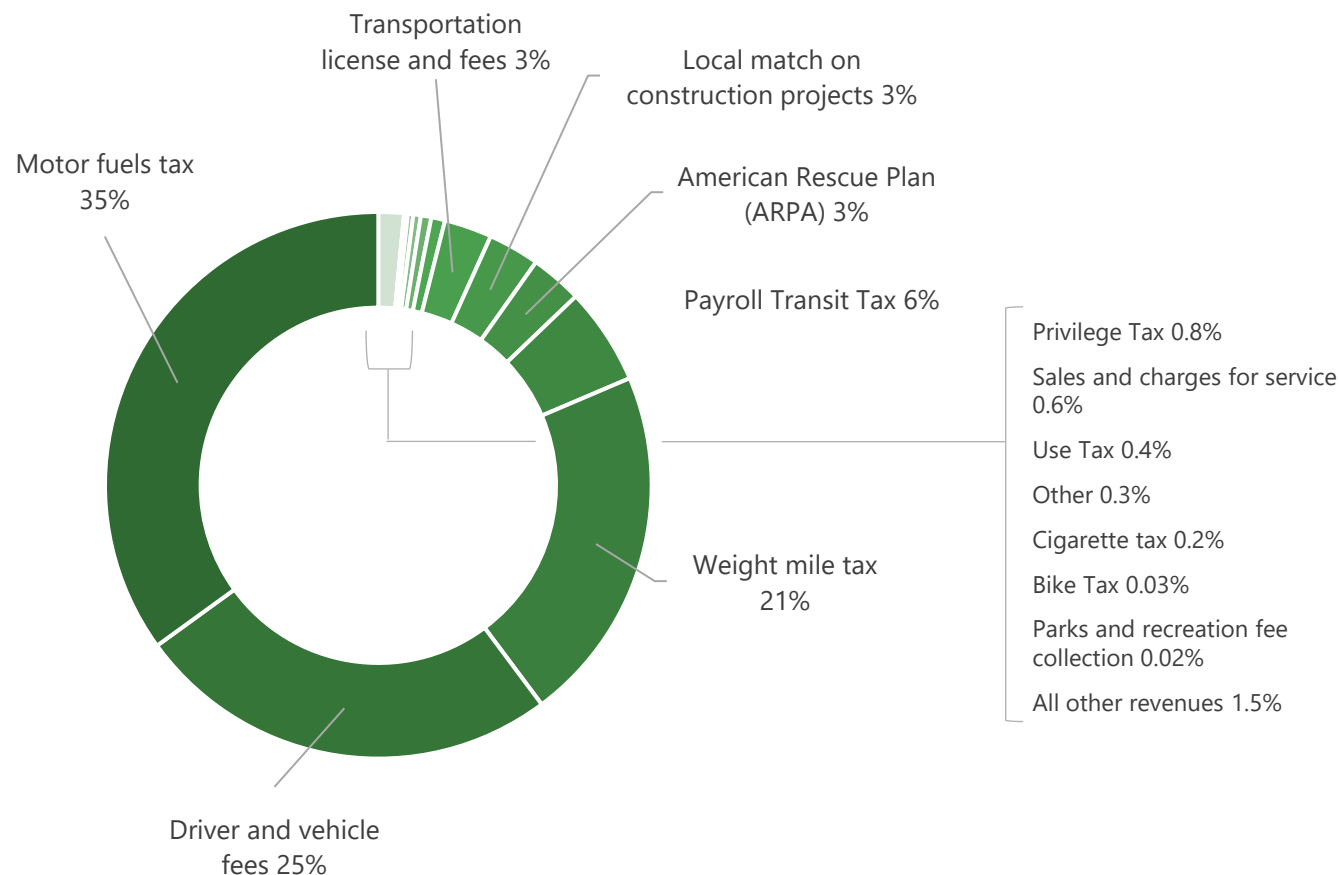
*But almost a quarter of funding comes from the General Fund*



# Transportation Revenue Sources

## State

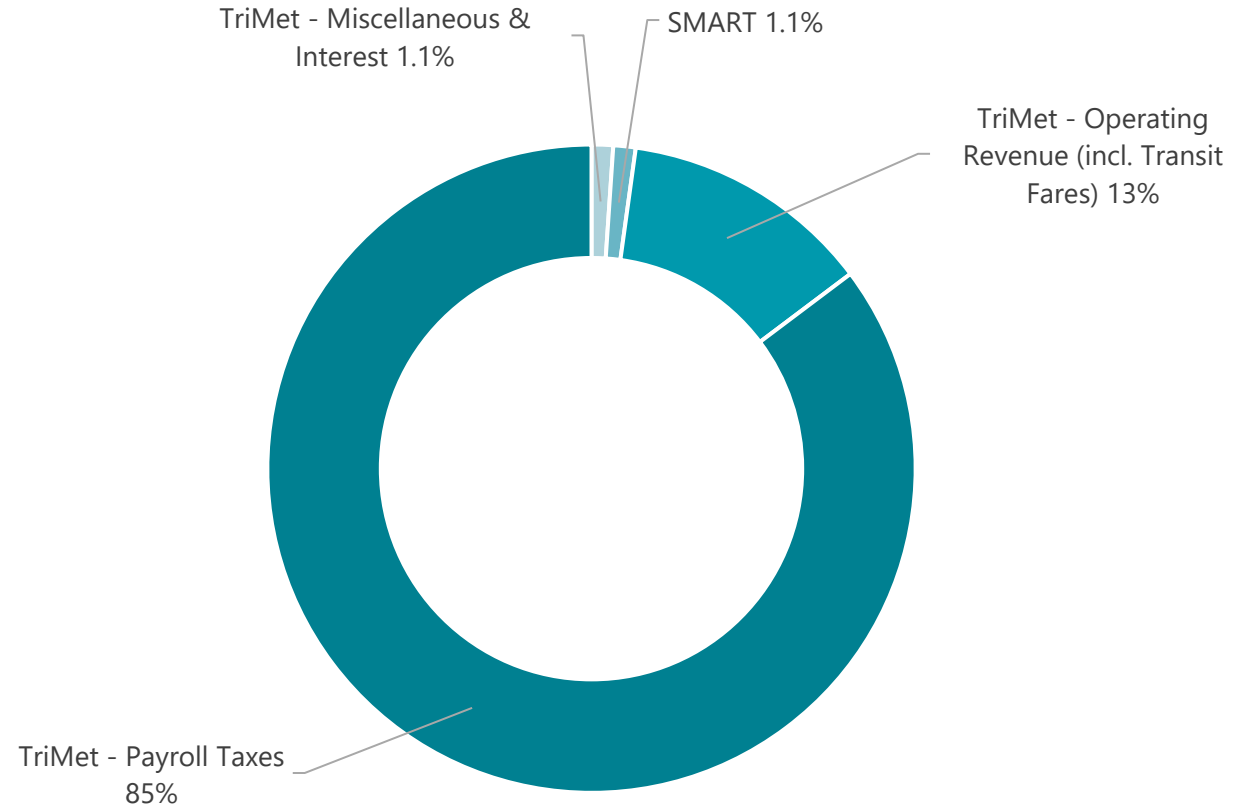
*The gas tax and driver and vehicle fees contribute 60% of state funds in the RTP*



# Transportation Revenue Sources

## Regional

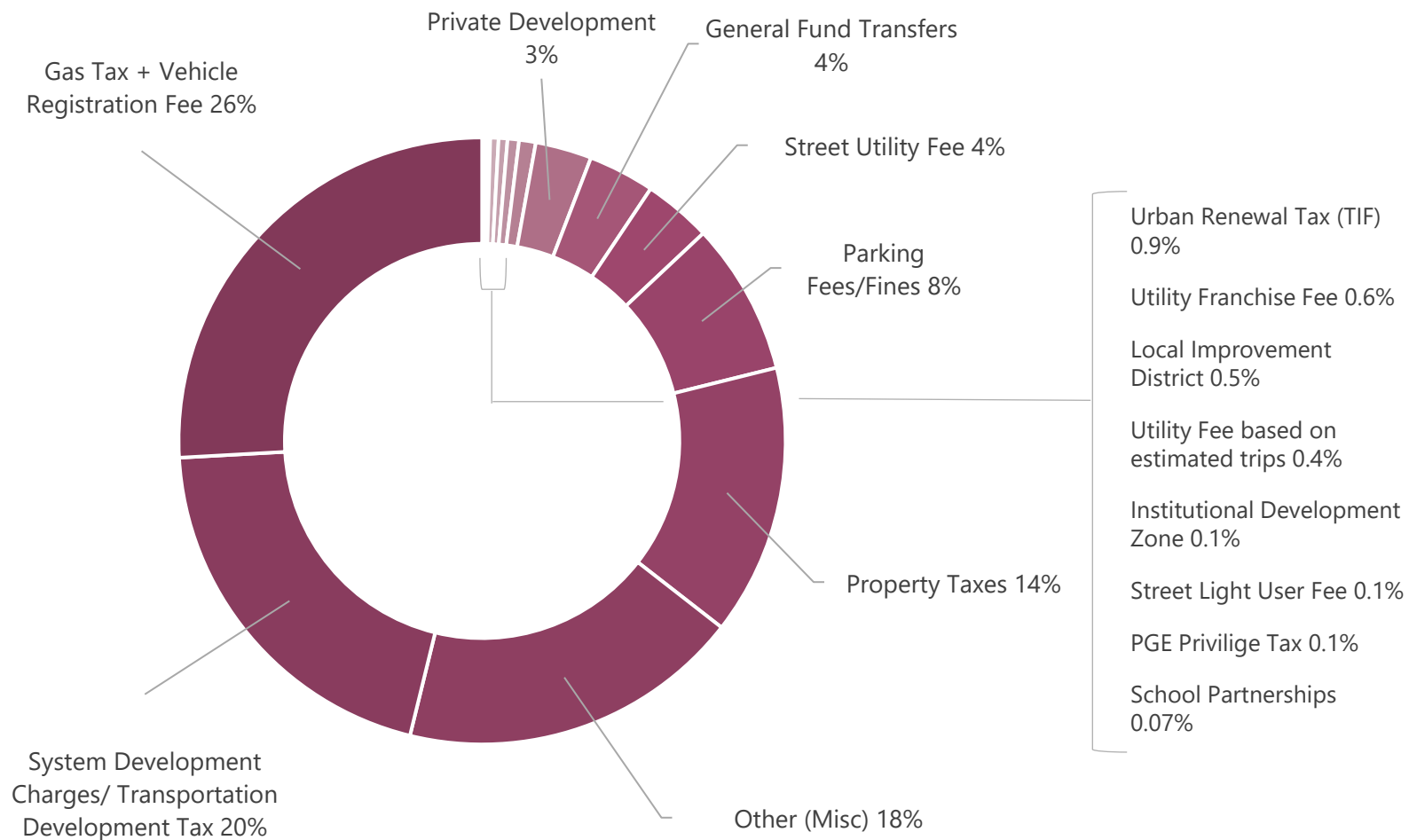
*TriMet Payroll Taxes make up the vast majority of regional funds*



# Transportation Revenue Sources

## Local

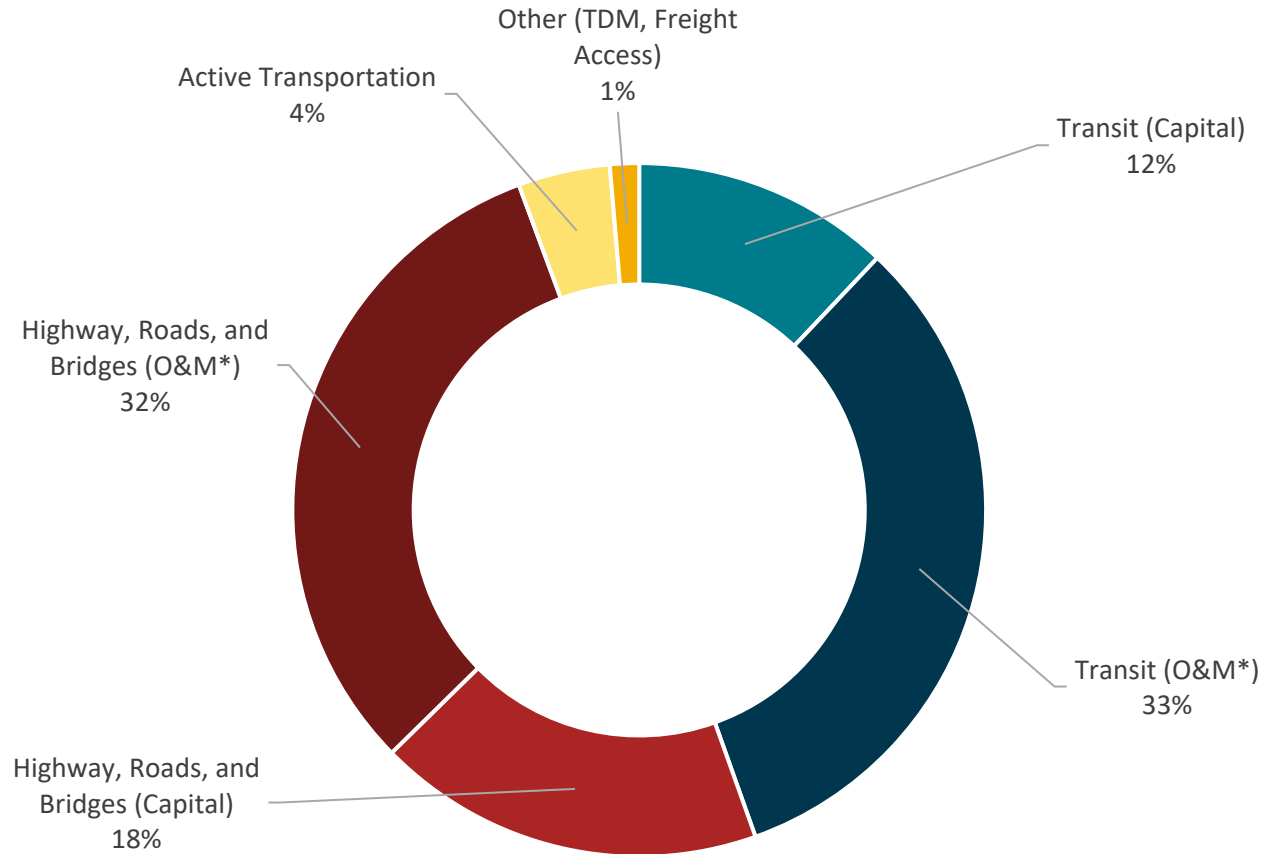
*Gas Tax, VRF, and System Development Charges are predominant sources*



# Planned Funding Allocations

## 2018 RTP

*Planned funding  
by investment  
category*





# Equity Assessment (Appendix A)

- The assessment includes many, but not all, of the existing revenue sources at the **federal, state, and local levels**.
- Assigned an **equity rating** (variable, poor, fair, good) based on performance against the measures
- There are many **societal benefits** to collecting revenues to fund the transportation system
- The goal of the assessment is to **evaluate the impacts** of the way the system is currently funded on low-income households and people of color

Equity Evaluation of Existing and Emerging Revenue Sources  
Metro

**Existing Revenue Sources – Summary Table<sup>1</sup>**

Source	Overall Equity Rating	Share	Burden	Tiered	Benefits Received	Payment Methods	Penalties
<b>Federal</b>							
Fuels tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Heavy trucks and trailers sales tax	Good	Good	Good	Good	Fair	Good	Good
Heavy vehicles annual use tax	Good	Good	Good	Good	Fair	Good	Good
Individual income taxes, corporate income taxes (General Fund transfer)	Fair	Good	Fair	Fair	Fair	Poor	Poor
<b>State</b>							
Motor Fuels Tax	Poor	Poor	Poor	Poor	Fair	Good	Good
Weight Mile Tax	Good	Good	Good	Good	Fair	Good	Good
Driver and Vehicle Fees	Poor	Poor	Poor	Fair	Poor	Good	Fair
Transportation License and Fees	Good	Good	Good	Good	Fair	Good	Good
Cigarette Tax	Fair	Poor	Poor	Fair	Good	Good	Good
Bike Tax	Poor	Poor	Poor	Fair	Good	Fair	Fair
Privilege Tax	Fair	Fair	Poor	Good	Good	Good	Good
Statewide Transit Tax (employee paid)	Fair	Fair	Poor	Fair	Good	Fair	Poor
Income Tax (General Fund Transfer)	Poor	Poor	Fair	Fair	Fair	Poor	Poor
Lottery Revenues	Fair	Poor	Poor	Fair	Good	Good	Good
<b>Local (differs by municipality)</b>							
Transit Payroll Tax (employer paid)	Good	Good	Good	Good	Good	Fair	Fair
Transit Fares (Passenger Revenues)	Good	Good	Fair	Good	Good	Fair	Fair

<sup>1</sup> The revenue sources represented in this table are not an exhaustive list of all sources of funding in the region. See the Revenue Sources Not Included in Assessment section of this document for more details.

Nelson\Nygaard Consulting Associates, Inc. | 2

# Revenue Allocation Constraints

- Funding constraints determine where and how revenue can be spent and are applied at the revenue source, fund, or program level
- State and local motor fuel taxes all are subject to the constitutional requirement for exclusive spending on roadways, prohibiting the use of those funds for transit and other uses outside the road right of way
- While motor fuel tax funds and other motor vehicle revenue sources are collected by users of roadways, restricting these funds to pay for further roadway improvements raises equity issues
- These restrictions encourage further use and funding of roadway networks that **require access and ability to use a personally owned vehicle**



Metro

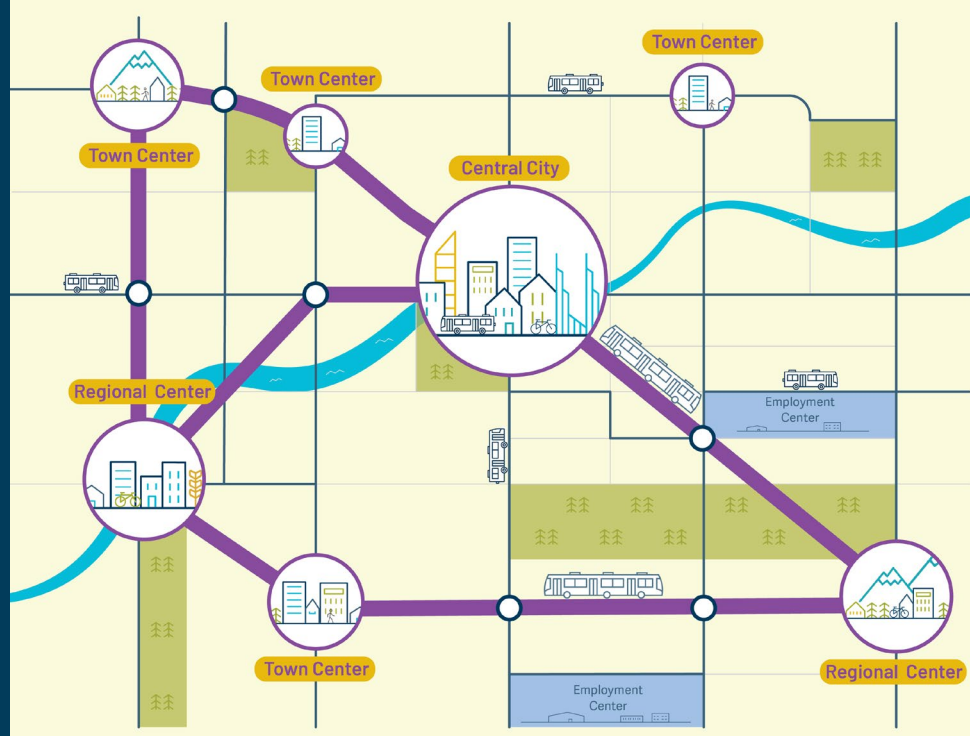


# HCT Strategy Update: Vision & Corridor Readiness Tiers





# Establishing the Policy Framework & Vision

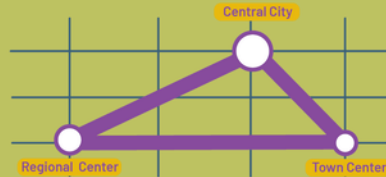


***Regional Transit Network Policy 4:***  
*Complete and strengthen a well-connected high capacity transit network to serve as the backbone of the transportation system... High capacity transit prioritizes transit speed and reliability to connect regional centers with the Central City, link regional centers with each other, and link regional centers to major town centers.*

## High Capacity Transit...



Is frequent



Is direct



Provides a comfortable waiting environment



Serves places with a mix of and many destinations



Runs for most of the day



Is fast and reliable



Moves lots of people



Has its own track or bus lane

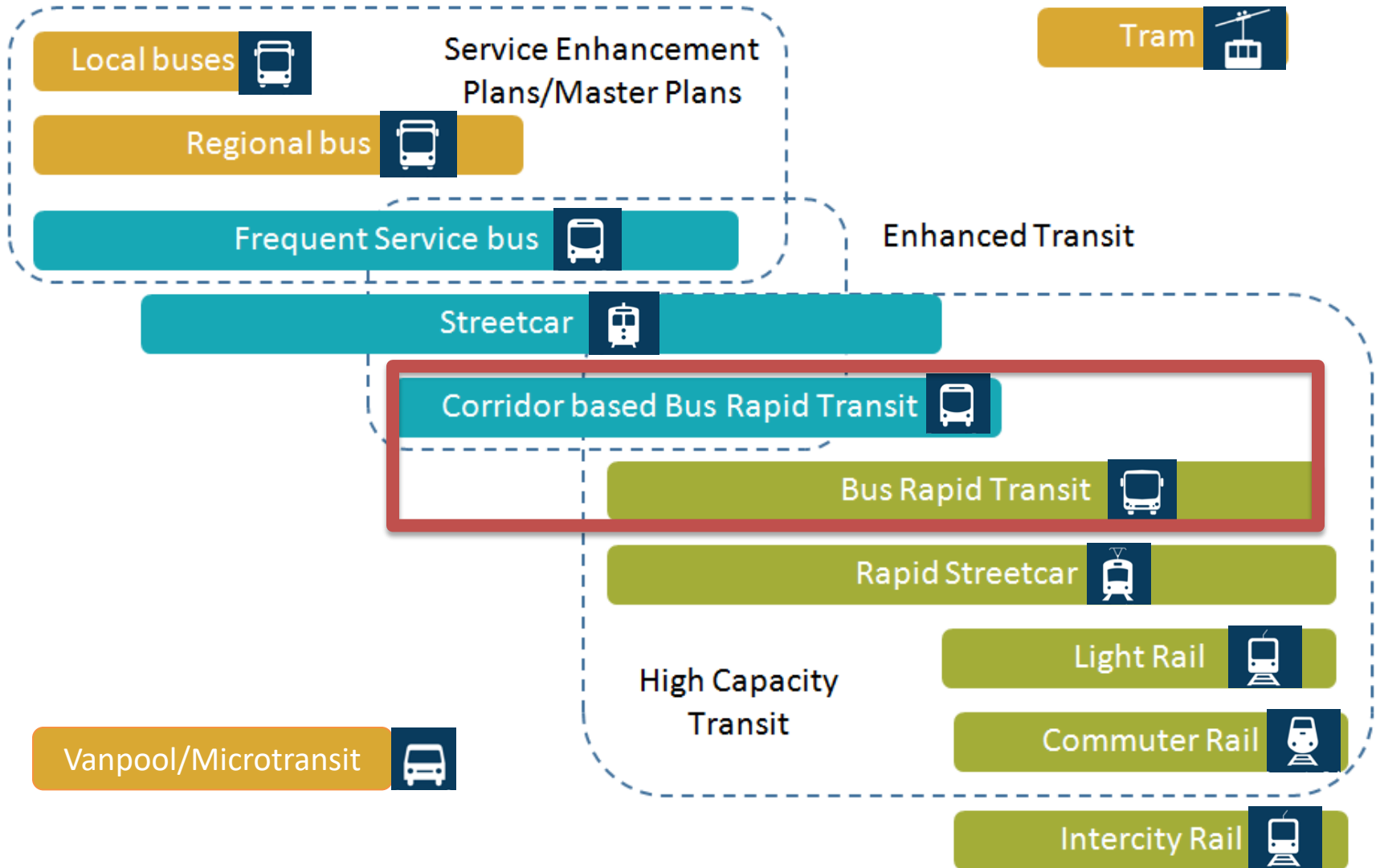
# Evolving the role of high capacity transit

# A key tool in the transit toolbox

With cars

Some priority in-street

Own lane or track






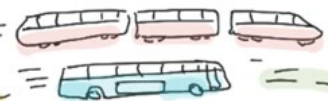





# Working together to make refinements...

 **Metro**

**HIGH CAPACITY TRANSIT PLAN** 2023 RTP


Now is the time to build high capacity transit for a better future = 


We must provide community benefit 


★ Real alternatives to driving — especially for people of all abilities

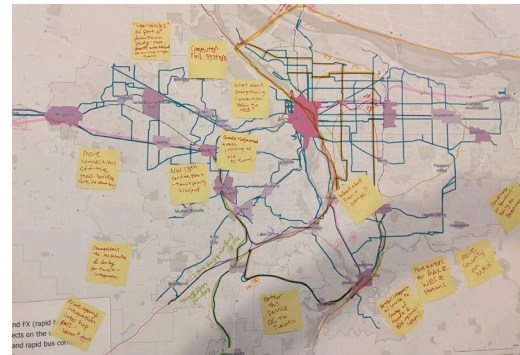
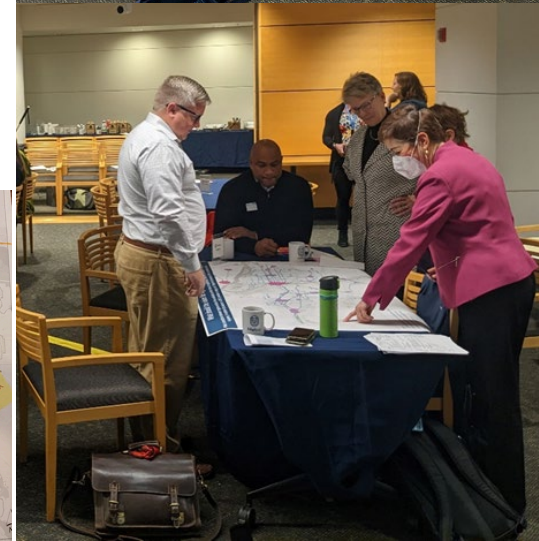
From the community:

- > Routes are too long
- > It's easy to miss a connection
- > Inconsistent information

We have grown because we had a vision from the beginning 











Metro

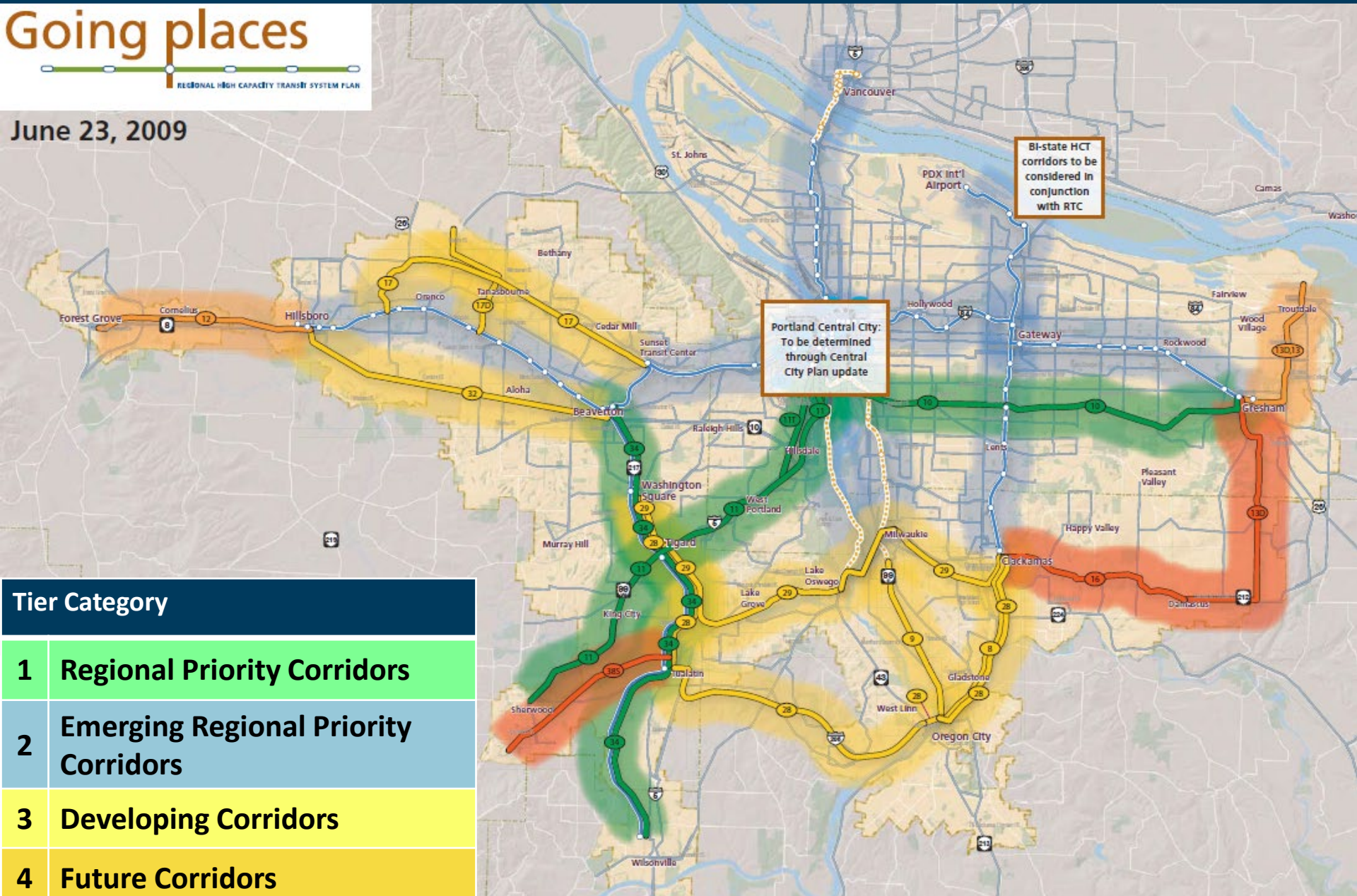
# Assessing Readiness & Tiering Corridors



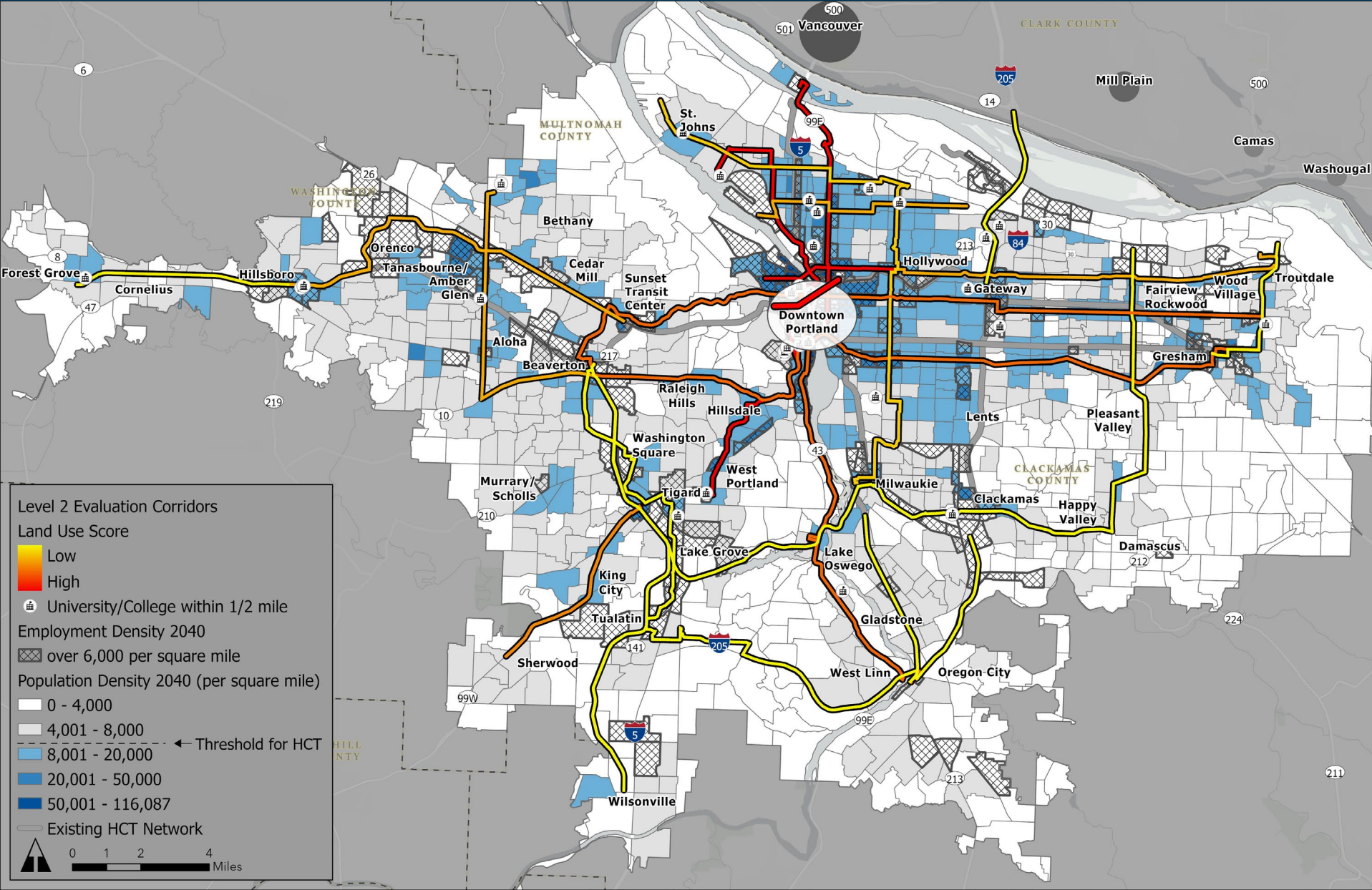
# Categorizing Corridors into Tiers



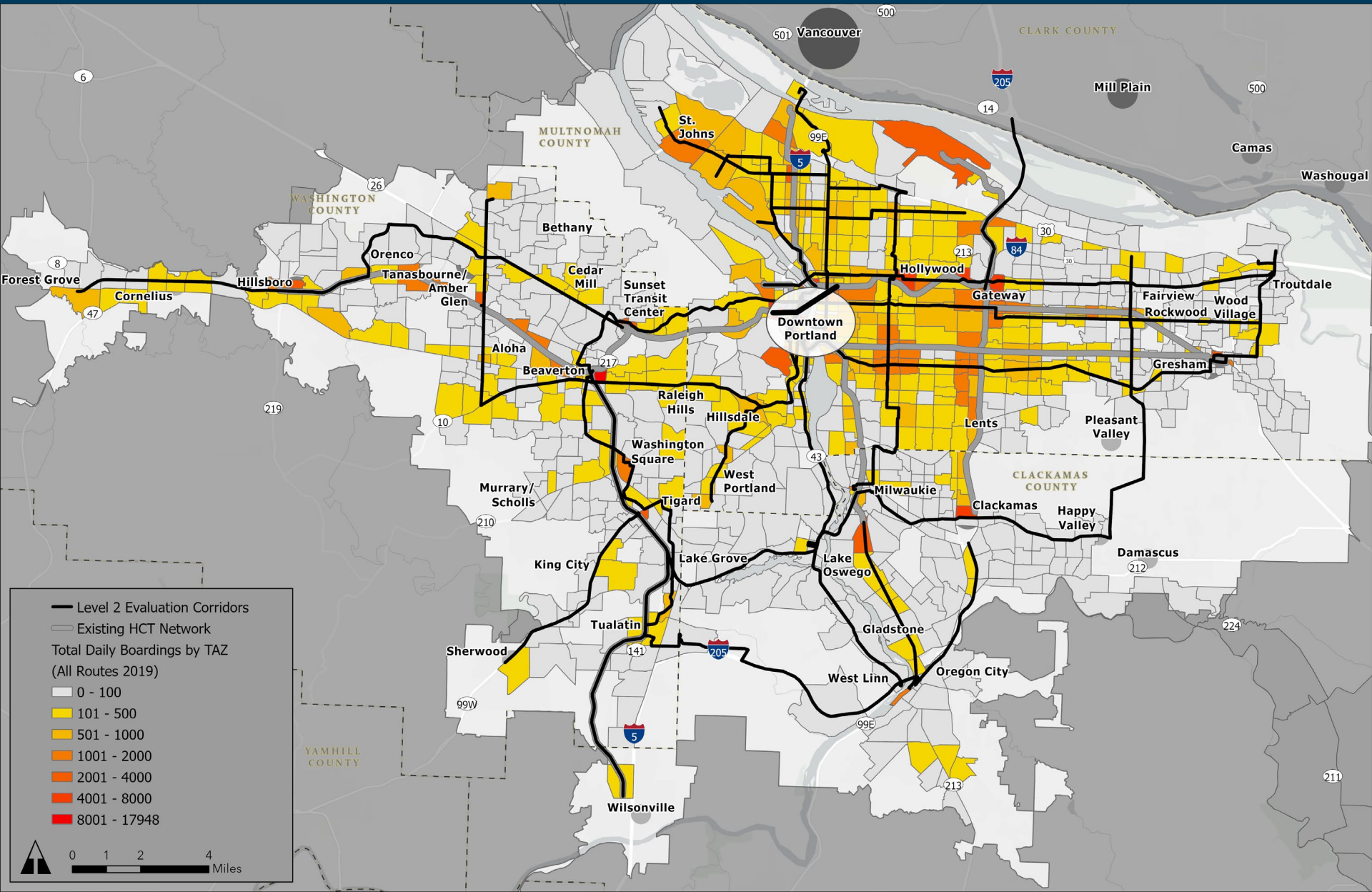
June 23, 2009





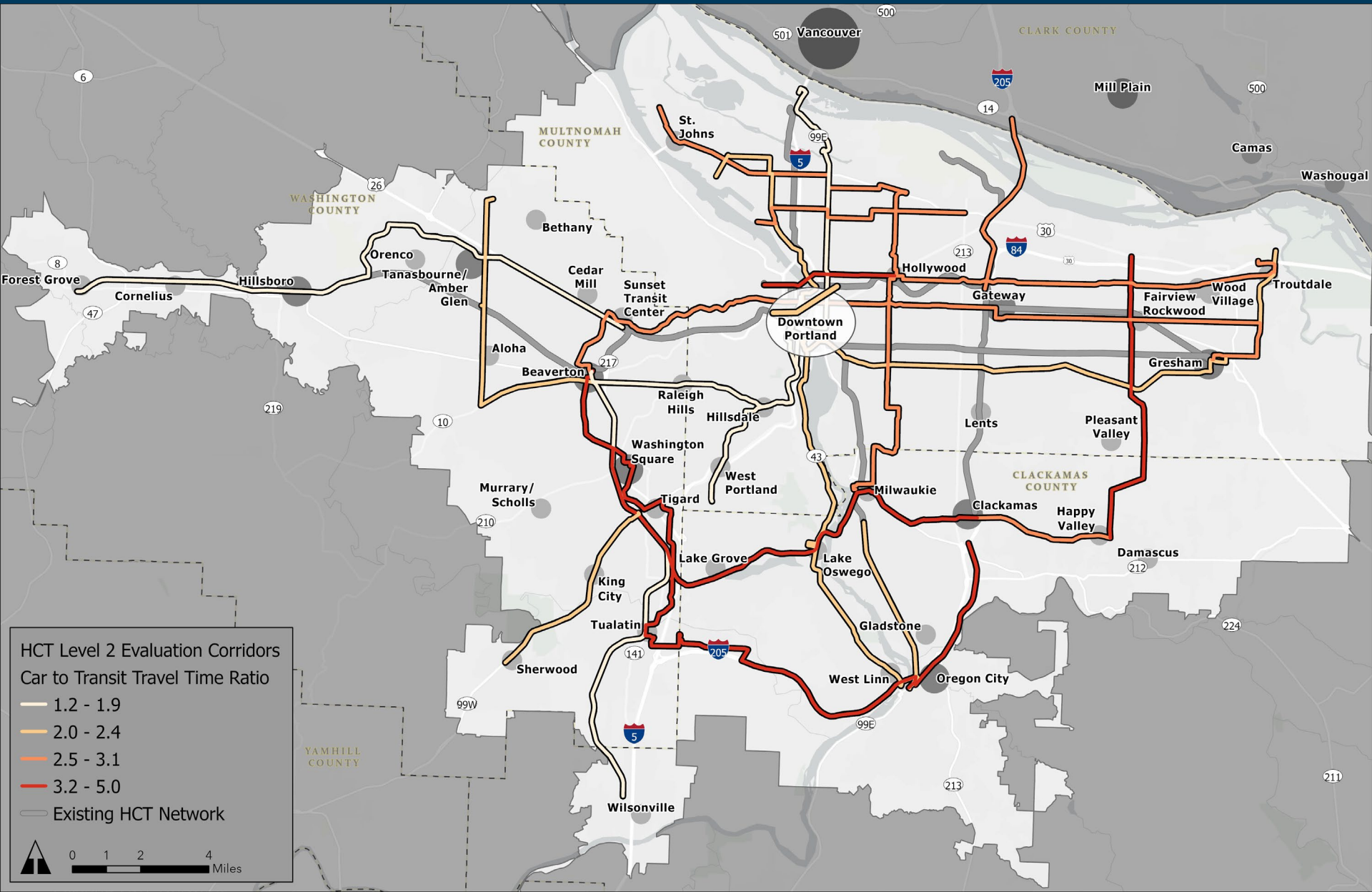
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# Where people ride transit today

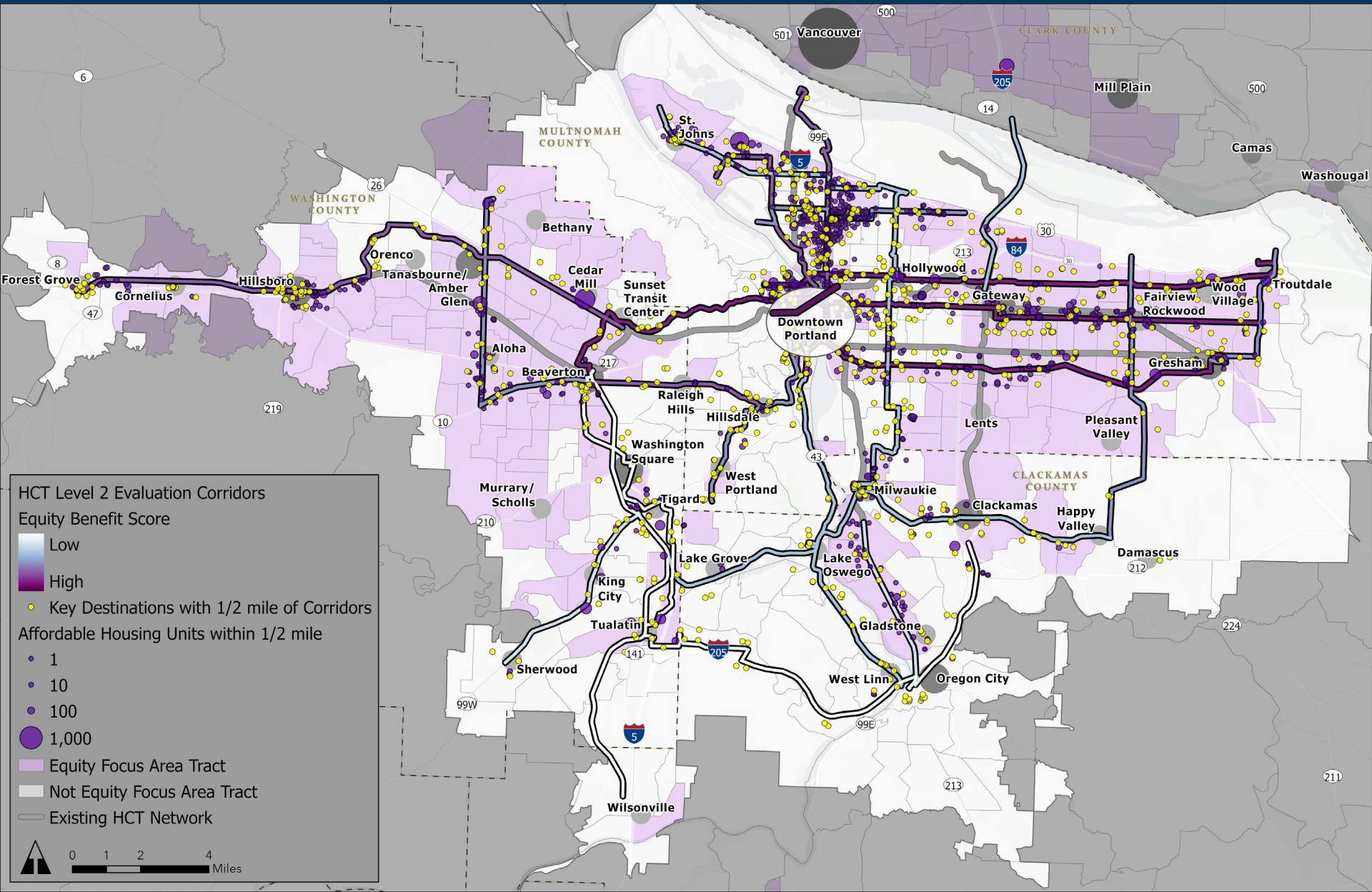




# How long it takes to take transit vs. driving

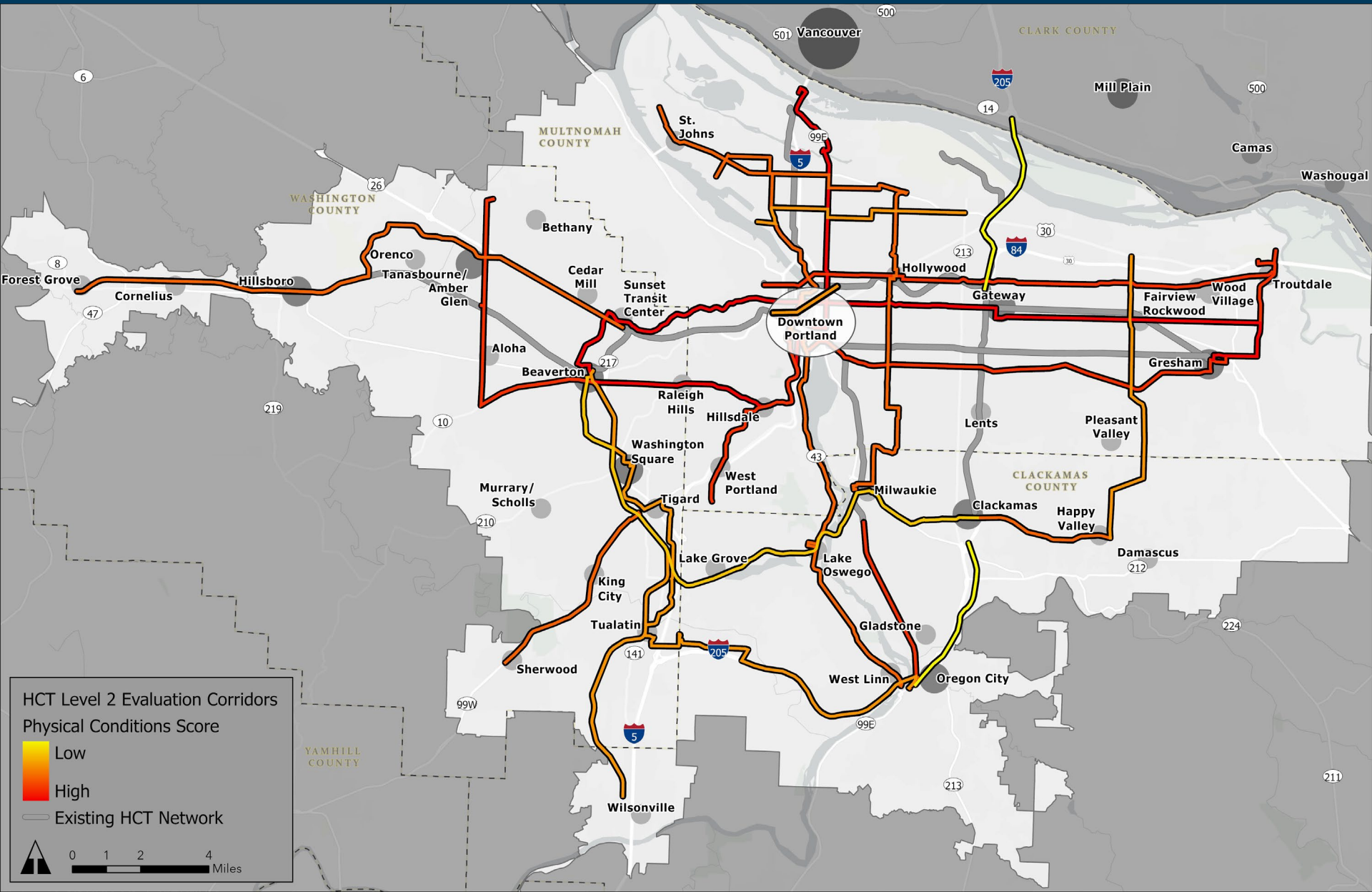


# Where people who rely on transit live & work





# Where there are transit-supportive streets





# HILLSBORO COMPREHENSIVE PLAN



## TRANSIT DEVELOPMENT PLAN

April 2021



## CLATSOP COUNTY TRANSITATION SYSTEM PLAN

Prepared by  
Kittelson & Associates, Inc.  
810 SW Alder Street, Suite 700  
Portland, Oregon 97205  
(503) 228-5230

In coordination with:  
Angelo Planning Group



Reflecting  
transit-  
supportive  
plans and  
policies



# Categorizing Corridors into Tiers

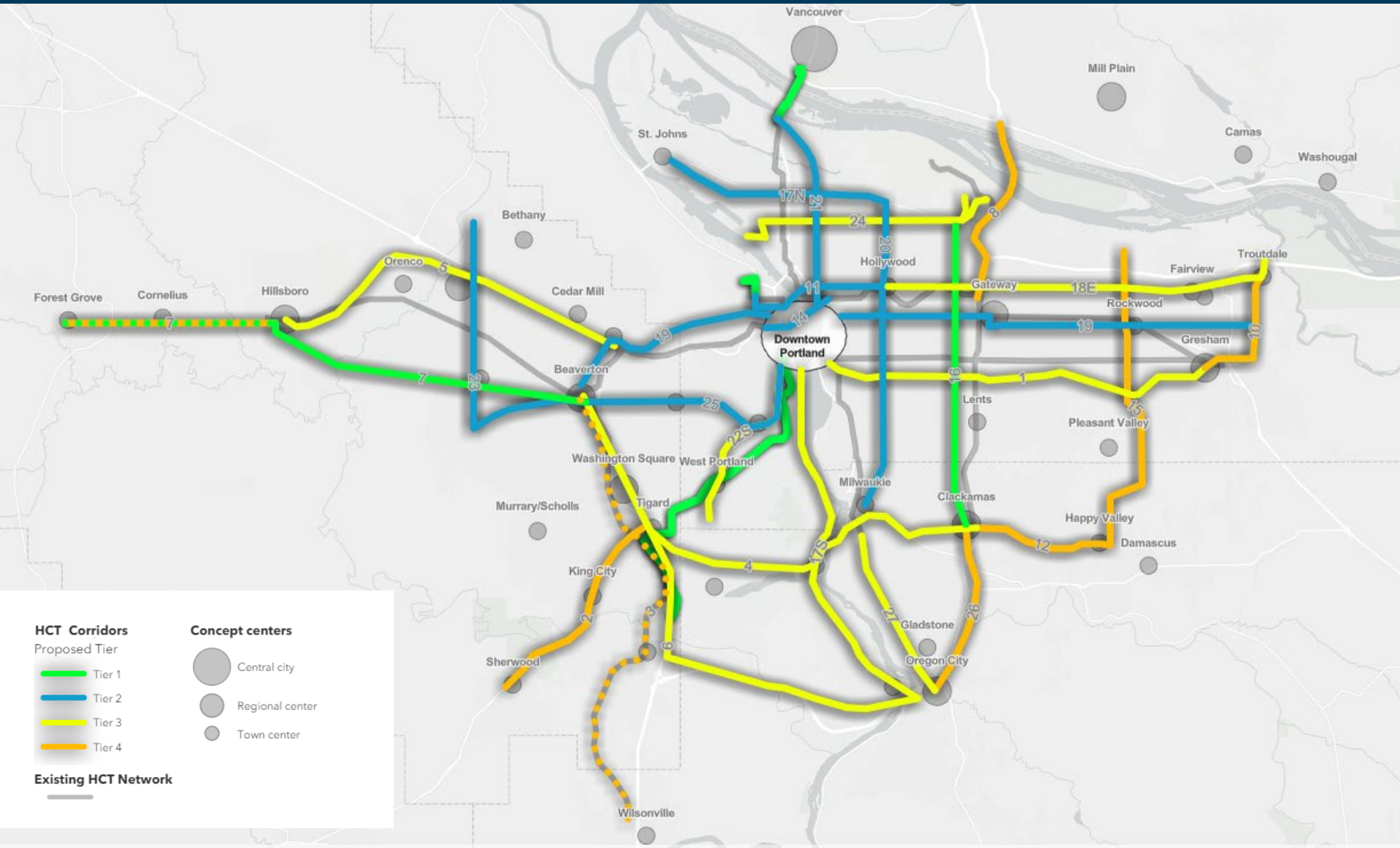
Tier		Description
Regional Transportation Plan Investment Priorities		
1	Regional Priority Corridors	<ul style="list-style-type: none"><li>Planning for investment is already underway</li></ul>
2	Emerging Regional Priority Corridors	<ul style="list-style-type: none"><li>Corridors are already ready for investment and planning for high capacity transit could start in the next five years</li></ul>
3	Developing Corridors	<ul style="list-style-type: none"><li>Corridors are getting ready for investment, but there is more work to do (e.g., land use) before we plan for high capacity investment in these areas</li></ul>
4	Future Corridors	<ul style="list-style-type: none"><li>Corridors providing an important future connection in the regional network that are not yet ready for high capacity transit investment</li></ul>

# Proposed Corridor Tiers



Corridors	Land Use, Equity, Mobility, Environment	Access, Policy, Complexity	Total Score	Tier	Geography
NW Lovejoy to Hollywood via Broadway/Weidler				2	Portland/Multnomah
Central City Tunnel				2	Portland/Regional
Beaverton - Portland - Gresham via Burnside				2	Washington/Portland/Multnomah
Hayden Island - Downtown Portland via MLK				2	Portland
Bethany to Beaverton via Farmington/SW 185th				2	Washington
Beaverton to Portland via Hwy 10 (BH Hwy)				2	Washington/Multnomah
St Johns - Downtown Portland via Vancouver/Williams, Rosa Parks				2	Portland
St. Johns - Milwaukie via Cesar Chavez				2	Portland
Portland to Gresham in the vicinity of Powell Corridor				3	Multnomah
PCC Sylvania to Downtown Portland via Capitol Hwy				3	Portland
Sunset Transit Center to Hillsboro via Hwy 26/ Evergreen				3	Washington
Swan Island to Parkrose				3	Portland
Oregon City to Downtown Portland via Hwy 43				3	Clackamas/Multnomah
Hollywood to Troutdale				3	Portland/Multnomah
Park Ave MAX Station to Oregon City via the McLoughlin Corridor				3	Clackamas
Beaverton - Tigard - Tualatin - Oregon City				3	Clackamas/Washington
Beaverton - Tigard - Lake Oswego - Milwaukie - Clackamas Town Center				3	Clackamas/Washington
Hillsboro to Forest Grove				4	Washington
Gresham to Troutdale				4	Multnomah
Tigard to Sherwood via Hwy 99W Corridor				4	Washington
Beaverton to Wilsonville in the vicinity of WES				4	Washington
Happy Valley to Columbia Corridor via Pleasant Valley				4	Multnomah/Clackamas
Clackamas Town Center to Damascas				4	Clackamas
Clackamas Town Center to Oregon City				4	Clackamas
Gateway to Clark County in the vicinity of I-205 Corridor				4	Multnomah/Clark

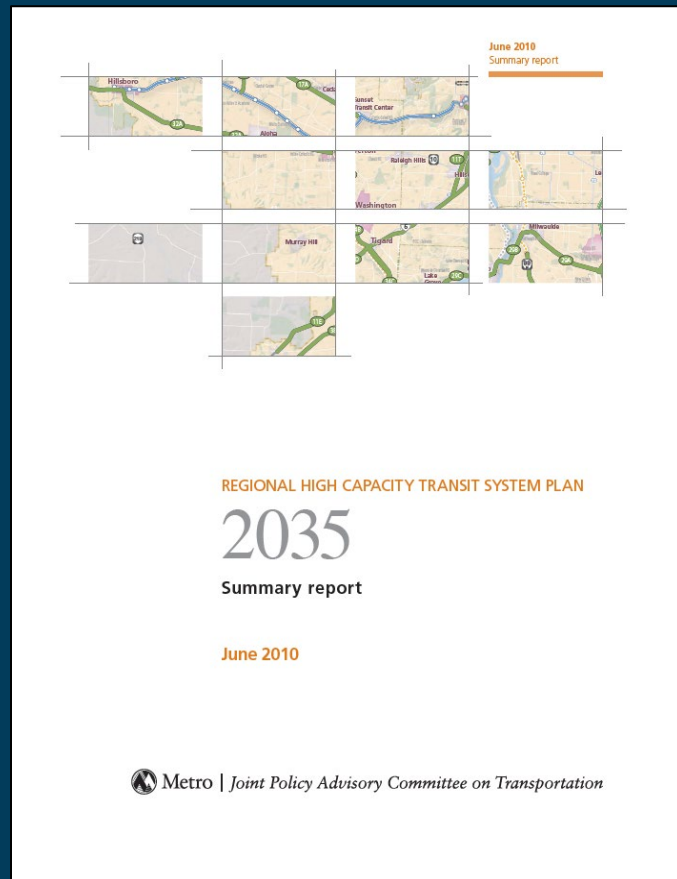
# Proposed Corridor Tiers







# Planning Winter Engagement



# Outlining the Report

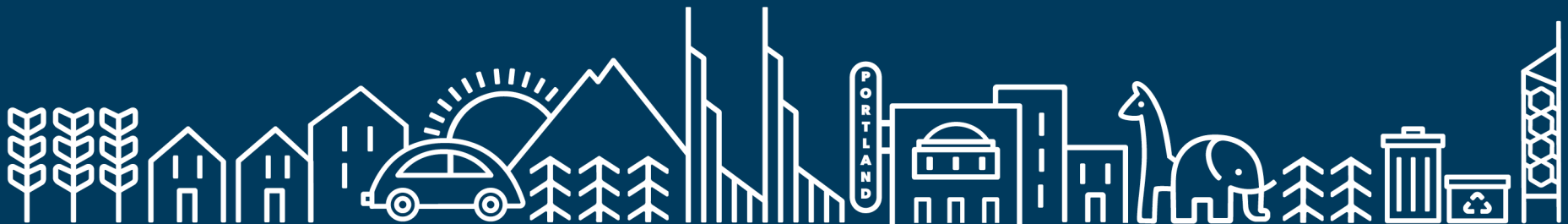
- Introduction
- HCT System Today
  - Status, Challenges & Opportunities
- Policy Framework
- Network Vision
- Corridor Investment Tiers
- Supporting the Vision
- Implementation
  - Strategies
  - Corridor Planning Needs
  - Future Study
- Appendices



# Looking to Next Steps

**Thank you!!**

**oregonmetro.gov**





January 9, 2023

Mayor Julie Fitzgerald  
City of Wilsonville  
29799 SW Town Center Loop E  
Wilsonville, OR 97070

Dear Mayor Fitzgerald,

Thank you for your letter dated November 8, 2022 to Board President Linda Simmons about recommendations to improve collaborative, and coordinated planning with other regional public transit providers for Forward Together. After conferring with President Simmons, I'm responding to you on behalf of President Simmons and the Board. You raised several important points and I want to address them each below.

**Collaborative, coordinated planning**

We agree that collaborative and coordinated planning is important to meet the transit needs of our region. Together, we have already taken multiple steps to support such planning. TriMet convenes a monthly coordination meeting with all the Clackamas, Washington, and Multnomah public transportation provider staff. Called the Regional Coordination Technical Committee, the group meets to discuss Statewide Transportation Improvement Funds, State Special Transportation Funds, Federal 5310 funding and other issues of coordination. SMART staff regularly participates in these meetings. Additionally, we conduct a monthly meeting to review the JPACT and MPAC policy agendas with the Clackamas transportation providers. Both meetings have facilitated meaningful communication between our organizations.

**JPACT representation**

Of course, representation at the JPACT table is important, and I take my role there very seriously. The JPACT bylaws, managed by Metro staff, articulate the balance of representation on the committee. As you probably know, in recent years, Wilsonville admirably represented the cities of Clackamas County. TriMet supports continued discussion between Wilsonville and Metro staff about representation at JPACT. I understand you feel there may be additional topics or processes we should be considering to represent the transit needs of the entire region. We would be happy to continue to discuss how our coordination efforts can be improved or other ideas you have. Please feel free to contact JC Vannatta, Executive Director of Public Affairs, to continue conversations along these lines.

**Engagement for Forward Together and service changes**

TriMet conducted two major engagement efforts during Forward Together. First was a focus on goals for service restoration and growth, which included a month-long comment period and a survey with over 5,500 responses. The second round was public review of the draft service concept which included a month-long comment period and a survey with over 4,500 responses and open houses with over 500 total people attending.



In addition, as we approach each annual service plan process, we will be coordinating with the City and SMART and other stakeholders on proposed changes stemming from Forward Together concepts that are actually proposed for that year. Our annual service change process (in accordance with Chapter 18 of the TriMet Code) typically involves two rounds of public engagement and coordination with all impacted jurisdictional partners. This means riders, the public, jurisdictions, and other transit providers all get additional opportunity to coordinate and comment before any final decisions are made about what service changes actually go into effect.

### **Changes in demand and service reflected in Forward Together**

As you know, the COVID-19 pandemic has had an enormous impact on transit ridership. Nowhere in the region has there been more ridership decline than downtown Portland, especially during the weekday peak commute times. In response to these changes in demand, TriMet is looking to reallocate service from bus lines that were primarily designed to serve the rush hour commute to downtown Portland where demand has dropped significantly and instead dedicate that service to bus lines serving areas with stronger transit markets and on a broader range of hours and days.

### **TriMet service connecting Wilsonville**

Line 96-Tualatin/I-5 is one example of a downtown Portland oriented line that has experienced a significant ridership drop. Between Fall 2019 and Fall 2022, Line 96 experienced a 66% decrease in ridership. With the proliferation of tele-commuting, it is likely that this trend will continue. Because of this, the Forward Together Service Concept envisions a reallocation of service away from Line 96 to other bus lines serving the Wilsonville, Tualatin, Lake Oswego areas. Under the service concept, the destinations that would be served from Wilsonville include Bridgeport Village, Tualatin, Lake Grove, PCC Sylvania, Barbur Transit Center, and downtown Portland. Moreover, the service concept adds weekend service on Line 44 to Wilsonville, which isn't currently available on Line 96.

Due to TriMet's operator shortage, we are unlikely to make the service changes referenced above in FY2024, but we may be able to do it in FY2025. As with every significant service change, prior to implementation, we will conduct additional outreach and engage with you and other jurisdictions and stakeholders as part of our annual service planning process and make refinements to the proposal, if needed.

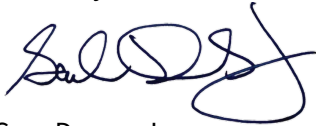
There are challenges to extending TriMet service to the Wilsonville Transit Center including the state law that enables us to provide service but comes with limitations on service outside our district. I have asked our service planning team to work with SMART staff to see where we can better coordinate service between Wilsonville and the TriMet district.

### **Forward Together and the TriMet Board**

The TriMet Board did not take formal adoption action on the overall concept, we have worked to make sure the Forward Together concept now reflects their policy expectations. The Board will take formal actions on each actual service change, giving them the ability to review and revise individual service changes in the light of new information available at the time of each service change ordinance.

Thank you again for your letter. I look forward to our continued cooperation.

Sincerely,

A handwritten signature in blue ink, appearing to read "Sam Desue, Jr.", with a stylized, flowing script.

Sam Desue, Jr.

TriMet General Manager

Cc: Dr. Linda Simmons, Board President, TriMet Board of Directors  
Kimberly Angove, Executive/Board Administrator, TriMet  
Lynn Peterson, President, Metro Council  
Dwight Brashear, Transit Director, SMART  
JPACT members  
Clackamas County Coordinating Committee  
Washington County Coordinating Committee  
East Multnomah County Transportation Committee

# JOINT MEETING OF THE OREGON AND WASHINGTON TRANSPORTATION COMMISSIONS

## AGENDA

**September 19, 2012**

**Pendleton, Oregon**

### **Tuesday, September 18**

**6:00 PM** No-host dinner with Oregon and Washington Commissions. (Hamley Steakhouse, 8 SE Court Avenue, Pendleton, OR 97801)

### **JOINT MEETING OF THE OREGON AND WASHINGTON TRANSPORTATION COMMISSIONS**

***Pendleton, Red Lion Hotel***

***Walla Walla Room***

***304 SE Nye Avenue***

***Pendleton, Oregon 97801***

***(541) 276-6111, Fax (541) 276-2413***

### **Wednesday, September 19**

**8:00 AM** ODOT's regular monthly agenda review and briefing session with ODOT staff in the *Cayuse Room.*

### **Joint Meeting: Oregon and Washington Transportation Commissions**

- 9:00 AM** E) Introductions (*30 min., Oregon and Washington Commissions*)
- 9:30 AM** F) Economic ties between Washington and Oregon. Informational. (*40 min., Michael Fischer, Cambridge Systematics*)
- 10:10 AM** G) Receive an informational presentation of the Rail Corridor. Informational. (*30 min. John Sibold, WSDOT*)
- 10:40 AM** H) Receive an informational presentation of the Electric Highway. Informational. (*30 min. Jim Whitty, ODOT and Jeff Doyle, WSDOT*)
- 11:10 AM** I) Receive an informational presentation on Road Usage Fee/Charge efforts under way. Informational. (*45 min. Jim Whitty, ODOT and Jeff Doyle, WSDOT*)
- 11:55 AM** Working Lunch – break and pick up lunches in *Cayuse Room.*
- 12:10 PM** J) Working Lunch – Conduct an informational discussion about the Columbia River Crossing project, tolling governance, and legislative oversight efforts. Informational. (*2 hours, Kris Strickler, ODOT and Nancy Boyd, WSDOT*)

# JOINT MEETING OF THE OREGON AND WASHINGTON TRANSPORTATION COMMISSIONS

## AGENDA

September 19, 2012

Pendleton, Oregon

### Wednesday, September 19, (continued)

2:10 PM K) Wrap-up **Informational**. (20 min., Secretary Hammond and Director Garrett.)

2:30 PM ADJOURN

### **FORMAL MONTHLY MEETING**

**Pendleton, Red Lion Hotel**

**Walla Walla Room**

**304 SE Nye Avenue**

**Pendleton, Oregon 97801**

**(541) 276-6111, Fax (541) 276-2413**

### Regular Monthly Meeting: Oregon Transportation Commission

*Note: The Commission may choose to take agenda items out of order, pull, defer or shorten presentation time of agenda item(s) to accommodate unscheduled business needs. Anyone wishing to be present for a particular item should arrive when the meeting begins to avoid missing an item of interest.*

**Website address to view agendas/minutes on the Internet:** [http://www.oregon.gov/ODOT/COMM/otc\\_main.shtml](http://www.oregon.gov/ODOT/COMM/otc_main.shtml)

*The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours before the meeting to Jacque Carlisle, Commission Assistant, at (503) 986-3450.*

2:45 PM B) Public Comments. (**Up to 15 min.**)  
(Public testimony is valued by the Commission, and those who wish to testify are encouraged to sign up on the public comment sheet provided at the meeting handout table. Note: This part of the agenda is for comments on topics not scheduled elsewhere on agenda. General guidelines: provide written summaries when possible and limit comments to 3 minutes. If you bring written summaries or other materials to the meeting, please provide the Commission Assistant with 10 copies prior to your testimony.)

3:00 PM C) Request to approve and receive public comments of the 2015-2018 Statewide Transportation Improvement Plan (STIP) Funding Allocation and Project Selection process for the **Enhance** category. **Approval/Informational**. (**60 min., Jerri Bohard and Paul Mather**)

# JOINT MEETING OF THE OREGON AND WASHINGTON TRANSPORTATION COMMISSIONS

## AGENDA

**September 19, 2012**

**Pendleton, Oregon**

### **Wednesday, September 19, (continued)**

- 4:00 PM**      D1)      Approve \$184,200 in Transportation Enhancement (TE) funds to construct wildlife fencing adjacent to I-5 in conjunction with project #16763 (I-5: Glendale-Hugo Paving and Climbing Lane). Approve amending the Statewide Transportation Improvement Program (STIP) to add the TE Discretionary funds.
- D2)      Approve a request to amend the Statewide Transportation Improvement Program (STIP) to add \$184,200 to construct wildlife fencing adjacent to Interstate 5 in conjunction with the Interstate 5: Glendale-Hugo Paving and Climbing Lane project in Region 3. The total estimate for this project is nearly \$50 million.
- Approval. (5 min., *Jerri Bohard*)
- 4:05 PM**      E)      Consider approving items on the Consent Calendar (See following page).  
                 Approval. (5 min., *Matthew Garrett*)
- 4:10 PM**      ADJOURN

## CONSENT CALENDAR

1. Approve the minutes of the August 15-16, 2012, Commission meeting in Baker City.
2. Confirm the next two Commission meeting dates:
  - Tuesday and Wednesday October 16-17, 2012, meeting in Silverton
  - Wednesday, November 14, 2012, in Salem
3. Adopt a resolution for authority to acquire real property by purchase, condemnation, agreement or donation.
4. Approve the following Oregon Administrative Rule:
  - a. Amendment of 734-020-0019 relating to advisory speeds.
  - b. Amendment of 735-063-0065, 735-063-0067 and 735-063-0070 relating to CDL "V" restriction.
  - c. Amendment of 735-070-0004 relating to cancellation of driving privileges for providing a false or fictitious address to DMV.

5. Approval a request to amend the 2012-2015 Statewide Transportation Improvement Program (STIP) to add the Preliminary Engineering (PE) phase for the Interstate 205: U.S. 26 to Clackamas River Seismic Retrofit project. This project will be funded by project savings realized in the State Bridge Financial Plan. The estimated cost of the PE phase of this project is \$750,000.

## **Your Action is Requested**

Whereas

Constructed 1917, we have the current I-5 bridge after decades of “political fighting”. The Clark County citizens and business leaders stood up and forced the Clark County Commissioners to take action to construct our bi-state bridge as a county to county bridge.

The Clark County Councilors have the unique responsibility of having the largest amount of Columbia River waterfront inside their boundaries. This includes several ports Woodland, Ridgefield, Vancouver, Camas, and Washougal. Your boundaries also include several cities, businesses, and all forms of property zoning. Plus you represent the citizens who will pay the largest portion of tolls on daily commutes when using the I-5 and I-205 freeway interstate bridges.

It is very important to have a full conversation on all the ramifications of putting tolls on the I-5 freeway system. This conversation must take place as hearings, with presentations to the Washington Transportation Commissioners and the local citizens. To date there have been no hearings solely on tolling, it's effects on the economy, or why would we suddenly change to tolling over a fuel tax by either the Washington Transportation Commission or Oregon Transportation Commission. The only hearing held on tolling the Columbia River Crossing project by the Transportation Commissioners took place 200-miles away in central Oregon, in the year 2012. Identified as an informational working lunch decision Item J. Approximately a dozen citizens show up at the Joint Washington and Oregon Transportation Commission Hearing. We were shut out of the room the “luncheon” was held in because no formal vote would be taken. (A violation of the Open Meeting Law) I am sure you understand how disrespected we felt! It was so insulting, rude, and unkind. We were not allowed the handouts for the two-hour meeting, and sat in the hearing room waiting for their return. We took time off from work, paid for hotel rooms, and had traveling expenses just to hear the tolling decision. Some of the Transportation Commissioners were unable to make the meeting, stating the distances and had phoned into the meeting. There have been NO Hearings by the Transportation Commissions of Washington and Oregon concerning converting **The I-5 interstate freeway system** into **The I-5 interstate toll-road system**.

The need to have several independent and joint commissioner hearings is extremely important on tolling and not tolling of the main lanes of the I-5 freeway system. Putting tolls on the extra lanes adjacent to the main lanes such as, HOV, HOT, to pay for an advantage in the traveling experience still keeps **the I-5 freeway system** intact choosing to pay an additional fee as a toll for use of an additional “non-freeway” lane or stay on the freeway system. While several seem to be singularly focus on a toll to finance ‘one’ bridge across the Columbia River they have lost sight of the fact every municipality between Canada and Mexico will have the right to place a toll on the new I-5 interstate toll highway system. Here are a few on the many questions and problems that must be thoroughly answered and verified.

1. The Federal Highway Administration funding does not come from tolls placed on I-5. The State of Washington has formerly stated \$650-\$850-million would be provided to SW Washington, large projects have been funding in other areas of State so it is SW Washington's turn. So is Oregon's lack of funding, is that why a toll is suggested?
2. Oregon receives \$30-million on 1-cent a gallon fuel tax annually. Ten cents a gallon fuel tax annually is \$300-million and ten years at ten cents is \$3 billion the entire amount that Oregon needs. Scenarios



showing differing fuel tax by counties, etc have not been provided. The price of fuel takes enormous leaps up and down as much as a dollar per gallon with no local benefit. The citizens want to see difference step tax scenarios. An example: Would 3 years of a 25-cent a gallon the closer you are to the I-5 FREEWAY system and 5 cents across the rest of the State of Oregon cover the money for a new I-5 crossing?

3. Fuel tax is 100% in compliance and 100% of funds collected goes directly into transportation funding
4. Toll tax is 70% in compliance and 60% of net funds collected go directly into transportation funding. Why would we consider changing to a tolling funding system that takes millions or billions of dollars annually from the taxpayers sending it directly to banks and away transportation funds?
5. Electric utilities currently collect taxes. Is the Department of Transportation working on diverting a percentage of these taxes to transportation funding? The utilities tax collect system currently in use works well.
6. Privacy issues with the new “toll tags” individual identification pings on every cell tower tracing all movements instead of a “responding tag” specific the each machine. The expensive toll tag ID system can be used every time another toll is placed on the former I-5 FREEWAY to easily track the movement of US Citizens.
7. Once the first toll is place on the main lanes of the I-5 permanent or not municipality between Canada and Mexico will have the right to place a toll on the new **I-5 interstate toll highway system**.  
Will there be a limit on how high the toll can be?  
What size community can place a toll on I-5?  
How many tolls can be on I-5 at one time?  
What can the toll money be use on now that it doesn't have to be solely for infrastructure?  
Can new town spring up along I-5 be allowed to immediately impose a toll?

### **Your Action is Requested**

Please send correspondence to the Washington and Oregon Governors asking them to immediately have the Transportation Commissioners provide presentations and listening posts inside the study area, boundaries of the I-5 Transportation and Trade Corridor. I am also asking you to seek the support of the Project Sponsor Agencies SW WA Regional Transportation Councils, and CTRAN having them require hearings to take place to receive their support on any project going forward considering a toll. It would be important to ask other elected bodies to join you in seeking responsible leadership in provide additional information concerning the consideration of placing a toll of any kind on **the I-5 Freeway Interstate System**. It might be necessary to involve California Transportation Commissioners in the enormous of change to the I-5 freeway interstate international system.

Thank you sincerely for you immediate attention on this important matter it is greatly appreciated.  
Former Chair of the Clark County **West County Bridge No-Tolls Advisory Vote 2013** committee,

Sharon Nasset

Sharon Nasset 503.283.9585

\*Agenda attached.

JOINT MEETING OF THE OREGON AND WASHINGTON TRANSPORTATION COMMISSIONS AGENDA

September 19, 2012 Pendleton, Oregon **Wednesday, September 19 12:10 J.)** Working Lunch – Conduct an informational discussion about the Columbia River Crossing project, tolling governance, and legislative oversight efforts. Informational. (2 hours, **Kris Strickler, ODOT and Nancy Boyd, WSDOT**)

## **An important Reason to Keep The I-5 Freeway System Toll-Free.**

The I-5 freeway system from Canada to Mexico carries billions of dollars of freight and millions of citizens enjoying the “free” movement of goods and services. The idea of pooling our money together to pay for our road system has always been very important. Oregon was one of the first States to have a gas tax used to up-keep the roads. The idea of toll roads and turnpikes was absolutely a freedom of movement issue and did not work for farm communities that only had cash after a crop. Always having to have money in your pocket to be picked isn’t what citizens wanted then, and they don’t want it now. The I-5 freeway-mainline has never had a toll on it since the “Freeway System” went in the 1960’s as a new model to the nation. The States of California and Washington have added additional lanes to the mainline that are pay for service however you can drive the entire transcontinental freeway and not pay a toll. The drag on the economy locally and nationally to siphon off billions of dollars by allowing a toll on the mainline of I-5 freeway would be an enormous mistake. Once Oregon does it in Portland at the I-5 bridges and the Rose Quarter every town on the “non” freeway system would do it too. If we have a right they would have a right to add tolling as well. The type of tolling suggested is not honest and over 40% goes to the company handling the machines and does the money transacting. They provide the machines, maintain the machines, they also take in the money, count the money, deposit the money, tell us what is our share, and have no responsibility to go after those who don’t pay the toll. If you do not know that, that is shady, you do not know accounting or business. Taking in the money, counting, deposit, and do the books, by “one/company” not a good business model.

The losing of our freeway system and the adding of tolls by any towns along I-5 freeway are unacceptable. The Federal Highway Administration should not allow the new extremely expensive adding in of the “banking system” and financially risky tolling scheme.

1. Fuel tax is 100% in compliance and 100% of funds collected goes directly into transportation funding
2. Toll tax is 70% in compliance and 60% of net funds collected go directly into transportation funding. Why would we consider changing to a tolling funding system that takes millions or billions of dollars annually from the taxpayers sending it directly to banks and away transportation funds?
3. Electric utilities currently collect taxes. Is the Department of Transportation working on diverting a percentage of these taxes to transportation funding? The utilities tax collect system currently in use works well.
4. Every property with 220 electrical service is a charging station needing only a receptacle outlet to access service. The addition of receptacle on most properties will enable limiting the need for diesel heavy equipment in residential areas. Smart Meters can distinguish between 110 and 220 electrical usage allowing a percentage of the utility taxes deviated to transportation funding viable.\* Asking utility companies to put out bonds to pay for the addition of 220 receptacle outlets for all properties, Smart Meters, and the ability to charge personal account with electrical usage in different location on one account would be an enormous game changer in converting to electrical energy usage.

**We have projects that are toll-free and lessen congestion tremendously those community projects have been block! Please look at to the alternative that can be funded without a toll.**

**Thank You,**

Paid for by Economic Transportation Alliance /Third Bridge Now a 501c3 Non-Profit Public Charity

[www.thirdbridgenow.org](http://www.thirdbridgenow.org) • Third Bridge Now 2114 Main St. PMB #154 Van. WA 98660 • 503.283.9585



# Tolling Has Exorbitant Cost and Privacy Issues

## Expensive Overhead

Today's "Modern" tolling systems are much more expensive than many people realize. For every dollar paid in a toll, 44% goes to pay overhead. So for every \$100 paid in tolls, **only** \$56 goes to pay for the actual bridge and "Other Uses" (as yet undefined).

## Loss of Privacy

To pay the **base** toll charge, drivers will have to have a transponder within their vehicle. The transponder can be used to **track** the vehicle's location via cell towers. The alternative, which allows you to retain your privacy, requires added fees to the base toll charge.

### "Pay As You Go" Peak Period Example

Fee Breakdown		Where the Fees Go	
Toll	\$6.00	Pay as You Go	\$3.00
License Plate Identification Fee	\$1.00	Toll Overhead 44%	\$2.64
Handling Charge	\$2.00	To Bridge and Other Uses	\$3.36
<b>Total One Way Expense</b>	<b>\$9.00</b>	<b>Total One Way Expense</b>	<b>\$9.00</b>

### "Transponder" Peak Period Example

Fee Breakdown		Where the Fees Go	
Toll	\$6.00	Toll Overhead 44%	\$2.64
		To Bridge and Other Uses	\$3.36
<b>Total One Way Expense</b>	<b>\$6.00</b>	<b>Total One Way Expense</b>	<b>\$6.00</b>

## Where are the Additional Fees Going?

Of the \$9.00 one way fee, only \$3.36 goes toward repayment of the bridge and "Other Uses."

## Alternative Payment Method

An EBT card, also known as a "food stamp card," will be able to be used to pay the toll. Imagine being at poverty level and having to use your EBT card to get to your job, (ETB is currently being used on the Tacoma Narrows tolling system). This form of payment maybe treated as the "pay as you go" system with a \$3.00 each way charge in addition to the toll payment.

## Some Don't Pay, Others Pay More

Approximately 10% of the systems users will not be charged do to a one time passing through the electronic system. It is too expensive to find them.

Businesses will pay for each axle on a truck, approximately four times the rate of the average vehicle unless the truck is larger, oversize, double, or triple trailer truck with more than 4 axles.

## Who else may not pay?

What happens to those who repeatedly drive though without paying?

# Tolling Will Damage Regional Economy and is Not Economically Prudent!

## **Appendix C – CRC Tolling Study Committee Report Travel Demand Forecasting, Revenue Projections, Determination of Net Revenues, and Financial Capacity Analysis**

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### **Travel Demand Forecasting**

Regional travel demand models are used to forecast how people may choose to travel in the future given projected growth patterns for population and employment as well as future transportation facilities. The Portland-Vancouver area regional travel demand model used for the Columbia River Crossing (CRC) project was developed jointly by the Portland-area Metro Regional Government (Metro) and the Southwest Washington Regional Transportation Council (RTC). The model, run by Metro and peer-reviewed by a national panel of experts in October 2008, applies a four-step process in estimating future travel demands:

Step 1: Person-trips are estimated from adopted regional growth projections and adopted regional transportation plans. Growth projections include population and employment forecasts throughout the metropolitan region. Transportation plans include future transportation facilities, including roadways, transitways, and bicycle and pedestrian facilities.

Step 2: Predicted person-trips are then distributed to zones across the metropolitan region. Over 25,000 network routes, or “links,” are used in the model, as well as over 2,000 transportation analysis “zones.” The model predicts how many people will want to travel from one zone to another via different links.

Step 3: Person-trips between each of the zones are broken down by mode of travel (drive alone, carpool, transit, bicycle, walking) based on each option’s attractiveness when considering travel time and cost, as well as each traveler’s socioeconomic characteristics. Travel costs include parking fees, transit fares, tolls, and automobile operating costs.

Step 4: The model assigns each trip to a specific routing in the model’s network. For the CRC’s tolling analysis work, the model predicts how many people are projected to cross the Columbia River on I-5 and I-205 via automobile and transit. The model is used to predict weekday peak period vehicle volumes across each bridge, which are later used to develop daily traffic demands.

The regional travel demand model is appropriate for comparing the relative weekday effects of travel across the Columbia River for different tolling scenarios. The model used for tolling analysis purposes allows relative generalizations to be made about I-5 and I-205, including vehicle and transit trips, and the duration of vehicular congestion experienced along each river crossing.

Daily and hourly traffic volumes in 2030 would vary for the I-5 bridge and the I-205 bridge with different tolling levels. Based on information included in the model regarding how much people value their time for different types of trips, lowering or raising toll rates affects how many people choose to pay the specific toll, divert to the alternative bridge, travel during another time of the day, take transit, or travel to a different destination altogether. The scenario analysis found:

- For most of the I-5 only toll scenarios, the majority of drivers would not change their travel patterns. Some would choose a new destination or a non-tolled route. Diversion to transit is minimal due to the already increased ridership associated with project improvements.
- Route diversion tends to increase as toll rates increase; however, the percentage of diversion tends to be lower during peak periods when travelers' willingness to pay tolls may be higher and/or alternative routes are congested, and thus, time consuming.
- For scenarios that toll both the I-5 and I-205 bridges, traffic levels would be higher on I-5 and lower on I-205 compared to tolling only the I-5 bridge. However, compared to the No Toll project scenario, total cross-river traffic demand would be less on both the I-5 and I-205 bridges as many trips would divert to transit or not be made across the Columbia River.

See the attached spreadsheet titled *Traffic Effects for Tolling Scenarios* for more detailed information about traffic diversion, average daily traffic volumes and hours of congestion predicted for each of the tolling scenarios.

Additional work refining one or two likely scenarios will be undertaken to inform financial planning and final rate setting prior to issuing toll revenue bonds. That analysis would independently review and refine many key assumptions, including land use projections, and also examine parts of the network beyond the I-5 and I-205 river crossings, such as key interchanges with these highways, and critical roadways and intersections. An updated and detailed toll traffic and revenue report is warranted before issuing debt, and would be required by the credit rating agencies if any of the bonds were to be backed solely by toll revenues.

## **Revenue Projections**

The annual traffic and revenue projections produced for the CRC project are derived from outputs of the Metro regional travel demand model. The Metro model employs inputs for users' values of time as a surrogate for the relationship of time and cost reflecting the potential toll on the I-5 bridge crossing. The regional model was further supplemented by the development of a corridor level traffic model (VISSIM) which provided traffic operation capabilities to estimate the effect of future congestion in the corridor. This became the basis for "post-processing" the model results to refine traffic demand projections. The traffic and revenue projections show both the annualization of the direct Metro model results and the refined post-processed results, the latter of which bracket the mid-range of anticipated traffic and revenue impacts.

Ten toll scenarios that vary toll rates and toll locations (I-5 only or both I-5 and I-205 bridges) were developed by the CRC team for analysis, in conjunction with the Oregon and Washington departments of transportation. Toll rates were assumed to vary by time of day according to a fixed schedule that applies higher toll rates in peak periods and lower rates during off-peak times when demand is less. Toll rates were originally specified in constant year 2006 dollars in the project's Draft Environmental Impact Statement (EIS); however the actual tolls paid are assumed to increase with expected inflation, projected at 2.5 percent per year. See Exhibit 1 for information about each scenario.

It is expected that the toll collection will be all-electronic, which allows tolls to be collected without toll booths causing drivers to slow down to pay tolls. Thus, drivers would either have a transponder, paying the rates noted in Exhibit 1, or the vehicle would be identified via the license plate, in which case a \$1.00 “pay-by-plate” processing fee would be added to each transaction. For example, a vehicle traveling during the peak period (6 am to 10 am) without a transponder would be charged \$2.00 plus the \$1.00 processing fee, or \$3.00 for their trip in one direction.

### Exhibit 1. Tolling Scenarios Evaluated

Scenarios Analyzed		Min/Max Toll Rate (2006\$)	Min/Max Toll Rate (2018\$)	Tolls Collected	Toll Schedule Type	Tolling Start Date
Tolling I-5 Only	<b>Scenario 1A</b> <i>DEIS Toll Rate</i>			Each Way	Asymmetric Variable Toll Schedule	July 1, 2016 (FY 2016)
	<b>Scenario 1B</b> <i>Lower than DEIS Toll Rate</i>					
	<b>Scenario 1C</b> <i>Flat Toll Rate</i>				Symmetric Fixed Toll Schedule	
	<b>Scenario 1D</b> <i>Additional Price Points</i>	\$1.00 / \$2.50	\$1.34 / \$3.36			
	<b>Scenario 1E</b> <i>1.5x DEIS Toll Rate</i>	\$1.50 / \$3.00	\$2.02 / \$4.03		Asymmetric Variable Toll Schedule	
	<b>Scenario 1F</b> <i>2x DEIS Toll Rate</i>	\$2.00 / \$4.00	\$2.69 / \$5.38			
	<b>Scenario 1G</b> <i>3x DEIS Toll Rate</i>	\$3.00 / \$6.00	\$4.03 / \$8.07			
	<b>Pre-Completion Tolling<sup>1</sup></b> <i>DEIS Toll Rate</i>			Each Way	Asymmetric Variable Toll Schedule	July 1, 2013 (FY 2014)
Tolling I-5 and I-205	<b>Scenario 2A</b> <i>DEIS Toll Rate</i>			Southbound Only <sup>2</sup>	Asymmetric Variable Toll Schedule	July 1, 2016 (FY 2016)
	<b>Scenario 2B</b> <i>Lower than DEIS Toll Rate</i>					
	<b>Scenario 2C</b> <i>Lower I-205 Toll</i>					

<sup>1</sup> Pre-Completion Tolling to be added to any other scenario

<sup>2</sup> A round-trip toll is collected on scenarios tolling Southbound only

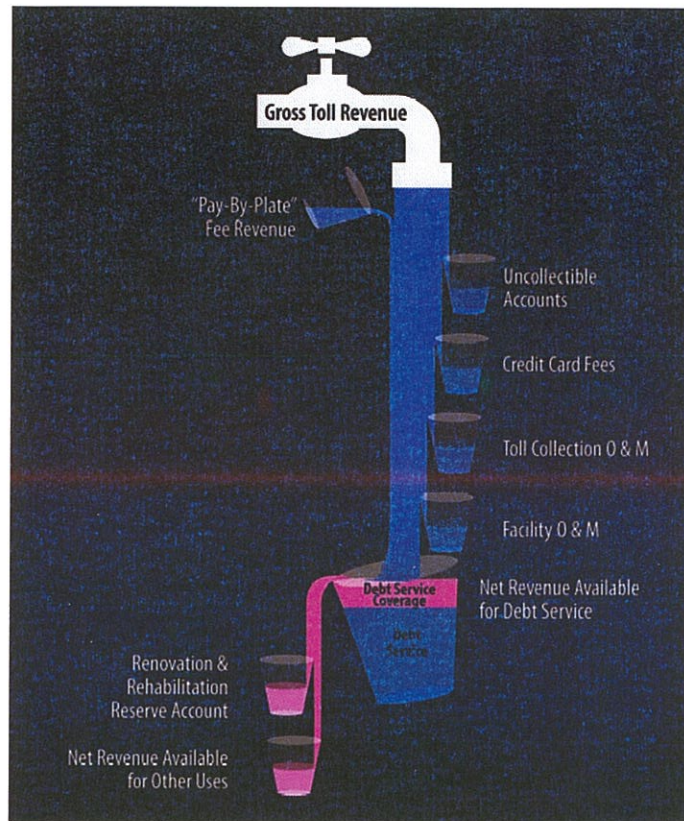
The rates for commercial vehicles are assumed to be proportionately greater than passenger cars, roughly as a function of the number of axles for a commercial vehicle. For the purposes of this analysis, it is assumed that commercial vehicles will pay on an N minus one basis based upon axles, that is, a five-axle truck would pay four times the passenger car rate (five minus one times the passenger rate). Model volumes were provided for medium (three-axle) and large (five-axle) trucks. The exact commercial toll schedule will be a function of the future development of the electronic toll collection system. Toll schedules assumed for each scenario are shown on the attached spreadsheets, *Toll Rate Schedules for I-5 Scenarios* and *Toll Rate Schedules for I-5 and I-205 Scenarios*.



## Determination of Net Revenues

To arrive at the portion of revenues available to support financing via the repayment of debt, several deductions must be made from gross toll revenues and fees. Key among these deductions is the obligation to pay for toll collection and facility operation and maintenance (O&M) costs for the bridge and roadway. The deductions from gross revenues include the following:

- Potential toll revenue lost due to uncollectable accounts
- Credit card and banking fees associated with toll payment and accounts
- Toll collection operations and maintenance costs, including maintenance, periodic replacement of equipment, back office costs and bridge insurance
- Routine operations and maintenance of the bridge and roadway facilities



Facility O&M costs include routine maintenance of the bridge and all roadways within the project area as well as incident response for the project area. After gross revenues have paid all of the above deductions, including toll collection and facility O&M costs, the remaining net revenue is available for debt repayment.

The net revenue stream represents the cash flow that can be used directly for financing to repay bonds, or to directly pay for construction if pre-completion tolling is implemented. In addition to bond repayment, there will be a periodic need for renovation and rehabilitation activities for the project. These costs are assumed to be funded out of excess net revenues after annual debt repayments that result from the debt service coverage requirement placed on net revenues. A reserve account may be created that would be funded from these excess net toll revenues.

## Financial Capacity Analysis

Tolling the I-5 bridge does not have the financial capacity to yield a funding contribution equal to the \$2.38 billion cost in year of expenditure dollars for the highway portion of the project. Rather, a number of funding sources will likely be needed to build the project, including federal and state (Oregon and Washington) funding sources combined with funding from tolls.

For the purposes of this analysis, the bridge is assumed to be substantially completed by the end of fiscal year 2018, with revenue operations beginning on July 1, 2018 (state fiscal year 2019). Toll bond proceeds are assumed to be received in the middle and latter years of construction to maximize their funding contribution, and other funding

sources are assumed to cover construction costs in the initial years. Other project improvements to the highway and interchanges would continue into 2019, and the last bonds needed to fund these completion activities are assumed to be issued after tolling has commenced.

The CRC toll bonds were assumed to be backed by other revenue sources, and the full faith and credit of one or both states to provide the bonds with a credit rating and interest costs equivalent to that of general obligation debt of either state.

The use of toll bonds will increase the total costs paid during and after construction due to the added interest and issuance costs. However, these financing costs are treated separately from the project capital cost during construction. Increased use of toll bonds will increase the total costs paid due to added interest and issuance. The construction cost does not increase as a result; rather it adds a financing cost both during and after construction.

State-backed bonds are limited by Washington State Constitution to a 30 year repayment period. Accordingly, debt with the maturity of up to 30 years was assumed to maximize the total proceeds that can be generated by the forecasted net toll revenue stream.

A minimum debt service coverage factor of 1.25 was assumed for state-backed debt whereby net toll revenues were maintained at 1.25 times the projected annual debt service. The intent of this is to provide some protection against draws on the revenue sources pledged to backup toll revenues, such as motor vehicle fuel tax revenues, in the event of lower-than-projected toll revenue performance.

Interest rates on state-backed bonds are assumed to be 6.00 percent for current interest bonds ("CIBs") and 6.50 percent for capital appreciation bonds ("CABs"), based on the current double-A credit ratings in both states. Issuance costs are assumed to be 0.2 percent of the total par amount of bonds issues for state-backed bonds. Additional costs would include 0.5 percent of the par amount for current interest bonds for underwriting (underwriter's discount) and 1.0 percent of the par amount for capital appreciation bonds.

Interest is assumed to be capitalized through the year before the project completion date, or up to two years after full toll collection commences. Earnings on invested funds (construction fund and capitalized interest fund) are assumed to be at an annual rate of 2.50 percent. While this might be higher than current yields on short-term investments, it is substantially less than the assumed future interest cost of borrowing, (between 6.0 and 6.5 percent for state-backed bonds), and thus represents approximately the same level of negative arbitrage currently being experienced by issuers of tax-exempt bonds.

### **Funding Range**

Based on the analysis done for this report, several preliminary conclusions can be reached:

1. Tolling can contribute a significant amount of funding to the project.
2. Tolling cannot be the only funding source for the project. Several funding sources, including state (Oregon and Washington) and federal, will be needed to supplement tolling funds.

3. Toll rates on I-5 can only be raised so high before total revenue and funding decrease. The limit is approximately two times the toll rate studied in the project's Draft EIS.
4. State backing of the debt is necessary to maximize the toll funding contribution. By essentially making the debt equivalent to general obligation bonds, state-backing affords the debt a high credit rating and relatively low interest rates. Non-recourse debt that is backed solely by toll revenues is anticipated to carry a lower or minimum investment-grade credit rating; which would entail higher interest rates, increased capitalized interest costs, and higher debt service coverage requirements.

Further study is warranted as the project design and cost of the project are refined, or as more information is available about other funding sources.



## Traffic Effects for Tolling Scenarios

Scenarios	Average Daily Traffic Volumes			Diversion to I-205 Compared to No Toll Scenario	Average SB I-5 Duration of Congestion	Average NB I-5 Duration of Congestion	Total Average I-5 Duration of Congestion
	I-5 Bridge Total	I-205 Bridge Total	Total River Crossings				
Existing Conditions (2005)							
No Build	134,000	146,400	280,400	-	2.0 hrs	4.0 hrs	6.0 hrs
No Toll Scenario	184,000	210,000	394,000	-	7.25 hrs	7.75 hrs	15.0 hrs
Scenario 1A	220,000	203,000	423,000	-	5.5 hrs	1.5 hrs	7.0 hrs
Scenario 1B	181,000	216,000	397,000	13,000	3.5 hrs	1.0 hrs	4.5 hrs
Scenario 1C	190,000	211,000	401,000	8,000	4.0 hrs	1.0 hrs	5.0 hrs
Scenario 1D	175,000	215,000	390,000	12,000	3.75 hrs	1.0 hrs	4.75 hrs
Scenario 1E	173,000	218,000	391,000	15,000	3.25 hrs	1.0 hrs	4.25 hrs
Scenario 1F	154,000	224,000	378,000	21,000	2.75 hrs	0.75 hrs	3.5 hrs
Scenario 1G	133,000	231,000	364,000	28,000	2.0 hrs	0.5 hrs	2.5 hrs
	89,000	240,000	329,000	37,000	1.0 hrs	0.0 hrs	1.0 hrs
Scenario 2A	198,000	177,000	375,000	-26,000	4.25 hrs	1.25 hrs	5.5 hrs
Scenario 2B	201,000	181,000	382,000	-22,000	4.5 hrs	1.25 hrs	5.75 hrs
Scenario 2C	192,000	185,000	377,000	-18,000	4.0 hrs	1.0 hrs	5.0 hrs

SB = southbound | NB = northbound

### Notes

1. Year 2030 results shown, except for Existing Conditions (2005).
2. Average duration of daily congestion levels shown.
3. All results are approximate.
4. The no toll scenario is included for comparison purposes. Tolling is needed to fund the project.

## Toll Rate Schedules for I-5 Toll Scenarios

Time Period	Studied for comparison purposes  Raises - \$0	Scenario 1A	Scenario 1B	Scenario 1C	Scenario 1D	Scenario 1E	Scenario 1F	Scenario 1G
		Draft EIS Variable Toll: Toll structure from the Draft EIS	Lower than Draft EIS Toll: Peak period tolls are lower than DEIS	Fixed Rate Toll: Same toll all day; rate based on weighted average of Draft EIS variable toll	Additional Price Points: Variable toll schedule; rates change more throughout day	1.5X Draft EIS Variable Toll: All tolls are 1.5 times the Draft EIS rates	2x Draft EIS Variable Toll: All tolls are twice the Draft EIS rates	3x Draft EIS Variable Toll: All tolls are triple the Draft EIS rates
		Raises - \$1.1 - \$1.4 billion	Raises - \$0.9 - \$1.2 billion	Raises - \$1.1 - \$1.4 billion	Raises - \$1.2 - \$1.5 billion	Raises - \$1.4 - \$1.8 billion	Raises - \$1.6 - \$2.1 billion	Raises - \$1.2 - 2.0 billion
		One-Way Tolls	One-Way Tolls	One-Way Tolls	One-Way Tolls	One-Way Tolls	One-Way Tolls	One-Way Tolls
		Collected Both Directions	Collected Both Directions	Collected Both Directions	Collected Both Directions	Collected Both Directions	Collected Both Directions	Collected Both Directions
Midnight to 5 AM		\$1.00	\$1.00	\$1.65	\$1.00	\$1.50	\$2.00	\$3.00
5 AM to 6 AM		\$1.50	\$1.25		\$1.50	\$2.25	\$3.00	\$4.50
6 AM to 7 AM					\$2.00	\$3.00		\$6.00
7 AM to 9 AM		\$2.00	\$1.50		\$2.00			
9 AM to 10 AM					\$1.75	\$2.25		
10 AM to 3 PM		\$1.50	\$1.25		\$2.00			
3 PM to 4 PM					\$2.50	\$3.00		
4 PM to 6 PM		\$2.00	\$1.50		\$2.00			
6 PM to 7 PM		\$1.50	\$1.25		\$1.50	\$2.25	\$3.00	\$4.50
7 PM to 8 PM		\$1.00	\$1.00		\$1.00	\$1.50	\$2.00	\$3.00
8 PM to midnight								
Midnight to 5 AM		\$1.34	\$1.34	\$2.21	\$1.34	\$2.02	\$2.69	\$4.04
5 AM to 6 AM		\$2.02	\$1.68		\$2.02	\$3.02	\$4.04	\$6.05
6 AM to 7 AM					\$2.69			
7 AM to 9 AM		\$2.69	\$2.02		\$3.36	\$4.04	\$5.38	\$8.07
9 AM to 10 AM					\$2.69			
10 AM to 3 PM		\$2.02	\$1.68		\$3.36	\$3.07	\$4.04	\$6.05
3 PM to 4 PM					\$2.69			
4 PM to 6 PM		\$2.69	\$2.02		\$3.36	\$4.04	\$5.38	\$8.07
6 PM to 7 PM					\$2.69			
7 PM to 8 PM		\$2.02	\$1.68		\$2.02	\$3.02	\$4.04	\$6.05
8 PM to midnight		\$1.34	\$1.34		\$1.34	\$2.02	\$2.69	\$4.04

### Notes

1. These are toll rate schedules analyzed for planning and testing purposes. Actual toll rates will depend on a final finance plan and will be determined by the Oregon and Washington state transportation commissions to meet legislative funding direction.
2. Toll funding contribution ranges assume 30-year state-backed debt.
3. No Toll scenario included for comparison purposes. Tolling is needed to fund the project.
4. Assumes medium trucks pay 2x and large trucks pay 4x the auto toll rate using a transponder; administrative fee would be added to process payments not involving a transponder.
5. Tolls are assumed to escalate at 2.5% per year to match the expected rate of inflation.
6. Tolling during construction could be added to any scenario. Rates assumed to match Scenario 1A, except there would be no toll from midnight to 5am. Tolling early could provide about \$330 million in additional funds for construction.

## Toll Rate Schedules for I-5 & I-205 Toll Scenarios

No Tolls		Tolling I-5 and I-205					
Time Period	2006 Dollars	Scenario 2A		Scenario 2B		Scenario 2C	
		Draft EIS Variable Toll on Both Bridges: Draft EIS tolls on both bridges  Raises ~\$2.8 - \$3.4 billion		Lower than Draft EIS Toll on Both Bridges: Peak period toll is lower than Draft EIS rate  Raises ~\$2.1 - \$2.5 billion		Lower Toll on I-205: Peak period toll is lower on I-205 than I-5; variable rate toll on both bridges  Raises ~\$2.4 - \$3.0 billion	
		Roundtrip Tolls		Roundtrip Tolls		Roundtrip Tolls	
		Northbound	Southbound	Northbound	Southbound	Northbound	Southbound I-5
Midnight to 5 AM		No Toll Collected	\$2.00	No Toll Collected	\$2.00	No Toll Collected	\$2.00
5 AM to 6 AM			\$3.00		\$2.50		\$3.00
6 AM to 10 AM			\$4.00		\$3.00		\$4.00
10 AM to 3 PM			\$3.00		\$2.50		\$3.00
3 PM to 7 PM			\$4.00		\$3.00		\$4.00
7 PM to 8 PM			\$3.00		\$2.50		\$3.00
8 PM to midnight			\$2.00		\$2.00		\$2.00
Midnight to 5 AM		No Toll Collected	\$2.69	No Toll Collected	\$2.69	No Toll Collected	\$2.69
5 AM to 6 AM			\$4.04		\$3.36		\$4.04
6 AM to 10 AM			\$5.38		\$4.04		\$5.38
10 AM to 3 PM			\$4.04		\$3.36		\$4.04
3 PM to 7 PM			\$5.38		\$4.04		\$5.38
7 PM to 8 PM			\$4.04		\$3.36		\$4.04
8 PM to midnight			\$2.69		\$2.69		\$2.69

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## E-ZPasses Track Vehicles In NY Even Off Toll Roads New Yorkers may not realize they are being tracked

[http://autos.aol.com/article/e-zpasses-track-vehicles-ny-toll-roads/?icid=maing-grid7|main5|dl6|sec1\\_ink2%26pLid%3D375937](http://autos.aol.com/article/e-zpasses-track-vehicles-ny-toll-roads/?icid=maing-grid7|main5|dl6|sec1_ink2%26pLid%3D375937)

Posted: Sep 16, 2013

| By: AOL Autos Staff

New York's E-ZPass uses a radio-frequency identification sensor, or RFID tag, which allows residents of the Big Apple to pay road tolls electronically. But most drivers don't know that the state is using the passes to gather data far from toll booths, according to an article in Forbes.

Internet hacker "Puking Monkey" wanted to see where his RFID tag was being scanned. He rigged the E-ZPass so a light would turn on and a toy cow would moo every time the RFID tag was read. He found his pass being read several times on short trips around New York, far from any tollbooths.

While speaking at the hacker convention Defcon, Puking Monkey called his findings "intrusive and unsettling." Tag readers on the streets are part of New York's traffic initiative "Midtown in Motion", which uses the passes to track traffic movement to improve flow. The New York Department of Transportation wasn't forthcoming about the program, but TransCore, the manufacturer of the RFID tags used in E-ZPasses, told Forbes via email "The tag ID is scrambled to make it anonymous ... the system cannot identify the tag user and does not keep any record of the tag sightings."

Still, it's an unsettling reminder that if the state of New York can track drivers without notifying them, potentially anyone can. Puking Monkey told the crowd at Defcon that drivers can protect themselves by keeping their E-ZPasses in a bag and bringing them out when driving through tollbooths. Laws governing electronic information gathering are hazy and undefined in most states. Californians have their cars photographed and tracked by police, with no transparency on how that data is being used.

Gallery: Your Guide To The Cars Of 2014  
Acura MDX Acura RLX Audi R8 Audi RS7

Filed under: Driving Laws

[http://autos.aol.com/article/e-zpasses-track-vehicles-ny-toll-roads/?icid=maing-grid7|main5|dl6|sec1\\_ink2%26pLid%3D375937](http://autos.aol.com/article/e-zpasses-track-vehicles-ny-toll-roads/?icid=maing-grid7|main5|dl6|sec1_ink2%26pLid%3D375937)