



May 18, 2017

## Attachment 4

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# 2018 Regional Transportation Plan Project Evaluation Pilot

## INTRODUCTION

At the direction of the Metro Council, Metro staff have been working with the Transportation Policy Alternatives Committee (TPAC), the Metro Technical Advisory Committee (MTAC), and other interested partners to develop and pilot a project evaluation process and criteria to apply to projects submitted for consideration in the 2018 RTP. This project-level evaluation and criteria are intended to:

- 1.) Provide jurisdictions with information about the impact large-scale projects have on meeting our regional goals and addressing needs on the regional transportation system;
- 2.) Improve transparency to the public about the return on investment they receive by building regional projects;
- 3.) Help identify a pipeline of multi-modal regional transportation projects to address regional needs and public priorities, and maximize progress toward the region's shared vision and goals for our transportation system.

The project-level criteria, developed based on the adopted RTP goals and objectives, will first be tested and refined on a small subset of capital projects recommended by jurisdictional staff for inclusion in the RTP during the first Call for Projects. For the pilot phase, Metro staff recommend that application of the draft criteria be limited to a small number of capital projects submitted by each sponsoring agency. The city of Portland, ODOT, TriMet, Port of Portland and each county will be asked to apply the criteria to at least five of their respective project submittals. All other agencies will be asked to apply the criteria to at least one of their respective project submittals. During the second Call for Projects phase in 2018, Metro staff are recommending that all capital projects greater than \$10 million be evaluated, unless exempted as outlined in the criteria.

## BACKGROUND

### How the project evaluation criteria will be used

The project-level criteria provide information as to how the project helps advance the goals and objectives of the RTP. At no point will the project evaluation criteria be used to determine whether a project moves forward or not, or where it fits in a development timeline. The criteria are intended to simply provide information in a consistent, mode-neutral way. This information can then be used by policy-makers to identify regional priorities for future funding. The project-level criteria will also allow local jurisdictions to make better informed decisions to finalize the projects and programs they will recommend for the 2018 RTP (e.g., timing, phasing, and constrained vs. strategic project lists) in 2018.

The criteria work in conjunction with the system performance evaluation and transportation equity analysis that will be conducted on the Constrained RTP Investment Strategy and the Strategic RTP Investment Strategy. They provide a project-level look at how major projects impact our overall transportation system performance.

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### Use of the score

In order to compare "apples to apples," when the projects are presented they will be grouped and reported with similar project types. This means bike projects will be presented with other bike projects, road projects will be presented with other road projects, and so on. Local agency staff can then use that information to identify refinements to the initial project lists (e.g., timing, phasing, and constrained vs. strategic project lists) in 2018 to address deficiencies identified through the system evaluation and/or the transportation equity analysis.

The RTP Performance work group will conduct the initial review of the pilot criteria in Fall 2017 to identify potential adjustments to the measures and criteria for consideration by the regional technical advisory committees. Recommendations from the technical committees will be brought forward for consideration by JPACT, MPAC and the Metro Council in advance of the final evaluation.

### Steps to determine projects to include in the transportation plan

Local jurisdictions and county coordinating committees will play the strongest role in determining what projects are put forward for inclusion in the plan. After agencies determine their priority projects (dependent on the funding projections), agency and public input, technical analysis (e.g., the system performance and transportation equity analysis), and discussion by the Metro Council and regional policy advisory committees will help shape the final list in 2018.

In January 2018, the initial list of projects proposed by agencies will be shared with the general public, along with findings from the system performance and transportation equity analysis, for comments and input. Based on the input and any updates to the available funding forecast, the initial list of projects in the RTP will be updated by agencies for the final draft Regional Transportation Plan in April 2018. At that time, all capital projects greater than \$10 million in cost will apply the refined criteria, unless otherwise exempt as outlined in the updated criteria based on further discussion and recommendation by TPAC and MTAC in Fall 2017. The final draft project list will undergo a second round of system performance and transportation equity analysis and a final round of agency and public input before adoption in 2018.

### **DRAFT 2018 RTP PROJECT CRITERIA PROPOSED FOR TESTING** *(The criteria are listed alphabetically)*

1. AIR QUALITY AND CLIMATE CHANGE | 10 POINTS
  2. CONGESTION RELIEF | 10 POINTS
  3. ENVIRONMENTAL PROTECTION | 10 POINTS
  4. EQUITY AND ACCESS TO OPPORTUNITY | 10 POINTS
  5. FREIGHT AND GOODS MOVEMENT | 10 POINTS
  6. JOBS AND ECONOMIC DEVELOPMENT | 10 POINTS
  7. PLACEMAKING AND 2040 CENTERS SUPPORT | 10 POINTS
  8. READINESS AND COST-EFFECTIVENESS | 10 POINTS
  9. TRANSPORTATION SAFETY | 10 POINTS
  10. TRAVEL OPTIONS | 10 POINTS
- BONUS: TRANSPORTATION RESILIENCY | 5 POINTS

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### **Exemptions from pilot project evaluation**

The following projects are specifically exempt from the pilot:

- 100% locally funded projects
- 2015-2018 and 2019-21 Regional Flexible Funds Allocation (RFFA) funded projects, including:
  - Three priority bottleneck projects (I-5/Rose Quarter, OR 217, and I-205 widening – Ph. 1: I-205/Abernethy Bridge and Ph. 2: I-205 mainline);
  - Two priority transit projects (the Southwest Corridor and Division Transit projects); and
  - TBD active transportation projects selected by JPACT and the Metro Council for project development
- Freight rail and marine terminal projects
- Stand alone Intelligent Transportation Systems and Active Traffic/Corridor Management projects
- Programmatic activities such as the TOD program, transportation demand management programs, the Regional Travel Options program, etc.
- Transit maintenance and operations projects that do not add capacity, such as transit vehicle purchases and replacements, rail track reconfiguration, operational upgrades, transit garage upgrades, etc.
- Road maintenance and operations projects that do not add capacity, such as rehabilitation of bridge mechanical system, bridge painting, bridge deck repair, guardrails, etc.
- Corridor refinement plans, area studies and other planning-focused projects