

# Memo



**Metro**

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Date: Monday, January 08, 2018  
To: JPACT and interested parties  
From: Dan Kaempff, Principal Transportation Planner  
Subject: DRAFT 2018 Regional Travel Options Strategy

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## Purpose

Introduce the first draft of the 2018 Regional Travel Options (RTO) Strategy to JPACT, and seek their input on the updated direction for the RTO program as defined in the Strategy.

## Background

RTO is the region's transportation demand management program and is a component of the Congestion Management Process. The RTO program supports the land use and transportation policy framework envisioned in the 2040 Growth Concept, and further defined through the Regional Transportation Plan (RTP). RTO works to increase people's awareness of non-single occupant automobile options and to make it easier to use those options. The RTO program maximizes the return on the region's investments in transit service, sidewalks and bicycle facilities by encouraging travel using these modes through education of their personal and economic benefits. It also helps to reduce demand on the region's streets and roads, thus mitigating auto congestion and reducing greenhouse gas emissions.

Metro coordinates the work of cities, counties, transit agencies, non-profit community organizations and other partners that conduct a variety of efforts in support of the region's RTO policy, goals and objectives. RTO policy guidance is provided through a Strategic Plan that further defines the region's transportation demand management policy as laid out in the RTP.

Funding for the RTO program comes from two sources. The bulk of funding comes through a Step 1 Region-wide Investment allocation of Regional Flexible Funds (RFF). Additional funding for marketing and community outreach activities is provided through a grant from the Oregon Department of Transportation (ODOT). Funding levels for the Federal Fiscal Years (FFY) spanning from 2019-2021 are detailed below in Table 1.

*Table 1 – Regional Travel Options funding (FFY 19-21)*

Source	Federal amount
RTO – RFFA	\$7,789,811
RTO – SRTS	\$1,500,000
ODOT (estimated)	\$622,695
<b>Total:</b>	<b>\$9,912,506</b>

As part of the 2019-2021 RFF allocation process, JPACT and Metro Council made the policy decision to increase the amount of funding invested in the RTO program in order to respond to state and regional initiatives. To increase the region's ability to respond to the state mandate to reduce greenhouse gas emissions, as defined through the Climate Smart Strategies (CSS), the RFFA allocation was increased by \$250,000.

And, in response to input from a regional coalition of cities and community organizations, JPACT and Metro Council's RFFA decision included an additional \$1,500,000 for the implementation of a regional Safe Routes to School (SRTS) program to fund educational efforts at the region's public schools.

The RTO program has been guided by a Strategic Plan, developed in collaboration with the program's stakeholders and adopted by JPACT and Metro Council, since 2003. The 2018 RTO Strategy is the fourth iteration of the program policy, goals and objectives. It updates and refines these goals and objectives to better align the RTO program with new policy direction from Climate Smart Strategies, the 2014 and forthcoming 2018 editions of the Regional Transportation Plan and Metro's Regional Equity Strategy.

A key element of the updated Strategy is new direction for expanding the program through enhancing the capacity of the region's cities, counties, universities and not-for-profit community organizations to deliver RTO programs. It also provides the foundation for supporting communities and school districts with their local SRTS programs.

### **Plan Development Process**

In March 2017, Metro staff provided TPAC with a preview of the proposed process and policy issues to be discussed in the update of the RTO Strategy. Prior to the TPAC discussion, staff identified five policy issues that were seen as critical to the continued success and relevance of the RTO program, and responded to new policy direction via CSS, the 2018 RTP, and JPACT/Metro Council direction related to the 2019-21 RFFA process. The five issues discussed were:

1. Growing the program's reach in Suburban Communities
2. Envisioning the role Technology should play
3. Developing a regional Safe Routes to School program
4. Enhancing and refining the regional Collaborative Marketing effort
5. Reaching out to new Community Partners to build more diverse means of reaching the public

TPAC affirmed these five policy areas, as well as the overall planning process and direction laid out by staff for the Strategy update.

Subsequently, Metro issued a RFP for qualified third-party contractors to conduct public outreach and research, and to write and produce the 2018 RTO Strategy. Alta Planning + Design was chosen and awarded a contract in May 2017.

During the summer of 2017, Alta gathered input through several methods aimed at capturing a broad and diverse range of opinions and insights from stakeholders regarding the RTO program. These methods included:

- Research of peer programs from outside the Portland region to gather insights and experience that could be useful in how Metro manages and evaluates the RTO program, and to help shape future program policy direction.
- Interviews with stakeholders who had current or past experience as RTO funding recipients, or who could likely be future RTO partners. These interviews were intended to listen to experiences from partners for their insights on what in the current RTO was working, and what were areas to improve upon, modify or expand.
- A series of public workshops focused on the five policy issues identified above to gather input from regional stakeholders. These workshops gave participants the opportunity to

provide their insights on how the program should respond and adapt to address these issues.

### **Changes from the 2012-17 RTO Strategic Plan**

Based on input and feedback collected through the above means, the 2018 RTO Strategy recommends several changes or refinements to previous program direction as previously defined in the 2012-2017 RTO Strategic Plan.

#### *1. Alignment with regional policy direction*

The RTO program is a key strategy to implement the region's transportation and land use policy, and to respond to the state's mandate to reduce greenhouse gas emissions.

Goal 4, Objective 4.4 of the 2014 RTP directs the region to include investments in Demand Management as a means of more effectively and efficiently managing the transportation system. This goal specifically references telecommuting, walking, bicycling, transit, carpooling, and using techniques that encourage shifting automobile trips away from peak hours.

The Climate Smart Strategy, adopted by Metro Council in 2014, also includes investments in the RTO program among the actions Metro can take to reduce greenhouse gas emissions.

In June 2016 Metro adopted the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. The strategic plan focuses on removing barriers for underserved communities and improving equity outcomes for these communities by improving how Metro works internally and with partners around the Portland region.

#### *2. Expanding the program and creating new partnerships*

Two of the policy themes discussed in the initial phases of the Strategy development centered on how to reach new audiences. One method for this is to create new partners and local programs in those portions of the region where little or no RTO activity has occurred, or expand existing efforts where there is identified potential. Another is to build new partnerships with community organizations and other groups which share goals and objectives with the RTO program.

The 2018 RTO Strategy lays out a series of objectives focused on building new partners and encouraging innovation in partners' work, to allow for new methods of reaching the public to emerge that are responsive to local needs and circumstances, and that prioritize serving communities of color, persons with low-English proficiency, low-income households, older adults, youth, and people with disabilities.

Further, the Strategy provides further guidance to partners through a 0-5 scale called the Travel Options Capability Index (see page 43 of the draft RTO Strategy). The Index illustrates how partners can begin and grow RTO local programs through a series of indicators that delineate the various components of successful efforts.

#### *3. Regional Safe Routes to School program direction*

Policy direction from the 2019-21 RFFA process allocated \$1,500,000 for the development and implementation of a Regional Safe Routes to School program. The intent behind this funding was to support educational programs in the region's schools that teach and encourage children to walk, bicycle or skate to school.

Many similar regional SRTS programs exist around the country to serve as a model for Metro to follow. Key components of these program include training children on safe crossings of streets, events (such as Walk/Bike to School days) to raise awareness and interest among children and parents, organizing “walking school buses” (e.g. groups of children, led by parents, walking or cycling to school), and other educational and outreach efforts aimed at reducing auto trips to schools and improving student health.

While the RFFA policy direction did not provide specific, detailed direction on how Metro should develop a SRTS program, a general outline of what the program might entail was discussed during the RFFA process. Housing the SRTS program within the RTO program structure would enable Metro to leverage its existing grant-making capabilities to allocate funding to the region’s school districts and local governments. In addition, Metro is in a position to provide regional coordination and technical assistance to help begin, grow and strengthen local efforts.

Participants at policy workshop #3, which focused on SRTS, were largely stakeholders working directly with SRTS programs. They were asked to look at five different program scenarios and discuss which one(s) would best support their needs and vision for SRTS, or if there were other models for program delivery that should be considered. (The scenarios are attached to this staff report as Attachment 1.) Based on their insights, as well as experiences working with other regions on SRTS programs, Alta developed a framework for Metro’s implementation and administration of the region’s SRTS program.

The proposed SRTS implementation strategy is detailed within the draft 2018 RTO Strategy document, beginning on page 29. The implementation strategy defines Metro’s role in coordinating and supporting partners’ SRTS outreach programs. It recommends additional support staff at Metro as well as a third-party contractor to conduct coordination activities, develop implementation tools and templates, and provide technical assistance to local programs and practitioners.

#### *4. Defined approach to using Technology*

During the timespan of the 2011-17 RTO Strategic Plan, the number of Americans with smartphones more than doubled. Approximately 80 of US residents now use these devices, and combined with dwindling sales of desktop and laptop computers, it’s clear that smart, mobile technology has forever changed the way we communicate and access information.

This development has had direct impacts on the RTO program. Technological developments have created new ways for people to access travel information, make travel choices, and accessing and paying for transportation. RTO partners have considered various means of using these tools to help reach additional people and further their work.

The Strategy outlines how the RTO program should support Metro’s and our partner’s work with emerging technologies, and identifies the types of projects that best align with the program’s mission and goals. It also creates opportunities to learn from and deploy new technologies, with the goals of gaining information and improving the overall program.

#### *5. Implementation and funding methodology*

The Strategy defines an updated direction for the RTO program that builds on its historical success while recommending changes that can result in a growth in participation and a positive impact in helping the Portland region’s residents’ use of travel options.

Since its inception, the RTO program has been anchored by a number of key partners, committed to conducting programs aligned with the RTO mission. Over time, these partners have consistently engaged with the majority of residents served, delivered the bulk of the positive outcomes, and demonstrated innovation and excellence in their work.

The Strategy recommends changing the funding relationship with these key partners from one where funding is uncertain, due the nature of a competitive grantmaking process, which results in overall program outcomes are also uncertain, and replacing it with a system where funding is more certain, and grant agreements extend to three years, as opposed to the current two-year grant cycle.

Partners funded through such means would be subject to agreeing to higher standards of reporting and outcomes, with future funding being conditioned on their performance. In addition, they should have attained Level 3 or better status on the RTO Partners Capability Index (see pages 43-45 of the draft 2018 RTO Strategy). TPAC would take on an additional role to oversee the outcomes of these investments and make decisions on continuing partners' funding.

In addition to this funding allocation, a smaller amount of RTO funds would remain in a competitive pot, to create opportunities for new partners and innovative concepts to emerge.

Further staff and TPAC work is needed post adoption of this Strategy to refine and implement this proposed funding structure.

### **Comments and input to the draft Strategy**

Staff presented the draft Strategy at a joint TPAC/MTAC workshop on January 3, 2018. The key points of discussion and staff responses from that presentation are summarized in Attachment 2, "TPAC/MTAC Workshop Comments."

Input from the January 3 workshop and from the JPACT discussion will be incorporated into a second draft Strategy to be released for comment in early February. This comment period is scheduled from February 5-23 and will provide stakeholders and interested parties the opportunity to help shape the final 2018 RTO Strategy.

Further discussion at TPAC and JPACT, and adoption by JPACT and Metro Council is scheduled to occur through the spring of 2018, as outlined below.

### **Schedule and deliverables**

January	TPAC/JPACT briefings on first draft Strategy
February 5-23	Stakeholder comment opportunity on second draft Strategy
March 9	Requested TPAC recommendation of final Strategy to JPACT
April 19	Requested JPACT action to adopt final Strategy
May	Council action to adopt final Strategy requested

### **Implementing the 2018 RTO Strategy**

The adoption of this proposed Strategy will bring about a number of changes to the RTO program, primarily related to how funding is allocated to partners, and how to best implement the region's SRTS program.

The draft Strategy document creates a framework for how funding can be allocated to better achieve outcomes that are aligned with regional goals and objectives. But, as a strategic direction document, it does not provide specific implementation details for how exactly to do that.

Metro will work with TPAC to develop, consider and implement program changes to accomplish these goals for both the regular RTO funding and the SRTS program. This work will commence in the Spring of 2018 and be wrapped up in time to inform the funding allocation process for projects beginning July 1, 2019.

Over time, as experience is gained and results are evaluated from this new funding strategy, further work may be necessary to modify and improve it. The Strategy allows for flexibility over the 10-year life span of this plan for adjustments within the parameters of the goals and objectives.



## Metro Regional Travel Options Strategy Update

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### DRAFT SRTS Scenarios

**November 28, 2017**

With newly dedicated funding to support Safe Routes to School (SRTS), Metro is considering scenarios for establishing and implementing a regional SRTS program that supports local efforts.

The following scenarios were developed as part of Metro's Regional Travel Options (RTO) Strategic Plan update. Each of the five scenarios considers potential funding and investment strategies Metro may consider moving forward. The scenarios describe Metro's role, in terms of a full-time employee's salary, plus staffing costs. Each scenario is ranked by effectiveness for VMT reduction, equity support, regional SRTS programming, and how well it aligns with the RTO program-wide goals. Each scenario also includes a detailed pros and cons list.

The scenarios were developed through best practices in regional SRTS programs, from stakeholder feedback at workshops and interviews, as well as by regional SRTS practitioners and key Metro RTO staff.

The Metro RTO Strategy Update project team recommends scenario 5, which includes both additional staff support at Metro as well as a third-party contractor that would conduct coordination activities, develop implementation tools and templates, and provide technical assistance to local programs and practitioners.

		Metro's Role	Reduce VMT via direct program delivery	Equity: Build Partners' capacity	Regional SRTS Program (coordination & support)	Evaluation toward RTO program-wide goals	Pros	Cons
Scenario 1	Third-party SRTS coordinator through a contractor	0.25 FTE Contract mgmt. & mgmt. of local project delivery	**	***	***	***	Brings technical expertise and (potentially) existing relationships Can connect districts/cities/schools across boundaries Dedicated person/group may result in more follow-through and ownership of program Lower overhead and administrative cost Provides added capacity at an organization	Creates an added step of communicating with Metro, as they are outside of Metro Does not add capacity at Metro; outsources the work Potential for higher turnover and more time spent building relationships with partners Potentially less effective for forming local relationships between cities & districts
Scenario 2	Primary SRTS Coordinator housed at each County*	0.5 FTE Contract mgmt & mgmt. of local project delivery	**	***	**	**	Could spur inter-county coordination, build existing relationships County could leverage existing SRTS programs at cities Could scale up existing local programs in more context-sensitive ways Could leverage County HHS and other agencies	Potentially less internal support & expertise for coordination position Challenging to coordinate between counties Less region-wide coordination & sharing best practices/lessons learned
Scenario 3	Metro SRTS staff person	1 FTE mgmt. of local project delivery; technical assistance, coordination	**	**	***	***	More regional scalability of programming (i.e. campaigns, resources) Could leverage existing Metro materials, knowledge, working groups, communication support Metro employment opportunity may attract more experienced candidates Offers region-wide support, evening gaps in expertise between counties/cities	Potentially expensive Significant amount of work for a single individual; limited ability for coordination and technical support Creation of useful, supportive relationships with practitioners around the region may take some time for staff to develop Potentially less effective for forming local relationships between cities & districts

\* Note: All scenarios will involve some form of SRTS coordination at the County level, whether by supporting a County staff position, providing county-specific coordination and technical assistance based on the year-to-year needs at each County. Scenario 2 differs by housing the main SRTS coordinators at the Counties, rather than regionally.



Description		Metro's Role	Reduce VMT via direct program delivery	Equity: Build Partners' capacity	Regional SRTS Program (coordination & support)	Evaluation toward RTO program- wide goals	Pros	Cons
Scenario 4	Local Implementation	0.25 FTE mgmt. of local project delivery	*	**	*	*	Local providers could collaborate via task force meeting or subcommittee of CMG Uses existing staffing & structure at Metro; no new programs More money available for sponsorship events and programs and pass through money Cities/districts/schools develop unique and context-sensitive programs based on their internal direction and interest	Limited ability to manage and coordinate to ensure regional outcomes are met Would continue to be an ad hoc process as cities/districts/schools became interested in implementation Would limit development of region wide resources Most susceptible to high turnover of local implementers
Scenario 5	Third-party contractor with Metro staff person (hybrid of Scenarios 1+3)	0.5 FTE contract mgmt; mgmt. of local project delivery	***	***	***	***	Good balance of regional knowledge & Metro support with technical assistance & local, practioner-level knowledge Flexible with program needs (i.e. early program development, later years primarily program delivery) Could hire new staff person ½ time on SRTS and ½ time on CMG and technical assistance for local providers	Potentially less effective for forming local relationships between cities & districts



## Metro Regional Travel Options Strategy

### TPAC/MTAC Workshop Comments

January 4, 2018

Table 1 below summarizes the key comments and discussion from the joint Transportation Policy Alternatives Committee (TPAC) and the Metro Policy Advisory Committee (MTAC) work session on January 3, 2018. These changes will be addressed prior to the public review draft in February, along with additional comments from the Joint Policy Advisory Committee on Transportation (JPACT).

*Table 1. TPAC/MTAC Work Session Comments and Metro RTO Strategy Team Responses*

TPAC/MTAC Comment	Metro RTO Strategy Team Response
1. Need to more clearly consider the different needs of aging populations: access to services, lack of mobility, etc.	"Older adults" are considered throughout the plan as important to specifically address for equity reasons. See page 46 of the draft RTO Strategy. We can add data about the need for mobility options for older adults.
2. Consider taking a more localized/project-based approach, rather than aiming to change regional VMT.	We will clarify that the RTO program is one element of the larger approach to achieving regional VMT reduction goals, working along with infrastructure and service improvements, pricing, and other approaches. We will also better clarify regional data and trends vs. data from RTO participants.
3. Goals should more clearly state why they are important and what they will achieve; they are too much like objectives and actions.	We will add context to the goals from the context provided in the document. In particular, we will clarify that VMT reduction is a measureable proxy for livability; the overarching goal is to provide cleaner air and water, healthier populations, and to improve safety.
4. Clarify what the RTO program does NOT do: shuttles, infrastructure improvements, etc.	We will add language to the introduction that defines the limits of the RTO program. RTO is the regional "brand name" for transportation demand management, which is defined as actions aimed directly at changing people's travel behavior through means other than building infrastructure. TDM works in conjuncture with infrastructure improvements to increase the number of single occupant vehicle miles traveled and non-auto mode split.
5. Consider focusing on workplace access and shuttles.	See above re: clarifying what is included in RTO and what is not included. The Plan provides the types of activities funded by RTO, which includes commuter trips. Much of the program's emphasis has been and remains on addressing commute trip needs. A deliberate decision was made some years ago to not use RTO funding to directly fund shuttle service, as the costs of providing such service is quite high, and the regional need was far greater than the available funds.

TPAC/MTAC Comment	Metro RTO Strategy Team Response
6. Discuss what the RTO program could do with additional funding.	Potential ideas: Increase funding available for local programs, combined with increased technical support from Metro; implement regional-scale programs such as individualized marketing or vanpool.
7. Provide background to the Map of Opportunities and clarify why the identified areas are designated as having high access to travel options.	The information on the source and data analysis is described in the map captions, foot notes and text discussion in the RTO Commute Report <sup>1</sup> from which these were drawn. If further clarification is needed beyond the Commute report information, we can write up a description. We will add a highly detailed figure caption to each image/table/chart. It's important to note that this information is only one of a number of sources of information that stakeholders can use to develop programs.
8. Be more clear about how Metro can help communities meaningfully engage with the process.	We will develop an Executive Summary that provides a brief overview of the RTO program and its history, the problem statement, the Strategy recommendations, and how partners can get involved in the program moving forward.
9. Clearly state how the RTO program currently impacts the community and provides benefits.	This information is included in Chapter 1. We will include this as important context in the Executive Summary, to be included in the draft released for comment in February.
10. If the overall goal of the program is to manage demand, state which of the goals is most effective.	The plan contains data supporting each of the goals. We will more explicitly state that the focus on areas of opportunity, higher-capability partners, and partners with a proven track record of success are the most likely approaches to reduce demand and SOV use.
11. Provide a clear problem statement upfront to explain why the shift in the program is necessary.	Agree; we will make this more explicit and include it in the forthcoming Executive Summary.
12. Provide more context and source information for the mode split chart.	See above comment.
13. Discuss how the RTO program can work with STIF funding and coordinate through TriMet.	We are happy to collaborate with TriMet and other STIF service providers to help improve people's access to transit. We will add language to the Strategy which indicates this as an opportunity and work with TriMet and other partners on coordination.

<sup>1</sup> <https://www.oregonmetro.gov/sites/default/files/2017/09/20/Metro%20Commute%20Report%20FINAL.pdf>