

TO: Metro Council  
FR: Margi Bradway, Ted Leybold  
DATE: October 4, 2021  
RE: Council direction regarding new procedures for MTIP Amendments

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### **Introduction**

Metro Council initiated a discussion on how to better utilize the Metropolitan Transportation Improvement Program (MTIP) process to ensure the region's near-term investment program reflects the investment priorities – climate, safety, equity and congestion relief (mobility) – as identified in the 2018 Regional Transportation Plan (RTP). At its September 7, 2021 work session, Council members requested a proposal from Metro staff on both new short-term procedural actions as well as long-term policy and procedural actions developed through the 2023 RTP and 2024-27 MTIP processes. This evaluation proposal for MTIP amendments is complementary to the evaluation conducted on the package of projects included in the development and adoption of a new MTIP every three years.

### **New Short-Term MTIP Procedural Actions**

Between now and the development of the 2023 RTP, new procedural actions are proposed to better inform amendment decisions. The focus of the procedural actions is to evaluate whether projects added to the MTIP or projects in the MTIP being proposed for modification reflect and advance the four investment priorities in the 2018 RTP. The current process ensures a proposed amendment meets eligibility requirements for inclusion in the MTIP and simply identifies how a project may contribute to an RTP performance goal. Council expressed interest in focusing additional analysis efforts on larger projects that were likely to have impacts on motor vehicle capacity and/or greenhouse gas emissions.

To meet this direction, Metro staff propose the following changes.

Projects that warrant further analysis will be based on meeting the following thresholds:

- **Cost:** total project cost is expected to be approximately \$100 million or greater<sup>1</sup>, *and*
- **Capacity:** project will add motor vehicle lane capacity (including auxiliary lanes) to the transportation system in the region, or add a system management tool that is likely to have a significant impact on motor vehicle travel demand or capacity (e.g. pricing).

Metro staff will make a determination on whether a project meets the threshold that requires further analysis.

### **Supplemental Analysis/Evaluation Components**

The supplemental analysis will consist of the following two elements.

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<sup>1</sup> A less expensive project may be subject to the supplemental evaluation if it is a segment or component part of a series of planned motor vehicle capacity project(s) within a corridor or sub-area.

## **1. Proposed policy review on priority transportation investments**

### **State policy**

For projects on the ODOT system that meet the cost and capacity threshold, Metro will request documentation on how the proposed amendment addressed and is determined to be consistent with statewide Oregon Highway Plan (OHP) Policy 1G and Action 1G.1: *“maintain highway performance and improve safety by improving system efficiency and management before adding capacity.”*

### **Regional Transportation Plan policy**

RTP Policy 18 states that *“Prior to adding new throughway capacity beyond the planned system of through lanes, demonstrate that system and demand management strategies, including access management, transit and freight priority and congestion pricing, transit service and multimodal connectivity improvements cannot adequately address throughway deficiencies and bottlenecks.”*

Pages 3-71 and 3-72 of the 2018 RTP regarding the Congestion Management Process state that the *“The RTP calls for implementing system and demand management strategies and other strategies prior to building new motor vehicle capacity, consistent with the Federal Congestion Management Process (CMP), Oregon Transportation Plan policies (including Oregon Highway Plan Policy 1G) and Section 3.08.220 of the Regional Transportation Functional Plan (RTFP).”*

Metro will ask agency staff proposing an MTIP amendment to describe how the proposed project and the amendment is consistent with these regional policies.

## **2. Proposed performance assessment/evaluation**

To measure the how a project or an amendment to a project advances the RTP investment priorities, Metro staff considered a wide range of performance measures for both the short-term and the long-term that would provide the most relevant information regarding a project’s performance and consistency with the four RTP investment priorities of Equity, Safety, Congestion Relief, and Climate. Metro staff will work to develop the measures and analysis tools for a long-term approach to supplemental MTIP amendment analysis and will utilize the development processes of the 2023 RTP and 2024-27 MTIP to do so, with initial ideas for performance measure development described in Appendix A. For the short-term, Metro staff recommend using information and tools that are more readily available.

### **Modified assessment for a Preliminary Engineering project phase**

Staff will assess the project based on the information available at the time and initially screen for the appropriate level of performance assessment. Some proposed amendments to the MTIP fund only the preliminary engineering (PE) phase of a project. At this stage, the project design is often still conceptual. Prior to substantially completing the PE phase of work, the scope of the project is typically not completed enough for a detailed project performance evaluation. In these circumstances, the some of the performance measures described below may not be applicable or may need to be adjusted. Those measures are identified in the tables with footnotes.

Future project phases requesting inclusion in the MTIP by amendment, such as adding a right-of-way or construction phase of the project, will necessitate the project undergoing the full performance assessment.

## Equity

To measure equity in the context of the project, Metro staff will look at whether the project increases access to travel options in Equity Focus Areas and whether it has been identified as a priority transportation improvement by communities of Black, Indigenous, and People of Color (BIPOC) and low-income persons or communities. For projects that have progressed enough through preliminary engineering and environmental impact work and clearly defined a project scope and design elements, Metro staff will also measure and describe the change in accessibility to jobs and community places for projects substantially through the Project Engineering (PE) phase with defined project elements.

Increased safety provided by projects is also a priority equity consideration and is included as a part of the safety performance evaluation described below.

| Desired Outcomes  | Performance Measures  |
|---|---|
| Increased access to affordable travel options in Equity Focus Areas | Description of what the project contributes to building elements of the planned transportation network in equity focus areas per the RTP planned modal element network maps |
| Identified by the community as a priority                           | Description of whether it was included in the Regional Investment Measure project list, or was identified in the creation of a publicly developed plan(s) <sup>2</sup>      |
| Increased access to jobs and community places                       | Change in accessibility to jobs and community places by households in equity focus areas*   |

\*For projects that have completed PE or have clearly defined project elements that can be modeled. Still confirming ability to complete analysis in MTIP amendment timeframe.

## Safety

Current methods for evaluating safety impacts have been limited to measuring the amount and percentage of funding investment in the MTIP for projects that were developed specifically to address documented safety issues that contribute to fatal and serious injury crashes and include recognized safety countermeasures. Efforts to predict changes in crashes based on proposed projects are being developed and evaluated at the national level, but have not yet been tested or deployed locally and is therefore an evaluation tool proposed for long term action.

Investment and location information will be provided as impacted by the proposed amendment, and with break out by locations specific to high crash locations and equity focus areas.

| Desired Outcomes  | Performance Measures  |
|---|---|
| Reduce fatal and serious injury crashes for all modes of travel | Change in the amount of investment in Safety:<br>Programmed in the MTIP <ul style="list-style-type: none"><li>- Located in high injury corridors</li><li>- Located in high injury corridors in equity focus areas</li></ul> |
|   | Description of whether project location is a priority area for safety improvements and includes safety counter-measures*  |

\* For projects that have not completed PE, the description would be whether the project purpose is to address known safety issues and committed to assess and include appropriate safety counter measures.

<sup>2</sup> Publicly developed plan meets the guidelines of the adopted Metro Public Engagement Guidelines and project sponsor identifies comments from public or community organizations that indicate support of the project or the project's equity benefits.

### **Congestion Relief**

Short term evaluation of congestion relief will include qualitative descriptions on the proposed project's impacts to street connectivity, whether the project includes a robust Transportation System Management and Operations (TSMO) approach and associated project elements, and whether the project includes capital or programmatic elements that may increase auto trips or options to single occupant motor vehicle travel. Staff also proposes to provide model data results for a near-term year (e.g. 2027) on changes in vehicle miles traveled and travel time between major origin and destination pairs within the travel corridor in vicinity of the project for projects substantially through the PE phase with defined project elements.

| <b>Desired Outcomes</b>                              | <b>Performance Measures</b>   |
|--|---|
| Increased reliability                                | Impacts to street connectivity; additional connectivity generally improves reliability  |
|  | Description of any TSMO elements of project that will increase reliability from either recurring or non-recurring causes of congestion                                |
| Increased travel efficiency                          | Description of whether project scope includes a robust TSMO approach and project attributes/elements to increase efficiency (in addition to meeting CMP/OHP policies) |
|  | Change in VMT and travel time between major Origin/Destination pairs in vicinity of project*  |
| Increased travel options, decrease drive-alone trips | Description of project capital or programmatic elements that will increase access to travel options   |
|  | Description of project elements that may increase motor vehicle travel  |

\*For projects that have completed PE or have clearly defined project elements that can be modeled. Confirm ability to complete analysis in MTIP amendment timeframe.

Additional analysis in the short-term will not address congestion relief from additional motor vehicle capacity provided, but defers this as a long-term measure needing development of project level analytical tools that adequately consider or measure the potential dispersion of congestion to other parts of the roadway network and the potential of induced demand recreating congested conditions.

### **Climate**

Short term evaluation strategy for climate includes an analysis of whether the projects aligns with Metro's Climate Smart goals. In addition, the description of elements that will increase access to and use of multi-modal options will be provided. Staff also proposes to provide model data results for a near-term year (e.g. 2027) on changes in greenhouse gas emissions for projects substantially through the PE phase with defined project elements.

Metro staff continues to refine and update our current climate models for the 2024 RTP and will host an Expert Panel Review on best practices in greenhouse gas (GHG) modeling. In addition, Metro initiated discussion with the ODOT Climate Office regarding tools they are developing to

qualitatively rate projects for how they contribute or detract from climate goals based on the relevant attributes of the project.

| Desired Outcomes   | Performance Measures   |
|--|--|
| Progress towards meeting state mandated greenhouse gas emissions targets | Description of whether project scope includes capital or programmatic elements that will increase access to travel options based on adopted Climate Smart strategies |
| Reduced emissions from vehicles  | Description of project elements that may increase motor vehicle emissions  |
| Reduced drive alone trips  | Comparison of GHG emissions with and without project in 2024 or 2027*  |

\*For projects that have completed PE or have clearly defined project elements that can be modeled. Would not apply to PE phase as project scope not yet developed enough to perform the analysis. PE phase only projects may have different measure, such as a description of whether GHG emissions analysis is included in the project's PE phase scope of work. Still confirming ability to complete analysis in MTIP amendment timeframe.

### Council Feedback and Recommendations

Metro Council provided clear feedback that they would like more analysis of proposed MTIP amendments in the short term and long term based on outcomes identified in the RTP. Metro Council expects staff to provide this information, or work with the proposing agency to provide this information, for all projects over the threshold described above.

In the short term, Metro staff will work with the project lead agency proposing the project or amendment to present additional information in the amendment staff report that comes before Council. The staff report will also show that the amendment as proposed meets technical eligibility for approval. The additional analysis will be provided to Transportation Policy Alternatives Committee (TPAC), JPACT and Metro Council in the amendment approval process. Metro staff will also continue to work with the Council through the development of the 2023 RTP and the 2024-27 MTIP to update how we evaluate projects.

Metro Council also indicated that it would like to reconsider the four investment priority areas and how they are applied to projects as part of the 2023 RTP update. As part of the update to the 2023 Regional Transportation Plan Update, Metro staff will facilitate a process to:

- Revisit and redefine priority investment policies. This will include increasing specificity of desired outcomes and methods to measure performance of those outcomes, particularly methods that can be measured at the project scale.
  - Consider whether one priority area should be weighted more heavily than another
  - Use project criteria for the Call for Projects in the 2023 RTP, with the criteria based on outcomes identified by Council and JPACT
- Ensure that the RTP provides additional guidance on how short-term investments (the MTIP as a whole) should be evaluated to ensure they are implementing the RTP investment priorities.
- Work with JPACT and the Metro Council to update the 2024-27 MTIP and MTIP Administrative Procedures to better reflect how to implement the refinements and guidance from the 2023 RTP Update process.

Appendix A lists potential desired outcomes and performance measures that may be considered and further developed as the 2023 RTP and 2024-27 MTIP are developed.

## Appendix A: Potential Long-Term Approach to MTIP Amendment Analysis and 2023 RTP Development

### Equity

Provide the short-term outcomes and performance measures, plus:

| Desired Outcomes                              | Performance Measure   |
|---|---|
| Increased access to jobs and community places | Change in accessibility to jobs and community places by households in equity focus areas* |

\* Refining methods and assessing ability to conduct analysis within a timeframe compatible with the MTIP amendment process. Likely would not apply to PE phase only amendments as project scope may not yet be developed enough to perform the analysis.

#### Performance Measure description

Priority transportation outcomes identified by equity stakeholders include increasing access to jobs and community places that provide opportunity and services as an important outcome for new transportation projects. Metro staff will work to refine the methodology of this performance measure as it applies to individual projects and to make sure it can be performed in a timeframe compatible with MTIP amendment procedures.

Increased safety of the transportation system has also been identified as a priority transportation outcome by equity stakeholders for equity focus areas but whose performance measure is included below in the Safety section.

### Safety

Provide the short-term outcomes and performance measures, plus:

| Desired Outcomes  | Performance Measure  |
|---|--|
| Reduce fatal and serious injury crashes for all modes of travel | Forecasted reduction in crashes*<br><br>Forecasted reduction in crashes in equity focus areas* |

• Further investigating the Highway Safety Manual predictive crash tool and assessment of ability to conduct analysis within a timeframe compatible with the MTIP amendment process. Likely would not apply to PE phase only amendments as project scope may not yet be developed enough to perform the analysis.

#### Performance Measure description

There is a new analysis tool developed at the national level to forecast the reduction in crashes by a proposed project. Metro staff is investigating the potential use of this new tool for project level analysis.

## Congestion Relief

Provide the short-term outcomes and performance measures, plus:

| Desired Outcomes            | Performance Measure  |
|-----------------------------|--|
| Increased travel efficiency | Project addresses a recurring congestion issue and has a completed analysis of: <ul style="list-style-type: none"><li>- Potential dispersion of congestion to other locations on the system</li><li>- Potential for induced demand to recreate congestion on system and increase VMT</li></ul> |

### Performance Measure description

To address or measure congestion relief provided by additional motor vehicle capacity, a long-term measure and supporting analytical tools should be developed that adequately accounts for or measures the potential dispersion of congestion to other parts of the roadway network and accounts for the potential of induced demand recreating congested conditions in the future.

## Climate

Provide the short-term outcomes and performance measures, plus:

| Desired Outcomes  | Performance Measure   |
|---|---|
| Progress towards meeting state mandated greenhouse gas emissions targets<br><br>Reduced emissions from vehicles | Qualitative analysis of greenhouse gas emission reduction potential based on project scope attributes*# |
|   | Comparison of GHG emissions with and without project in 2024 or 2027*                                   |

\*Refining methods and assessing ability to conduct analysis within a timeframe compatible with the MTIP amendment process. Would not apply to PE phase as project scope not yet developed enough to perform the analysis. PE phase only projects may have different measure, such as a description of whether GHG emissions analysis is included in the project's PE phase scope of work.

# Tentative pending further investigation with ODOT Climate Office project analysis effort for the 24-27 STIP development.

### Performance Measure description

Discussions with Metro Council have begun on development of improved analytical tools to measure transportation impacts on climate. Metro staff is also coordinating with the ODOT Climate Office on tools they are developing to consider transportation investment impacts on climate. These discussions should lead to new proposals for climate impact measurement.