

## STAFF REPORT

### IN CONSIDERATION OF RESOLUTION NO. 18-4886, FOR THE PURPOSE OF ADOPTING THE 2018 REGIONAL TRAVEL OPTIONS STRATEGY

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Date: April 4, 2018

Prepared by: Dan Kaempff

## BACKGROUND

Regional Travel Options (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 and funds 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. Since 2003, the RTO program has been guided a strategic plan to guide the investment of Regional Flexible Funds (RFF) and ODOT funds that are allocated to this regional effort. The strategic direction is updated periodically to ensure the program is aligned with changes in regional policy and responds to the public's changing travel needs.

As part of the 2019-2021 RFF allocation process, JPACT and Metro Council made two policy decisions to increase the amount of funding invested in the RTO program in order to respond to state and regional initiatives.

1. 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 RFF allocation was increased by \$250,000.
2. Also, in response to input from a regional coalition of cities and community organizations, JPACT and Metro Council's RFF allocation 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.

In response, the 2018 RTO Strategy updates the policy direction for the program and provides a framework for how funding can be allocated to better achieve outcomes that are aligned with regional goals and objectives.

In developing the 2018 RTO Strategy, Metro worked with Alta Planning + Design to lead a process with policymakers and stakeholders that affirmed the following five policy issues to be addressed:

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

Throughout the spring and summer of 2017, Alta conducted a series of stakeholder workshops organized around these five policy issues. The feedback gathered at these workshops was used to develop a draft 2018 RTO Strategy document. Incorporating input from TPAC and JPACT, an updated draft Strategy was released for comment February 5-27.

The input received from stakeholders during the comment period has been incorporated into this version of the 2018 RTO Strategy, as documented in Exhibit A.

### **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 49 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.

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, found on page 53. 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 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 Core 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 Core partners. Currently, funding is allocated through a competitive grantmaking process, which means funding is uncertain from grant cycle to grant cycle. This means that overall program outcomes are also uncertain, and that partners spend time on raising funds that could be better spent on delivering programs. The Strategy recommends replacing the competitive method with a system where funding is certain provided performance metrics are being attained, and grant agreements are for three years, as opposed to the current two-year grant cycle.

Core 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 must have attained Level 4 or better status on the RTO Partners Capability Index (see pages 49-50 of the 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 portion of RTO funds would remain in a competitive process, to create opportunities for new partners and innovative concepts to emerge. And sponsorship and marketing support for partners' efforts would continue as well. Also, to help Emerging partners grow in their aspirations to develop local RTO programs and attain Core partner status, a portion of funds are identified to support planning and initial program efforts.

Upon adoption of the 2018 RTO Strategy, Metro will work with TPAC work to refine and implement this proposed funding structure.

## ANALYSIS/INFORMATION

1. **Known Opposition** None
2. **Legal Antecedents** 1991 Federal Clean Air Act Amendments. The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474 in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

TDM Relationship to DEQ's Ozone Maintenance Plan (Governor's Task Force on Motor Vehicle Emissions Reduction (HB 2214)). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2969B) provides TDM policies and objectives that direct the region's planning and investment in the regional TDM program.

2035 Regional Transportation Plan. The federal component of the plan was approved by Metro Council Ordinance No. 10-1241B on June 10, 2010. The RTP establishes system management and trip reduction goals and objectives that are supported by the RTO program strategies.

Regional Travel Options Strategic Plan. The 2006 RTO Strategic Plan established a new vision for the region's transportation demand management programs and proposed a reorganized and renamed Regional Travel Options program that emphasized partner collaboration to implement an integrated program with measurable results. JPACT and the Metro Council adopted the plan through Resolution No. 04-3400, which also renamed the TDM Subcommittee the RTO Subcommittee, and was adopted in January 2004. Subsequent Strategic Plans (2008-2013) were adopted through Resolution No. 08-3919 on April 3, 2008, and (2012-2017), adopted through Resolution No. 12-4349 on May 24, 2012. The 2012-2017 Strategic Plan brought several changes to the program, including restructuring existing program funding categories and disbanding the RTO Subcommittee.

2014 Regional Transportation Plan. The plan was approved by Metro Council Ordinance No. 14-1340 on July 17, 2014. The RTO program is included in the strategies identified in the RTP Transportation

System Management and Operations vision, an integrated set of transportation solutions intended to improve the performance of transportation infrastructure.

2018-2021 MTIP. Programmed funding to the RTO program for FF years 2018-2021, and documents the authority to sub-allocate funds to the program components. JPACT and the Metro Council adopted the 2018-2021 MTIP through Resolution No. 16-4702.

3. **Anticipated Effects** Adoption of this resolution will provide the policy direction, program goals and objectives that will guide the RTO program over the next 10 years (2018-2028).
4. **Budget Impacts** There are no anticipated impacts for Metro's current budget. The Strategy provides policy for determining future program grant awards of program funds adopted in the 2018-2021 MTIP by Resolution 16-4702. The Strategy recommends consideration in future budget decisions of the addition of Metro staff positions to better provide technical support to regional partners and help achieve the program goals and objectives.

#### **RECOMMENDED ACTION**

Adopt the 2018 Regional Travel Options Strategy and approve the goals and objectives of the Strategy.

## 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 (1 asterisk = low effectiveness, 3 asterisks = high effectiveness). 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.

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 1	Third-party SRTS coordinator through a contractor	0.25 FTE Contract mgmt. & grant mgmt	**	** *	** *	** *	<ul style="list-style-type: none"> <li>Brings technical expertise and (potentially) existing relationships</li> <li>Can connect districts/cities/schools across boundaries</li> <li>Dedicated person/group may result in more follow-through and ownership of program</li> <li>Lower overhead and administrative cost</li> <li>Provides added capacity at an organization</li> </ul>	<ul style="list-style-type: none"> <li>Creates an added step of communicating with Metro, as they are outside of Metro</li> <li>Does not add capacity at Metro; outsources the work</li> <li>Potential for higher turnover and more time spent building relationships with partners</li> <li>Potentially less effective for forming local relationships between cities &amp; districts</li> </ul>
Scenario 2	Primary SRTS Coordinator housed at each County*	0.5 FTE Contract mgmt & grant mgmt	**	** *	**	**	<ul style="list-style-type: none"> <li>Could spur inter-county coordination, build existing relationships</li> <li>County could leverage existing SRTS programs at cities</li> <li>Could scale up existing local programs in more context-sensitive ways</li> <li>Could leverage County HHS and other agencies</li> </ul>	<ul style="list-style-type: none"> <li>Potentially less internal support &amp; expertise for coordination position</li> <li>Challenging to coordinate between counties</li> <li>Less region-wide coordination &amp; sharing best practices/lessons learned</li> </ul>
Scenario 3	Metro SRTS staff person	1 FTE grant mgmt; technical assistance, coordination	**	**	** *	** *	<ul style="list-style-type: none"> <li>More regional scalability of programming (i.e. campaigns, resources)</li> <li>Could leverage existing Metro materials, knowledge, working groups, communication support</li> <li>Metro employment opportunity may attract more experienced candidates</li> <li>Offers region-wide support, evening gaps in expertise between counties/cities</li> </ul>	<ul style="list-style-type: none"> <li>Potentially expensive</li> <li>Significant amount of work for a single individual; limited ability for coordination and technical support</li> <li>Creation of useful, supportive relationships with practitioners around the region may take some time for staff to develop</li> <li>Potentially less effective for forming local relationships between cities &amp; districts</li> </ul>

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 grant mgmt	*	**	*	*	<ul style="list-style-type: none"> <li>Grantees could collaborate via task force meeting or subcommittee of CMG</li> <li>Uses existing staffing &amp; structure at Metro; no new programs</li> <li>More money available for sponsorship events and programs and pass through money</li> <li>Cities/districts/schools develop unique and context-sensitive programs based on their internal direction and interest</li> </ul>	<ul style="list-style-type: none"> <li>Limited ability to manage and coordinate to ensure regional outcomes are met</li> <li>Would continue to be an ad hoc process as cities/districts/schools became interested in implementation</li> <li>Would limit development of region wide resources</li> <li>Most susceptible to high turnover of local implementers</li> </ul>
Scenario 5	Third-party contractor with Metro staff person (hybrid of Scenarios 1+3)	0.5 FTE contract mgmt; grant mgmt	** *	** *	** *	** *	<ul style="list-style-type: none"> <li>Good balance of regional knowledge &amp; Metro support with technical assistance &amp; local, practioner-level knowledge</li> <li>Flexible with program needs (i.e. early program development, later years primarily program delivery)</li> <li>Could hire new staff person ½ time on SRTS and ½ time on CMG and grantee technical assistance</li> </ul>	<ul style="list-style-type: none"> <li>Potentially less effective for forming local relationships between cities &amp; districts</li> </ul>

\* 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.