Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: November 23, 2022

To: Transportation Policy Alternatives Committee (TPAC) and interested parties

From: Kim Ellis, RTP Project Manager

Subject: Policy Framework and Draft Revenue Forecast for the 2023 RTP Call for Projects – RECOMMENDATION TO JPACT REQUESTED

PURPOSE

This memo provides an overview of the policy framework and draft revenue forecast for the 2023 RTP Call for Projects. The purpose of the Call for Projects is to collaboratively update the region's near-term and long-term investment priorities for the 2023 Regional Transportation Plan (RTP) to support regional goals for equity, safety, climate, mobility and economy.

ACTION REQUESTED

On December 2, the Transportation Policy Alternatives Committee (TPAC) will be asked to make a recommendation to the Joint Policy Advisory Committee on Transportation (JPACT) on the Policy Framework and the Project List Cost Targets for the 2023 RTP Call for Projects. Staff is seeking TPAC's recommendation on two parts:

1. Policy Framework for the 2023 RTP Call for Projects (Attachment 1)

2. Project List Cost Targets for the 2023 RTP Call for Projects (Attachment 2) *Note: Development of the draft revenue forecast and project list cost targets continues; updated information will be provided at the meeting.*

Pending JPACT action on recommendation from TPAC and Council action on recommendations from JPACT, Metro will issue the Call for Projects on January 6, 2023. The deadline for project sponsors to submit recommended updates to RTP project and program priorities to Metro is February 17, 2023.

BACKGROUND

A major update to the Regional Transportation Plan (RTP) is underway. The RTP is the blueprint for transportation in our region and a key tool for implementing the region's 2040 Growth Concept and Climate Smart Strategy. Together, these plans will help ensure that greater Portland thrives by connecting people to their jobs, families, schools and other important destinations and by allowing business and industry to create jobs and move goods to market.

The policy framework provided in **Attachment 1** reflects the culmination of more than two years of work by state, regional and community partners to develop a vision and goals, update policies related to mobility, high capacity transit, and pricing and identify regional transportation needs. The 2023 RTP Call for Projects responds to this direction as agency partners work together and with communities to update the investment priorities of the plan to address identified needs. **Attachment 2** describes the draft revenue forecast and project list cost targets. **Attachment 3** describes the overall process and approach for updating, assessing, and refining the list of projects and programs for the 2023 RTP consistent with the policy framework. **Attachment 4** provides draft project submission guidance to agency staff responsible for updating for submitting new and updated project information as part of the Call for Projects. The RTP Project Submission Guide includes two supplemental forms - a public engagement form and a congestion management process (CMP) documentation form – for agency partners to submit as part of the Call for Projects.

NEXT STEPS

A summary of key dates and next steps follows.

Dec. 2, 2022	TPAC recommendation to JPACT on Draft Policy Framework and Draft Project List Cost Targets for 2023 RTP Call for Projects
Dec. 6 and 7, 2022	Online RTP Hub orientation for agency staff responsible for submitting new and updated project information as part of the Call for Projects (a more in-depth training session will be offered on Jan. 9, 2023) (12/6 from 1-2:30 PM and 12/7 from 9-10:30 AM)
Dec. 14, 2022	MPAC discussion on Draft Policy Framework for 2023 RTP Call for Projects
Dec. 15, 2022	JPACT considers action on TPAC recommendation on Draft Policy Framework and Draft Project List Cost Targets for 2023 RTP Call for Projects
Dec. 15, 2022	Metro Council considers action on JPACT recommendation
Jan. 6, 2023	**RTP Call for Projects begins**
Jan. 9., 2023	Tentative: RTP Hub Training for agency staff responsible for submitting new and updated project information as part of the Call for Projects (10 AM-noon)
Feb. 17, 2023	**DEADLINE:** Project list updates and supporting information due
January to June 2023	Work continues to develop draft 2023 RTP and appendices for public review, reflecting feedback received throughout Phase 2 and Phase 3 of the update. Community based organizations start engaging community members in transportation priorities and telling community stories.
March-April 2023	Policymakers, regional advisory committees, community members and other stakeholders review and comment on draft priority projects and the high-level project assessment; this will include an on-line comment opportunity
	RTP System Analysis conducted
May 1, 2023	**DEADLINE:** Governing body project list endorsements due
May-June 2023	JPACT and Metro Council consider public input and technical findings and provide direction on finalizing draft RTP and list of project and program priorities for public review
July 1 to Aug. 14 2023	Public comment period on draft plan and list of project and program priorities with hearing(s)
Sept.-Nov. 2023	Metro staff document public comments received and work with TPAC and MTAC to develop recommendations for consideration by MPAC, JPACT and Metro Council
November 2023	JPACT and Metro Council consider adoption of the 2023 RTP

/Attachments

- Attachment 1. Draft Policy Framework for the 2023 RTP Call for Projects
- Attachment 2. Draft Revenue Forecast and Project List Costs Targets for the 2023 RTP Call for Projects
- Attachment 3. Draft Approach for 2023 RTP Call for Projects
- Attachment 4. Draft 2023 RTP Project Submission Guide

DRAFT Policy Framework for the 2023 Regional Transportation Plan Call for Projects

November 23, 2022

The Regional Transportation Plan brings city, county, regional and state priority transportation projects together to create a coordinated regional transportation priority list for the period from 2023 to 2045. It is a key step for these projects to qualify for potential state, and federal funding. All types of projects are included in the Regional Transportation Plan list – highways, key roads, transit, freight, biking and walking as well as programs. The current list includes more than 1,100 projects.

This document provides more information about the policy framework that will guide updating the list of Regional Transportation Plan project and program priorities. Dramatic changes have unfolded since the RTP was last updated five years ago, many documented in the 2023 RTP Emerging Transportation Trends Study. As greater Portland continues to emerge from the disruptions of the pandemic and respond to other urgent trends and challenges, the 2023 Regional Transportation Plan update provides allow levels of government to work together to deliver a better transportation future.

An outcomes-based approach

An outcomes-based approach means updating the plan's project priorities guided by a vision and goals that describe what communities want greater Portland to be in the future. Measurable objectives and performance targets are used to evaluate performance over time of the investments recommended in the plan and to monitor how the transportation system is performing between scheduled plan updates, which occur every five years.

Figure 1 shows the elements of this outcomes-based approach.

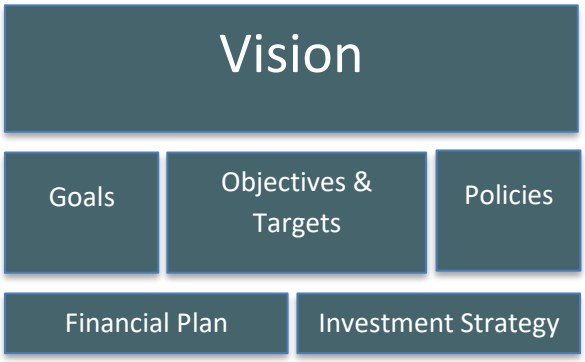


Figure 1. 2023 RTP outcomes-based planning approach

Vision and goals

The people of greater Portland have said they want a better transportation future, no matter where they live, where they go each day, or how they get there. The vision and goals, shown in **Figure 2**, describe what people have said is most important to achieve with the updated RTP – more equitable transportation, a safer system, a focus on climate action and resilience, a thriving economy and options for mobility. Developed by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council in 2022, this vision and five goals, along with other RTP policies, will guide updating the list of RTP project and program priorities.

Figure 2. 2023 RTP vision and goals

Policy Framework for the 2023 RTP Call for Projects
The policy framework for the Call for Projects includes:

- **RTP outcomes-based approach** described above;

- **Draft 2023 RTP vision and goals** developed by JPACT and Metro Council for the 2023 RTP**:**

  Goals (developed in 2022 by JPACT and Metro Council)
  - **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.

  - **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.

  - **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.

- **Supporting measurable objectives and performance targets** that the region wants to achieve with investments in the transportation system to realize the plan's vision and goals – these will continue to be reviewed and refined in 2023; and

- **Supporting policies** that guide planning and investment in each part of the regional transportation system to achieve the plan's vision and goals include:

  - **2040 Growth Concept map and supporting policies** that identify priority areas and investments to support current and planned land uses, including centers, downtowns and main streets, ports, industrial areas, employment areas, and other regional destinations that are accessible through a variety of multimodal connections;

  - **RTP transportation network maps and supporting RTP modal and design policies** that designate the regional system for transit, motor vehicle, freight, bicycle and pedestrian travel and priorities for investment;

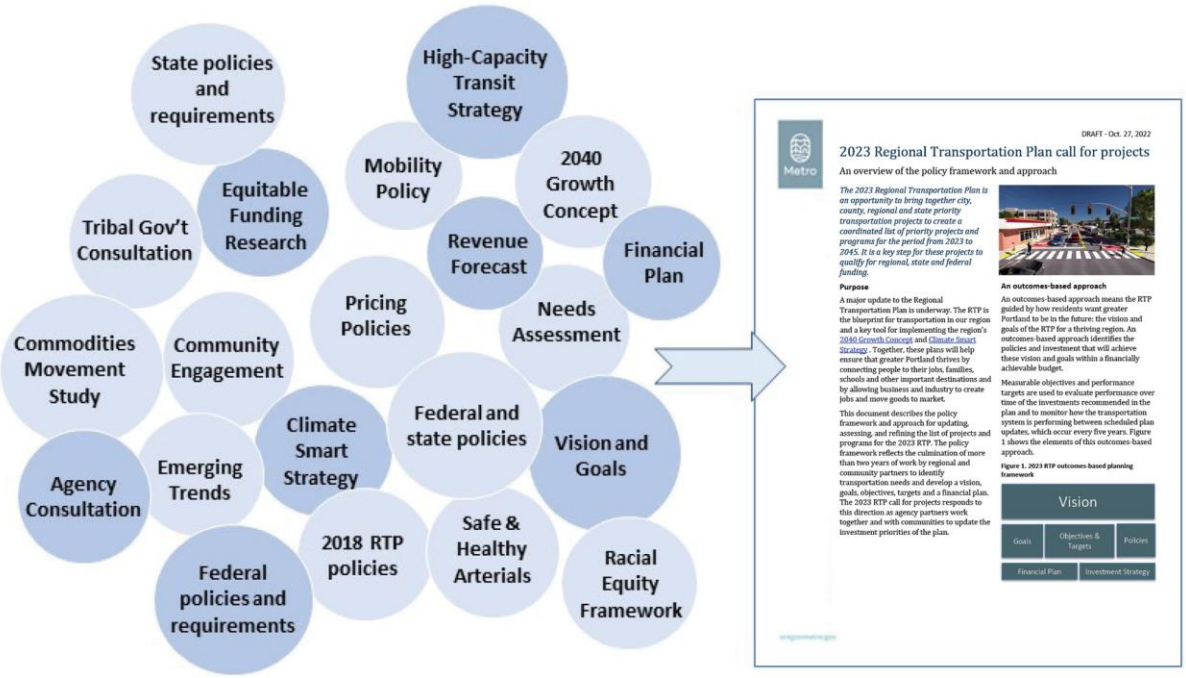
  - **Equity Focus Areas map and supporting RTP equity policies** that identify priority areas and investments to advance equity;

  - **High Injury Corridors and Intersections map and supporting RTP safety policies** that identify priority corridors to improve safety;

- **High capacity transit network map (draft) and supporting RTP policies (draft)** that identify priority corridors ready for high capacity transit investment; these will continue to be reviewed and refined in 2023;
- **Congestion management network map and supporting RTP congestion management policies** that identifies priority corridors to comprehensively manage congestion consistent with congestion management process policies in Chapter 3 of the RTP;
- **Draft policies related to pricing and regional mobility** that will continue to be reviewed and refined in 2023; and
- **Other existing Chapter 3 policies** that will be reviewed and may be refined in 2023.

In addition to the RTP policy framework, the call for projects is informed by public engagement, adopted regional plans, strategies, policies, federal and state policies and requirements, the RTP needs assessment, the revenue forecast, and other elements as illustrated in Figure 3**.** Many of these elements have been under development since the adoption of the 2018 RTP.

Figure 3. Elements informing the 2023 RTP call for projects



These elements come together to inform the call for projects and provide additional information to guide how investments in roads, bridges, bikeways, sidewalks, transit service and other needs are addressed and prioritized. The elements reflect extensive engagement with local elected officials, public agencies, Tribal governments, community-based organizations**,** business groups and the community at large.

Draft Revenue Forecast and Project List Cost Targets for the 2023 Regional Transportation Plan Call for Projects

November 23, 2022

Background and Context

Development of the draft revenue forecast and cost targets for the 2023 RTP Call for Projects is underway and will be finalized by the end of the year. The region has limited transportation funding, which must be used strategically to meet the extensive needs of the people who live and work here.

The RTP revenue forecast is an important part of the call for projects process, providing an estimate of how much funding can be reasonably expected to be available during the life of the plan (2023-2045) both for capital projects and for maintaining and operating the existing transportation system. As part of development of the RTP, federal regulations require the total cost of projects in the financially constrained list of projects to not exceed the total revenue reasonably expected to be available to the greater Portland region over the life of the plan, including maintenance and operations of the transportation system. The forecast will include revenues raised at the federal, state, regional and local levels for transportation projects and programs to be included or accounted for in the 2023 RTP.

Defining terms

Constrained budget
The budget of federal, state and local funds the greater Portland region can reasonably expect through 2045 under current funding trends – presumes some increased funding compared to current levels

Constrained list
Projects that can built by 2045 within the constrained budget – makes up the federal and state constrained transportation plan

Strategic list
Additional priority projects that could be achieved with additional resources

The draft forecast reflects extensive consultation and coordination with local governments, the Oregon Department of Transportation (ODOT), TriMet and SMART staff that is still underway. Metro convened to two workshops with local agency staff and individual meetings with ODOT and TriMet staff to support this work. The forecast will include revenues raised at the federal, state, regional and local levels for transportation projects and programs to be included or accounted for in the 2023 RTP.

Forecasted local revenues come from local TSPs and capital improvement programs in consultation with local agencies. Some of these revenues are already committed to individual projects. The federal and state revenues were identified through a statewide funding working group convened by ODOT that included transit providers and MPOs. In addition, Metro is working with ODOT to estimate a range of potential tolling revenues that are reasonably expected to be available to fund ODOT capital projects (e.g., I-5 Interstate Bridge Replacement (IBR) Program, I-205/Abernethy Bridge, I-205 Widening) and investments to address the impacts of those projects.

Consistent with the adopted RTP work plan, three levels of investment will be defined for the 2023 RTP, with each level representing a statement of priority. The first and second levels, together, are known as the financially constrained project list under federal and state law. In order for projects to be eligible to receive federal and state funding, they must be on the *Constrained Priorities* project list. The RTP Constrained Priorities will be prioritized into near-term (2023-2030) and long-term (2031-2045) priorities – based on the financially constrained revenue forecast in the RTP.

- The first level of priority, **the *Near-term Constrained Priorities,*** will represent the highest priority transportation project and program investments for near-term (2023-2030).
- The second level of priority, **the *Long-term Constrained Priorities*** will represent the highest priority transportation project and program investments for long-term (2031-2045).
- The third level of priority, **the *Long-term Strategic Priorities***, will represent additional investments that advance RTP policy priorities or need further study but that do not fit within the financially constrained revenue forecast, but the region agrees to work together to complete remaining planning work and identify funding to advance these priorities in the 2031-2045 time period. **This investment level is recommended to be double the financially constrained cost target.**

Project lead agencies will be provided agency and county-level project list cost targets based on available funding for the constrained project list and strategic project list as shown in Table 1.

Table 1 is a placeholder to illustrate the project list cost target information that will be available for the call for projects.

Table 1: Draft Cost Targets for Purposes of the 2023 RTP Call for Projects (*under development – and*)

Agency/coordinating committee	Constrained List cost target for 2023-2030 (millions of YOE dollars)	Constrained List cost target for 2031-2045 (millions of YOE dollars)	Strategic List cost target for 2031-2045 (millions of YOE dollars)	Total RTP List cost target for 2023-2045 (millions of YOE dollars)
City of Portland	$457.32	$1,389.63	$1,846.95	$3,693.90
Clackamas County, Cities, & NCPRD	$0.000	$0.000	$0.000	$0.000
Multnomah County and Cities	$0.000	$0.000	$0.000	$0.000
Washington County, Cities & THPRD	$1,410.42	$3,688.47	$5,098.89	$10,197.77
Oregon Dept. of Transportation	$0.000	$0.000	$0.000	$0.000
TriMet & SMART (Transit Capital)	$2,009.20	$3,514.80	TBD	$3,514.80
Metro	$87.00	$259.80	$0.000	$346.80
Port of Portland	$0.000	$0.000	$0.000	$0.000

This information will be updated to include updated information as it becomes available. Operations and Maintenance cost data for some Clackamas and East Multnomah County agencies is still being calculated and needed to determine capital cost targets for those areas. Metro is working with ODOT to determine reasonably expected revenues from tolling and to determine cost targets for ODOT projects. Financially constrained Transit Capital funds available require identification of available financially constrained state and local match funds during the planning process or may be moved to the Strategic Cost Target. Port of Portland data is also still being collected. Additional financially constrained revenues may be forecast for project specific federal discretionary grants and listed separately from these cost targets.

Strategic list cost targets will be set at the same amount as total Constrained List cost targets, doubling the amount of funds available for the Total RTP List cost target.

Process and Approach for the 2023 Regional Transportation Plan Call for Projects

November 23, 2022

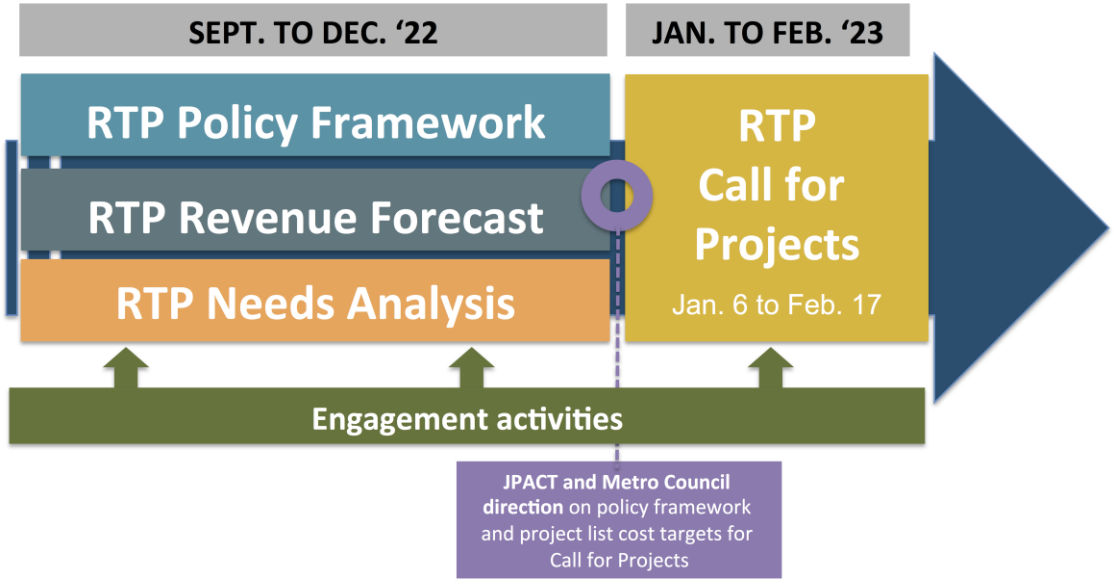
The Regional Transportation Plan brings city, county, regional and state priority transportation projects together to create a coordinated regional transportation priority list for the period from 2023 to 2045. It is a key step for these projects to qualify for potential state and federal funding. All types of projects are included in the Regional Transportation Plan list – highways, key roads, transit, freight, biking and walking as well as programs. The current list includes more than 1,100 projects.

This document summarizes the overall process and approach for updating, assessing and refining the list of project and program priorities for the 2023 Regional Transportation Plan consistent with the policy framework. Additional information is being prepared to support the process. Pending support and direction from the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council in December 2022, the Call For Projects kicks off the window of time for transportation agencies to update existing projects and add new priority projects to the RTP.

Updating the list of priority projects and programs in the RTP is more than just a housekeeping exercise; priorities in the RTP are updated to reflect changing transportation needs and trends – such as those documented in the 2023 RTP Emerging Transportation Trends Study and 2023 RTP needs assessment – and respond to the policy framework. The 2023 RTP is an opportunity advance new project priorities identified in planning efforts completed through a public process since December 2018[1] and incorporate more recent JPACT and Metro Council policy feedback through the 2023 RTP update.

Figure 1 shows the timeline and steps leading up to the call for projects.

Figure 1. Development of the call for projects



[1] Examples include projects identified through transportation system plan (TSP) updates, corridor and areas studies; development of the Metro's regional funding measure in 2020, TriMet's Forward Together Service Restoration Planning effort, and SMART's Master Plan update.

The list of projects and programs in the 2018 RTP is the starting place for the call for projects. Many of the projects and programs in the 2018 RTP will be carried forward, with updated costs and, sometimes, refinements to project details. Some projects may no longer be needed, while new projects identified in local transportation system plan updates and other public planning processes may be added.

Over many years of planning, local, regional and state partners have identified and refined projects to meet the transportation needs of the region. These projects are primarily identified in local transportation system plans, but also in capital improvement plans, transit service and master plans, park and trail plans, corridor plans, concept plans, and other transportation studies. Engaging the public and affected communities is a core part of identifying transportation needs and developing the list of projects to address those needs.

Who is eligible to submit project or programs to the RTP?

Eligible entities are referred to as project sponsors and include:

- Clackamas County and its cities
- Multnomah County and its cities
- Washington County and its cities
- City of Portland
- South Metro Area Regional Transit (SMART) district
- TriMet
- Oregon Department of Transportation (ODOT)
- Port of Portland (in coordination with transportation agencies and county coordinating committees)
- Metro
- Portland Streetcar, Inc. is eligible as part of a joint project with the City of Portland and TriMet
- Tualatin Hills Park & Recreation District
- North Clackamas Parks & Recreation District
- Go Lloyd TMA
- Westside Transportation Alliance TMA

Eligible project sponsors are encouraged to join together to propose a project, such as a multi-county or multi-city or city-county transportation project.

What projects or programs can be submitted to the RTP?

Communities across the region contribute to the development of plans and studies from which RTP projects are drawn from. Cities, counties, transit agencies, park and trail providers, the Port of Portland, ODOT and other agencies are responsible for compiling and submitting the list of priority projects recommended for the RTP.

Example of the types of investments that will address local, regional and state transportation needs on the regional transportation system and regional transportation challenges is provided in Figure 2.

Figure 2. Examples of RTP Projects and Programs

How will project list updates be coordinated?

Transportation agencies will work through county-level coordinating committees and with the City of Portland to review and update priorities for the RTP.

During the call for projects, transportation agencies are asked to update the projects and programs in the RTP that will implement the regional vision, advance regional goals, and address the transportation needs of the region. As in previous updates of the RTP, transportation agencies, including ODOT and TriMet, will work through county-level transportation coordinating committees and with the City of Portland, to coordinate across jurisdictional boundaries and recommend priority projects for the 2023 RTP. These meetings, as well as meetings of elected and appointed officials, provide opportunities for the public to learn about and provide input on the projects and programs being recommended.

Several resources and tools are being developed and will be available to support jurisdictional partners, including an on-line RTP Hub database, a project submission guide, project cost estimate guidance, online maps and geospatial data of the 2018 RTP projects[2], RTP policy framework maps, and RTP needs assessment maps and related data.

A web page and on-line project database – called the RTP Hub - will support jurisdictions as they review and update their investment priorities at www.oregonmetro.gov/rtp. Two on-line trainings on access and use of the Hub will be held for agency staff on Dec. 6 and Dec. 7. The online hub will go live on Jan. 6.

A **2023 RTP Project Submission Guide** is being developed to support agencies that are updating the list of projects. Agencies will update and add projects in the RTP Project Hub, an online database. Agencies updating or submitting new projects to the RTP will provide information that will be used in the outcomes assessment, and system, equity, climate and environmental analysis of the draft project list. For projects already in the RTP Project Hub, much of the information will already be available. Some information will need to be updated, or added for new projects.

Project list updates and supporting information from coordinating committees, TriMet, ODOT, and City of Portland priorities due February 17

The call for projects starts Jan. 6 and closes on Feb.17, 2023. Over the past two years, the update of the RTP has focused on understanding the region's transportation challenges and priorities for investment and updating the region's vision for the transportation system.

Now it is time to pull the pieces together in the call for projects to address these challenges, reflect the region's priorities and make progress toward our shared vision and goals for the future transportation system. Each county-level coordinating committee will submit endorsement letter with their respective lists of projects and programs, indicating the lists are the agreed upon priorities for 2023 RTP for the cities and county of each respective sub-region.

Project list endorsements from governing bodies due May 1

New for the 2023 RTP, agencies will be asked to submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP.

This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects.

[2] Existing 2018 RTP Projects can be viewed at: https://www.arcgis.com/apps/webappviewer/index.html?id=73e94a0343ea487e82b4830fead7c88e&extent=-13751666.1848%2C5656339.7069%2C-13586562.2037%2C5748675.6371%2C102100

Key information requested in Call for Projects (definitions are provided in the Project Submission Guide):

- **Agency information** identifying the nominating agency, agency partners and primary owner.
- **General project information** describing the project, location, features and design elements.
- **Project status**, whether the project is has committed construction funding, and/or the project is new.
- **Estimated project cost** estimated in current cost (in 2023 dollars) and for the time period within which the project is recommended for completion (year of expenditure). Metro will inflate 2018 RTP project costs in the RTP Hub from 2016 dollars to 2023 dollars – a 40% increase. Metro will provide guidance for inflating current cost to expected year of expenditure cost during the Call for Projects.
- **Time period** for which the project is anticipated to be completed, 2023-2030 or 2031-2045.
- **Project type and investment category**:
    - Active Transportation (Pedestrian, Bicycle, or Pedestrian & Bicycle)
    - Freight
    - Roadways
    - Bridges
    - Roadway Operations
    - Bridge Operations
    - Roadway Maintenance and Preservation
    - Bridge Maintenance and Preservation
    - Throughways
    - Transit Capital (High Capacity, Better Bus, or Other)
    - Transit Operating Capital
    - Transit Service and Operations
    - Transit Maintenance
    - Transit-oriented Development
    - Transportation System Management (Technology)
    - Transportation Demand Management
    - Pricing Programs; and
    - Regional Activities
- **Safety projects** identified as a safety project through a state or local process.
- **Modeling assumptions** describing the number and type of traffic lanes and signals (before and after the project), posted speed, signal timing/coordination, type of bicycle facility to be provided, and whether sidewalks are included.
- **GIS shapefiles** for location-specific projects for Metro to develop maps and conduct GIS analysis to determine which projects overlap with 2040 Growth areas, high injury corridors, Equity Focus Areas and other spatial data.

- **Drawings or more detailed maps** when needed to communicate the location or modeling assumptions for more complex projects.

What projects are eligible to be included in the 2023 RTP?
To be included in the RTP, projects and programs must meet certain eligibility requirements consistent with the RTP policy framework. Projects must be located on the designated regional transportation system[3] and be inside the federally-recognized metropolitan planning area boundary, and:

1. Projects must help achieve regional vision, goals and policies for the transportation system.
2. Projects must cost at least $2 million or be bundled with similar projects to meet the cost threshold.
3. Projects must come from adopted plans or strategies developed through a planning process that identified the project to address a transportation need on the regional transportation system.
4. Projects that were identified through a public planning process that met the appropriate requirements for public involvement, including having provided opportunities for public comment, with specific efforts to engage communities of color, people with low-incomes and people with limited English proficiency.

Draft 2023 RTP Goals developed by JPACT and Metro Council

Project list updates and supporting information is due February 17. For all projects submitted to the RTP, agencies will provide documentation of public engagement conducted during the planning and development of projects. New for the 2023 RTP, agencies will be asked to submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP. This step supports transparency and awareness of the process and projects for the public, community partners and elected and appointed officials responsible for implementing the projects. This engagement information may be provided after the projects have been submitted in the call for projects but must be submitted by May 1. Metro will use the information provided to describe the array of public engagement opportunities that contributed to the development of the 2023 RTP.

How will projects and the transportation system be evaluated to measure progress?

Once the Call for Projects closes, Metro will complete an outcomes-based technical analysis of how the draft project list advances the RTP vision, goals and policies. This analysis consists of two phases. The first phase is a high-level assessment of the individual projects based on information provided in the Call for Projects and the project's location. The assessment will be used to show how individual projects, as well as the collective set of RTP projects, advance each of the five regional goals.

[3] An on-line viewer of the 2018 RTP network maps, that also includes the urban growth boundary and the metropolitan planning area boundary, can be found at: https://drcmetro.maps.arcgis.com/apps/MapSeries/index.html?appid=9057331682354a188ecec2688071239f
The draft 2023 RTP Network Maps will be posted in an on-line viewer for the Call for Projects.

The high-level assessment is designed to:

- Produce results that are clear and easy to communicate, interpret and compare. The measures included in the high-level assessment are defined as yes-or-no questions that are easy to answer based on established RTP policies and guidance, and regional datasets. The goal is to report on how key aspects of the RTP are being implemented – not to account for all the nuances of what makes a "good" RTP project. RTP elements like the High Capacity Transit Strategy and the Freight Delay and Commodities Movement Study will define which transit and freight projects meet the region's needs in depth. The high-level assessment is designed to complement these analyses and allow for comparison across all RTP projects.

- Highlight projects that meet multiple RTP goals. Prior RTP work and feedback from agency and community members have repeatedly highlighted that many projects in the RTP serve multiple goals. For example, providing high-frequency transit in key locations supports climate, mobility, and equity goals. Though there are unique criteria associated with each goal area, they are designed to reflect the fact that certain types of projects that advance multiple goals – particularly bicycle, pedestrian and transit projects that are needed to provide a complete set of affordable and sustainable transportation options given that the region's motor vehicle network is much more fully built out than other modal networks. The assessment will be focused on highlighting these projects and synergies.

- Reflect the "typical" RTP project. One of the goals of the RTP process is to coordinate transportation and land use planning. Land use is a major driver of transportation choices, so this typically means that the RTP aims to coordinate transportation investments in 2040 growth areas, Equity Focus Areas, and other key areas. Major projects, such as new light rail lines or large throughway projects, can also influence surrounding land use patterns, potentially creating new centers of activity. However, the vast majority of RTP projects are relatively small in scale. These projects play an important role in implementing the region's 2040 land use vision and community plans and visions. The high-level assessment focuses on capturing how transportation projects are concentrated in the areas where the region has prioritized investment, and does not account for major projects' potential to alter land uses. This is an important consideration, but it is likely to be captured in the in-depth analyses that major projects typically conduct as part of their individual project development process.

- Achievable with the available time, resources and information provided by nominating agencies. There are more than 1,000 projects in the RTP and the plan update must be completed next year to maintain compliance with Federal regulations. In order to fit within the RTP timeline, the high-level assessment has been designed to be automated and based on existing maps and data and/or the information provided by nominating agencies through the Call for Projects.

The following section provides more detail about the high-level assessment will be conducted, including how each of the measures will be evaluated and how results of the assessment will be presented to stakeholders.

The second phase of the evaluation is a system analysis of how the RTP performs with respect to performance measures and targets that reflect RTP goals. This analysis will be used to assess how the overall package of projects advance regional goals and make progress towards the regional performance targets. This phase includes detailed equity and climate analyses that are required by the federal and state regulations that govern the RTP. The system analysis uses Metro's travel model and other analytical tools, as well as the information from the high-level assessment. The system analysis accounts not only for the projects and policies in the RTP, but also for factors such as projected population and job growth.

Table 2 summarizes the key questions that the assessment and analysis will look to answer for each of the five RTP goals. It reflects comments submitted by partner agencies (see Appendix __) on the initial draft version of the table in cases where there was consensus among commenting agencies and the necessary data and policies are in place to support the recommended change. Changes made to the table in response to these comments include:

- Adding a new Equity measure that captures whether projects benefit underserved people
- Adding a new Mobility measure that reflects whether projects are improving existing facilities.
- Edit the access to jobs measure under Mobility to reflect projects that improve access to 2040 growth areas and incorporate prior accessibility analyses.

Table 2: Measuring progress towards RTP goals

RTP goal	High-level project assessment	System analysis
Equitable transportation: Transportation system disparities experienced by Black, Indigenous and other 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.	Is the project located in an Equity Focus Area? Is the project in an investment category that underserved people identified as a priority through RTP community engagement (transit, bike and pedestrian)?	Does the RTP benefit Equity Focus Areas at least as much, if not more, than other communities in the region? Key performance measures: • Access to destinations (EFAs vs. other areas) • System completion (EFAs vs. other areas) • System completion near transit (EFAs vs. other areas)
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.	Does the project have a high or medium greenhouse gas reduction potential?[4] Is the project located on a Regional Emergency Transportation Route or Statewide Seismic Lifeline Route?	Does the RTP meet vehicle miles traveled per capita reduction targets? Does the RTP meet transit, bicycle and pedestrian mode share targets? Key performance measures: • Total GHG emissions • GHG emissions per capita • Vehicle miles traveled per capita • Mode share
Safe system: Traffic deaths and serious crashes are eliminated, and all people are safe and secure when traveling in the region.	Is the project identified as safety project?[5] Is the safety project on a high injury corridor?	Does the RTP meet regional safety targets? Key performance measures: • Fatal and serious crashes • System completion, especially in 2040 growth areas and near transit.
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.	Does the project complete a gap in the region's pedestrian, bicycle or transit networks? Does the project include ADA-pedestrian-, bicycle- or transit-supportive design elements?	Does the RTP meet targets for completing the multimodal transportation system? Does the RTP meet vehicle miles traveled per capita reduction targets?

[4] As defined in the 2014 Climate Smart Strategy https://www.oregonmetro.gov/climate-smart-strategy
[5] Identified as a safety project through a state or local process.

RTP goal	High-level project assessment	System analysis
		Does the RTP meet targets for reliable travel on throughways?[6] Key performance measures: • System completeness • VMT per capita • Reliability on throughways (based on travel speed)
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.	Is the project located in a 2040 center, station community, industrial area or employment area? Is the project located in an area that offers higher-than-average access to destinations?	Does the RTP improve freight, transit, bicycle and pedestrian access that serve centers and industrial and employment areas? Does the RTP increase access by auto and transit to destinations? Key performance measures: • Access to destinations • System completeness in 2040 growth areas • Access to bicycle/pedestrian facilities and transit stops

Implementing the high-level project assessment

Metro staff will apply the high-level assessment to all **capital** projects included in the constrained RTP project list. Capital projects are the projects that have the potential to change how people travel, and therefore to influence future progress toward regional goals. This does not mean that operations and maintenance are not important – these investments are critical to continue to maintain the progress that previous RTP capital projects made toward goals. However, the benefits of operations and maintenance are typically already accounted for as part of the analysis of the underlying capital projects when these projects enter the RTP, so it would be double-counting their benefits to also include them in the high-level assessment. Furthermore, operations and maintenance projects are funded from separate sources than capital projects, which can make it challenging to compare results across these two categories. This approach may not capture the benefit of certain RTP programmatic investments that have region-wide benefits; there are a small enough set of such investments that Metro staff intend to recommend qualitative ways of evaluating them through further conversations with partners.

Metro staff will develop GIS scripts and other automated methods to assess whether each capital project in the RTP meets each of the measures shown in Table 2 above. Table 3 summarizes the data sources and methods that Metro staff will use to evaluate each measure.

Table 3: High-level project assessment methods and data sources

[6] As defined in the draft Regional Mobility Policy developed to test and refine through the 2023 RTP update.

RTP Goal	Measure	Data source[7]	Assessment method
Equity	Is the project located in an Equity Focus Area?	Equity Focus Area map, *project location*	Projects that are located fully or partly within an Equity Focus Area receive credit.
Equity	Is the project in an investment category that underserved people identified as a priority through RTP community engagement (transit, bike and pedestrian)?	Regional Mobility Policy summary of input from marginalized communities on transportation priorities for greater Portland, *investment category*	Projects in the following investment categories receive credit: Active Transportation, Transit (High Capacity, Better Bus, or Other),
Climate	Does the project have a high or medium greenhouse gas reduction potential?[8]	Climate Smart Strategy, *investment category*	Project impact will be assessed based alignment between the investment category and the strategies assessed in Climate Smart, as follows: High carbon reduction strategies: • Pricing Programs • Transit (High Capacity, Better Bus, or Other) • Transit-oriented Development Medium carbon reduction strategies: • Active Transportation • Transportation Demand Management • Transportation System Management (Technology) High carbon reduction projects receive more credit than medium-impact ones.
Climate	Is the project located on a Regional Emergency Transportation Route or Statewide Seismic Lifeline Route?	Regional Emergency Transportation Route map, Seismic Lifeline maps, *project location*	Projects that fully or partially overlap with the routes identified in either one of these maps receive credit.
Safety	Is the project identified as safety project?	Agency identified consistent with RTP definition,[9]	Projects receive credit if the lead agency identifies a project as meeting definition of a safety project.
Safety	Is the safety project on a high injury corridor?	High Injury Corridors map, *project location*	Projects that fully or partially overlap with a high-injury corridor or intersection receive credit.

[7] Italics indicate data provided by nominating agencies through the Call for Projects.
[8] As defined in the 2014 Climate Smart Strategy https://www.oregonmetro.gov/climate-smart-strategy
[9] Safety projects and programs are identified by agencies in safety action plans and other plans and studies. Safety projects have the primary purpose of preventing and reducing fatal and serious injury crashes addressing a documented safety problem at a documented high injury or high-risk location (including Regional High Injury Corridors and Intersections) with one or more proven safety countermeasure(s).
Safety projects address a safety problem (occurrence and risk of fatal and serious injury crashes) that has been identified and documented through an analysis of crash and risk data in in safety plans or other plans and studies. And the project or program addresses the identified safety problem using proven safety countermeasures such as road diets, medians and pedestrian crossing islands, pedestrian hybrid beacons, roundabouts, access management, reflective backplates, safety edge, enhanced curve delineation, and rumble strips, or programs such as Safe Routes to School, messaging and behavioral programs.

RTP Goal	Measure	Data source[7]	Assessment method
Mobility	Does the project complete a gap in the region's pedestrian, bicycle or transit networks?	RTP network gap maps, *project location*, *investment category*	Projects that fully or partially overlap with a gap in one of the modal networks and that are in a relevant investment category receive credit. For example, a project that overlaps with a gap in the pedestrian system and is in the Active Transportation category would receive credit.
Mobility	Does project include ADA-pedestrian-, bicycle- or transit-supportive design elements?	*Project design elements*	Projects receive credit if they include any of the design elements identified through the call for projects[10]
Economy	Is the project located in a 2040 center, station community, industrial area or employment area?	2040 Growth Concept map, *project location*	Projects that fully or partially overlap with one of the relevant land use types will be awarded credit.
Economy	Is the project located in an area that offers higher-than-average access to destinations?	Economic Value Atlas access to all jobs across all modes and times of day,[11] *project location*	Projects that fully or partially overlap a zone where access to jobs is higher than the regional average.

In most cases, projects will be awarded one point for each measure they meet. Since most goal areas contain two measures, this will result in a score of between zero and two points for each goal area. The exception is in Climate, where projects can receive up to two points for one of the

[10] Buffer treatment and benches
Lighting intersections & marked crossings
Overpass or underpass
Priority inter. treatments/raised median island
Pedestrian signal or beacon
Sidewalk infill
Universal access and ADA compliance
Sidewalk reconstruction/improvements
Bicycle boulevards
Bicycle parking
On-street bikeway or bike lane
Overpass or underpass
Priority treatments at intersect & crossings
Buffered bikeways
Protected bikeways/cycletracks
New trail/multi-use path or extension
Treatments (pull-outs, seating, wayfinding)
High visibility trail street crossings
New rail infrastructure/connection
New rapid bus infrastructure/connection
New bus line/connection
New transit vehicles
Transit center, stop or station
Park and rides
Enhanced transit corridor investment
Other priority/enhanced transit toolbox designs
New service

[11] To view the relevant layer, navigate to the Economic Value Atlas, deselect the "Measures" check box in the upper-left corner of the screen, scroll through the menu of measures below, and select the People > Job Access layer. Metro staff will be preparing a GIS layer containing this data for use in the high-level assessment.

measures (two for implementing a high-impact GHG reduction strategy, one for implementing a moderate-impact strategy) and three points total. The results for climate will be down-weighted so that they have the same weight as results for other categories.

Table 4 illustrates how Metro staff will present the results of the high-level project assessment for a set of hypothetical example projects.

Table 4: Illustrative high-level project assessment results for individual projects

	Equity			Climate			Safety			Mobility			Economy			Total
Project	EFA	Equity priority	*Equity total*	Climate impact	Emergency route	*Climate total (weighted)*	Safety project	High injury network	*Safety total*	Gap completion	Design elements	*Mobility total*	2040 land uses	Access to destinations	*Economy total*	Total – all measures
Example project #1	1	0	*1*	M	1	*1.3*	1	0	*1*	1	1	*2*	1	1	*2*	7.3
Example project #2	1	1	*2*	H	0	*1.3*	1	1	*2*	1	1	*2*	1	1	*2*	9.3
Example project #3	1	1	*2*	M	0	*0.7*	1	0	*1*	0	1	*1*	0	0	*0*	4.7

Table 4 does not apply any minimum thresholds to project scores or otherwise suggest that projects should be excluded from the RTP project list. Instead, it will be used to prepare information on how projects advance each of the RTP goals with respect to each measure. **While a numerical score will be developed, the scores will be reported in a simplified graphical form – full circle, half circle, empty circle to visually communicate how projects advance each of the RTP goals.** This will help decision-makers identify projects that advance multiple goals and understand how individual projects contribute to each of the RTP goal areas**.**

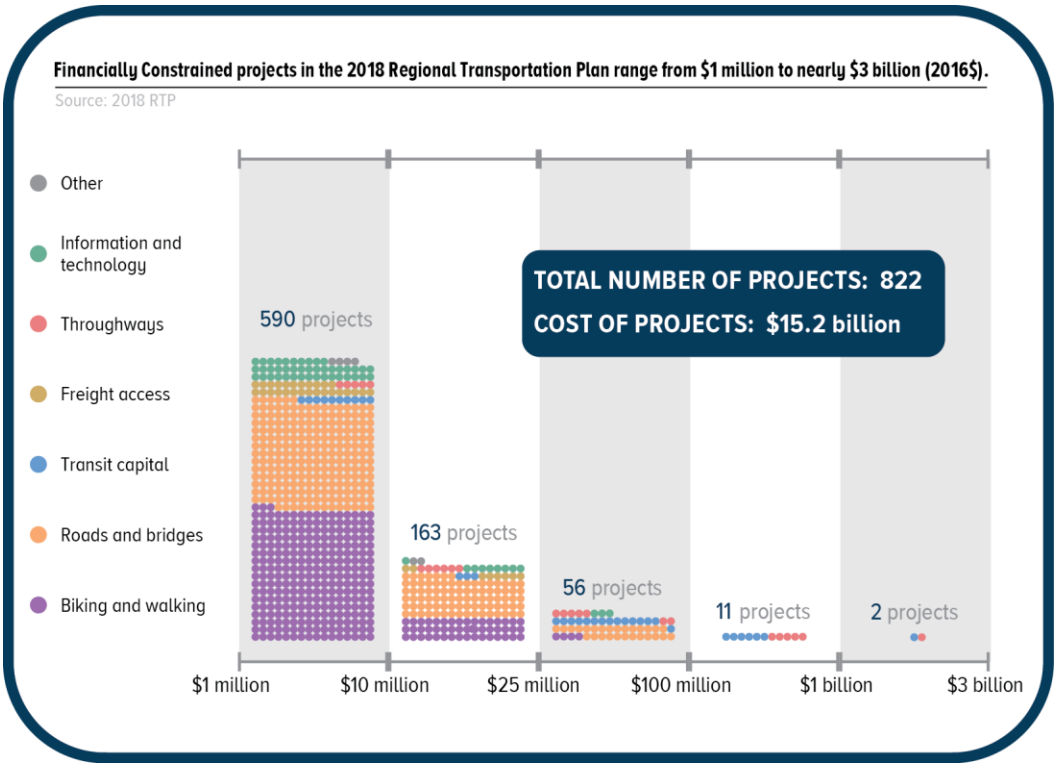
In addition, Metro staff will report on the total percentage of the RTP constrained capital project budget that is associated with projects that meet each measure, both for near-term projects that will be implemented by 2030 and for all projects included in the RTP, which runs through 2045. This will enable decision-makers to understand the extent to which the RTP invests in and prioritizes projects across the RTP goals. Table 5 illustrates what the results might look like using illustrative figures that are not based on the current or previous RTP project lists.

Table 5: Illustrative high-level project assessment results for all RTP capital investments

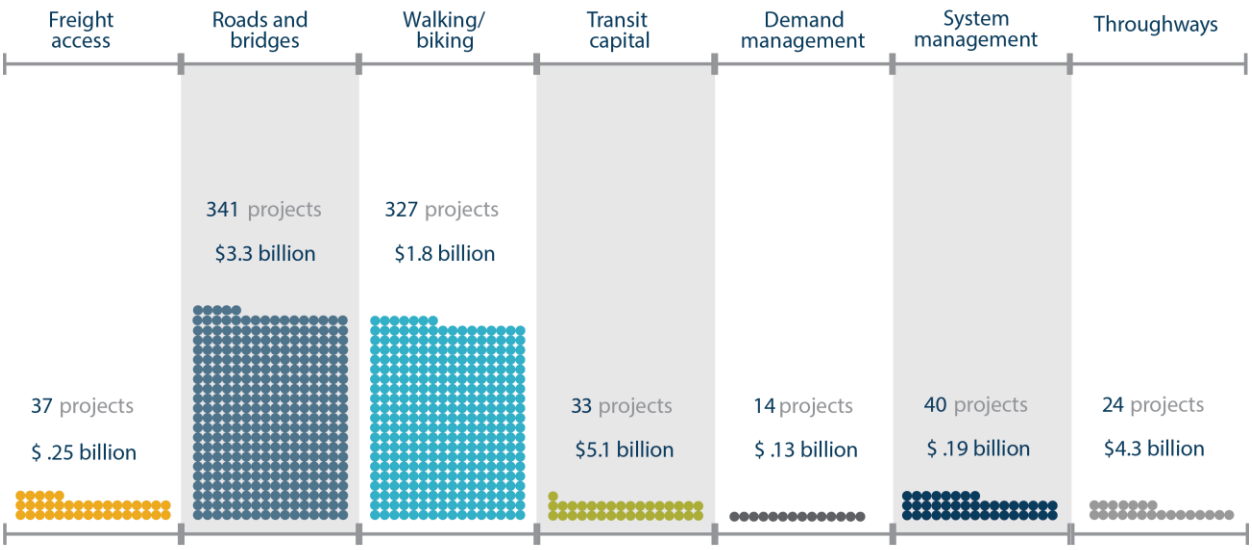
		Illustrative Results	
		% RTP constrained capital budget spent on projects	
Category	**Measures**	**2030**	**2045**
Equity	Located in an Equity Focus Area	67%	55%
Equity	In an investment category that underserved people identified as a priority through RTP community engagement	35%	33%
Equity	Meets both of the above measure	25%	21%
Climate	Has a high or medium greenhouse gas reduction potential	41%	39%
Climate	Located on a Regional Emergency Transportation Route or Statewide Seismic Lifeline Route	35%	44%
Climate	Meets both of the above measure	20%	19%

		Illustrative Results % RTP constrained capital budget spent on projects	
Category	**Measures**	**2030**	**2045**
Safety	Identified as a safety project	67%	72%
Safety	On a high injury corridor	30%	34%
Safety	Meets both of the above measure	16%	18%
Mobility	Completes a gap in the region's pedestrian, bicycle or transit networks	52%	44%
Mobility	Includes ADA- pedestrian-, bicycle- or transit-supportive design elements	80%	85%
Mobility	Meets both of the above measure	46%	43%
Economy	Located in a 2040 center, station community, industrial area or employ. area	35%	31%
Economy	Located in an area that offers higher-than-average access to destinations	55%	50%
Economy	Meets both of the above measure	35%	31%

Other infographics will be used communicate the range of costs and types of investments as shown in the figures that follow.



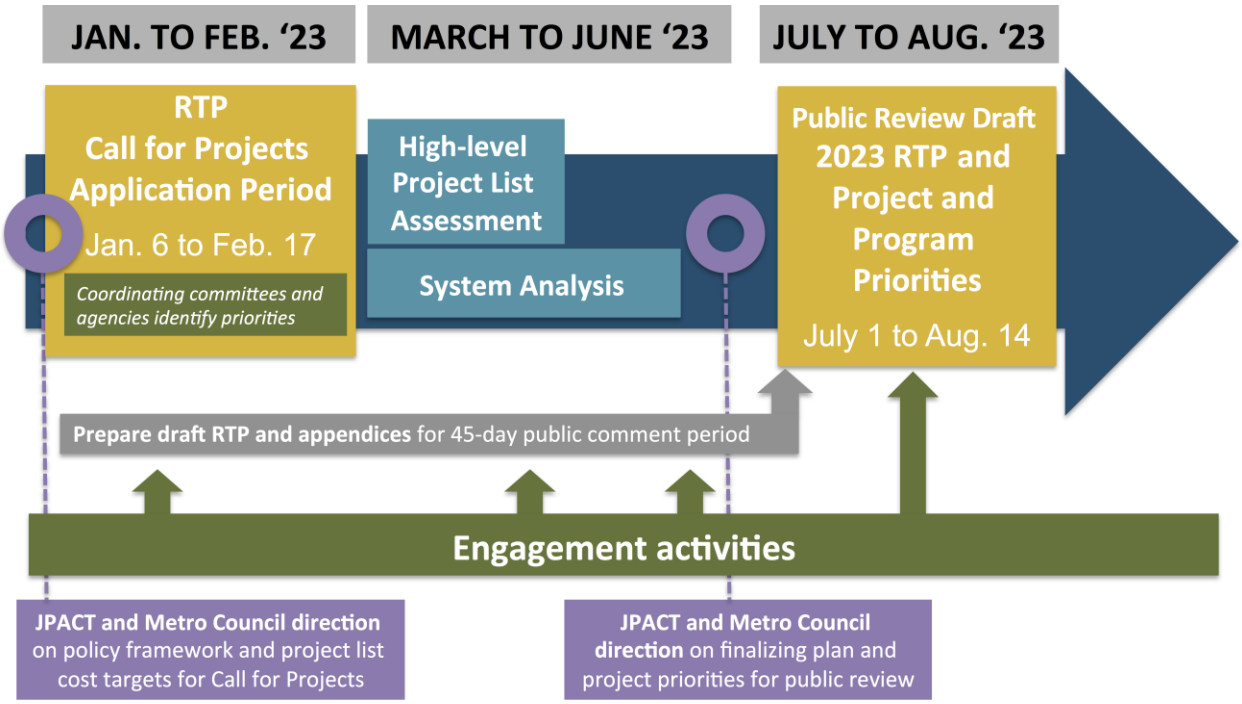
Roads, bridges and walking/biking had the most projects in the 2018 Regional Transportation Plan.



Refining project and program priorities for the 2023 RTP public review draft

Figure 5 illustrates the timeline and process for the call for projects and the development of the public review draft of the RTP.

Figure 5. Call for projects timeline and process



A summary of key dates follows.

Jan. 6, 2023	**RTP Call for Projects begins**
Feb. 17, 2023	**DEADLINE:** Project list updates and supporting information due
January to June 2023	Work continues to develop draft 2023 RTP and appendices for public review, reflecting feedback received throughout Phase 2 and Phase 3 of the update. Community based organizations start engaging community members in transportation priorities and telling community stories.
March-April 2023	RTP High-level Project list Assessment and System Analysis conducted Policymakers, regional advisory committees, community members and other stakeholders review and comment on draft priority projects and the high-level project assessment. Metro is partnering with community-based organizations to engage communities of color and culturally specific communities from across the region. The process is designed to grow the capacity of the organizations that serve these communities to engage in regional and local transportation decisions more broadly, including future decisions beyond the 2023 RTP. Metro will also host an online survey that provides an opportunity for the public to provide input on the draft project list during this time.
May 1, 2023	**DEADLINE:** Governing body project list endorsements due
May-June 2023	Input on the assessment of projects, along with the system analyses findings will inform decision-makers and regional partners as they continue to work together to finalize the draft RTP and project and program priorities for public review in Summer 2023. JPACT and Metro Council consider public input and technical findings and provide direction on finalizing draft RTP and list of project and program priorities for public review
July 1 to Aug. 14 2023	Public comment period on draft plan and list of project and program priorities with hearing(s)
Sept.-Nov. 2023	Metro staff document public comments received and work with TPAC and MTAC to develop recommendations for consideration by MPAC, JPACT and Metro Council
November 2023	JPACT and Metro Council consider adoption of the 2023 RTP

A more detailed 2023 schedule of key milestones and discussions is under development.

2023 Regional Transportation Plan

2023 RTP Project Submission Guide

For agencies and jurisdictions responding to Metro's call for projects

The Regional Transportation Plan brings city, county, regional and state priority transportation projects together to create a coordinated regional transportation priority list for the period from 2023 to 2045. It is a key step for these projects to qualify for potential state and federal funding.

The following information is being provided to assist agencies as they respond to the 2023 RTP Call for Projects. Agencies may nominate projects to the RTP from Friday, January 6 to Friday, February 17, 2023.

DEADLINE: 5:00 P.M., Friday, February 17, 2023

- ✓ All agencies nominating projects: Complete updates to project information and add new projects electronically via the online RTP Project Hub, including new or updated project geoshapefiles and a signed *Congestion Management Process Documentation form* for relevant projects
- ✓ All agencies nominating projects: Submit a signed *Public engagement and non-discrimination certification and documentation for projects submitted in the 2023 Regional Transportation Plan Call for Projects* (one per nominating agency) via email to Metro staff
- ✓ County coordinating committees, ODOT, TriMet, SMART, Port of Portland, City of Portland: Submit project list recommendations in excel format via email to Metro staff

DEADLINE: 5:00 P.M., Monday, May 1, 2023

- ✓ All agencies nominating projects: Submit a letter from governing body (e.g., council, board, commission), endorsing the agency's list of recommended projects, via email to Metro staff

During the past year, RTP work focused on understanding the region's transportation challenges and public priorities for investment, documenting in the amount of funding expected to be available to pay for the region's transportation needs and updating the region's vision for the transportation system.

Now it is time to pull the pieces together as we work together to address regional challenges, reflect public priorities, and maximize progress toward the region's shared vision and goals for the future transportation system.

Find more information and resources at **oregonmetro.gov/2023projects**

Update projects in the RTP Project Hub at https://app.grouptrail.com/signin

Questions? Contact Metro staff at
Ally Holmqvist
ally.holmqvist@oregonmetro.gov

Lake McTighe
Lake.mctighe@oregonmetro.gov

Send all email submissions to Ally Holmqvist at ally.holmqvist@oregonmetro.gov

[NOTE: HIGHLIGHTING THROUGHOUT DOCUMENT INDICATES THAT A HYPERLINK OR MISSING TEXT WILL BE ADDED IN THE FINAL DOCUMENT]

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Overview

The Regional Transportation Plan (RTP) brings city, county, regional and state priority transportation projects together to create a coordinated 23-year regional transportation priority list for the period from 2023 to 2045. Projects must be in the plan to qualify for federal and some state funding.

Projects in the RTP list include highways, roads, transit, freight, biking and walking as well demand and system management programs. The current list includes more than 1,200 projects regionwide. The projects must help achieve the region's vision and adopted goals for the transportation system.

Dramatic changes have unfolded since the RTP was last updated 2018, many documented in the 2023 RTP Emerging Transportation Trends Study. As greater Portland continues to emerge from the disruptions of the pandemic and respond to other urgent trends and challenges, the 2023 RTP coordinates all levels of government to work together to deliver a better transportation future.

For more information on the policy framework and approach for updating, assessing, and refining the list of projects and programs, refer to the *2023 RTP Policy Framework Overview*.

The information that follows is provided to assist nominating agencies as they respond to the 2023 RTP Call for Projects.

[NOTE: HIGHLIGHTING THROUGHOUT DOCUMENT INDICATES THAT A HYPERLINK OR MISSING TEXT WILL BE ADDED IN THE FINAL DOCUMENT]

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Schedule and deadlines

January 6	**Call for Projects begins** – Project Hub is open for updates
February 17	**Deadline**: *Agencies update/submit new project information, including modeling details, GIS shapefiles and congestion management process documentation form, through the online RTP Hub by 5 p.m.*
	Deadline: *ODOT, TriMet, Port of Portland, City of Portland and county coordinating committees submit list of projects (in excel) to Metro staff by 5 p.m.*
	Deadline: *Agencies submit Public engagement and non-discrimination certification and documentation to Metro staff by 5 p.m.*
February 21 to 28	Metro reviews submittals for completeness and compiles draft project lists for review by nominating agencies
February 29 to March 31	Metro staff conducts outcomes assessment and begins system, equity, climate and environmental analysis
April	Policymakers, regional advisory committees, community members and other stakeholders review and comment on draft priority projects and the high-level project assessment; this will include an on-line comment opportunity
	Metro staff prepares draft RTP and appendices, including system, equity, climate and environmental analysis
May 1	**Deadline**: *Agencies submit a letter of endorsement from their governing body (e.g., city council, board, or commission) indicating support for projects being submitted by their staff to the 2023 RTP to Metro staff by 5 p.m.*
May and June	JPACT and Metro Council discuss results and public input, and provide feedback to Metro staff on finalizing draft plan, projects, and appendices for public review
July 1 to August 14	45-day public comment period on draft RTP, project list and appendices (engagement activities will include a public hearing, online comment opportunity and other activities); comment period ends at 5 p.m.
September	MTAC and TPAC discuss public comments and staff recommendations for refinement of draft RTP and project list
	Metro Council, JPACT and MPAC discuss public comments and staff recommendations for refinement of draft RTP and project list
October	MTAC and TPAC consider public comments and make recommendations to MPAC and JPACT, respectively
October 25	MPAC recommendation to the Metro Council
November 16	JPACT considers final action and recommendation to the Metro Council
November 30	Metro Council considers final action

Identifying projects to update and submit to the RTP

What projects and programs are eligible to be included?

To be included in the RTP, projects and programs must meet certain eligibility requirements consistent with the *2023 RTP policy framework*. All projects, including those already in the RTP should be reviewed for consistency with the following requirements:

1. Projects must be located on at least one of the regional networks of the RTP designated regional transportation system
   - ! If a project location is not designated on an RTP system map, an *RTP System Map Changes Worksheet* must be submitted. All requested system map changes must be accompanied with an explanation for the proposed change that demonstrates how the requested change is consistent with RTP policy. Project sponsors must consult with RTP staff on the proposed changes in advance of submitting the changes through the Call for Projects.

2. Projects must be within the region's Federally recognized metropolitan planning area (MPA) boundary.

3. Projects must be in an adopted plan or strategies developed through a public process.
   - ! If not in adopted plan, agencies must provide documentation in the *Public engagement and non-discrimination certification and documentation for projects submitted in the 2023 Regional Transportation Plan Call for Projects* form describing the public process underway and when the plan will be adopted.
   - ! Note that if a project is not in a Transportation System Plan, and is not in the RTP, and adds motor vehicle capacity you must fill out Congestion Management Process Documentation.

4. Projects costs in 2023 dollars must be at least $2 million; smaller projects may be bundled with similar projects to meet the cost threshold such as sidewalk infill projects on multiple streets in a downtown area, seismic retrofits, transit service enhancements, minor bridge repair, area-wide Intelligent Transportation System projects; however, these projects should still have locations that can be mapped and analyzed.

5. All throughway, roadway, bicycle and transit capital (e.g., MAX extensions, bus rapid transit, streetcar) projects that change or add capacity must be specifically identified as individual projects with modeling assumptions because they must be modeled for air quality and greenhouse gas emissions; they cannot be bundled.

How many projects can be submitted?

The total cost estimates of projects, project phases, or programs identified for each list submitted must be no greater than the cost target for each agency and must total no more than the cost target identified for each time-period in the RTP. The table below summarizes project list cost targets for each county (including cities and special districts) and the City of Portland, ODOT, TriMet, the Port of Portland and Metro. For more information on the revenue forecast and assumptions related to these cost targets, see the 2023 RTP Financially Constrained Revenue Forecast. [NOTE UNDER DEVELOPMENT LINK TO BE PROVIDED]

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All project lists submitted must organize projects and programs into thee three time-periods:

- highest priority (2023-2030 in Constrained priorities project list),
- high priority (2031-2045 in Constrained priorities project list),
- additional priority (2031-2045 in Strategic priorities project list).

Table 1 is a placeholder to illustrate the project list cost target information that will be available for the call for projects.

Table 1: Draft Cost Targets for Purposes of the 2023 RTP Call for Projects (*under development*)

Agency/coordinating committee	Constrained List cost target for 2023-2030 (millions of YOE dollars)	Constrained List cost target for 2031-2045 (millions of YOE dollars)	Strategic List cost target for 2031-2045 (millions of YOE dollars)	Total RTP List cost target for 2023-2045 (millions of YOE dollars)
City of Portland	$0.000	$0.000	$0.000	$0.000
Clackamas County, Cities, & NCPRD	$0.000	$0.000	$0.000	$0.000
Multnomah County and Cities	$0.000	$0.000	$0.000	$0.000
Washington County, Cities & THPRD	$0.000	$0.000	$0.000	$0.000
Oregon Dept. of Transportation	$0.000	$0.000	$0.000	$0.000
TriMet & SMART (Transit Capital)	$0.000	$0.000	$0.000	$0.000
Metro	$0.000	$0.000	$0.000	$0.000
Port of Portland	$0.000	$0.000	$0.000	$0.000

How will project and program lists be developed and submitted?

Nominating agencies develop their project list updates. Coordination of submittals will occur through ongoing public meetings of county coordinating committees, the city of Portland and the Transportation Policy Alternatives Committee (TPAC) as outlined in more detail below.

Lead staff will each submit a list of all recommended city and county projects and programs recommended for their respective sub-region by the **February 17, 2023 deadline**

- Clackamas, Multnomah and Washington counties and cities within each county will recommend priority projects for their jurisdictions at county coordinating committees. County coordinating committee lead staff will manage project list submittals for the county and its cities. The policy-level county coordinating committee will be the endorsing body for the county coordinating committees (C-4 Metro Sub-committee, EMCTC, & WCCC).

- The City of Portland will recommend projects after reviewing priorities with its community advisory committees – the Pedestrian, Bicycle and Freight advisory committees and the Bureau and Budget Advisory Committee. City of Portland transportation staff will manage project submittals for the city and Portland Streetcar, Inc. Portland Streetcar, Inc. staff will participate in meetings held by the City of Portland and TriMet to coordinate and develop joint project submittals. Portland City Council will serve as the endorsing body.

- ODOT, the Port of Portland, TriMet, SMART and other agencies will seek feedback from county coordinating committees and the City of Portland to recommend priority projects. ODOT also will seek feedback from the Region 1 Area Commission on Transportation (ACT) to recommend priority projects. For these agencies the TriMet Board, Oregon Transportation Commission, Port Commission serve as the endorsing body; for SMART endorsement will be provided by the Wilsonville City Council.
- Park districts, school districts, transportation management associations, railroad operators, and city and county trails, environmental services, and land use staff will participate in meetings held by their respective county coordinating committee or the City of Portland to coordinate and develop joint project submittals.

How will project and program lists be endorsed?

Project submittals must clearly demonstrate that local and/or state officials and relevant coordinating committees support the project. Following submittal to Metro through the coordinated process described above, all agencies also submit a letter from their governing body, such as a city council, board or commission, endorsing the list of projects that they are recommending for the RTP By the **May 1, 2023 deadline**.

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Using the RTP Project Hub

[NOTE: ALL 'SNAPSHOTS' OF THE HUB ARE PLACEHOLDERS AND WILL BE UPDATED IN THE FINAL DOCUMENT.]

The RTP Project Hub is an online project database for nominating agencies to use to review and submit new or updated project program information for the 2023 RTP. All projects from both the 2014 and 2018 RTPs are in the Hub. The Project Hub is currently called the 2018 RTP Project List. The name will be updated to 2023 RTP Project List when the Call for Projects concludes, and all project additions and updates have been completed. A read-only version of the Hub will also be made publicly available.

How do I access the Hub? Link to be added

How do I save changes? You do not need to finish all at one time. You can make changes over time. Any changes you make are automatically saved. However, the Hub does not include prompts such as "are you sure you want to make the change?" therefore, it is important to go back and review your work to catch errors or inadvertent changes.

Who can see the changes I make? Text to be added.

How do I share changes I've made? Text to be added.

How can I find a project? The Hub includes a "Filter" on the left side of the screen. If you don't see a project or program, check that the correct filters are turned on.

⚠ *When you see this symbol take care to read the instructions. This symbol indicates that extra attention is needed.*

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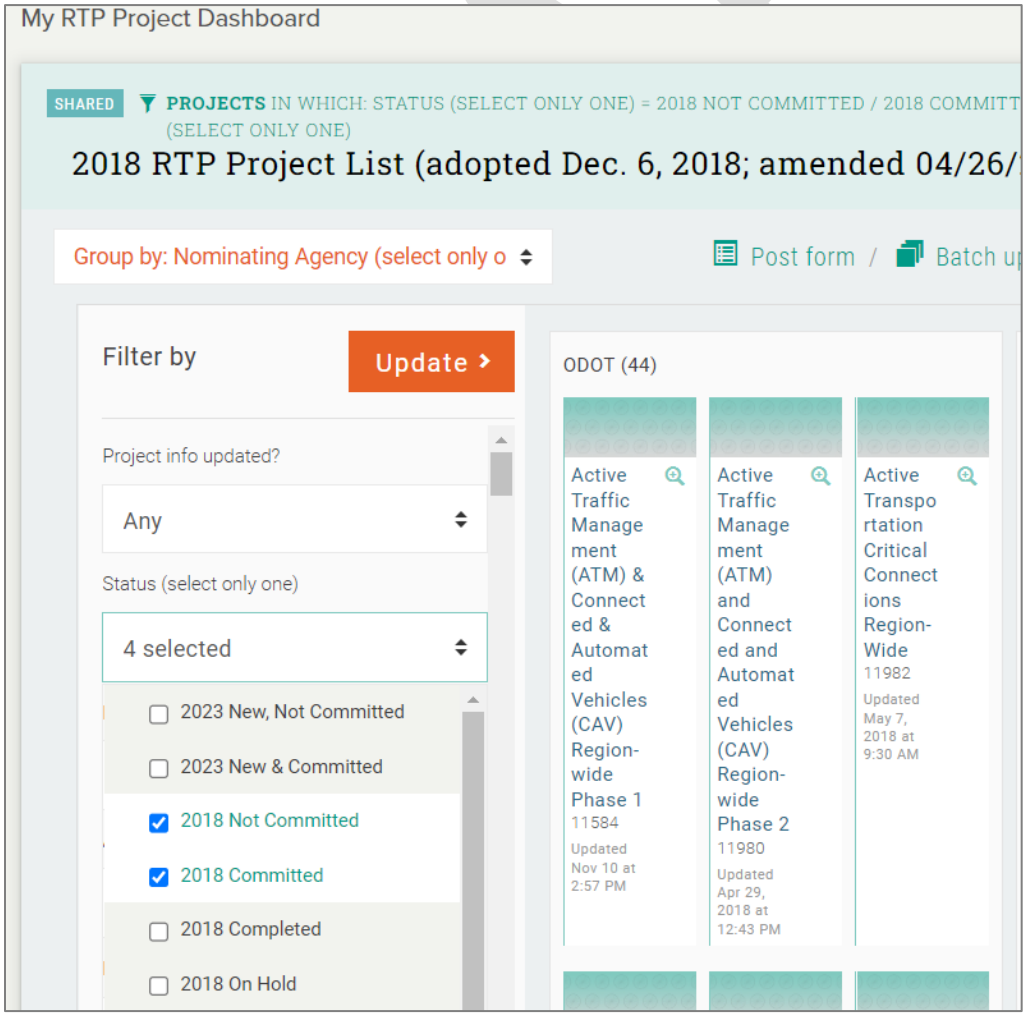
Adding new projects and programs to the Hub

Nominating agencies will carry many of the projects and programs in the current (2018) RTP into the updated 2023 RTP. However, new projects and programs may have been identified in planning processes since the 2018 RTP was adopted and these need to be added to the 2023 RTP.

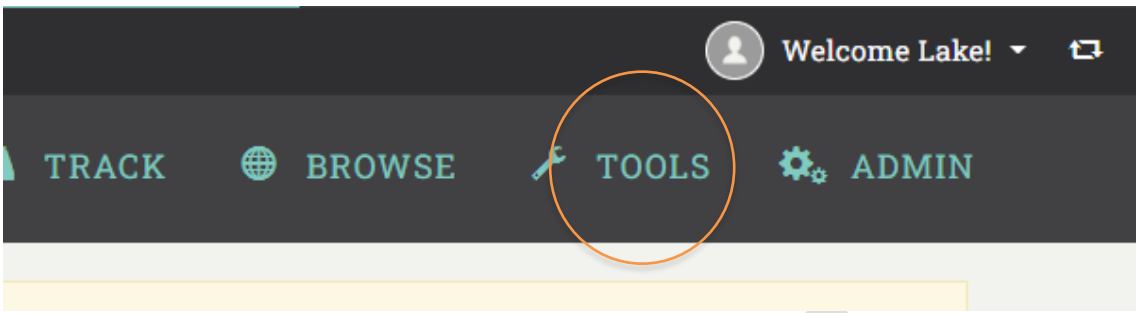
First, confirm that the project is not already in the Hub. Click on the "2018 RTP Project List" drop down menu.

Then, review the projects and confirm that the new project or program is not already included in the existing list.

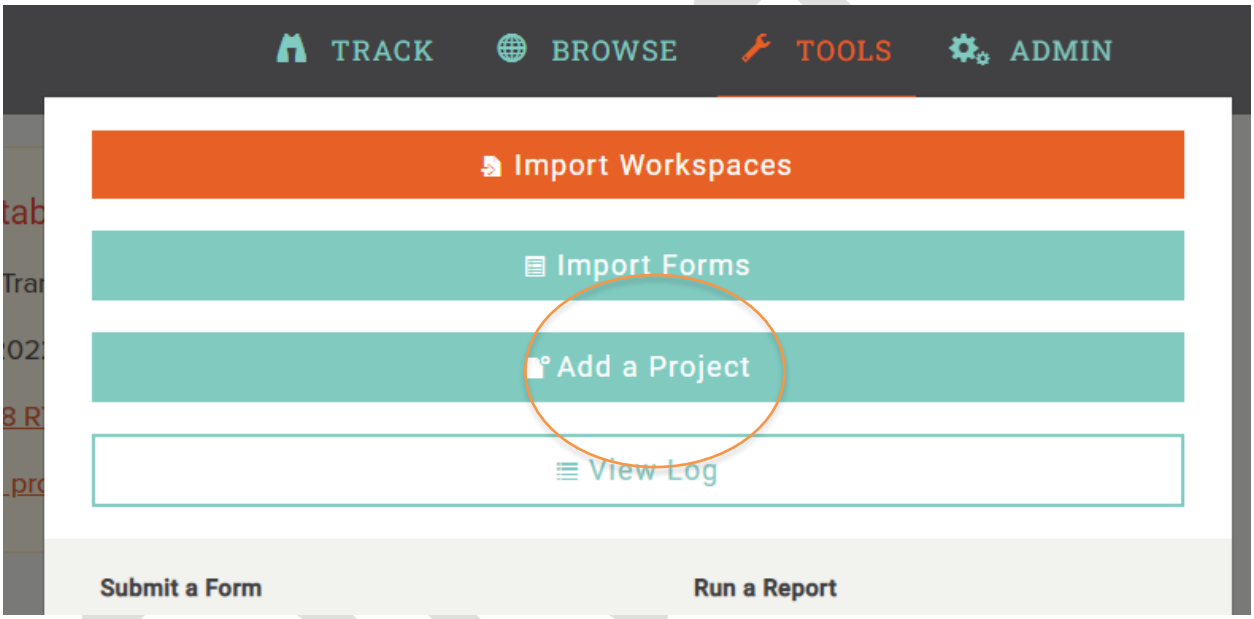
- ! Check the "Filter" on the left-hand side of the screen to make sure the correct filters are set.



Second, add the new project or program if it is not included in the Hub. Go to the top right corner of the Hub's menu bar and click on "Tools".



Next, from the drop-down menu click on the third-down, light blue "Add a project" button.



That will bring up a new window. **Click** in the field labeled "Enter project name" and fill out the rest of the form. When finished, click "Add a Project". Your project will be added to the list of projects.

Project or program name

[NOTED: THIS SECTION IS BEING REVIEWED AND UPDATED TO FOR CONSISTENCY WITH MTIP AND STIP PROJECT NAME GUIDANCE] Provide a brief, descriptive public friendly name of the project following these guidelines:

- Name must be 60 characters or less, including spaces.
- Must include the full name of the facility or location of the program (street, trail, or facility name, location, or area boundary).
    - Name throughway, roadway and bridge projects by their boundaries, from North to South and West to East, as in I-5: Northern Terminus – Southern Terminus.
    - All HCT and ETC projects must start with HCT and ETC followed with a colon.

    - Projects on highways and throughways must start with the route number followed by a colon (e.g. OR8: Tualatin Valley Highway)
- Use names of intersecting roads, rivers, streams, or landmarks instead of mile points in the project names whenever possible. If the project is a bridge, identify the body of water or structure under the bridge, and use the commonly known name. For example, Burnside Bridge (Willamette River). Do not include the structure number in the project name.
- The city/county name can be in parentheses at the end of the project name to further clarify the project location, as in US26: Willamette River – 162nd (Portland) Pedestrian Crossings.
- A modifier that describes the purpose of the project or program (e.g. installs bike lanes, extends street) can be included
    - Be as specific as possible, rather than including "improvement" use words that describe the type of facility and work (e.g., protected bikeway, bikeway update).
- Avoid punctuations, abbreviations, and acronyms. Some acceptable abbreviations are Ave for avenue, Br for bridge and RR for railroad. If acronyms must be used in the project name field due to the 60 character limit, spell out the acronym in the project description. Colons, parentheses, periods, forward slashes and dashes are acceptable punctuations. Do not use the following punctuations: ~$^*_+={}!|>?<@
- If you use an acronym, spell them out in the project description.
- Indicate project phase (e.g., Phase I, Phase II) if project is part of multiple phases.
- It is important to retain the same name for a project throughout its life. Naming a project one way in the RTP, and another way in the MTIP or (S)TIP, and something else at the time of contract, makes it very difficult to track the project. It also makes it difficult for stakeholders such as FHWA and the general public to identify the project.
- There will be times, however, when changing the name of a project is necessary. Some examples include:
    - Change in project scope
    - Combining two or more projects into a new project
    - Splitting existing projects into two or more new projects

<u>Examples of project/program names</u>

- Cleveland - Burnside to Stark: Complete Street
- 15th Ave: Sunrise to Evergreen Bike/Ped Improvements
- HCT: Division Transit NW Irving to Cleveland Park & Ride - Project Dev
- Additional examples to be added

Next, click in the field labeled "Description".

Project description

[NOTED: THIS SECTION IS BEING REVIEWED AND UPDATED TO FOR CONSISTENCY WITH MTIP AND STIP PROJECT DESCRIPTION GUIDANCE] Provide a brief description of the scope of the project, following these guidelines:

- Description must be 250 characters or less.

- Use plain language and avoid technical terms that the general public does not use.. Plainlanguage.gov provides resources for writing effectively, including a list of words to avoid.
- Reference other phases of the project, if there is more than one phase associated with the project.
- Include information so that the public and policymakers understand the purpose and desired outcome of the project or program. Examples of information to include: benefits of the project or program (e.g. increase pedestrian visibility, reduce number and severity of crashes); the reason for the project (e.g. high number of serious crashes at the intersection); plan or study that identified the project; links to other relevant projects; list design elements; milestones and deliverables.

Examples of descriptive project descriptions include (THIS SECTION TO BE UPDATED)

- Widen from two lanes to four lanes from Purdy Street to Ramsay Street with turn lanes and signals at intersections, ADA curb ramps, marked crossings, sidewalks, bike lanes, and traffic signal coordination.
- Implement comprehensive traffic management plan to improve traffic flow, including three new traffic signals between I-205 and 158th Avenue, better signalization, message signs, fiber optic interconnection and communication with central computer.
- Reconstruct and widen road to five lanes from the Columbia Slough to the Marine Drive overpass, including bike lanes, sidewalks and vegetated buffer of adjacent trail and natural resource area. The project also signalizes the intersection of the T-6 entrance at Marine Drive to improve safety.
- Expand and/or upgrade transit stations and park-and-ride lots in various locations, including the River District, St. Johns, Lents, Hollywood, Parkrose, Hillsdale and Barbur transit centers.
- Boulevard retrofit of street from 15th Avenue to 24th Avenue including wider sidewalks, curb extensions, safer crossings, street trees and traffic signals.

Project status

For new projects or programs, select one of the following from the drop-down list:

- **2023 New & Committed** - Indicates a new project that was NOT identified on the 2018 RTP Project list for which the agency has been awarded funding not to be fully obligated by Oct. 1, 2023, and therefore must be included in the draft 2023 RTP Constrained project list as follows:
    - Any project or project phases that has had its federal or state funding awarded, but NOT fully obligated by October 1, 2023 should be included in your 2023-2030 Constrained project list.
    - Any project or project phases located on the regional system and that will use committed local funding in local fiscal year 2023-24 (starting July 1, 2023) and beyond should be included in your Constrained project list in the appropriate time period.

    Examples of committed or awarded funding include:
    - formally declared local funding (via Council action), or

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  - awarded state or federal funding, such as through the federal discretionary programs (e.g., IIJA), ODOT STIP Enhance funding, or the 2025-27 RFFA process; or
  - local committed funding (MSTIP, SDCs, etc.)
- **2023 New, Not Committed -** Indicates a new, unfunded project that was NOT identified on the 2018 RTP Project list.

ADD TEXT ON HOW TO SEND AN EMAIL ALERT VIA HUB

Next, click the orange "Add a project" button in the bottom left corner.

- Your project will be added to the list of projects.
- Find the newly create project in the list of projects and complete all of the required information as directed in the next section.
- Repeat these steps for each new project or program.

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Updating project information in the Hub

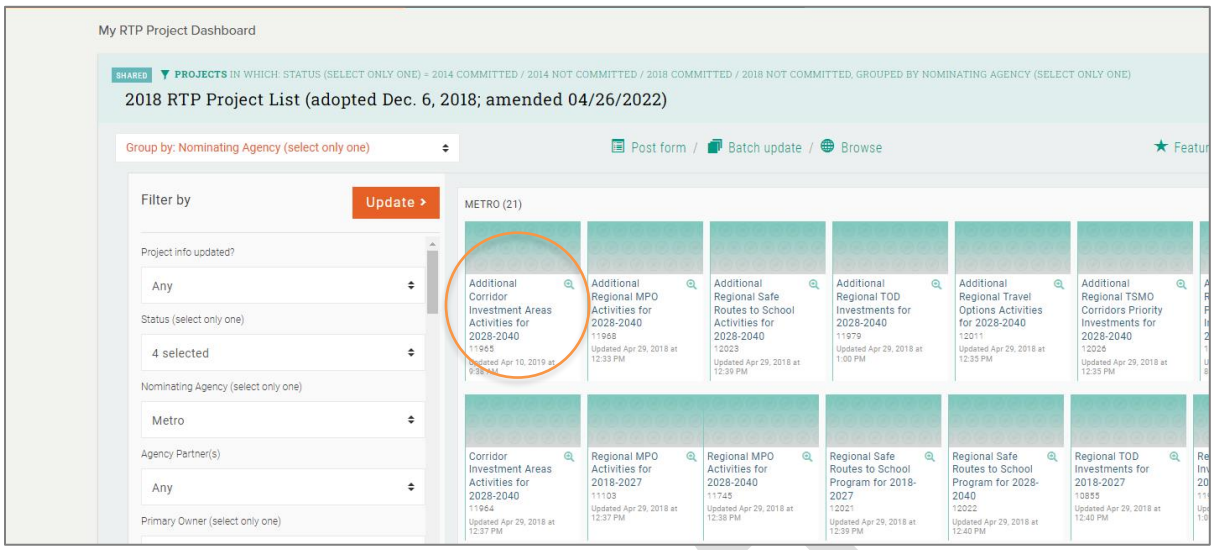
For projects included in the 2018 RTP, some data has been pre-populated in the HUB for convenience (e.g., previously provided information, escalated costs in 2023 $). For these existing projects, much of the information will already be available, but some information will need to be updated or added related to new questions. Information to be confirmed for existing projects and collected for new projects that will be used to organize, summarize; conduct system, equity, climate and environmental analysis; and assess outcomes of the projects includes:

- agency information
- general project information
- summary of public engagement
- estimated project cost in 2023 dollars
- time-period for completion
- project type and investment category
- modeling assumptions
- spatial data.

Please review and confirm all fields for all projects – *new and previously included in the 2014 or 2018 RTP – to ensure that all information is correct and up-to-date. Some questions have been added to the Hub and will be blank for all projects and some questions have changed, meaning that the prior Hub information may need to be revised. In this document these questions are indicated by an "*".*

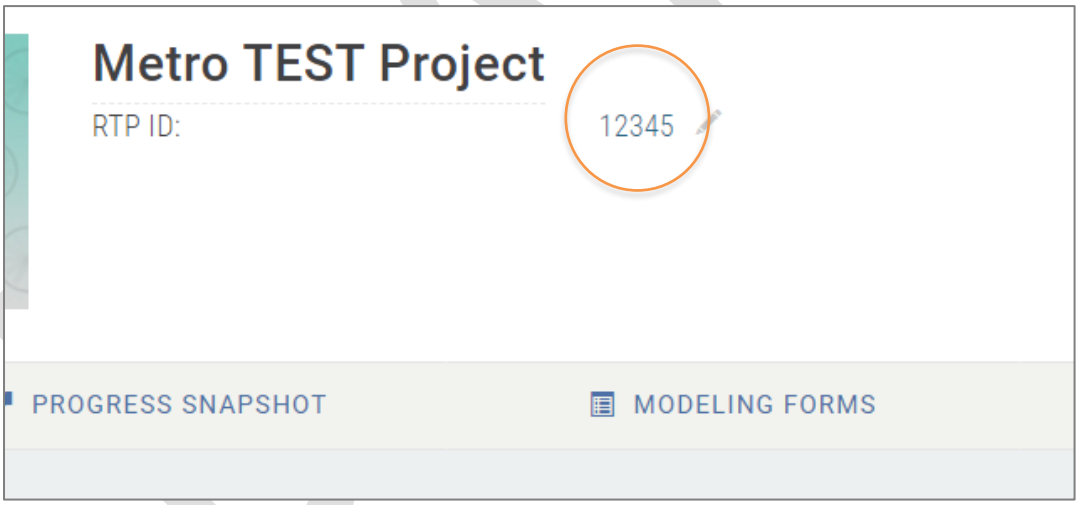
First, click on the "2018 RTP Project List" drop down menu.

All 2018 RTP projects and any newly added projects (through the process described in the previous section) will be listed in alphabetical order., typically by jurisdiction. Use the "Filter" on the left to sort projects in different ways. Click on the project or program you would like review, change or add information for.



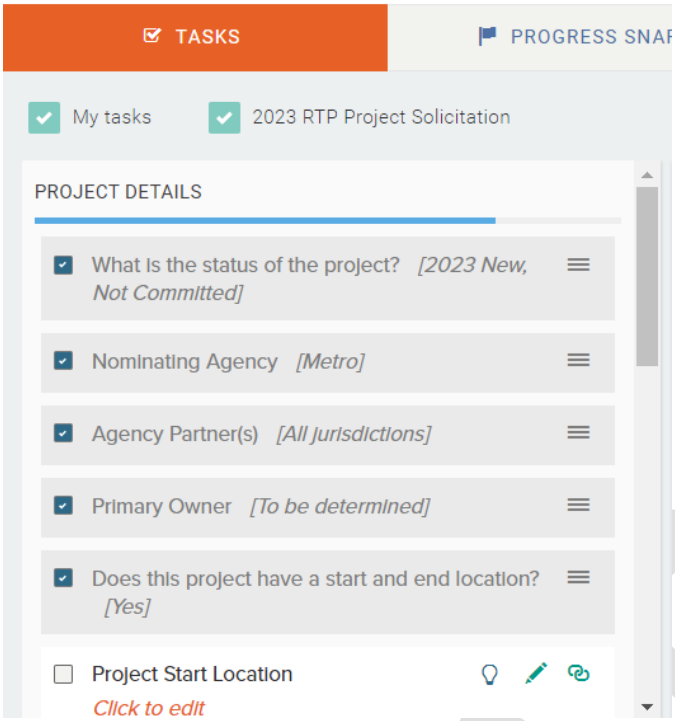
At the top you will find the **project name** and **RTP ID.**

DO NOT CHANGE THE RTP ID FIELD. *The RTP ID is a unique 6-digit code that is assigned by Metro to track projects in the Regional Transportation Plan. This is pre-populated for projects and programs that were included in the 2018 RTP, while new projects will automatically be assigned a unique 6-digit code.*



Part 1: Adding or Changing Project Details

To add or change project or program detail information, navigate to the “Tasks” tab.



Project Name

Text to be added

Description

Text to be added

What is the status of the project?

For projects and programs included in the 2018 RTP, the project status has been updated already

⚠ **Do not change the status** *for projects or programs included in the 2018 RTP <u>unless</u> you are putting the project **on hold** (i.e. not including it in the 2023 RTP)*

- ! For new projects or programs, you will have identified the status when adding the project or program. For those new projects and programs confirm that the status is either 2023 New & Committed or 2023 New, Not Committed.
- ! If there are any projects or programs in either the 2018 or 2014 RTP that you will **not** be including in the 2023 RTP, and that are not marked as 2018 Completed or 2014 Completed or 2018 On Hold or 2014 On Hold, update the status to 2018 On Hold or 2014 On Hold. If you do not update the status they will be inadvertently included in the 2023 RTP.
- ! For all other projects in the 2018 and 2014 RTPs, **Do not change the status**.

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What does your pre-populated 2018 RTP project or program status mean?

- 2018 Completed - Indicates a project for which the construction/program implementation phase has been completed and the facility or program is open for use or no further obligations or federal actions are required after Oct. 1, 2023.
- 2018 On Hold - Indicates a project that was identified on the 2018 RTP project list, has no committed funding, doesn't fit within RTP cost targets or is no longer a priority, and, therefore, is not currently recommended for inclusion in the draft 2023 RTP project list.
- 2018 Committed - Indicates a project that was identified on the 2018 RTP Project list, for which the agency has been awarded funding that was not fully obligated by Oct. 1, 2023, and therefore must be included in the draft 2023 RTP Constrained project list as follows:
    1. Any project or project phase(s) that has had its federal or state funding awarded, but NOT fully obligated by October 1, 2023 should be included in your 2023-2030 Constrained project list.
    2. Any project or project phases located on the regional system and that will use committed local funding in local fiscal year 2023-24 (starting July 1, 2023) and beyond should be included in your Constrained project list in the appropriate time period.

  Examples of committed or awarded funding include:
    - formally declared local funding (via Council action), or
    - awarded state or federal funding, such as through the federal discretionary programs (e.g., TIGER, FASTLANE), ODOT STIP Enhance funding, the 2025-27 RFFA process; or local committed funding (MSTIPe, SDCs, etc.)
- 2018 Not Committed - Indicates a project that was identified on the 2018 RTP project list, has no committed funding, and is recommended for inclusion in the draft 2023 RTP project list.
- 2018 Delete - Indicates a project identified on the 2018 list which is no longer being considered for construction/implementation at any point in the future. Selecting this option removes the project from the database.

Nominating Agency

The nominating agency is the public agency that is submitting the project or program to the 2023 RTP for consideration. TMAs submit projects in coordination with a transportation agency. Nominating agencies are responsible for updating and submitting required project information to Metro via the online RTP Project Hub, including new or updated geoshapefile information and the public engagement and non-discrimination certification and documentation. In those cases when the nominating agency is different from the facility owner, the nominating agency will be responsible for updating and submitting required project information in coordination with the facility owner as needed to ensure accurate information is provided. It does not indicate financial commitment to the project.

Select the appropriate nominating agency from the drop-down list

- ODOT
- Metro
- Clackamas County
- Multnomah County
- Washington County
- TriMet
- Portland Streetcar, Inc.
- SMART
- Port of Portland
- Beaverton
- Cornelius
- Durham
- Fairview
- Forest Grove
- Gladstone
- Gresham
- Happy Valley
- Hillsboro
- Johnson City
- King City
- Lake Oswego
- Milwaukie
- Oregon City
- Portland
- Rivergrove
- Sherwood
- Tigard
- Troutdale
- Tualatin
- West Linn
- Wilsonville

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- Wood Village
- Tualatin Hills Park & Recreation District
- North Clackamas Parks & Recreation District
- Go Lloyd TMA
- Westside Transportation Alliance TMA

Agency Partner(s)

The public agencies that will help implement the project through planning, project development and/or construction. Agencies are encouraged to coordinate when proposing projects. Partners may also contribute funding to help implement the project.

Select all agency partners from the list or "N/A" if not applicable.

- All eligible nominating agencies listed above.
- Railroad operators (e.g., Union Pacific, Burlington Northern Santa Fe, Portland & Western) are eligible as part of a joint project with a local government, Metro, ODOT or transit provider (in coordination with transportation agencies and county coordinating committees).

Primary Owner

A primary owner is the public agency with primary ownership of the project facility. While some projects will have more than one facility owner involved, agencies should identify the primary owner. Primary facility owners may be any of the nominating agencies or agency partners listed above.

Select the primary owner from the drop-down list.

Does this project have a start and end location?

Answer "**yes"** for a linear or area project such as "Hall Blvd: Locust to Durham Bikeways" that will have a clear start and end point. Answer "**no**" for programs that do not have a physical location or do not yet have a specific physical location identified "Transit Signal Priority Improvements (Portland)."

Click to edit to enter the start and end location of the project in each of the appropriate text boxes.

- **Project Start/End Location** – For projects answering "**yes**", identify the project extent from North to South and/or from West to East. These must be consistent with the project name.
  - Start location – the beginning of the project limit or location of a spot improvement
  - *End location* – the end of the project limit

Time Period

The 2023 RTP is for the Dec. 1, 2023 to Sept. 30, 2045 time period. Consistent with the adopted RTP work plan, the investment strategy includes two horizon years:

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Select the time period from the drop-down list.

- 2023-2030 to identify near-term priorities to meet the most immediate needs
- 2031-2045 to identify longer-term priorities to meet other regional needs

Indicate which of the two time periods (2023-2030 *or* 2031-2045 to match the revenue forecast years) the project is expected or recommended for construction/implementation. If "2023-2030" is selected, you must answer yes to the question "is the project on the financial constrained list".

Is the project on the financially constrained list?

The investment strategy also organizes projects based on the financially constrained revenue forecast and policy priorities of the RTP.

Select the Yes or No from the drop-down list.

- Constrained priority projects (both 2023-2030 and 2031-2045) fit within the RTP financial forecast cost target (i.e., "RTP budget"). For projects to be eligible to receive federal and state funding, they must be on this list.
    - Select "**yes**" if your project or program is on the list for which funding has been committed or is recommended to be implemented with funding the region currently expects to have available..
- Additional strategic priority projects (2031-2045) the region should work together to develop funding for and construct.
    - Select "**no**" if your project or program is on the list for which funding is not currently anticipated.

Estimated Cost (in 2023 Dollars)

Review and update if appropriate costs for existing projects and programs and add costs for new projects or programs.

Click to review, confirm, change, or add estimated cost.

- Costs should be in 2023 dollars. Costs for projects included in the 2018 RTP have been updated to 2023 dollars by inflating the previous 2016 costs by 40% based on transportation industry cost data.
    - Review and confirm the cost estimate is appropriate for the project.
    - If the project definition has changed due to project development activities or other reasons and a refined cost estimate is more appropriate, please provide a modified cost (in 2023 dollars). Upload a document providing a short explanation of the reason for the modified cost estimate under the "Files" tab of the Hub.
- Project costs must be $2 million or more.

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- Project costs must account for all elements that could impact the cost of the project. For projects included in the 2018 RTP, consider whether there are changes to the scope or other details not previously accounted for that would influence the overall cost beyond inflation escalation, such as:
    - Costs associated with right of way, utilities and stormwater.
    - Intelligent Transportation Systems, System or Demand Management elements.
    - All phases of the project (if not separated out into separate projects) including planning, preliminary engineering, right of way acquisition, utilities, construction.
    - For projects expected to use federal funds:
        - Project management to address federal aid process requirements. Non-certified agencies will need have the project budget provide reimbursement to their project delivery agency (ODOT or another certified agency). Certified agencies can incorporate these costs into other project cost elements but should indicate how they have done so.
        - NEPA process costs and project mitigation design elements
        - Meeting federal ROW procedural and cost requirements beyond local agency process
        - Construction engineering/traffic management requirements beyond local agency process
- Round project costs to the nearest $100,000.

- For projects with an anticipated completion date in 2030 or sooner, nominating agencies must provide documentation of cost estimation.
    - Nominating agencies may use Metro's cost estimate worksheet or use a comparable cost estimate methodology to update project costs for all capital projects.
    - Add the completed Metro or other worksheet to the "Files" tab of the Project Hub, with the following naming protocol: RTP-ID#_cost-estimate-worksheet.

***Estimated (Cost in year of expenditure dollars)**

Federal rules require project costs to be provided for in year-of-expenditure (YOE) dollars to account for the impacts of inflation. ODOT and statewide MPO staff have forecasted a 3.3% annual inflation rate for transportation projects for the purposes of long-range planning forecasts based on recent historical data.

Click to add estimated cost in YOE.

- For projects identified for implementation in the 2023-2030 timeframe please multiply the 2023 cost estimate by 1.138 to reflect a cost inflated to a 2027, the mid-year of this timeframe. For projects identified for implementation in the 2031-2045 timeframe multiply the 2023 cost by 1.627 to reflect a cost inflated to a 2038, the mid-year of this timeframe. This reflects an approach that generally assumes projects are implemented evenly over the planning period and shares the inflationary costs equally among projects in each of the two time periods for project analysis.
- If choosing a different cost methodology more appropriate to the project or program year of expenditure costs, provide the year-of-expenditure cost estimate to this

question and upload a short explanation of the cost method to the "Files" tab of the Project Hub.
- Round project costs to the nearest $100,000.

*How much funding is already committed to the project?

A revenue forecast of funds expected to be available for project costs during the planning period, accounting for new revenues from 2024 through 2045. The project costs submitted for the RTP need to reflect the total cost of the project or program, including those already committed.

Click to add amount of funding committed to the project; if none, enter 'none'.

- If a project or program is submitted that has funding already committed to it from prior to fiscal year 2024, identify that revenue amount so that it can be added to funding available for the project.

- Metro staff will coordinate with agencies whose projects have received funding awards from regional, state or federal sources within the planning period, such as the 2025-27 Regional Flexible Funds Allocation.

*Have you accounted for all elements that could impact the cost estimate of the project?

Project costs must account for all elements that impact the cost. (e.g., preliminary design, final design and engineering, right-of-way acquisition).

Select the Yes or No from the drop-down list.

- If you have included all of the expected project cost elements into your cost estimate, select "**yes**".
- If you have not yet included all of the expected project cost elements, select "**no**" and upload a document providing a short explanation under the "Files" tab of the Hub.

List RTP ID Numbers (if known) or other related project phases

List the ID# of other projects submitted to the 2023 RTP (including any already included in the 2018 RTP) that represent other phases of the project (e.g, RTP #11398, RTP #51345). Projects that cost more than $25 million are encouraged to be submitted as discrete phases of project development (e.g., preliminary design, final design and engineering, right-of-way acquisition, and construction) and/or smaller, logical segments.

Click to add ID numbers of related projects

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*Project features and design elements

Identify all features relevant to the project design. Any features or design elements that change roadway capacity or add bicycle infrastructure should be reflected in the modeling assumptions form (see part 4 below).

Select all that apply from the drop-down list.
[NOTE: DRAFT LIST AND DEFINITIONS; MINOR UPDATES WILL BE ADDED FOR CONSISTENCY WITH MTIP]

Feature/Element	Definition
Pedestrian Features and Elements	
Buffer treatment and benches	
Lighting intersections & marked crossings	Includes marked crossings, median refuges, Ped head start signal timing, RRFBs, pedestrian lighting of crossing area, etc.
Overpass or underpass	Physically separated crossing of a highway or throughway
Priority inter. treatments/raised median island	
Pedestrian signal or beacon	
Sidewalk infill	Adding sidewalk to fill a gap
Universal access and ADA compliance	Adds new or upgrades facilities consistent with the American With Disabilities Act requirements
Sidewalk reconstruction/improvements	Includes curb cuts, sidewalk widening, etc.
Bicycle Features and Elements	
Bicycle boulevards	On-street shared lane elements, sharrows, signage. May also include safety elements such as median island, signal modifications, lighting, etc., where crossing high volume streets.
Bicycle parking	All types – staples, corrals, at transit stations
On-street bikeway or bike lane	Conventional striped bike lane without physical separation or buffered striping
Overpass or underpass	Physically separated crossing of a highway or throughway
Priority treatments at intersect & crossings	Can include green paint, signal priority, protected intersection designs
Buffered bikeways	Bikeways with painted buffer
Protected bikeways/cycletracks	Projects that include physical barriers and/or grade separation from motor vehicle lanes. Should we break out these features or is a different definition more appropriate? E.g., do plastic wands in a striped buffer area constitute "Protected"?
Restriping/Maintenance	Maintaining existing bikeway facilities
Trail Features and Elements	
New trail/multi-use path or extension	Include if the project is a trail/path or if there is a complementary off-street element of a primarily on-street facility project.
Treatments (pull-outs, seating, wayfinding)	Include for both on-street facilities, and off-street trails
High visibility trail street crossings	
Transit Features and Elements	
New rail infrastructure/connection	• Construction or renovation of power, signal, and communications systems.
New rapid bus infrastructure/connection	
New bus line/connection	

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New vehicles	• Vehicles - service expansion • Vehicles – replacement • Purchase of new buses and rail cars to replace existing vehicles or for minor expansions of the fleet. • Purchase of operating equipment for vehicles (e.g., radios, fareboxes, lifts, etc.). • Purchase of support vehicles.
Transit center, stop or station	Stop features such as shelters, pads, lighting, real-tine arrival information, etc. • Construction of small passenger shelters and information kiosks. •
Park and rides	
Enhanced transit corridor investment	
Other priority/enhanced transit toolbox designs	Transit technology and ITS projects.
New service	• Special needs transportation services. • Transit service and operations enhancements and related “operating” capital
Other operations	• Safety and security programs. • Purchase of office, shop, and operating equipment for existing facilities. • Operating assistance to transit agencies. • Ongoing operations and related “operating” capital (such as transit vehicle replacements for existing service or maintenance facilities).
Maintenance	• Rehabilitation of transit vehicles. • Maintenance facilities, operations center facilities, vehicle storage, etc. • Construction of new bus or rail storage/maintenance facilities categorically excluded in 23 CFR part 771. • Rehabilitation or reconstruction of track structures, track, and trackbed in existing rights-of-way. • Reconstruction or renovation of transit buildings and structures (e.g., rail or bus buildings, storage and maintenance facilities, stations, terminals, and ancillary structures).
Freight Features and Elements	
Signal priority, freight-only lanes, queue jumps	Includes things to accommodate or optimize freight truck operations such as turning radii, height clearances, signal time extension, etc.
Loading zones	
Turning radius designs	
Grade separate freight modes	
Improved rail crossing	Can include speed upgrades, widening of turn radius, new safety features, etc.
New connection	New track or double tracking
Maintenance	
Operations	
Roadway Features and Elements	
New general purpose lane(s)	Include new turn lanes, center turn lane
New auxiliary lane(s)	
Bus lane	
Toll lane	

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Removes or separates auxiliary lane	
New road/roadway extension	
Reconstruction/realignment	For projects that include sub-grade work (more expensive and triggers state bike bill requirements)
Road widening	
New bridge	
Bridge reconstruction/realignment	
Bridge seismic retrofit	
Bridge maintenance	
New interchange	
Arterial inter. designs, gateway treatments	
Intersection design changes	
Seismic retrofit	Seismic retrofits for small/local bridges and ODOT bridge rehabilitation projects.
Treatments reduce conflicts among diff. modes	
Curb and stormwater drainage	
Road diet, removal of general purpose lane, or Adding diverter	
Maintenance	
Operations	
Projects that correct, improve, or eliminate a hazardous location or feature Railroad/highway crossing warning devices. Guardrails, median barriers, crash cushions. Pavement marking, resurfacing and/or rehabilitation. Fencing. Skid treatments. Safety roadside rest areas. Adding medians. Lighting improvements. Emergency truck pullovers. Emergency relief (23 U.S.C. 125) Increasing sight distance. Highway Safety Improvement Program implementation.	
Throughway Features and Elements	
New interchange	
Interchange design changes	
New connection	
Widening	
New general purpose lane(s)	
New auxiliary lane(s)	
Bus lane	
Toll lane	
Removes or separates auxiliary lane	
Maintenance	
Operations	
TDM/TSMO/Other Features and Elements	
ITS elements	• Includes ITS systems, real-time data collection and use,

	communications infrastructure, software purchases, etc. • Traffic control devices and operating assistance other than signalization projects.
Access management/demand management	Ride-sharing and van-pooling promotion activities. Other local or ODOT TDM programs
Multimodal Traffic Management	
Traffic Incident Management	
Traveler Information	Commuter and individualized marketing programs.
Other: Program	• Federal-aid systems revisions. • Engineering to assess social, economic, and environmental effects of the proposed action or alternatives to that action. • Noise attenuation. • Emergency or hardship advance land acquisitions (23 CFR 710.503). • Acquisition of scenic easements. • Plantings, landscaping, etc. • Sign removal. • Directional and informational signs. • Transportation enhancement activities (except rehabilitation and operation of historic transportation buildings, structures, or facilities). • Repair of damage caused by natural disasters, civil unrest, or terrorist acts, except projects involving substantial functional, locational or capacity changes.

What type of program?

If project does not have a start and end location (answers **no** to "Does this project have a start and end location") and is not a capital project. Identify the type (e.g., program) and scale (e.g., corridor, citywide, countywide, regionwide, or state) from the drop-down list. Examples include a transportation demand management (TDM) project or transit service operations and related "operating" capital (such as transit vehicle replacements and purchases or maintenance facilities).

Select the type of program from the drop-down list.

Part 2: Adding or Changing Investment Categories

To add or change project or program Investment Category information go to the section with that title in the "Tasks" tab.

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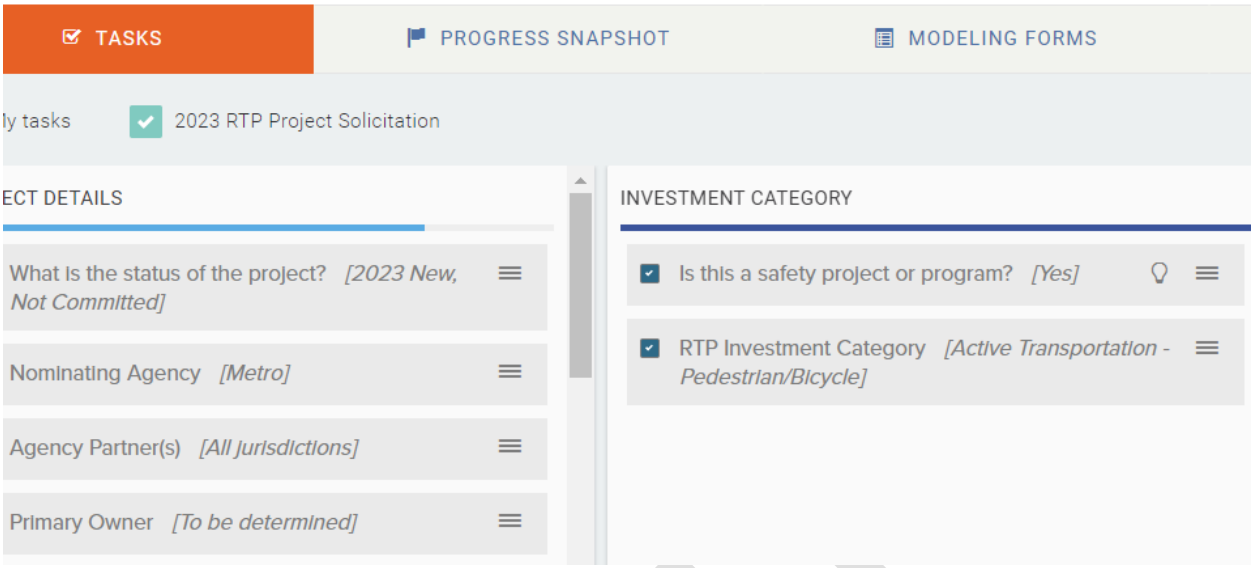

Is this a safety project or program?

Safety projects and programs are identified by agencies in safety action plans and other plans and studies. Safety projects have the primary purpose of preventing and reducing fatal and serious injury crashes addressing a documented safety problem at a documented high injury or high-risk location (including Regional High Injury Corridors and Intersections) with one or more proven safety countermeasure(s).

Select the Yes or No from the drop-down list.

Answer "**yes**" if the following apply:
A safety problem (occurrence and risk of fatal and serious injury crashes) has been identified and documented through an analysis of crash and risk data in safety plans or other plans and studies.

- The project or program addresses the identified safety problem using proven safety countermeasures such as road diets, medians and pedestrian crossing islands, pedestrian hybrid beacons, roundabouts, access management, reflective backplates, safety edge, enhanced curve delineation, and rumble strips, or programs such as Safe Routes to School, messaging and behavioral programs. More information about these and other proven countermeasures can be found at: https://safety.fhwa.dot.gov/provencountermeasures and www.oregon.gov/ODOT/HWY/TRAFFIC-ROADWAY/docs/pdf/CRF_Appendix.pdf.

RTP Investment Category

RTP Investments categories group projects and programmatic investments by the primary transportation network. If a project or program makes investments in multiple modes, please select the category that describes the most significant portion of the project.

Select the appropriate investment category from the drop-down list.

[NOTE: DEFINITIONS UNDER DEVELOPMENT FOR CONSISTENCY WITH MTIP]

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Investment Category	Description
Active Transportation	
Pedestrian	Capital projects primarily addressing pedestrian or people with disabilities needs. Sidewalks, off-street trails, modernize street and intersection designs to reduce conflicts and better serve people walking
Bicycle	Capital projects primarily addressing bicyclist needs. Protected and/or separated bike lanes, off-street trails, modernize street and intersection designs to reduce conflicts and better serve people walking
Pedestrian/Bicycle	Capital projects addressing both pedestrian and bicyclist needs. Protected and/or separated bike lanes, sidewalks, crosswalks and curb ramps on major streets, off-street trails, etc.
Roadways	
Freight	Capital projects primarily addressing freight access needs. Road and railroad crossing upgrades, port and intermodal terminal access improvements, rail yard and rail track upgrades
Roadways	Capital projects primarily addressing motor vehicle travel needs. New arterial and collector street connections, strategic widening, highway overcrossings, etc. Check design elements for pedestrian, transit and bicycle elements.
Bridges	Capital project primarily addressing motor vehicle travel needs. Check design elements for pedestrian, transit and bicycle elements.
Roadway Operations	
Bridge Operations	
Roadway Maintenance and Preservation	Pavement resurfacing, preventive maintenance, preservation and rehabilitation
Bridge Maintenance and Preservation	Bridge pavement resurfacing, preventive maintenance, preservation and rehabilitation
Throughways	Interchange fixes, strategic widening, auxiliary lane additions
Transit	
High Capacity	New LRT, bus rapid transit, streetcar, commuter rail facilities
Better Bus	
Capital - Other	Bus shelters and benches, passenger boarding areas, transit stop and station access, lighting at stops, et. Stop features such as shelters, pads, lighting, real-tine arrival information, etc. Maintenance facilities, operations center facilities, vehicle storage, etc.
Operating Capital	Features that make vehicle operations more efficient or reliable such as transit signal priority, que-jump lanes, etc.
Service and Operations	Funding that supports service operations costs
Maintenance	Preventive maintenance for fleet and facilities, transit vehicle replacement, etc. to keep system in good repair
Transit-oriented Development	Policy and market incentives to encourage building higher-density, mixed-use projects in centers and along corridors served by high capacity and frequent transit
Other	
Transportation System Management (Technology)	Traffic signal and transit priority coordination, vehicle charging stations, clearing crashes quickly, etc.
Transportation Demand Management	Regional travel options programs, paid and timed parking in centers, encourage walking, biking, use of transit, carpooling, carsharing, ridesharing,

	telecommuting, etc.
Pricing Programs	
Regional Activities	

Part 2: Indicating Modeling Status and Adding or Changing Modeling Assumptions

To add or change project or program modeling assumptions look column called "Modeling Forms" under the "Tasks" tab.

Is this project new or have the modeling details been updated?

New capital motor vehicle, freight, transit, and bicycle projects, OR projects included in the 2014 or 2018 RTP that have changed must provide modeling assumptions.

Select the Yes or No from the drop-down list.
If you are adding a new project, OR for projects included in the 2018 RTP that have changed, answer "**yes**". If not, select "**no**".

If you answer yes to this question, fill out a form of the project's modeling details under the "Forms" tab from the project menu bar.

*Does the project add a lane of any type?

The purpose of this question is to identify projects that add motor vehicle capacity to the regional transportation system which must be included in the regional travel model.

Select the Yes or No from the drop-down list.
Consistent with 660-012-0830, answer "**yes**" to this question for any project exceeding $5 million in cost and including: (A) A new or extended arterial street, highway, freeway, or bridge carrying general purpose vehicle traffic; (B) New or expanded interchanges; (C) An increase in the number of general purpose travel lanes for any existing arterial or collector street, highway, or freeway; and (D) New or extended auxiliary lanes with a total length of one-half mile or more.

If you answer yes to this question, fill out a form of the project's modeling details under the "Forms" tab.

Roadway capacity modeling details
Describe the modeling details (see roadway modeling worksheet example here):

- Indicate the number of NB, WB, SB, EB through lanes, auxiliary lanes, turn lanes, posted speed and traffic signals before and after the project;
- Describe the auxiliary lane extent and configuration that should be assumed in the traffic model;
- Describe the interchange configuration to be assumed in travel model;
- Describe the type of turn lane(s) (i.e. a right turn, double left turn, continuous left turn);
- Describe the turn lane restrictions that should be assumed in the traffic model; and
- List the locations of all existing & anticipated traffic signals.

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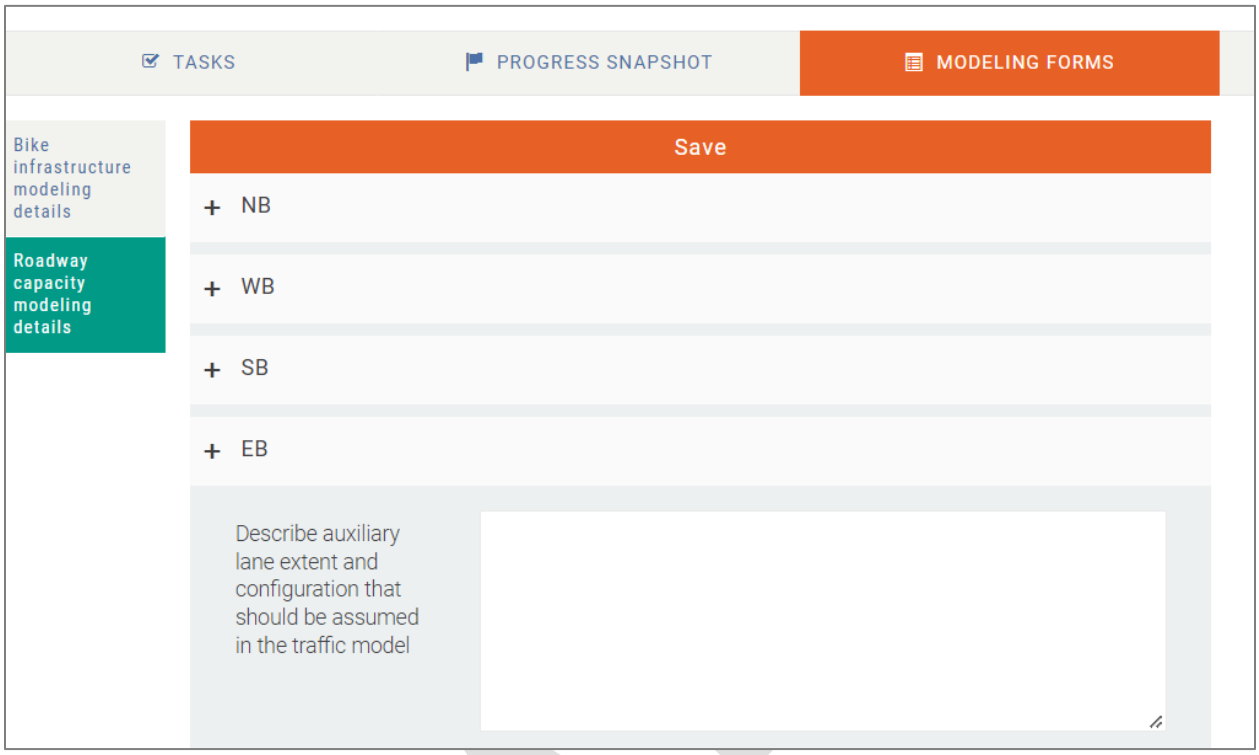

Also provide a link to any supporting modeling diagrams, engineering drawings, maps or other relevant information (see bike modeling worksheet example here). Maps and drawings should identify street names at project start and end locations and other important intersections.

! The RTP ID, project description, and project start and end location will populate automatically once you save.

Check "yes" this form has been completed and click "save" at the bottom of the form.

To upload any files to support the information provided:

- **Click** on the "Files" tab (second from the right) on the project menu bar.
- **Click** "Upload File" in the top right corner to find the correct file to upload.
- **Select** "Modeling Assumptions" from the checklist and add a short description of what you are uploading (e.g., engineering drawing).
- **Click** "Add File" in the bottom right to submit.

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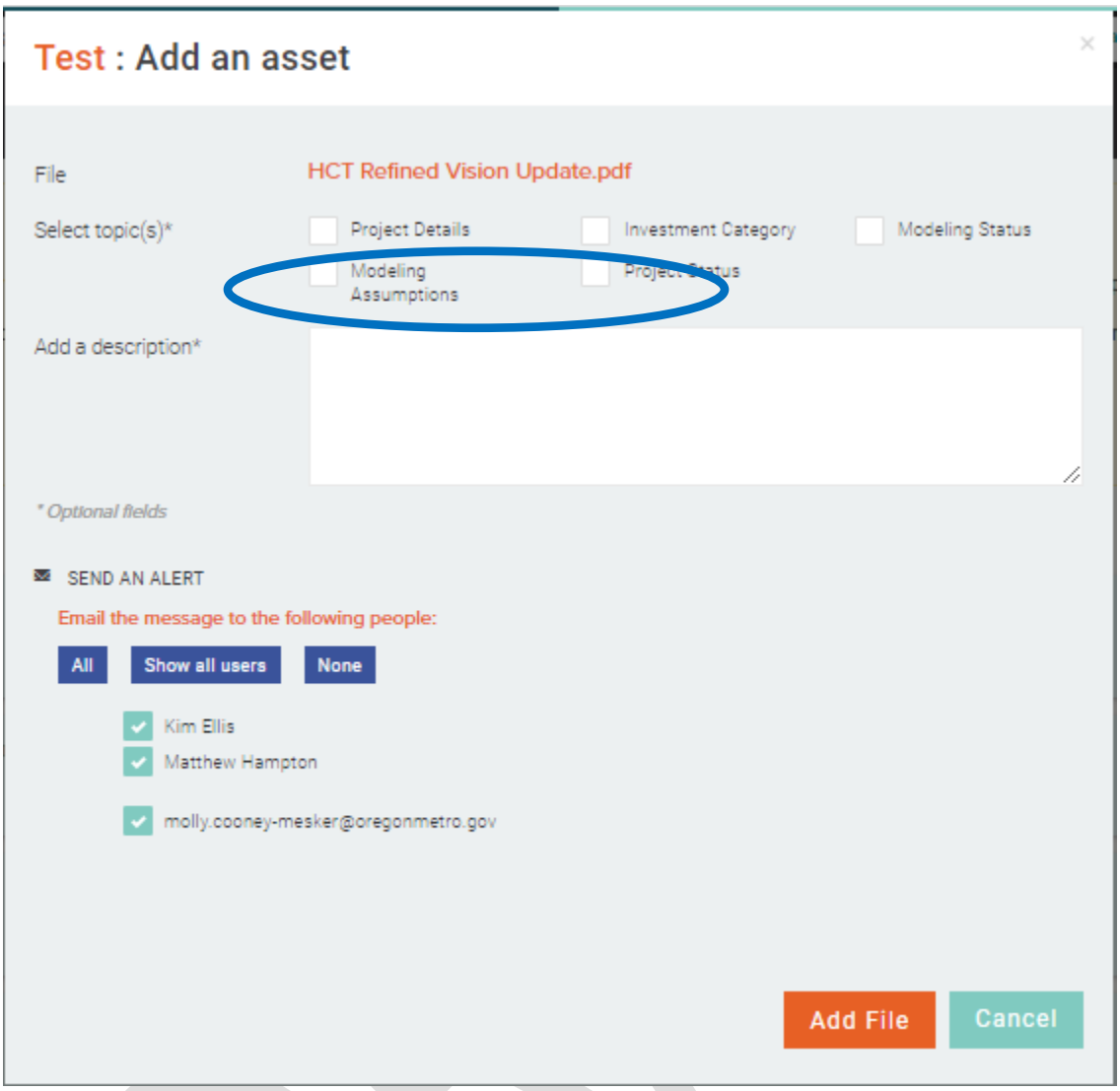
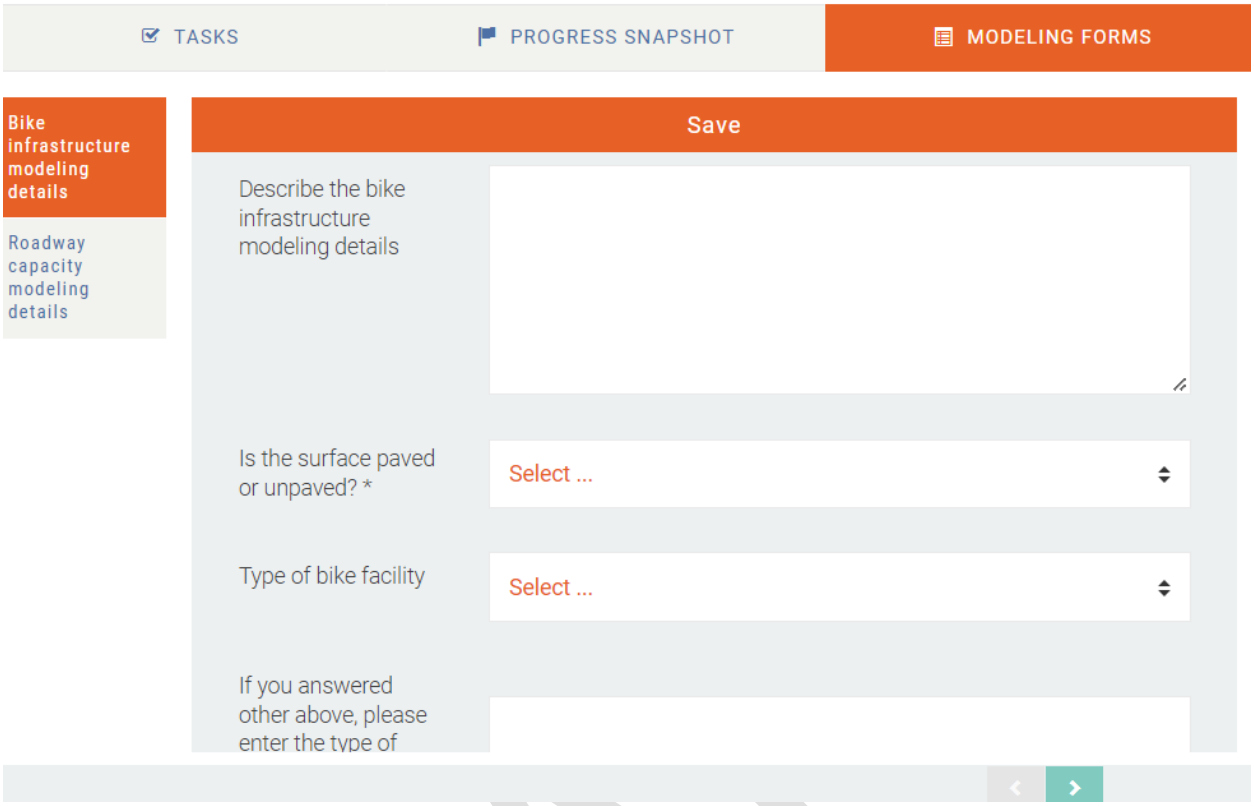


Does the project add bicycle infrastructure?

Bicycle infrastructure additions that must be included in the regional bike model include: adding a cycletrack, buffered or protected bike lanes, on-street bike lanes, bike boulevard, and off-street trail/multi-use path. If the project adds any of these types of bicycle infrastructure, answer "**yes**" to this question.

If you answer yes to this question, click on bike infrastructure modeling details or go to the "Modeling Forms" tab to fill out a form of the project's bicycle modeling details.



Describe the bike infrastructure modeling details, whether the surface is paved or not, the type of bike facility, and provide a link to any supporting modeling diagrams, engineering drawings, maps or other relevant information (see bike modeling worksheet example here). Maps and drawings should identify street names at project start and end locations and other important intersections.

! Don't worry about filling out the RTP ID, project description, or project start and end location- these are linked in the hub and will populate automatically once you save. Check "yes" this form has been completed and click "save" at the bottom of the form.

To upload any files to support the information provided:

- **Click** on the "Files" tab (second from the right) on the project menu bar.
- **Click** "Upload File" in the top right corner to find the correct file to upload.
- **Select** "modeling assumptions" from the checklist and add a short description of what you are uploading (e.g., engineering drawing).
- Click "Add File" in the bottom right to submit.

Note that many projects will both change roadway capacity and add bicycle infrastructure. For those projects, complete both modeling assumption sections. If only one of the two is applicable, you need only to submit modeling assumptions for the appropriate section.

Part 3: Adding or Changing Project Status

To add or change project or program status information look to the last column still in the "Tasks" tab.

*What plan or study identified the need for this project?

To be eligible for consideration for inclusion in the 2023 RTP, a project or program must come from adopted or approved plans, strategies or studies developed through a public planning process with public engagement and opportunities for public comment that identified the project to address a transportation need on the regional system. Indicate which type of adopted plan or strategy identified the need for the project or program.

Note that if a project is not in a Transportation System Plan, and is not in the RTP, and adds motor vehicle capacity you must fill out Congestion Management Process Documentation. Fill out the form and upload it to the "Files" tab.

Select the appropriate document from the list below or choose "This project has not been identified in a plan or study."

- Transportation System Plan
- Concept Plan
- Freight Plan
- Area Plan
- Corridor Refinement Plan
- Transit Plan
- Service Enhancement Plan
- Safe Routes to School Plan
- Safety Plan
- Active Transportation Plan
- Transportation Demand Management (TDM) Plan
- Transportation System Management and Operations (TSMO) Plan

*Was the public involved in the process prioritizing this project?

Many transportation system plans, subarea plans, topical (e.g. safety) plans, modal (e.g. freight) plans, or transit service plans include a larger list of projects that is prioritized for funding and timing based on community need. Typically, the public is engaged in a process to provide input shaping how the broader list is prioritized with specific outreach to communities of color, people with low-income and people who don't speak English well. Documentation of public involvement certifying that appropriate public involvement efforts were made or will be made and documented in the *Public engagement and non-discrimination certification and documentation form*.

Select the Yes or No from the drop-down list.

If the project or program went through a process where the public was engaged in its prioritization, answer "**yes**" to this question. If not, answer "**no**".

Please upload the project or program geospatial file (zipped GIS file)

[NOTE: THIS SECTION WILL BE UPDATED] All location-specific projects should submit a GIS geoshapefile shapefile. Having accurate geospatial information for transportation investments is vital to inform the visualization, mapping, analysis and communication of transportation investments in the RTP. Digitized geographic information will support geospatial analyses that will measure how investments are supporting the vision and goals for the transportation system (e.g., overlapping with 2040 Growth areas, high injury corridors, Equity Focus Areas and other spatial data). GIS data will also be published in Metro public communication materials.

- Base data we have from the adopted 2018 RTP is provided within the 2023 RTP Resource Guide to help project sponsors review existing project extents. The base data reflects all projects in the 2018 RTP project list. Project sponsors are asked to review the existing digitized extent of each project.
- If the digitized extend of the project has changed, project sponsors should either provide edited GIS files as a geodatabase or an updated shapefile (if edits are needed) through the RTP Project Hub website. Answer "**yes**" to the question "has the GIS information for this project changed" to indicate where geospatial information has changed for the project since submission for the 2018 RTP and to be prompted to upload files.
- Note that area-wide projects, including programmatic investments must identify the program/project boundary (e.g. city boundary for a sidewalk program, MPO boundary for a regional program).

Nominating agencies do not need to submit GIS files for projects in the 2018 RTP project list unless a revision is needed – refer to the current data by its RTP ID number and project name and attach the (zipped) file to the RTP Project Hub website. Answer "**no**" to the question "has the GIS information for this project changed" to indicate where geospatial information has not changed for the project since submission for the 2018 RTP.

If you answered yes:

- **Click** on the "Files" tab (second from the right) on the project menu bar.
- **Click** "upload file" in the top right corner to find the correct file to upload.
- **Select** "Project Status" from the checklist and add a short description of what you are uploading. Use the naming protocol "RTP-ID#-Geoshapefile"
- **Click** "Add File" in the bottom right to submit.

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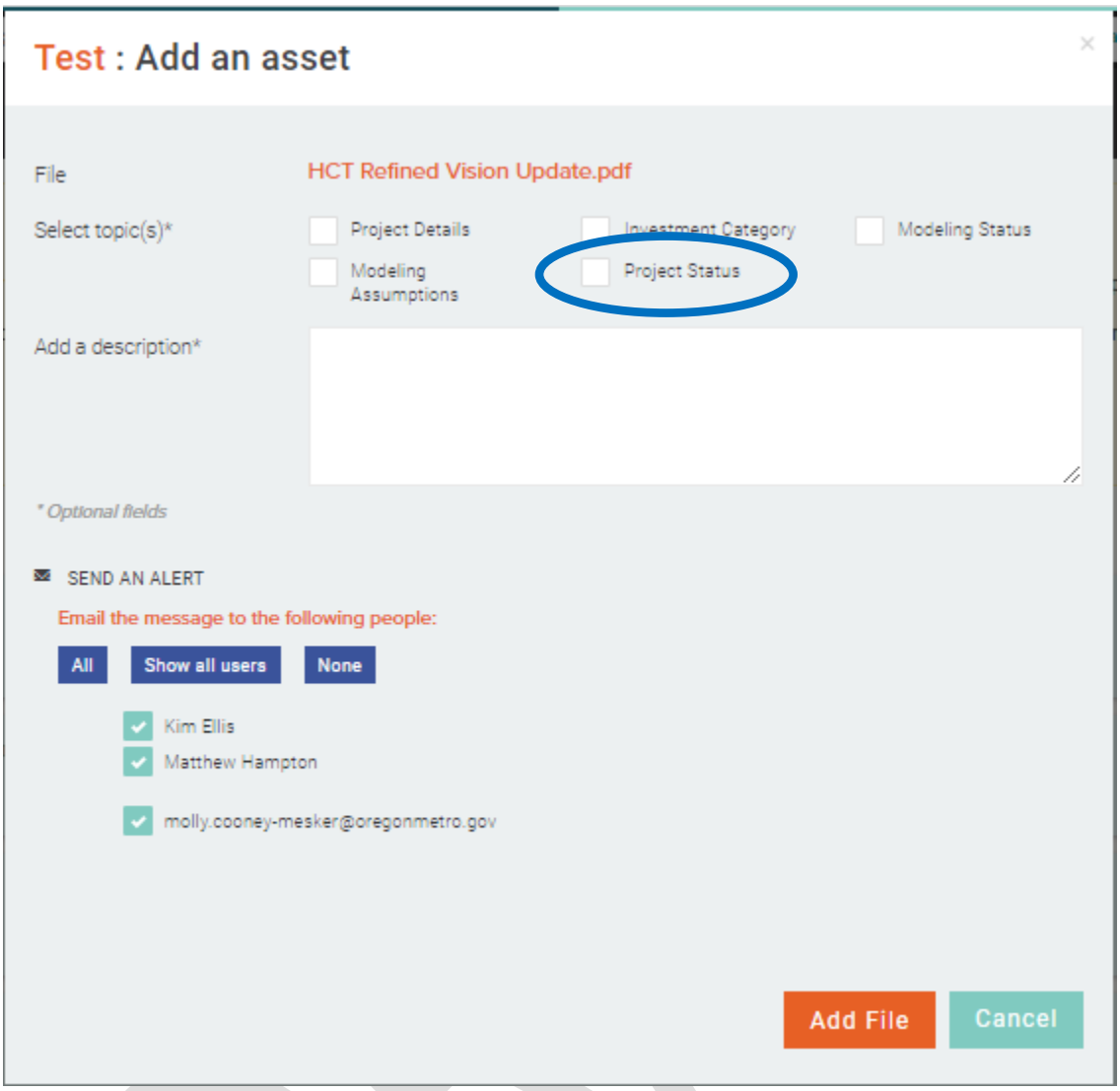
Test : Add an asset
File
HCT Refined Vision Update.pdf
Select topic(s)*
Project Details
Investment Category
Modeling Status
Modeling Assumptions
Project Status
Add a description*
* Optional fields
SEND AN ALERT
Email the message to the following people:
All
Show all users
None
Kim Ellis
Matthew Hampton
molly.cooney-mesker@oregonmetro.gov
Add File
Cancel

GIS Data Submission Guidance: The geodatabase and shapefiles contain Metro's most recent RLIS street centerlines and all the projects included in the 2018 RTP project list. The geodata can be viewed in the RTP Map Tool and downloaded from the following ftp site: ftp://ftp.oregonmetro.gov/dist/tran/RTP/
Nominating agencies must digitize the extent of their project by snapping to RLIS street lines (see below for examples) and saved as shapefiles or features in a geodatabase.

- **For existing projects**, project sponsors can zoom into the general areas of the project and use the "identify tool" to find the existing project and verify the spatial extent or make any necessary extent or shape adjustments. Select and export the updated feature.
- **For new projects**, project sponsors will need to digitize the project extent.

A. Linear Projects: Projects on roads, sidewalks, and other continuous paths associated with roadways should be created as a line feature that consists of RLIS street segments (e.g., traffic signal timing in a corridor or multiple corridors within a jurisdiction.) Please select the RLIS street lines for the project extent and export the feature titled with the RTP ID number and project name.

B. Point projects: Projects that are in discreet locations (e.g., intersection improvements, bridge projects, etc.) should be created as a point feature in a geodatabase or a shapefile and snapped to the street network. Please export the point feature titled with the RTP ID number and project name.

C. Area projects: Transportation projects that do not conform to lines or points can be represented with a polygon. These include region-wide projects, or projects that are programmatic in nature. In these instances, submit a polygon of the project or program extent in a geodatabase or as a shapefile. For instance, if your project is to implement a safe routes to school program in a city, you can submit the city boundary. Please export and upload the polygon feature titled with the RTP ID number and project name.

If more than one project is contained within a shapefile, please provide the RTP ID number and project name for each project in the attribute table.

Questions can be directed to Matthew Hampton at matthew.hampton@oregonmetro.gov

***Have additional files? If yes, please upload in the files tab**
TEXT TO BE ADDED

Have you answered all of the questions? If yes, is the project information updated and ready to review?
To track progress toward task completion for a given project or program, click the "Progress Snapshot" tab on the right of the project menu bar. Each letter stands for sub-tasks under the Tasks tab, for example P= Project Details and tells you how much of that status has been completed.

Staff and Data Resources

Metro staff can also provide topical project and program-related technical support as needed during the process.

2023 RTP Update Process	Kim Ellis kim.ellis@oregonmetro.gov
Public engagement	Molly Cooney-Mesker molly.cooney-mesker@oregonmetro.gov
Title VI non-discrimination documentation	Cliff Higgins clifford.higgins@oregonmetro.gov
RTP finance and agency revenues	Ken Lobeck ken.lobeck@oregonmetro.gov
Safety projects	Lake McTighe lake.mctighe@oregonmetro.gov
Pedestrian, bicycle and trail projects and Regional Active Transportation Plan	John Mermin john.mermin@oregonmetro.gov
Freight projects and Regional Freight Strategy	Tim Collins tim.collins@oregonmetro.gov
Mobility corridors, road and bridge capacity or reconstruction projects	Tim Collins tim.collins@oregonmetro.gov
Demand management projects and programs	Dan Kaempff daniel.kaempff@oregonmetro.gov
System management and operations projects and programs	Caleb Winter caleb.winter@oregonmetro.gov
Transit projects, Regional Transit Strategy and High Capacity Transit Strategy	Ally Holmqvist ally.holmqvist@oregonmetro.gov
Cost estimate methodology	Ted Leybold ted.leybold@oregonmetro.gov
Travel demand model assumptions (including motor vehicle, transit and bicycle)	Thaya Patton thaya.patton@oregonmetro.gov
Geographic information system data	Matthew Hampton matthew.hampton@oregonmetro.gov
RTP project list or on-line project hub	Ally Holmqvist ally.holmqvist@oregonmetro.gov

Who should I contact to coordinate updating the project list?

Nominating agencies coordinate with other agencies and Metro staff liaisons to submit project list endorsements. Confirm coordinating committee meeting dates, times and locations with the appropriate agency contact below.

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Agency	Agency contact
Metro	Ally Holmqvist (916) 812-3763 ally.holmqvist@oregonmetro.gov Lake McTighe (503) 267-8652 lake.mctighe@oregonmetro.gov
City of Portland	Eric Hesse (503) 823-4590 Eric.Hesse@portlandoregon.gov Francesca Jones 503-865-6214 francesca.jones@portlandoregon.gov
Clackamas County and cities	Karen Buehrig (503) 742-4683 karenb@co.clackamas.or.us
Multnomah County and cities (excluding City of Portland)	Jessica Berry (503) 988-3897 jessica.berry@multco.us
Washington County and cities	Chris Deffebach (503) 846-3406 christina.deffebach@co.washington.or.us
TriMet	Tara O'Brien (503) 341-5871 obrienta@trimet.org
ODOT	Glen Bolen (503) 539-8454 glen.a.bolen@odot.oregon.gov
Port of Portland	Lewis Lem (503) 781-8992 lewis.lem@portofportland.com

What data resources are available?

Several resources are available at oregonmetro.gov/2023projects to support nominating agencies as they review and update project priorities in the RTP.

Much of the data used in the project list assessment is found in the online RTP Map Tool. This map is a compilation of several regional datasets. Each data layer can be turned on and off.

The Map Tool shows the Metro planning area boundary, as well as all streets and rivers. Specific data layers included in the RTP map tool:

- 2018 RTP Projects
- 2040 Growth Concept Design Types
- Equity Focus Areas
- Regional High Injury Corridors and Intersections
- Fatal and serious injury crash locations

Draft 2023 RTP Network Maps

- Motor Vehicle
- Bike
- Pedestrian
- Freight
- Transit
- Transportation System Management and Operations (TSMO)
- Congestion Management Process (CMP) Network

RTP Network Gap Maps

- Regional motor vehicle network gaps
- Regional bike network gaps
- Regional pedestrian network gaps
- Regional trail network gaps
- Regional transit network gaps

Other datasets

- Regional Emergency Transportation Routes (ETRs)
- Oregon Seismic Lifeline Routes
- Environmental Resource Layers (e.g. Title 13, White Oak, etc.)

Economic Value Atlas

- To be determined

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2023 REGIONAL TRANSPORTATION PLAN

Public engagement and non-discrimination certification and documentation for projects submitted in the 2023 Regional Transportation Plan Call for Projects

Purpose

This form provides documentation and a description of the public engagement opportunities that have been provided by project sponsors during the planning and development of projects submitted in the 2023 Regional Transportation Plan (RTP) call for projects. Completion of the form declares that the project sponsors have provided adequate opportunities for public engagement during the development of plans and projects, including identifying and engaging marginalized communities, including people with low income, people with disabilities, people with limited English proficiency, and Black, Indigenous and other people of color.

Metro retains these forms to demonstrate compliance with federal (U.S. Department of Transportation, Federal Highways Administration and Federal Transit Administration) and state (Oregon Department of Transportation) guidance on public engagement and on Title VI of the Civil Rights Act and other civil rights requirements (see FTA Circular 4702.1B and Code of Federal Regulations 450.210 and 450.316). Documentation of the local actions described in this form may be requested by federal or state regulators.[1]

The state also outlines requirements for public engagement in transportation system planning activities by cities and counties in the Oregon Administrative Rules (OAR) as follows:

- OAR 660-012-0120: Transportation System Planning Engagement
- OAR 660-012-0125: Underserved Populations
- OAR 660-012-0130: Decision-making with Underserved Populations
- OAR 660-012-0135: Equity Analysis

Overview of Instructions

1) Complete this form for all projects and programs submitted to 2023 RTP.

- **Section A:** Public Engagement Checklist
- **Section B:** Signed Certification Statement
- **Section C:** Documentation of Source(s) of Projects Submitted
- **Section D:** Summary of Engagement *(for NEPA projects only)*

2) Submit list of projects for 2023 Regional Transportation Plan

3) Submit letter of endorsement from your governing body (e.g., city council, board, commission) for all projects submitted

4) Ensure records are retained by your agency in accordance with instructions in this form

One form must be completed for each list of projects submitted by each nominating agency for the 2023 RTP. Metro will use the information provided to document and describe the array of public engagement opportunities that contributed to the development of the 2023 RTP. All or parts of the completed form may be included in the 2023 RTP public engagement report.

[1] If such a request is unable to be met, the Regional Transportation Plan itself may be found to be out of compliance, requiring regional corrective action.

For questions, contact Ally Holmqvist, Senior Transportation Planner at ally.holmqvist@oregonmetro.gov

Instructions

By February 17, 2023 nominating agencies must fill out each section of this form and submit the completed form to Metro along with the list of projects submitted to the 2023 RTP.

By May 1, 2023 nominating agencies must submit a letter of endorsement from their governing body indicating support for the projects submitted to the 2023 RTP.

Nominating agencies must keep referenced records on file in case of a request for information.

Section A: Public Engagement Checklist

The checklist in this section outlines federal and state Title VI and engagement requirements for transportation planning and project development. By checking each box, project sponsors are confirming that the submitted projects have met the associated requirements to support Title VI and engagement compliance for the 2023 RTP. The type of records that should be retained are listed where appropriate. These do not need to be submitted to Metro, but must be retained by project sponsors as described above. The completed checklist may be included in the final 2023 RTP public engagement report.

Section B: Signed Certification Statement

By signing this section, project sponsors certify:

(1) That projects submitted to the 2023 RTP comply with federal and state Title VI and engagement requirements;
(2) their commitment to retaining records documenting this compliance; and
(3) their commitment to conducting future project development processes for projects in the RTP that are compliant with federal and state Title VI and engagement requirements.

Section C: Documentation of Source(s) of Projects Submitted

In this section, project sponsors provide a list of (1) the adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans or any other such plans or studies that were developed with opportunities for public feedback, in which the submitted projects are included and where additional information on public engagement may be found; and, if needed, (2) information for plans, strategies, etc. that are not yet adopted, but are anticipated to be adopted through a public process prior to the adoption of the 2023 RTP.

Section D: FOR NEPA PROJECTS ONLY - Summary of non-discriminatory, inclusive engagement for NEPA projects

In this section, project sponsors provide additional information on public engagement elements and activities that illustrate how requirements are being met and best practices that are being utilized for any projects subject to the National Environmental Policy Act (NEPA). These are typically large-scale, major projects, anywhere from $100 to 500 million in cost (CFR 40 1508.18), may be constructed in multiple phases, have a high level of public, legislative or congressional interest and require more extensive public outreach and engagement. Completed summaries may be included in the final 2023 RTP public engagement report

Letter of Endorsement Signed by Governing Body – Due May 1

A letter of endorsement from your governing body that indicates support for projects submitted to the 2023 RTP must be provided to Metro.

Requirements for Retention of Records

Records should be retained until the related local transportation system plan, subarea plan or strategy, topical plan or strategy, modal plan or strategy, transit service plan or other plan or study is superseded, or the submitted projects have been completed or removed from the RTP plus six years. Retained records do not have to be submitted unless requested by Metro, state regulators or federal regulators.

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Section A. Public Engagement Checklist for Projects Submitted

This checklist outlines federal and state Title VI and engagement requirements for transportation planning and project development. By checking each box, project sponsors are confirming that the submitted projects have met the associated requirements to support engagement compliance for the 2023 RTP.

Project Sponsor Agency: _____

Total number of projects submitted in 2023 RTP Call for Projects: _____

- ❑ All projects submitted in the call for projects are included in one or more of the documents listed in Table 1 in Section C of this form.

  ***Retained records**: Copies of all documents listed in Section C.*

  OR

- ❑ Not all projects submitted in the call for projects are included in one or more of the documents listed in Table 1 in Section C of this form. These projects are listed in Table 2 in Section C of this form.

- ❑ The nominating agency or governing body has adopted a Title VI Plan and administrative procedures to implement it in compliance with Federal Title IV of the Civil Rights Act and implementing regulations.

- ❑ Projects submitted for the 2023-30 implementation timeframe have conducted, or will conduct, documented project-specific public engagement and analyzed potential inequitable impacts for Black, Indigenous and other people of color, people with limited English proficiency and people with low income compared to those for other population groups.

  ***Retained records**: Documentation of public engagement activities.*

- ❑ Projects submitted for the 2031-45 implementation timeframe have conducted, or will conduct, project-specific public engagement and analyze potential inequitable impacts for Black, Indigenous and other people of color, people with limited English proficiency and people with low income compared to those for other population groups.

  ***Retained records**: Documentation of public engagement activities.*

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- ❑ A public engagement plan was developed for each of the plans, strategies, etc., listed in Table 1 of Section C, in compliance with Federal Title IV of the Civil Rights Act of 1964 and implementing regulations and these Oregon Administrative Rules: OAR 660-012-0120, 660-012-0125, 660-012-0130, and 660-012-0135, including the following (check all that are true):
  - ❑ A statement of non-discrimination.
  - ❑ Public notices were published and requests for input were sent in advance of the project start, engagement activity or input opportunities.
  - ❑ Timely, convenient and accessible forums for public input throughout the process. These forums included accommodations for people with disabilities (e.g., screen reader-compatible materials, ASL interpretation), people with limited English proficiency (e.g., translation) and other accommodations (e.g., hybrid meetings).
  - ❑ Interested and affected groups were identified, and contact information maintained, in order to share plan information; updates were provided for key decision points; and opportunities to engage and comment were provided throughout the process.
  - ❑ Efforts were made to engage marginalized populations, including Black, Indigenous and other people of color, people with limited English proficiency, people with low income, people with disabilities, older adults and youth. Meetings or events were held at times and locations that are convenient and accessible for marginalized populations with access to transit. Language assistance was provided, as needed, such as translation of key materials, use of a telephone language line service to respond to questions or take input in different languages, and interpretation at meetings or events.
  - ❑ During project and/or plan development, a demographic analysis was completed to understand the locations of Black, Indigenous and other communities of color, people with limited English proficiency, people with low income and, to the extent reasonably practicable, people with disabilities, older adults and youth in order to include them in engagement opportunities, at the minimum consistent with Title VI requirements.
  - ❑ Analysis was conducted to document potential inequitable impacts for Black, Indigenous and other communities of color, people with limited English proficiency and people with low income compared to those for other residents.
  - ❑ Public comments were considered throughout the process, and comments received on the staff recommendation were compiled, summarized and responded to, as appropriate.
  - ❑ Adequate notification was provided regarding final adoption of the plan, including how to obtain more detailed information, at least 15 days in advance of adoption. Notice included information on providing public testimony.

***Retained records**: Public engagement plans and documentation of each element that is checked.*

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- ❑ One or more projects or programs included in the submitted list identified potential inequitable impacts through demographic analysis and public outreach. If box is checked, list each project and describe the response to identified potential inequitable impacts.
    - RTP # (if assigned)
    - Project name
    - Project description
    - Response to potential inequitable impacts

***Retained records**: Summary of comments, key findings and changes made to final staff recommendation or adopted plan to reflect public comments (may be included in retained public engagement reports or legislative staff reports).*

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Section B. Signed Certification Statement – 2023 Regional Transportation Plan

By signing this section, project sponsors certify:

(1) that projects submitted to the 2023 RTP comply with federal and state Title VI and engagement requirements;
(2) their commitment to retaining records documenting this compliance; and
(3) their commitment to conducting future project development processes for projects in the RTP that are compliant with federal and state Title VI and engagement requirements.

_____ (project sponsor agency) certifies the information provided in Section A of this form is accurate.

As attested by:

_____

(agency manager signature) (name and title)

_____

(date)

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Section C. Documentation of Source(s) of Projects Submitted

Projects in the Regional Transportation Plan must come from plans, strategies, or studies developed and adopted through a public process with opportunities for public input. In this section, project sponsors provide a list of (1) the adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans or any other such plans or studies, in which the submitted projects are included and where additional information on public engagement may be found; and, if needed, (2) information for projects that were not identified in an adopted plan.

Table 1. Adopted Transportation Plans, Strategies and Studies

Complete this table listing all adopted local transportation system plans, subarea plans or strategies, topical plans or strategies, modal plans or strategies, transit service plans, or other such plans or strategies, in which the submitted projects are identified. Please include the plan, strategy, or study name, the adoption date and link to where the document can be accessed online. Add additional rows, if needed.

Plan name	Date adopted	Link

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Table 2. Projects Not From an Adopted Plan

Identify any projects that are not from an adopted plan identified in Table 1 above (at the time of the call for projects). Provide the requested project information, a brief explanation as to how the project or program was identified outside of an adopted plan or strategy, anticipated date of approval or adoption, and link to the planning process.

To be included in the 2023 RTP the plan must be formally approved or adopted by governing body prior to RTP adoption in November 2023.

RTP Project ID (if assigned)	Project name	Explanation of public process to be used	Anticipated date of approval or adoption	Link

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Section D. For NEPA Projects Only - Summary of non-discriminatory, inclusive engagement

In this section, the project sponsor provides additional information on public engagement elements and activities that illustrate how requirements are being met and best practices are being utilized for any projects subject to the National Environmental Policy Act (NEPA).

Provide a brief summary describing the engagement approach, practice and processes for each project subject to the National Environmental Policy Act (NEPA). The summary may be included in the final public engagement report for the 2023 RTP. List the project name and number for each project. Please respond to each of the following:

- Project name
- RTP Project ID#
- Project sponsor and agency partner(s)
- Brief description of the overall public engagement process, including time period
- Description of compliance with Title VI and Oregon Goal 1: Citizen Involvement and Goal 12: Transportation Planning Administrative Rules, including:
    - Description of how the community has been involved to date and how community will continue to be involved through project design and/or development, including Black, Indigenous and other people of color, people with limited English proficiency and people with low income.
    - How input helped shape project or plan development and prioritization, including what changes came about because of community input particularly for Black, Indigenous and other people of color, people with limited English proficiency and people with low income; and what community stability and anti-displacement strategies have been or will be considered and included in the project and/or plan development.
- Any additional best practices that contributed to equity, transparency, and accountability.

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2023 REGIONAL TRANSPORTATION PLAN
Congestion Management Process Documentation

To be completed for projects that add motor vehicle capacity and are not in an adopted local Transportation System Plan or the 2018 Regional Transportation Plan

Background
Section 3.5.5 of Chapter 3 of the RTP calls for analyzing and implementing system and demand management strategies and/or a combination of other strategies (e.g. pedestrian, bicycle, transit strategies) prior to building new motor vehicle capacity, consistent with the Federal Congestion Management Process (CMP) and the Oregon Transportation Plan policies (including Oregon Highway Plan Policy 1G). Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan (RTFP) further direct how cities and counties implement the CMP in the local transportation system planning process.

Consistent with OAR 660-012-0830, motor vehicle capacity is defined as: A) A new or extended arterial street, highway, freeway, or bridge carrying general purpose vehicle traffic; (B) New or expanded interchanges; (C) An increase in the number of general purpose travel lanes for any existing arterial or collector street, highway, or freeway; and (D) New or extended auxiliary lanes with a total length of one-half mile or more. Auxiliary lane means the portion of the roadway adjoining the traveled way for speed change, turning, weaving, truck climbing, maneuvering of entering and leaving traffic, and other purposes supplementary to through-traffic movement.

This definition is being used to ensure consistency with new administrative rules that apply to cities, counties and the Oregon Department of Transportation (ODOT) during the transportation system planning process.

Purpose
This form provides documentation of how a project that adds motor vehicle capacity and is not in an adopted local Transportation System Plan (TSP) or the 2018 Regional Transportation Plan was identified, evaluated and scoped consistent with the RTP congestion management process. Jurisdictions are asked to use this form to briefly describe how the proposed motor vehicle capacity project was identified, evaluated and scoped consistent with the RTP congestion management process (CMP) as follows:

- cities and counties shall describe how the project was identified, evaluated and scoped through a process consistent with the congestion management process defined in Sections 3.08.220 and 3.08.510 of the Regional Transportation Functional Plan.

- other agencies or jurisdictions shall describe how the project was identified, evaluated and scoped through a process consistent with the congestion management process described in Section 3.5.5 of Chapter 3 of the Regional Transportation Plan.

By Feb. 17, 2023, this form must be completed and submitted by the project sponsor for each applicable project. Metro will use the information provided to support development of federal CMP findings for the 2023 RTP.

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Project Name	*[insert]*
Project Location	*[insert]*
Brief description	*[Briefly how the proposed motor vehicle capacity project was identified, evaluated and scoped consistent with the RTP CMP.]*
Links to reports, plans and/or other supporting information referenced above	

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_____ (project sponsor agency) confirms the information provided above is accurate.

As attested by:

_____
(agency manager signature)

_____
(name and title)

_____
(date)