CFEC TSP Funding Program: Draft Template Statement of Work

**Acronyms and Definitions**

Agency or ODOT Oregon Department of Transportation

ACA Agency Contract Administrator

APM Agency Project Manager

CCPM City Contract Project Manager

CFA Climate Friendly Area

CPM Consultant Project Manager

DLCD Department of Land Conservation and Development

City City of XXX

GIS Geographic Information Systems

LTS Level of Traffic Stress

NTP Notice to Proceed

OHP Oregon Highway Plan

PAC Project Advisory Committee

PMT Project Management Team

Project Transportation System Plan Update

SOW Statement of Work

TAC Transportation Advisory Committee

TDM Transportation Demand Management

TM Technical Memorandum

TO Transportation Options

TPAU Transportation Planning Analysis Unit

TPR Transportation Planning Rule

TSM Transportation System Management

TSP Transportation System Plan

UGB Urban Growth Boundary

# Project Description and Overview of Services

## Project Purpose and Overview of Services

Agency is contracting with Consultant for services in connection with updating the City of XXX YEAR Transportation System Plan (the “Project”) to meet the requirements of the Transportation Planning Rule ("TPR"). The Transportation System Plan (“TSP”) update must include, but is not limited to:

* Executive summary, that serves as a stand-alone summary of the most important aspects of the TSP;
* Goals and Objectives;
* Existing and Future Conditions;
* Plan elements describing the preferred multimodal solutions with maps, tables, and descriptions of the preferred projects; and
* Implementation and Financially Constrained Plan.

All supporting documentation, including the technical memoranda (“TM”), must be included as an appendix (the “TSP Technical Appendix”) which must include, but is not limited to:

* Technical Memoranda;
* Alternatives analyses and evaluations;
* Title VI and Equitable Engagement Report and documentation;
* Comment Log; and
* Ordinance Revisions.

## Project Purpose and Transportation Relationship and Benefit

The Project will update the City of XX YEAR TSP. The TSP must identify an integrated network of multi-modal transportation facilities and services adequate to support development of the City’s existing and planned land uses over a twenty-year planning horizon. The Project must address transportation facility needs within City limits and the Urban Growth Boundary (“UGB”).

## Project Area

The Project Area is the [area inside City’s current Urban Growth Boundary](https://www.oregon.gov/odot/Data/Documents/City_Turner.pdf). [Describe additional concept plans or expansion areas as applicable.]

## Background

[INSERT background information relevant to the TSP update]

## Project Objectives

* Develop transportation goals and policies for the City’s Comprehensive Plan;
* Develop a twenty-year transportation system plan and the funding and financing strategies for transportation facilities;
* Develop implementation policies and code amendments which support a safe and reliable multimodal transportation system that supports a thriving economy; and
* Meet the applicable requirements of the TPR, including amendments adopted in 2022-2023 through the Climate Friendly and Equitable Communities rulemaking process.

## Supporting Outcomes

Supporting outcomes as part of this TSP Update must include, but are not limited to:

* Identify a safe, efficient, well-connected multi-modal transportation network that meets travel needs, based on existing and planned land uses;
* Identify appropriate Transportation Options (TO), Transportation System Management (TSM) and Transportation Demand Management (TDM) techniques;
* Identify how the investments and policies in the TSP support the path to reach regional GHG reduction target;
* Preserve the function and capacity of state transportation facilities;
* Fill gaps and improve safety on pedestrian and bicycle routes to schools and key destinations;
* Ensure the TSP is consistent with applicable laws and adopted plans, including the Transportation Planning Rule, Oregon Transportation Plan, Oregon Modal Plans, Oregon Facility Plans, and City Plans, policies, and ordinances.

## Applicable Standards and General Requirements

The standards, manuals, directives and other guidance applicable to Professional Services and Related Services provided under the Contract are referenced below or available on Agency’s webpages linked below and are incorporated by this reference with the same force and effect as though fully set forth herein. Additional standards, guidance and general requirements applicable to the Project may be specified in individual tasks or elsewhere in the Contract.

The standards, manuals, directives and other guidance listed below or available on Agency’s webpages are not exhaustive and may not include all applicable standards for a given Project. **Consultant shall be responsible for determining all applicable practices and standards to be used in performing Professional Services** **and Related Services. Consultant shall inform and demonstrate to Agency if standards, directives or practices required by Agency in performance of the work are insufficient, in conflict with applicable standards, or otherwise create a problem for the design.** Should the requirements of any reference, standard, manual or policy referenced in the Contractconflict with another, Consultant shall, in writing, request Agency to resolve the conflict.

#### Standards

Unless otherwise specified in a given task, the most current version of applicable standards, manuals, directives and other procedural guidance shall apply. Unless otherwise specified, the system of measurement and language used in all deliverables must be English.

##### Planning, Survey, Preliminary Engineering and Design Manuals, Standards and Guidance

* **Technical Manuals - alphabetical list** (<https://www.oregon.gov/ODOT/Engineering/Pages/Manuals.aspx>)
* **Planning Guidance and Resources** (<https://www.oregon.gov/ODOT/Planning/Pages/Guidance.aspx>)
* **Planning Analysis** (<https://www.oregon.gov/ODOT/Planning/Pages/Technical-Tools.aspx>)
* **Geo-Environmental Guidance (**<https://www.oregon.gov/ODOT/GeoEnvironmental/Pages/Guidance.aspx>)
* **Geometronics Resources & Guidance** (<https://www.oregon.gov/ODOT/ETA/Pages/OCRS.aspx>)
* **Surveying Manuals & Resources** (<https://www.oregon.gov/ODOT/ETA/Pages/Surveying.aspx>)
* **Bridge Standards & Manuals** (<https://www.oregon.gov/odot/bridge/pages/index.aspx>)
* **Engineering Guidance** (<https://www.oregon.gov/ODOT/Engineering/Pages/Eng-Guidance.aspx>)
* **Standard Drawings and Details (**<https://www.oregon.gov/ODOT/Engineering/Pages/Standards.aspx>)
* **Technical Guidance** (<https://www.oregon.gov/ODOT/Engineering/Pages/Technical-Guidance.aspx>)
* **Access Management Manual & Guidance** (<https://www.oregon.gov/odot/engineering/pages/access-management.aspx>)
* **Project Delivery Guide & Forms** (<https://www.oregon.gov/ODOT/ProjectDel/Pages/Project-Delivery-Guide.aspx>)
* **Oregon Standard Specifications for Construction** (<https://www.oregon.gov/ODOT/Business/Pages/Standard_Specifications.aspx>)
* **ODOT Forms Library** (<https://www.oregon.gov/ODOT/Forms/Pages/default.aspx>)

##### ADA Compliance – Assessment, Design, Inspection.

When the Services under this Contract include **assessment or design (or both)** for curb ramps, sidewalks or pedestrian-activated signals (new, modifications or upgrades), Consultant shall:

1. Use ODOT standards to assess and ensure Project compliance with the Americans with Disabilities Act of 1990 (“ADA”), including ensuring that all sidewalks, curb ramps, and pedestrian-activated signals  meet current ODOT Highway Design Manual standards; and
2. Follow ODOT’s processes for design, modification, upgrade, or construction of sidewalks, curb ramps, and pedestrian-activated signals, including using the ODOT Highway Design Manual, ODOT Design Exception process, ODOT Standard Drawings, ODOT Construction Specifications, providing a temporary pedestrian accessible route plan and current ODOT Curb Ramp Inspection form.

When the Services under this Contract include **inspection of curb ramps, sidewalks or pedestrian-activated signals** (new, modifications or upgrades), all such inspections shall include inspection for compliance with the standards and requirements in a. and b. above.  Inspections must be performed by ODOT certified inspectors (which must include certified environmental inspectors when appropriate). In addition, at Project completion, Consultant shall complete the applicable ramp-specific ODOT Curb Ramp Inspection Form734-5020(A-G) for each curb ramp constructed, modified, upgraded, or improved as part of the Project. Each completed form must be submitted electronically by clicking the “Submit by E-mail” button on the form (and cc APM). The forms are documentation required to show that each curb ramp meets ODOT standards and is ADA compliant. ODOT’s fillable Curb Ramp Inspection Form and instructions are available at: <https://www.oregon.gov/ODOT/Engineering/Pages/Accessibility.aspx>

Above references to curb ramps, sidewalks or pedestrian-activated signals also include, when applicable, shared use paths, transit stops, park-and-rides and on-street parking.

##### Website or Web Content Development and Maintenance Standards

Consultant shall perform all required web-related Services in conformance with the **ODOT Web Standards** (available at: <https://www.oregon.gov/ODOT/Pages/Web-Toolkit.aspx>), which is incorporated into this Contract with the same force and effect as though fully set forth herein. ODOT shall have ownership and control of Work Products developed by Consultant as set forth in the terms and conditions of the Contract, Section 12 - Ownership of Work Product.

##### ODOT Communications Standards

For any Consultant tasks that require communications functions on behalf of Agency, Consultant shall comply with the ODOT Communications Standards (available at: [https://www.oregon.gov/ODOT/Pages/Web-Toolkit.aspx](https://nam05.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.oregon.gov%2FODOT%2FPages%2FWeb-Toolkit.aspx&data=02%7C01%7CTonya.Finley%40deainc.com%7Cb074711c18f946d67a0708d728238274%7C75fc6250a5034863ab0060c7035d49b2%7C0%7C1%7C637022005307774139&sdata=A55gK1SVl1ka0UzdEqQregcOEO81SJyWodN9V30CtGc%3D&reserved=0)), which is incorporated into this Contract with the same force and effect as though fully set forth herein.

#### Software Requirements

Consultant shall deliver all Work Products in the format(s) required by Agency. Consultant’s software must produce deliverables that are fully compatible, readable and useable by Agency software, requiring no modification or translation of Consultant’s deliverables. No loss of data integrity or accuracy may result from any transfer of data. Compressed data must be in a "self-expanding executable" format. To ensure and verify this level of compatibility, Agency may provide sample or required format(s) to Consultant, and Consultant and Agency may conduct tests of sample deliverables from Consultant. Agency reserves the right to reject deliverables that do not meet these requirements. If a deliverable is rejected, Consultant shall resubmit deliverables to Agency that meet these requirements, and shall not bill Agency for the rejected deliverables or for time associated with correcting the rejected deliverables.

#### Professional Licenses, Registrations and Qualifications

Consultant and its subconsultants must be duly licensed to perform the Services, as required by the applicable Oregon Revised Statutes and Oregon Administrative Rules, and other applicable laws. Consultant’s personnel and subconsultant personnel must be duly licensed to perform all Services which they will be performing under the Contract, and must perform such Services under the "responsible charge" of a person so licensed (as that term is defined under ORS Chapter 672), or must be otherwise exempt from any licensing requirements applicable to the Services being performed.

Agency may require Consultant’s Personnel to demonstrate a competency in the particular area/discipline to which they are assigned. This may include, but is not limited to, submittal of license number, resume, and work samples from previously completed services or projects.

#### General Requirements

Consultant Quality Plan (“CQP”) for Professional Services and Related Services. A CQP must be approved and on file with Agency before any Services may be performed under the Contract. The CQP must be consistent with requirements of Agency’s “Consultant Quality Plan Guidance” available on the Quality Plans and Guides webpage at: <https://www.oregon.gov/odot/ProjectDel/Pages/Quality-Guides.aspx>.

Consultant shall ensure quality assurance and quality control is performed in conformance with the approved CQP on all Services and deliverables provided under the Contract. Consultant shall submit an updated CQP for approval if there are changes to Consultant’s quality management processes or organizational structure from what is in the approved CQP during the term of the Contract.

##### General Requirements for Project Management

A Project Management Team (“PMT”), composed of a City Project Manager, Oregon Department of Transportation’s (“ODOT”) Agency Project Manager (“APM”), and Consultant, will provide overall guidance for the Project and may invite others to participate. The PMT shall meet during performance of individual tasks to coordinate logistics of the Project and provide guidance and direction to Consultant for development of Project deliverables.

##### General Requirements for Written and Graphic Deliverables

Written (text) and graphic deliverables must be provided in electronic format. All documents must be written concisely, in plain language and use an easily understood format. Where possible, Consultant shall present information in tabular or graphic format, with a simple and concise accompanying narrative.

Consultant shall write materials intended for the public, such as meeting presentations, at no higher than a high school grade level using the Flesch–Kincaid Grade Level Formula.

Electronic versions of written (text) deliverables must be in Microsoft Word. Written deliverables must include the Project name, a title that refers to the contract deliverable, draft number, subtask number, and date of preparation.

Graphic deliverables must be in software compatible with AutoCAD, SketchUp, Adobe Illustrator, or ESRI compatible Geographic Information System (“GIS”) software, as appropriate to the deliverable. All graphic deliverables must be include a legend and the date of preparation. Electronic versions of base and plan maps must be in color and display-sized maps must be printed in color when important to public comprehension. Color deliverables must be readable when reproduced in black and white. Consultant shall provide GIS deliverables with data sets or updated data sets to City and APM.

Consultant shall provide a draft of written and graphic deliverables to the City and APM in electronic format at least two weeks prior to broader distribution. Consultant draft deliverables must be substantially complete and any changes or revisions needed to address comments are expected to be minor. City Project Manager shall and APM will review the deliverables and submit comments to Consultant within 5 business days from the date a deliverable is received.

##### General Requirements for Final Deliverables

Consultant shall prepare final, adoption ready plans and amendments to plans as final policy statements of the local government and must not include language such as “it is recommended…” or “City should…” Consultant shall prepare new and amended code language as final, adoption ready regulatory statements of City. Final plan, plan amendments, code, and code amendments must include all necessary amendments or deletions to existing City plans or code to avoid conflicts and enable full integration of proposed plan with existing City documents.

Final plans and amendments must not include names and logos of Consultant, Transportation and Growth Management Program, ODOT, or Oregon Department of Land Conservation and Development or project codes. These items are only allowed on the acknowledgement page.

# Tasks, Deliverables and Schedule

Unless the Contract is terminated or suspended, Consultant shall complete all tasks and provide all deliverables (collectively, the “Services”) included in this Contract and in accordance with the performance requirements and delivery schedules included in this Contract, with schedule adjustments as scoped in Task 1.3. For purposes of standardization, the task numbering in this SOW may be non-sequential.

## Task 1: Project Management

#### Project Oversight and Progress Reports

 Consultant shall provide the following Project oversight activities as needed:

* Program services, coordinate, and supervise Consultant staff;
* Prepare and monitor Consultant work plans, budgets, and schedule;
* Establish and monitor sub-consultant contracts;
* Prepare, host, and maintain an internal, non-public project management website for the Project (the “PM Website”) using Basecamp or similar web-based tools that include communication, Project roster, schedule, online discussion topics, and deliverables. Project management website must be available within 2 weeks of receiving Notice to Proceed (NTP). All final deliverables must be posted to the PM Website for distribution to the PMT;
* Maintain the Project file to include computations, assumptions, meeting minutes, working drawings, correspondence, and memoranda;
* Establish the PMT based on direction from APM and City;
* Coordinate Project document production and quality control measures.

Consultant shall prepare and submit to APM and ACA monthly invoices and progress reports that meet the requirements referenced in Exhibit B, Part 1, Section C of this Contract. In addition to the requirements in Exhibit B, progress reports must detail the Services performed during the billing period, including the individual performing the Services, as well as the hours and rates being reported for each task.

#### PMT Meetings

Consultant shall establish a schedule for the PMT to meet to discuss the Project.

 Project Management Team (“PMT”) will include, but is not limited to, the Consultant Project Manager (“CPM”), City Contract Project Manager (“CCPM”), and Agency Project Manager (“APM”). Consultant shall arrange and conduct up to 20 PMT meetings throughout the Project to discuss expectations for upcoming deliverables and meetings.

PMT meetings will be virtual and not to exceed 1 hour. Dates and times of scheduled virtual meetings must be determined at the kick-off meeting and included in the refined Project schedule. Consultant shall arrange a standard meeting link and provide dates, times, and access information to the PMT members as needed. Consultant shall provide a written agenda to PMT at least 2 business days prior to the meeting. PMT virtual meetings may be held in-person when they coincide with travel to City for community engagement or other meetings or if PMT agrees it is necessary to discuss/resolve issues of concern. Consultant shall submit meeting summary notes to APM after each meeting.

Consultant shall arrange and conduct a virtual Project kick-off meeting not to exceed 2 hours in length within 2 weeks of receiving Notice to Proceed. Specific items to discuss at the Project kick-off meeting include, but are not limited to:

* Project website;
* PMT meeting management, format, and schedule
* PAC Roster;
* Draft Project Schedule;
* TSP outline; and
* Community Engagement Plan.

#### Project Schedule

Consultant, with input from the PMT, shall develop a schedule that includes critical path dates, Deliverables, and due dates within the timeframes set forth in this Contract (the “Project Schedule”). Consultant shall distribute the draft Project Schedule to CCPM and APM for review and comment within 2 weeks of NTP. CCPM, in consultation with APM and ACA, will provide consolidated comments to Consultant within 2 weeks of receipt. Consultant shall address City and Agency comments in a revised draft of the Project Schedule and deliver the final Project Schedule to CCPM and APM within 2 weeks of receiving comments.

Consultant shall update the Project Schedule up to 2 times, as directed by CCPM, in consultation with APM and ACA, for any schedule changes to the timeframes identified within this Contract or resulting from an amendment to this Contract.

## Task 2: Community Engagement

#### Community Engagement Plan

City staff shall prepare draft and final Community Engagement Plan detailing goals and strategies to involve the community throughout the Project, centering the voices of underserved populations consistent with OAR 660-012-0130. When conducting a major TSP update, this must include strategies to inform underserved populations about choices being made in the planning process, provide meaningful opportunity to inform the process and provide an equitable decision-making role in the process to the extent possible. Community engagement strategies may include interviews, working groups, public open houses/workshops, online engagement, project articles, factsheets, and other means to engage the public throughout the process, including translation services.

Community Engagement Plan must include, but is not limited to:

* Community engagement process goals
* Decision-making framework, including roles of groups and committees
* Project identity, including project graphics and templates
* Key messages for Project Website and materials
* Use of City’s website or social media
* Engagement strategies for the general public, underserved populations, local agencies, and community partners
* Engagement methods to gather qualitative information, including lived experience, from the community and particularly underserved populations.

CCPM shall submit Draft Community Engagement Plan to PMT for review and comment within 8 weeks of project kickoff. **Consultant shall review Draft Community Engagement Plan and provide comments based on best practices and experience with similar communities.** PMT will submit 1 set of consolidated comments to CCPM within 2 weeks following receipt of draft Community Engagement Plan. CCPM shall prepare a Final Community Engagement Plan based on feedback received and submit to PMT within 2 weeks of receiving comments.

#### Project Website

**Consultant shall provide content for a public-facing Project Website throughout the Project.** City shall create and maintain the Project Website including, but not limited to: development, registration, hosting, gathering, and monitoring of content, and controls. Project Website must be fully functioning and accessible after the Project Kick-Off Meeting and remain fully functioning and accessible for a minimum of 6 months following Project completion.

Project Website must include, at a minimum:

* Project deliverables: Technical Memoranda and all maps and graphics in PDF or JPG format;
* Embedded translation tool;
* Method to sign up for a project notification list; and,
* Meeting information (times, locations, agendas, summaries, and materials).

Project Website must be updated before and after meetings and at the end of each Task. Any interactive features used for community engagement must not require user registration.

#### Community Profile, Major Equity Analysis and Title VI Report

**Consultant shall, in coordination with City, prepare Draft Technical Memorandum #1: Demographic Profile & Major Equity Analysis. Consultant shall submit Draft TM #1 to PMT, ODOT’s Transportation and Planning Analysis Unit (“TPAU”), and ODOT Region Traffic for review and comment within 16 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #1 based on feedback and submit to PMT within 2 weeks of receiving comments. The Final TM #1 must be completed at the close of the Project and shall include a Report on Equitable Outcomes and a Title VI Report.**

To inform development of Draft TM #1, City shall provide analysis and data relating to current and projected population and demographics and the history of relevant policies and community outcomes. To inform the development of the Title VI and Equitable Outcomes Report, to be completed at the close of the Project, City shall provide a summary of community engagement activities, engagement of underserved populations, and analysis of feedback received and its relationship to equitable outcomes.

TM #1 must meet the requirements outlined in OAR 660-012-0135 and should tell the story of who is living, working, and doing business in the community and what growth or changes are projected into the future. TM #1 must include, but is not limited to, the following elements:

##### Community Profile

1. Summary of current population locations and characteristics;
2. Summary of historic and projected population growth patterns;
3. Identification of geographic areas with disproportionate concentrations of underserved and transportation-disadvantaged populations;
4. Identification of existing activity centers and key destinations as defined in OAR 660-012-0360 and the types of trips associated with those locations.

##### Equity Analysis

* Documentation and assessment of current and past land use, transportation, and housing policies and racism in these development areas that have harmed or are likely to harm underserved populations;
* Documentation and assessment of climate change effects that have harmed or are likely to harm underserved populations;
* Documentation and assessment of how intersectional discrimination may have compounded disadvantages related to the transportation system.

##### Title VI and Equitable Outcomes Report

1. Summary of all community engagement activities conducted as part of the Project including committee meetings, public meetings and open houses, small group meetings or briefings, partner databases or email lists, comment log summaries covering key issues, and project webpage analytics;
2. Summary of how members of underserved populations were engaged as part of the Project in the development of community outcomes or performance measures;
3. Analysis of qualitative and quantitative information collected as part of the Project, including lived experience, from the community on how the proposed change benefits or burdens underserved populations;
4. Summary of key transportation improvements needed to achieve an equitable transportation system and summary of unresolved issues;
5. Review of transportation performance measures, including those required in OAR 660-012-0905, for progress toward key community outcomes;
6. Summary of how preferred transportation solutions identified as part of the Project work toward key community outcomes;
7. Summary of strategies implemented over the course of the Project and in its identified solutions to create greater equity or minimize negative consequences;
8. Summary of how the Project considered current or historic transportation investments within the planning area that have impacted historically underserved populations; and
9. Analysis of the changes and transportation solutions identified in the Project may impact underserved populations and may align with desired key community outcomes and performance measures under OAR 660-012-0905.

#### Project Advisory Committee Meetings

Consultant, in consultation with PMT, shall prepare a Project Advisory Committee (“PAC”) Roster, including contact information, and invite them to participate on the PAC to review Project deliverables and provide guidance. The PAC may include representation from:

* City Council
* Economic development and local businesses
* City and County technical staff
* County public health department
* Regional governments
* State agencies, including ODOT and the Department of Land Conservation and Development
* School District
* Public Safety and Emergency Service Providers
* Public transportation
* Airport, freight, rail, and other multimodal transportation
* Underserved Populations
* Federally recognized tribes
* Community leaders and community-based organizations

The PAC will meet up to 8 times over the course of the Project. CCPM, in coordination with APM, will arrange and CPM shall facilitate PAC meetings either face-to-face or virtually. Consultant shall provide PMT with a draft agenda for each PAC meeting at least 1 week prior to the meeting. Consultant shall provide PMT with meeting minutes for each PAC meeting that summarize key issues discussed and any implications for Project schedule or Deliverables within 1 week of relevant PAC meeting.

#### Interested Parties Database and Comment Log

City shall develop and maintain a database to inform interested parties including, but not limited to, federal, regional, state, and local authorities, environmental groups, active transportation advocates, individuals, key businesses, public services, education, and community organizations (the “Interested Parties Database”). The Interested Parties Database information must include, when available, name, affiliation, address, and email address of each interested party. City shall expand and update this database throughout Project to include new interested parties as they become engaged in the Project.

City shall develop and maintain a log of public comments, questions, and concerns received throughout the Project (“Comment Log”). City shall also include in the Comment Log public comments received on all Deliverables and how they were addressed.

#### Public Engagement Meetings

The City will arrange and conduct, with Consultant support, up to 4 Public Engagement Meetings to present Project elements and alternatives and receive community input. These meetings may take place as stand-alone events, be held in conjunction with meetings of community organizations or partner agencies or take the form of focus groups. Meetings should include both in-person and virtual/online events as directed by the Community Engagement Plan. **Consultant shall prepare presentation materials and/or facilitate meetings at direction of City staff and as specified in the Community Engagement Plan.** City will promote Public Engagement Meetings using existing City resources and networks.

In-person events must be conducted in locations that are sufficient to meet the needs of the community, with adequate ADA access, and should offer the opportunity for community members to bring their children. Online or virtual events must provide access to graphical materials, presentations, and tools for proving input and feedback and for asking questions in real time.

**Consultant shall summarize input received during public meetings in the applicable technical memoranda.**

#### Targeted Engagement Activities

City shall develop and lead targeted engagement activities that provide focused opportunities to elicit meaningful input and participation from underserved or transportation-disadvantaged communities. These activities may include interviews, focus groups, budgeting and project prioritization activities, and workshops, and may take place in person or online, as appropriate. **Consultant shall provide a single set of materials for these meetings as specified in the Community Engagement Plan.**

City shall conduct in-person events shall be conducted in locations that are sufficient to meet the needs of the community, with adequate ADA access, and will offer the opportunity for community members to bring their children. Online or virtual events must provide access to graphical materials, presentations, and tools for proving input and feedback and for asking questions in real time. Translation and interpretation services must be provided as needed. City shall summarize input received during public meetings and update PMT throughout the Project as appropriate.

#### Task C.2.9 Additional Meetings [CONTINGENCY TASK]

**Consultant shall facilitate up to 4 additional meetings with PAC, Planning Commission, City Council, and other bodies depending on project needs. Schedule of additional meetings will be determined by CCPM and APM.**

## Task 3: Policy and Planning Framework

Consultant shall assess existing plans, policies, standards, rules, regulations, and other applicable documents as they pertain to development of an updated TSP and develop for the updated TSP a vision, goals, objectives, and evaluation criteria for use later in setting policy, selecting preferred alternatives, project prioritization and decision-making. Consultant shall utilize template materials as provided on the TSP Guidelines website as applicable.

#### Background Information

Upon request of Consultant, City shall and ODOT will provide the most current version of the existing plans, policies, standards, rules, regulations, and other documents pertinent to the Updated TSP in electronic format, as available. Consultant shall review and address relevant background information identified in the State and Local Plan Review Checklists in Agency’s TSP Guidelines. Documents and data sources to be reviewed include, but are not limited to the following, as applicable:

##### Statewide Regulatory and Plan Documents

* Oregon Transportation Planning Rule (OAR Chapter 660, Division 012), including amendments adopted in 2022-2023 through the Climate Friendly and Equitable Communities rulemaking process.
* Oregon Transportation Plan (2023)
* Oregon Highway Plan (1999, last amended 2022)
* Oregon Freight Plan (2011, last amended 2023)
* Oregon Public Transportation Plan (2018)
* Oregon State Rail Plan (2014)
* Oregon Bicycle and Pedestrian Plan (2016)
* Oregon Transportation Safety Action Plan (2021)
* Oregon Transportation Safety Action Plan Implementation Work Program (2023)
* Oregon Transportation Options Plan (2015)
* Statewide Planning Goals
* State Law on Reduction in Vehicle-Carrying Capacity (Oregon Revised Statutes 366.215)
* Oregon Administrative Rules (“OAR”) Chapter 734 Division 051
* ODOT funding projections
* Statewide Transportation Improvement Program (STIP)
* ODOT Highway Design Manual (2023)
* Oregon Intersection Safety Implementation Plan (2012)
* Oregon Bicycle and Pedestrian Safety Implementation Plan (2014)
* ODOT TSP Guidelines (2018 and as amended)
* ODOT Analysis Procedures Manual (2022 and as amended)
* State Law on Reduction in Vehicle-Carrying Capacity (Oregon Revised Statutes 366.215)
* Oregon’s Statewide Transportation Strategy (2013)
* Oregon’s Climate Resilience Plan & associated risk maps (FACS-STIP)
* Oregon Department of Environmental Quality regulations on clean air vehicles and trucks
* Oregon National Electric Vehicle Infrastructure plan

##### City of XXX Regulatory and Plan Documents

* Transportation System Plan
* Comprehensive Plan
* Land Use Development Code and Revised Code, including parking and EV charging standards
* Housing Needs Analysis and Housing Production Strategy
* Buildable Lands Inventory, as applicable
* Economic Opportunities Analysis and Development Strategy Report
* UGB Expansion Area Analysis, as applicable
* City-level performance measures and targets associated with STS path developed to meet Oregon’s GHG Reduction targets (OAR 660-044), as applicable.
* Periodic Review and Urban Growth Boundary Amendments Findings of Fact
* Current and past budget for transportation
* Current and historic funding sources
* Parking studies, as applicable
* Parks, trails, or recreational plans, as applicable
* Community engagement summaries and documentation from prior planning efforts
* Climate Friendly Area Studies, Highway Impact Summaries, and Multimodal Transportation Gap Summaries
* Public works engineering standards and other technical guidance resources
* Capital improvement plans and public facilities plans.
* Downtown, Area and Corridor Plans, as applicable
* Area public transportation plans/Transit Development Plans

##### Regional Regulatory and Plan Documents

* County Comprehensive Land Use Plan
* County Transportation System Plan
* MPO Regional Transportation Plan
* Other MPO plans, as applicable
* Most recent major report as defined in OAR 660-012-0900(7), documenting Regional Preferred Scenario or STS path that meets Oregon’s GHG Reduction targets (OAR 660-044) and associated city performance targets, as applicable.
* Public engagement summaries and documentation from prior planning efforts
* Adjoining City of XXX Transportation System Plan
* Transit development plans and capital investment plans
* Any City or region-set climate action plans, climate ordinances, climate targets.

##### Data

* GIS layers
* Any vehicle, pedestrian, and bicycle counts for streets, highways, and intersections in the Project Area
* Any data on the availability of buildable land within the Project Area
* Expenditures for roadway, pedestrian, bicycle, and transit improvements in the Project Area over the past 5 to 10 years, by City, County, transit providers, and ODOT
* Inventory data not in GIS layers as needed for Draft Technical Memorandum #5
* Demographic data related to Underserved Populations
* Urban Growth Boundary expansion area [staff report and associated materials](https://cityofturner.org/index.asp?SEC=3B685BDD-AA78-420C-8C5D-960708833D60), as applicable
* Electronic Aerial photos, as needed.
* Transit ridership and service data for service providers in the Project Area, as available.
* Population and employment projections (from MPO and/or Portland State University Population Resource Center and Oregon Economic Department)

City shall ensure coordination of the Project with other related planning efforts by identifying those related efforts and providing Consultant with contact information for staff managing those related efforts.

#### Plans, Policy, and Code Review Memorandum

Consultant shall prepare Draft Technical Memorandum #2: Plans, Policy, and Code Review reviewing the City’s plan, policy, and code documents. Consultant shall identify conflicts, changed conditions and data gaps, and Comprehensive Plan and code revisions needed to comply with State plans, policies, and regulations. Consultant shall also identify other local and regional plans and policies that are relevant to the TSP process, including reports developed through the state-led greenhouse gas reduction target-setting process and the area Housing Needs Analysis and any Housing Production Strategy, as they relate to and inform the Project. It must al so include a summary of information and community feedback gathered during public engagement efforts for recent related planning efforts.

Draft TM #2 is intended to guide later decisions regarding selection of preferred alternatives and necessary amendments to pertinent document and regulations. Draft TM #2 must review and summarize the applicability to the Project of the background documents identified in Task 3.1.

Consultant shall submit Draft TM #2 to PMT, TPAU, and Region Traffic for review and comment within 12 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 1 week of receiving draft memorandum. Consultant shall revise Draft TM #2 based on feedback and submit to PMT within 1 week of receiving comments. Consultant shall distribute the revised Draft TM #2 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM #2 incorporating PAC comments and submit to PMT within 2 weeks of the relevant PAC meeting.

#### Goals, Objectives, and Criteria Memorandum

Consultant shall prepare Draft Technical Memorandum #3: Goals, Objectives, and Criteria to establish the TSP vision, goals, objectives, and evaluation criteria for use later in, among other areas, setting policy, selecting preferred alternatives, project prioritization and decision-making. The goals, objectives, and evaluation criteria must be structured in a way that informs relevant, strategic, actionable policies in support of Statewide Planning Goal 12, “to provide and encourage a safe, convenient, and economical transportation system.”

##### Goals and Objectives

Consultant shall propose draft TSP Goals and Objectives in close coordination with PMT. Goals must be based on transportation policies in the City’s existing TSP and other elements of the Comprehensive Plan, the Community Profile completed in Task 2.4, community engagement activities, and other relevant adopted plans.

##### Project Prioritization Criteria

Consultant shall develop a method of prioritizing projects consistent with OAR 660-012-0155 and addressing the “Shall” methods from the TSP Guidelines. Prioritization method may also address the “Should” methods depending on local needs. The Project prioritization framework must be based on the goals and policies developed in Task 3.3.A and must consider:

* 1. Meeting greenhouse gas reduction targets provided in OAR 660-044-0020 or OAR 660-044-0025; (B) Supporting compact, pedestrian-friendly patterns of development in urban areas, particularly in climate-friendly areas; (C) Reducing single-occupant vehicle travel as a share of overall travel; and (D) Meeting performance targets set as provided in OAR 660-012-0910.
	2. Support, if within an MPO, the region’s preferred scenario/STS path for meeting the state-set GHG reduction targets (OAR-660-044).
	3. Improving equitable outcomes for underserved populations identified in OAR 660-012-0125.
	4. Improving safety, particularly reducing or eliminating fatalities and serious injuries.
	5. Improving access for people with disabilities.
	6. Improving access to key destinations as outlined in OAR 660-012-0360.
	7. Completing the multimodal transportation network
	8. Supporting the local, regional, and state economies; and
	9. Other factors determined in the community.

##### Performance Standards

Consultant shall develop a framework of performance standards to evaluate the performance of programs and projects identified in the planned modal systems in later tasks, as described in OAR 660-012-0215. These performance standards will be critical in helping City understand how to evaluate transportation investments in the years following the adoption of the Updated TSP and in identifying transportation solutions for subsequent TSP updates. Performance standards shall support City of XXX’s achievement of Oregon’s greenhouse gas reduction targets, but are not required to include performance measures established in regional scenario planning or greenhouse gas reduction target setting process.

At least 1 performance standard must be adopted that supports increasing transportation options and avoiding principal reliance on the automobile. The transportation performance standards must evaluate at least 2 of the following objectives for the transportation system, for any or all modes of transportation:

* Reducing climate pollution.
* Equity
* Safety
* Network connectivity
* Accessibility
* Efficiency
* Reliability
* Mobility

##### Performance Targets

Consultant shall document applicable performance targets identified in the most recent major report on progress towards metropolitan area greenhouse gas reduction targets, as described in OAR 660-012-0900(7). Performance targets for the performance measures provided in OAR 660-012-0905 will be set via a separate planning process and will be set at levels that are reasonably likely to achieve the regional performance targets from an approved land use and transportation scenario plan as provided in OAR 660-044-0110 or the regional performance targets from the Statewide Transportation Strategy as adopted by the Oregon Transportation Commission. Performance targets are to be achieved by the end of the TSP planning horizon. Consultant shall document performance targets established per OAR 660-012-0910 for each performance measure in OAR 660-044-0110 and OAR 660-012-0905, as well as any for locally determined performance measures identified during the processes outlined in Division 44.

Consultant shall submit Draft TM #3 to the PMT, TPAU, and Region Traffic for review and comment within 16 weeks of receiving NTP. CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #3 based on feedback and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #3 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM#3 prepared incorporating PAC comments and submit to PMT within 2 weeks of the relevant PAC meeting.

## Task 4: Analytical Methods

#### Analysis Methods and Assumptions Memorandum

Consultant shall develop Draft Technical Memorandum #4: Analysis Methods and Assumptions in coordination with Agency’s Transportation Planning Analysis Unit (“TPAU”), Region Planning, and Region Traffic sections. Draft TM #4 must describe analytical procedures to evaluate existing conditions, future conditions, alternatives analysis, and Level of Traffic Stress (LTS). These procedures must be consistent with [ODOT’s Analysis Procedures Manual](https://www.oregon.gov/odot/planning/pages/apm.aspx). Consultant shall obtain approval of proposed methodology from Agency’s TPAU, Region Planning, and Region Traffic sections prior to beginning analysis.

Consultant shall provide an overview summary of the methodologies and assumptions for the current and future conditions and solutions for the following:

1. Crash analysis
2. Vehicular analysis
3. VMT per capita computations
4. List of performance standards and respective calculation methodologies to be used in the TSP
5. Regional travel model versions/assumptions
6. Applicable traffic mobility targets for State and local facilities
7. Multimodal analysis, including Level of Traffic Stress (LTS)

In addition, Consultant shall summarize data and analytical methods required to evaluate greenhouse gas reduction performance measures and targets as defined in OAR 660-012-0900 through OAR 660-012-0910 and established in the jurisdiction’s first major report.

Consultant shall coordinate with staff of the City, Agency (including TPAU and Region Traffic), County, and the MPO to determine reasonable growth assumptions for future traffic conditions, document the operational City and County standards for transportation facilities within the Project Area, and determine whether a Horizon Year Build scenario must be evaluated in the TSP update.

Consultant shall submit Draft TM #4 to TPAU, Climate Office, Region Planning, Region Traffic, County, MPO and APM for review and comment within 16 weeks of receiving NTP. Consultant shall obtain approval of the  Draft TM #4 from TPAU, County and City prior to beginning analysis of transportation conditions in the Project Area (Task 5.2). After approvals are obtained and review comments are resolved, Consultant shall provide revised Draft TM #4 to PMT; CCPM shall provide comments within 1 week of receiving draft memorandum. Consultant shall revise Draft TM #4 based on PMT feedback and submit to PMT within 1 week of receiving comments. Consultant shall distribute the revised Draft TM #4 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM #4 incorporating PAC comments and submit to PMT within 2 weeks of the relevant PAC meeting.

## Task 5: Existing Conditions and Needs Analysis

Consultant shall conduct an existing transportation system conditions analysis for the transportation system in the Project Area to determine existing conditions, deficiencies, and gaps. Inventory and analysis must be consistent with Final TM #4 and must contain the “Shall” elements from the TSP Guidelines Existing Needs Determination. Analysis may also contain the “Should” elements from the TSP Guidelines Existing Needs Determination depending on local needs. Inventory and analysis must also be consistent with TPR OAR 660-012-0150, OAR 660-012-0505 Pedestrian System Inventory, -0605 Bicycle System Inventory, -0705 Public Transportation System Inventory, and -0805 Urban Street and Highway System Inventory. If applicable, inventory must comply with any inventory modifications prescribed by Metro pursuant to TPR 660-012-0140(6).

System inventories will be used to establish a baseline for comparison with future needs. The inventories must be based on geospatial data and augmented with visual and descriptive data, as available, provided by Agency and City and through public and partner engagement. City will assist with inventorying facilities if required datasets are not available. Consultant shall provide inventory as layers in City’s GIS database and as maps for Project.

1.

#### Transportation System Inventory Memorandum

Consultant shall prepare Draft Technical Memorandum #5: System Inventory using available datasets from City, Agency, and other public agencies, in addition to content reviewed during Task 3, to inventory and assess the existing conditions in the Project Area. Draft TM #5 must include the following:

##### Land Development and Natural Constraints

Consultant shall summarize the available lands inventory to identify existing, planned, and potential land uses, and environmental constraints. The inventory must be consistent with acknowledged comprehensive plans and based on data assembled by City and must include:

1. Vacant and developable land;
2. Zoning, both current and planned;
3. Climate Friendly Areas and transportation system deficiencies or analysis needs identified in related Multimodal Transportation Gap Summaries and Highway Impact Summaries;
4. Key destinations defined in Task 2.4 and other activity centers that are likely destinations for bicyclists and pedestrians, such as schools, parks, commercial centers, and neighborhood centers;
5. Natural resources, natural hazards, and environmental barriers, and
6. Natural Hazard assembly point/infrastructure locations.

If data are available, the inventory may also include relevant land use performance measures as identified in OAR 660-012-0905, including:

1. Affordable housing located within CFAs
2. Existing and permitted dwelling units within CFAs
3. Percent of retail/service jobs within CFAs
4. Percent of all households and low-income households located within ½ mile of priority transit corridors
5. Percent of key destinations within ½ mile of priority transit corridors

##### Roadway System

Consultant shall update the roadway (streets and highways) inventory consistent with OAR 660-012-0800 and OAR 660-012-0805.

The inventory must also include, but is not limited to:

1. Location and jurisdiction of publicly owned, operated, or supported streets;
2. Functional classification of each facility by jurisdiction, including State classification of highways as shown in the most recent adopted Oregon Highway Plan and National Highway System facilities;
3. Identification of primary uses (regional, local, pass-through, and freight traffic);
4. Identification of primary users of a facility, including whether users are primarily on foot, bicycle, transit, freight, or in personal vehicles;
5. Land use context for each segment of a facility, including types of planned land uses surrounding the facility;
6. Locations of key destinations, as defined in Task 2.4;
7. Roadway characteristics according to functional classification, as follows:
	1. Local streets: location;
	2. Collectors: location, condition, and number of lanes (general-purpose and turn lanes);
	3. Arterials: location, condition, number of lanes (general-purpose and turn lanes), and lane widths;
	4. Expressways and other limited-access highways: location, condition, number of lanes (general-purpose and turn lanes), lane widths, and locations and types of interchanges;
8. An overview of pricing strategies in use, including specific facility pricing, area or cordon pricing, and parking pricing;
9. Identification of pavement type and conditions;
10. Location of all reported serious injuries and deaths of people related to vehicular crashes from the most recent 5 years of available data;
11. Intermodal connections and facilities for passenger travel;
12. Lane configurations and traffic control devices at study intersections (Consultant shall assemble);
13. Signal locations and signal owners within study area (Consultant shall assemble based on City and ODOT input);
14. Posted speed limits;
15. Location and type of Intelligent Transportation System (ITS) facilities;
16. Locations, conditions, and ownership of bridges; and
17. Additional safety-related information, including Safety Priority Index System locations and locations known to have off-ramp queuing.

##### Pedestrian System

Consultant shall update pedestrian system summary and inventory consistent with OAR 660-012-0500 and OAR 660-012-0505 and describe how the pedestrian system serves people walking, using mobility devices (such as wheelchairs, walkers, and canes) or other conveyances.

The summary and inventory must include, but is not limited to:

1. Location, width, type, and condition of all sidewalks, crosswalks, shared-use paths, trails, and other types of pedestrian facilities along all arterials and collectors within the plan area;
2. Location, width, type, and condition of all pedestrian facilities within Climate-Friendly Areas or Metro Region 2040 centers and within ¼ mile of primary and secondary schools;
3. Crossing distances, type of crossing, closed crossings, curb ramps, and distance between crossings;
4. Assessment of pedestrian facility consistency with state, regional, and local design standards;
5. Identification of crash risk factors on inventoried pedestrian facilities, including speed, volume, separation, and roadway width;
6. Location of all reported injuries and deaths of people walking or using a mobility device from the most recent 5 years of available data;
7. Identification of key pedestrian destinations, including destinations identified in Task 2.4.

If available, Consultant may also document any additional data inputs required to calculate:

1. Pedestrian Level of Traffic Stress consistent with ODOT’s Analysis Procedures Manual; and
2. Relevant transportation performance measures as identified in OAR 660-012-0905, including:
	1. Percent of LTS 1-2 pedestrian facilities within CFAs;
	2. Percent of transit stops served by marked pedestrian crossings within 1000 feet within the plan area.

##### Bicycle System

Consultant shall update bicycle system summary and inventory consistent with OAR 660-012-0600 and OAR 660-012-0605 and describe how the bicycle system serves people of all ages and abilities and a range of conveyances operating at a scale and speed like bicycles.

The summary and inventory must include, but is not limited to:

1. Location, width, type, and condition of all bicycle lanes, routes, paths, and accessways, including pedestrian facilities that may be used by bicycles;
2. Location, width, type, and condition of all bicycle facilities within Climate-Friendly Areas or Metro Region 2040 centers, within ¼ mile of primary and secondary schools, and on bicycle boulevards;
3. Assessment of bicycle facility consistency with state, regional, and local standards;
4. Identification of crash risk factors on inventoried bicycle facilities, including speed, volume, separation, and roadway width;
5. Location of all reported injuries and deaths of people on bicycles from the most recent 5 years of available data; and
6. Identification of key bicycle destinations, including destinations identified in Task 2.4.

If available, Consultant may also document any additional data inputs required to calculate:

1. Bicycle Level of Traffic Stress for segments and intersections consistent with ODOT’s Analysis Procedures Manual; and
2. Relevant transportation performance measures as identified in OAR 660-012-0905, including:
	1. Percent of LTS1-2 bicycle facilities within CFAs.

##### Rail Transportation (as applicable)

If applicable, the Consultant shall summarize rail system characteristics based on information available, including:

1. Location of rail lines, terminals, yards, and other key support facilities;
2. Location and type of rail crossings;
3. Owners and operators of rail lines;
4. Type of service (passenger or freight) and type of freight carried, as applicable;
5. Approximate number of daily trains and schedule of operations, as applicable;
6. Identification of track conditions and numerical Federal Railroad Administration standards to which they are maintained;
7. Train speeds;
8. Industries served and commodities handled; and
9. Potential for rail banking, trail use, or public use if rail line were abandoned.

Consultant shall present the results of this analysis in Draft Technical Memorandum #5: System Inventory. Consultant shall submit Draft TM #5 to PMT, Agency Region Traffic, and TPAU for review and comment within 24 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall prepare Final TM #5 based on feedback received and submit to PMT within 2 weeks of receiving comments.

##### Public Transportation System

Consultant shall update the public transportation system summary and inventory in coordination with public transportation providers and consistent with OAR 660-012-0700 and OAR 660-012-0705. The public transportation inventory must also discuss local and regional connectivity between services and must identify on-demand/door-to-door transit services in the region, dial-a-ride, and paratransit service, including demand and accessibility.

The summary and inventory must include, but is not limited to:

1. Local and inter-community transit service providers, including intercity passenger rail;
2. Fixed-route and dial-a-ride service areas;
3. Locations of existing and planned fixed routes, major stations, transit hubs and major transfer points, and transit stops;
4. Service characteristics, such as service frequency and span, and special service characteristics, such as bus rapid transit, frequent transit, and priority transit corridors as defined in OAR 660-012-0710;
5. Existing and planned intermodal and intercity bus and passenger rail terminals and park-and-ride stations;
6. Locations of transportation-disadvantaged and disabled populations;
7. Existing and planned transit-supportive facilities, such as dedicated rights-of-way, transit lanes, transit priority signals, etc.;
8. For urban areas with a population over 25,000 that are not currently served by transit, an evaluation of the feasibility of developing a public transit system;
9. Identification of ADA accessibility to individual transit stops and services; and
10. Identification of key public transportation destinations, including destinations identified in Task 2.4.

If data are available, the inventory may also include performance measures as identified in OAR 660-012-0905, including:

1. Pedestrian and bicycle Level of Traffic Stress 1 and 2 networks that serve transit stops.

##### Transportation Options

Consultant shall identify existing TO programs, services, providers, and projects in the planning area in coordination with City, County, and public transportation service providers and consistent with OAR 660-012-0145. Inventory must include, but is not limited to, existing programs and services, policies, and transportation demand management programs, and TO needs of underserved populations.

##### Traffic Volumes

Consultant shall compile all volume data pertaining to the Project area from existing City and ODOT traffic counting sources, including relevant volume data available from ODOT’s [Traffic Counts website](https://www.oregon.gov/ODOT/Data/Pages/Traffic-Counting.aspx), within 6 weeks of the Notice to Proceed.

Traffic volumes shall be collected at up to 20 intersections or corridor segments as specified in Final TM #4. Any required turning movement counts must meet the following conditions:

* Consistent, standardized format for all traffic counts and electronic (\*.xls or \*.csv) count delivery along with formatted PDF counts for technical appendices.
* All new traffic counts to be conducted within a single week for simplification of adjustment factors; counts along corridors must all be conducted in a single day for count verification purposes.
* Consistent fifteen-minute data increments throughout count period and for all user types with clearly labeled count periods.
* Electronic count files must include City, State, and street name fields.
* Counts must include a separate account of pedestrians, bicyclists, passenger vehicles, and heavy vehicles by fifteen-minute data increments.
* Single-file inclusion of all intersection approaches (including private driveways).
* Counts must all be recorded with video to verify the location and any data anomalies.
* Video content must include a location map showing camera angle, depicting which way camera is facing intersection.
* Counts should include notes on any observed anomalies encountered as part of the data collection efforts.
* Count delivery formats must accommodate counts between 1 hour and 16-hours in single tables.

Consultant shall conduct and provide the following counts to supplement available data:

|  |
| --- |
| **Three hour (6-9 am.) Peak Period Count** |
| **ID Number** | **Location** |
| 1 |  |
| 2 |  |
| **Four hour (2-6 p.m.) Peak Period Count** |
| **ID Number** | **Location** |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| **16-hr Full Federal Manual Classification Count** |
| **ID Number** | **Location** |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |

##### Truck Freight

Consultant shall inventory the freight system and major freight generators in the Project Area. Freight generators are businesses that ship or receive a significant amount of freight. The Freight Inventory is expected to be based on Chamber of Commerce and Oregon Employment Department data assembled by City and Agency and must include the following:

1. Identification of Oregon Highway Plan Freight Routes and Reduction Review Routes;
2. Identification of National Highway System Freight Network Critical Urban and Rural Freight Corridors;
3. Identification of local and regional truck freight routes;
4. Truck freight connectors and intermodal facilities, and
5. Freight bottlenecks identified in local, regional, and state plans.

The analysis may also include:

1. Identification of truck freight average daily traffic volumes on roadways and intersections that experience significant truck traffic, including ODOT and City facilities;
2. Identification of truck freight routes with weight, height, or other freight-related restrictions;
3. Estimated freight flows;
4. Location of at-grade, above-grade, and below-grade crossings with other transportation modes, including major bicycle and pedestrian routes and key destinations;
5. Intersections with truck turning limitations;
6. General information and mapped locations of major freight generators and receivers;
7. Comparison of freight facility locations to major destinations and areas with high concentrations of historically disadvantaged communities;
8. Major commodities shipped or received;
9. Connector roads connecting to intermodal facilities or to major freight generators; and,
10. Truck-involved crash data on roadways and intersections that experience significant truck traffic.

##### Vehicle Miles Traveled

For jurisdictions subject to OAR 660-012-0160, Consultant shall calculate household-based light vehicle miles traveled per capita under existing conditions (“Base Year”). This calculation must be determined using the XX MPO travel demand model, consistent with the definition in OAR 660-012-0005(64) and in OAR 660-012-0160. Consultant shall document all underlying modeling assumptions used, so that Base Year VMT per capita can by compared to Horizon Year VMT per capita. Consultant shall submit a [model request](https://www.cognitoforms.com/ODOT2/RequestForTravelDemandModelRun) at least 8 weeks before it is needed to be used following appropriate guidance for the relevant [travel demand model](https://www.oregon.gov/odot/Planning/Pages/Technical-Tools.aspx#travelDemandModel).

##### Funding Review

Consultant shall prepare a summary of current and historical transportation funding, as well as a forecast of future status-quo revenues through the planning period. This summary must include current and historical (most recent 5–10-year period) revenue sources that have funded the maintenance and improvement of the transportation system and historical expenditures that have supported the transportation system. The forecast must conform to the requirements of the TPR (OAR 660-012-0115).

Consultant shall obtain projected transportation funding and revenue information from City. City will provide Consultant with a history in electronic format of all existing revenue streams with a 10-year history of trends. City will also provide Consultant with currently available funding information, including the following:

* Transportation revenues received from the State;
* Local transportation revenues; and
* System development charges and other revenue from development.

City will also work with other agencies, including public transportation providers, to provide Consultant with a full picture of multimodal funding expended in the planning area over the most recent 5-10 year period.

##### Air Transportation (as applicable)

If applicable, consultant shall summarize and update data on the air transportation system, as available, including:

1. Identification of public airports and services provided, including flight and passenger activity and any future expansion plans;
2. Airport protected surface area;
3. Multimodal ground transportation access;
4. Runway length/condition;
5. Owners and operators of private use airports; and
6. Surrounding land uses and zoning.

##### Marine Transportation (as applicable)

If applicable, the Consultant shall summarize and update data on the marine transportation system based on information available, including:

1. Identification of navigable bodies of water and infrastructure and programs that use them to transportation goods and passengers;
2. Marine port facilities and intermodal connectors;
3. Waterside and landside facilities at marine ports;
4. Number and types of businesses located at the port;
5. Number and types of vessels that use the port;
6. Identification of support areas for marine transportation, such as marinas, boat ramps, parking, etc.; and
7. Identification of underutilized marine transportation facilities.

##### Pipelines (as applicable)

If applicable, the Consultant shall summarize pipelines that transport natural gas and petroleum products using available information, including:

1. Identification of pipeline owners and operators;
2. General locations and types of pipelines;
3. Identification of pipeline terminals; and
4. Identification of planned changed to the pipeline network and operations.

#### Transportation System Existing Conditions Analysis Memorandum

Consultant shall analyze existing conditions based on Final TM#4 and Final TM#5. The results of this analysis must be presented in Draft Technical Memorandum #6: Existing Conditions. The draft memorandum must comprehensively assess multimodal conditions, interactions, and conflicts at inventoried facilities and identify deficiencies in the existing transportation system. Consultant shall, at a minimum, identify deficiencies of the transportation system based on the performance standards and targets identified in Final TM#3.

Consultant’s analysis must include the following:

##### Safety Analysis

Consultant shall review safety issues, including crash locations and areas of concern identified via community engagement and conversations with agency partners, to identify existing safety issues and inform subsequent analysis under this task. Consultant shall obtain the most recent 5 years of crash data available from ODOT’s Crash Analysis & Reporting Unit for study segments and intersections in the Project Area (those where count data is collected in Task 3.1). Consultant’s data for state highways must include locations of Safety Priority Index System (SPIS) sites.

Consultant shall assemble, inventory, and identify City-wide crash patterns (e.g., school zone, alcohol-involved, weather, surface, light conditions) in the history of collisions on the transportation system among all users (e.g., vehicles, pedestrians, bicyclists). For each crash inventoried, Consultant shall summarize:

1. Location,
2. Crash type and characteristics,
3. Severity (property damage, injury, or fatality),
4. Summary review of pedestrian/bicycle and fatal crashes, and
5. Intersection Bike & Ped LTS, if available.

Consultant shall calculate the crash rate for up to [xx, TBD during scoping phase] study intersections and segments and for any SPIS sites within the study area that fall within the top 15 percent of SPIS sites statewide. Consultant shall compare study location crash rates to Table II in the Statewide Crash Rate Book to identify study segments with more crashes than other similar facilities in Oregon. The safety analysis must identify crash patterns and document countermeasures at the following locations:

* Intersections with crash rates that exceed the critical crash rate and the 90th percentile crash rate,
* Locations with an excess proportion of specific crash types,
* Locations of crashes that involved people walking or bicycling, and
* Locations where crashes resulted in fatalities or severe injuries.

In addition to analyzing crash history, Consultant may apply federal Highway Safety Manual screening measures to conduct a predictive safety analysis at up to [xx, TBD during scoping phase] locations where safety is a concern to identify countermeasures that could reduce the potential for future crashes. These countermeasures must not increase Bike or Pedestrian LTS, especially in CFAs, unless justified.

##### Pedestrian System Analysis

Consultant shall perform analysis of the pedestrian system as inventoried in Task 5.1.C, including pedestrian facilities and street crossings, and identify deficiencies based on available GIS data, field observations, and online mapping. Analysis must include:

1. Gaps and deficiencies in the pedestrian system identified by comparing the existing inventory with a complete buildout of the pedestrian system consistent with OAR 660-012-0510.

If data are available, the analysis may also include:

1. Pedestrian Level of Traffic Stress calculations consistent with ODOT’s Analysis Procedures Manual; and
2. Relevant transportation performance measures as identified in OAR 660-012-0905, including:
	1. Percent of LTS 1-2 pedestrian facilities within CFAs;
	2. Percent of transit stops served by marked pedestrian crossings within 1000 feet within the plan area.

##### Bicycle System Analysis

Consultant shall perform analysis of the bicycle system as inventoried in Task 5.1.D, and identify deficiencies based on available GIS data, field observations, and online mapping. Analysis must include:

1. Gaps and deficiencies in the bicycle system identified by comparing existing inventory with a complete, connected, low-stress, direct and comfortable network that serves people of all ages and abilities as described in OAR 660-012-610 and the city’s Climate Friendly Area plans.

If data are available, the analysis may also include:

1. Bicycle Level of Traffic Stress calculations for segments and intersections consistent with ODOT’s Analysis Procedures Manual; and
2. Relevant transportation performance measures as identified in OAR 660-012-0905, including:
	1. Percent of LTS1-2 bicycle facilities within CFAs.

##### Public Transportation System Analysis

Consultant shall perform analysis of the public transportation system as inventoried in Task 5.1.E, and identify deficiencies based on available data. Analysis must include gaps and deficiencies in the public transportation system by comparing the complete public transportation system with the public transportation system inventory developed under OAR 660- 13 012-0705.

If data are available, analysis may also include relevant performance measures as identified in OAR 600-012-0905, including:

1. Percent of total households and low-income households located within ½ mile of priority transit corridors;
2. Percent of key destinations within ½ mile of priority transit corridors.

This task must be completed in coordination with transit providers and consistent with local transit plans.

##### Vehicle Operations Analysis

Consultant shall evaluate vehicle operations in the City’s transportation system and identify gaps and deficiencies in the roadway system by comparing complete buildout of the system as described in OAR 660-012-0810 with the existing inventory and consistent with the guidance in ODOT’s Analysis Procedures Manual. Operational analysis may include the following, depending on local performance standards and planning needs:

1. Volume-to-Capacity ratio
2. Level-of-service
3. Delay
4. Non-simulation based HCM 95th percentile queuing (at locations where excessive queuing is observed)

Consultant shall analyze vehicle operations for up to 20 intersections or roadway segments using methods consistent with the approved Final TM #4. All analyses must focus on the weekday evening peak period conditions unless otherwise discussed and agreed with Consultant, City, and APM.

##### Access Management Analysis

Consultant shall identify existing access management standards as defined in OAR 734-051. Consultant shall review City standards and review existing City arterials and collectors adjacent to Study Intersections identifying general corridor areas with driveways that are non-compliant.

##### Intermodal Connections Analysis

Consultant shall identify deficiencies in the existing intermodal connections, based on research and existing inventory data collected in TM #5.

##### Bridge Conditions Analysis (as applicable)

The City and ODOT shall provide a generalized summary analysis of publicly owned bridge conditions using the ODOT Bridge Management System. This is intended to integrate prior bridge analyses, conditions assessments, and current inventory to provide a prioritized list of bridge maintenance or improvement needs. The summary must be provided in a separate memorandum, including tables with prioritized Projects and planning-level Project cost estimates. Consultant shall review the memorandum and integrate its contents into Draft TM #6.

##### Two-lane Highway Capacity Analysis (as applicable)

Consultant shall perform two-lane highway capacity analysis where counts data are available, using methodologies identified in the current edition of the Highway Capacity Manual.

Consultant shall present the results of the existing conditions analysis in Draft Technical Memorandum #6: Existing Conditions. Draft TM #6 must contain narrative, tables, and maps that describe the existing conditions and be suitable for eventual inclusion in the Updated TSP and its appendices.

Consultant shall submit Draft TM #6 to PMT, Agency Region Traffic, and TPAU within 32 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #6 based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #6 to PAC at least 1 week prior to their respective meetings. Consultant shall prepare Final TM #6 incorporating PAC comments and submit to PMT within 2 weeks of relevant PAC Meeting.

## Task 6: Future Conditions and Solutions Development

#### Future Systems Conditions Analysis Memorandum

Consultant shall prepare the future systems conditions analysis, an assessment of land use and transportation future conditions in the Project Area under a “No-Build” scenario in the plan horizon year. The plan horizon year is defined as either 20 years from the anticipated year of TSP adoption or the horizon year of the Regional Transportation Plan, whichever is more distant.

 In preparing the “No-Build” scenario, Consultant shall incorporate planned transportation improvements that have an identified and committed funding source (e.g., are in the Statewide Transportation Improvement Program). The No-Build Scenario must reflect considerations identified during regional scenario planning, as applicable.

The future systems conditions must include the following elements:

##### Population and Employment Forecasts

Consultant shall compile current population figures and work with the City and appropriate State agencies to identify future population, households, and employment estimates for 20 years. Growth assumptions must be informed through regional coordination and PSU population projections Forecasts must be consistent with a final population forecast issued under OAR Chapter 660, Division 32. Climate Friendly Areas (CFAs) must be analyzed using zoning and other information requested from the jurisdiction, and future forecasts must be compared to adopted growth targets identified in Task 3.D. Analysis must contain the “Shall” elements from the TSP Guidelines Future Travel Demand Determination and may also contain the “Should” elements depending on local needs.

Consultant shall follow modeling guidance developed by TPAU for development of future population and household demographics and employment information by TAZ.

##### No-Build Scenario

Consultant shall use the XX MPO travel demand model to develop horizon year No-Build traffic volumes. Model output must be post-processed using NCHRP Report 765 techniques. Consultant shall submit a [model request](https://www.cognitoforms.com/ODOT2/RequestForTravelDemandModelRun) at least 8 weeks before it is needed to be used following appropriate guidance for the relevant [travel demand model](https://www.oregon.gov/odot/Planning/Pages/Technical-Tools.aspx#travelDemandModel). Consultant shall follow modeling guidance to develop horizon forecast year No-Build traffic volumes.

Consultant shall analyze horizon year conditions under a No-Build scenario. Analysis must contain the “Shall” elements from the TSP Guidelines Future Capacity Determination and may also contain the “Should” elements depending on local needs. Analysis must include intersection and highway segment capacity analysis for facilities identified in Task 5.1. Consultant shall use traffic analysis software programs that follow procedures from the most current edition of the Highway Capacity Manual, consistent with ODOT’s [Analysis Procedure Manual.](https://www.oregon.gov/odot/Planning/Pages/APM.aspx) Future systems analysis may include performance evaluation based on performance standards selected in earlier tasks.

##### Future Deficiencies and Needs

Consultant shall identify projected future transportation system deficiencies and needs for all transportation modes. Analysis must contain the “Shall” elements from the TSP Guidelines Future Deficiencies Determination and TSP Guidelines Future Needs Determination and may also contain the “Should” elements depending on local needs. Deficiencies may result from the failure to meet measurable standards or from the failure to satisfy the goals, objectives, and evaluation criteria identified in Final Technical Memorandum #3, including, as applicable, regional performance targets from an approved land use and transportation scenario plan as provided in OAR 660-044-0110 or the regional performance targets from the Statewide Transportation Strategy as adopted by the Oregon Transportation Commission. Consultant shall clearly describe the deficiency and whether the deficiency occurs under existing and future conditions.

##### Horizon Year (No-Build) Vehicle Miles Traveled

Consultant shall calculate the No-Build Horizon Year household-based light vehicle VMT per capita consistent with the definition in OAR 660-012-0005(64) and in OAR 660-012-0160. Consultant shall document all underlying modeling assumptions used, so that VMT per capita can be calculated and compared for the Horizon Year No-Build and financially constrained investment scenarios, if required per OAR 660-012-0160.

Draft Technical Memorandum #7: Future Systems Conditions must contain narrative, tables, and maps that describe future conditions and be suitable for eventual inclusion in the Updated TSP and its appendices.

Consultant shall submit Draft TM #7 to PMT, Agency Region Traffic, and TPAU within 36 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #7 based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #7 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM #7 incorporating PAC comments and submit to PMT within 2 weeks of relevant PAC Meeting.

#### Solutions Analysis and Funding Program Memorandum

Consultant shall prepare Draft Technical Memorandum #8: Solutions Analysis and Funding Program identifying transportation solutions that address the identified deficiencies and needs. Solutions must address the standards, goals, and objectives identified in Final TM #3. Analysis must address the “Shall” elements from the current ODOT Transportation System Plan Guidelines and may also contain the “Should” elements depending on local needs. Consultant shall coordinate with APM to solicit comments from ODOT TPAU and Region Traffic regarding the potential of the alternative solutions and recommended improvements on State facilities.

Draft TM #8 must include an evaluation matrix for the alternative solutions packages, utilizing the evaluation criteria identified in Final Technical Memorandum #3: Goals, Objectives, and Prioritization. Draft TM #8 must estimate conceptual construction and operational costs for alternative solution packages. Cost estimates must be planning-level cost estimates, based on year 20XX dollars, and referenced to appropriate escalation factors.

Draft TM #8 must include, but is not limited to, the following elements:

##### Identification of Automobile-Related Solutions

Consultant shall prepare proposed solutions to identified deficiencies for vehicular traffic, including TSM. Consultant shall make a list of recommended changes to street classifications with supporting rationale.

##### Access Management and Spacing

Consultant shall recommend strategies for future access management and identify opportunities to improve access management on City streets, as well as recommend strategies to adjust current access points based on the OAR Chapter 734 Division 051, and City access goals and ordinances. Specific driveway closures will not be included in the TSP.

##### Bicycle and Pedestrian Connectivity

Consultant shall recommend connectivity, safety, access, and comfort improvements to City’s existing bicycle and pedestrian network, particularly routes that connect to key destinations as defined in Tasks 2.4 and 5.1. Consultant shall recommend future bicycle and pedestrian network extensions within the Project Area or connecting to existing facilities in adjacent areas. Consultant shall incorporate the existing multi-use trails system and park trail system plans into the planned system. Consultant shall provide recommendations to improve connectivity to the existing multi-use trails system and identify potential future connectivity to multi-use trail system locations within and adjacent to the Project Area.

##### Transit

Consultant shall recommend connectivity, frequency, and accessibility improvements to existing transit routes and facilities and recommend future transit routing extensions into and beyond the Project Area.

##### Multimodal Route Connectivity

Consultant shall recommend multimodal connectivity improvements between City’s existing bicycle and pedestrian networks and any existing or planned transit facilities. Consultant shall recommend future bicycle, pedestrian, and transit network improvements into and beyond the Project Area that supports intermodal connectivity.

##### Freight

Consultant shall identify the major freight issues in the Project Area including accessibility, mobility, safety, and freight passage through, into, and from Project Area with an emphasis on intermodal connections. Consultant shall recommend freight route improvements to the existing transportation system and future freight route improvements to accommodate future land use and transportation system changes. Consultant shall identify problem areas such as access issues, roadway constraints, turning radii at intersections, vertical clearance constraints, conflicts with pedestrian and bicycle traffic, and truck loading zone issues.

##### Safety

Consultant shall identify Study Intersections or segments of significant safety concern and other locations where countermeasures could reduce crash frequency to mitigate increases in crashes associated with increased traffic volume or future roadway projects. Countermeasure in CFAs should not increase the Bike and Ped Level of Traffic Stress, without further justification.

##### Local Street Connectivity and Extension Plan

Consultant shall prepare a list of local street alignment and connectivity improvements in several areas of the Project Area where the local street alignment influences future development of these areas, consistent with City’s local street grid pattern. Consultant shall depict future local street connections in these areas on a map and in text.

##### Local Street Standards

Consultant shall prepare standards for the layout of locally owned streets, providing for safe and convenient bicycle and pedestrian circulation.

##### Emerging Transportation Technologies

Consultant shall prepare a list of and recommendations for the range of emerging transportation technologies (parking management systems, ridesharing, autonomous vehicles, bike- and scooter-share programs, etc.) likely implemented in Project Area during the planning horizon. Recommendations must identify existing municipal code elements and comprehensive plan policies that may preclude or support the effective implementation of emerging transportation technologies.

##### Parking Management Strategies

Consultant shall prepare a range of parking management strategies, which must consider projects, programs, and policies supporting management systems, physical parking infrastructure, shuttle systems, and multi-use parking/emergency management vertical evacuation structures.

Analysis may also include relevant performance measures as identified in OAR 600-012-0905, including:

1. Average daily public parking fees within CFAs.

##### Funding Programs

Consultant shall prepare a comprehensive list of funding options for City’s consideration, drawing on the Funding Review developed in Task 5.1. Funding options must include, but are not limited to, the following:

1. A summary of historic, existing, and future City transportation funding sources;
2. All funding sources available to City in a matrix form, and a brief narrative explaining each option; and
3. Additional funding sources relevant to the City’s future transportation needs, including funding available to local and regional transit operators.

Consultant may also summarize relevant performance measures as identified in OAR 600-012-0905, including:

1. Percent of jurisdiction transportation budget programmed within CFAs;
2. Percent of jurisdiction transportation budget programmed within neighborhoods with underserved populations;
3. Percent of investments that support low-pollution transportation modes.

##### Development Code Amendments

Consultant shall prepare a conceptual list of amendments to City’s Municipal Code to implement the code revisions identified in Task 3.2 consistent with requirements of OAR 660-012.

##### Transportation Options and Transportation Demand Management

Consultant shall prepare a list of Transportation Options (TO) and Transportation Demand Management (TDM) strategies applicable to different groups (e.g., year-round residents, employees, and visitors) with sustainable solutions to help foster a multi-modal transportation environment.

Consultant may also report relevant transportation performance measures as identified in OAR 600-012-0905, including:

1. Number and percent of employees covered by employer based TDM programs;
2. Percent of households engaged in transportation options activities;
3. Percentage of transportation options and TDM program funds focused of underserved communities.

Draft TM #8 must contain narrative, tables, and maps that describe the future conditions and be suitable for eventual inclusion in the Updated TSP and its appendices.

Consultant shall submit Draft TM #8 to PMT, Agency Region Traffic, and TPAU within 44 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #8 based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #8 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM #8 incorporating PAC comments and submit to PMT within 2 weeks of the relevant PAC Meeting.

#### Task C.6.3 Alternative Solutions Development Meeting [CONTINGENCY]

If warranted at the beginning of Task 6.2, CCPM shall schedule an Alternative Solutions Development Meeting to function as a “brainstorming session” to develop solutions for identified deficiencies. Participants should include, at a minimum, Region Traffic, Region Planning, Region Active Transportation Liaison, Region Transit Coordinator, MPO (if applicable), City Public Works, and the consultant. Other units and departments may also be included as needed. As potential alternatives are discussed, each business line can indicate the level of support for a project and conditions, if any.

This helps eliminate potential alternatives that would be infeasible, would not meet standards, and that ODOT, MPO, and City will not support. Only projects that can be supported by Agency will be analyzed and presented as alternatives. Dismissal of alternatives must be well documented. Once a set of alternatives is agreed upon, the consultant shall then conduct further analysis.

#### Task C.6.4 Freight Capacity Reduction Analysis [CONTINGENCY]

If applicable and upon written authorization from APM, Consultant shall prepare a Mobility Advisory Committee PowerPoint Presentation summarizing proposed improvements to state facilities, based on [Oregon Revised Statue 366.215 Implementation Guidance](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.oregon.gov%2Fodot%2FPlanning%2FDocuments%2FORS_366.215_Implementation_Guidance.pdf&data=05%7C02%7CSarah.PETERS%40odot.oregon.gov%7Cbee6d669156145178df908dc187b4826%7C28b0d01346bc4a648d861c8a31cf590d%7C0%7C0%7C638412164996245098%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=ILzte%2BCxHEQILd3bWzYgw1%2Ba%2BwN1WpkyR33%2Fpt9TT0s%3D&reserved=0) and using the [appropriate template](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.oregon.gov%2Fodot%2FProjectDel%2FMobility%2FMobility-PPt-Template-Instructions.pdf&data=05%7C02%7CSarah.PETERS%40odot.oregon.gov%7Cbee6d669156145178df908dc187b4826%7C28b0d01346bc4a648d861c8a31cf590d%7C0%7C0%7C638412164996254231%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=q4yS8yZEeEYJ%2FYMc2YwLxieDKtmLiYvpvSNRtGYildc%3D&reserved=0), and consistent with *Oregon Revised Statutes 366.215 – Creation of state highways, reduction in vehicle-carrying capacity*.

Consultant shall provide the draft Presentation to PMT, and revise based on a single, consolidated round of comments. APM will coordinate review recommendations pertaining to state facilities with ODOT Delivery and Operations Division Mobility Services Team.

## Task 7: Identification of Preferred and Cost-Constrained Solutions

#### Preferred Solutions Memorandum

Consultant shall prepare a Draft Technical Memorandum #9: Preferred Solutions identifying preferred and cost-constrained alternatives based on the analysis presented in earlier final technical memoranda, the criteria and standards defined in Final TM #3, and input received from the PMT, PAC, and public. Draft TM #9 must include, but is not limited to, the following elements:

##### Unconstrained Project List

City shall develop an unconstrained, prioritized project list. The unconstrained investment scenario must be created by combining projects identified through the existing conditions, needs, and gap analysis tasks. Not every project identified will be included in the unconstrained project list and to the extent practicable, City will combine single-mode projects into multi-modal projects where it makes sense. The unconstrained project list must be prioritized using criteria established in Task 3.3.

##### Constrained Project List

Consultant shall identify a preferred solution for each deficiency or need and, if different, a cost-constrained alternative considering the revenue forecast for each deficiency or need, consistent with ODOT Transportation System Plan Guidelines Section 6.1 – Development of a Financially Constrained Project List. Preferred improvements to State facilities must be coordinated with ODOT Region Planning and Traffic staff. Identification of alternatives must include, in addition to those elements required by the TPR, the following elements:

* A prioritized list of projects for walking, bicycling, transit, parking, and motorized vehicles, including freight;
* Projects necessary to reduce transportation barriers to key development and redevelopment areas;
* Corridor improvement needs;
* Access management strategies for City, County, and State arterials and collectors;
* Planning-level cost estimates referenced to an appropriate escalation factor for updates; and
* A list of features needing Agency approval (e.g., marked crosswalks on State Highways).

Available funding for the Financially Constrained Project List must be based on funding identified in Final Technical Memorandum #8 Solutions Analysis and Funding and must reflect projected transportation revenue amounts. Planning-level cost estimates for solutions on the constrained project list may not exceed 125% of available funding. Consultant shall incorporate results of Contingent Tasks C7.2, C7.3, and C7.4, if authorized.

##### Future Transportation Funding Plan

Consultant shall prepare a future transportation funding plan based on the current and historic transportation funding information in Final TM #8, consistent with ODOT Transportation System Plan Guidelines and ODOT Directive PB-03 Financial Feasibility in System Planning. The plan must discuss existing and anticipated funding mechanisms, evaluate the ability of these mechanisms to finance solutions identified in Tasks 7.1.A and 7.1.B, and identify the general timing of each multimodal transportation project/program against the projected funding.

Draft Technical Memorandum #9 Preferred Solutions must contain narrative, tables, and maps that describe preferred solutions, the Financially Constrained Project List, and the future transportation funding plan and that are suitable for eventual inclusion in the Updated TSP and its appendices. TM #9 must describe how the constrained project list would make progress toward adopted targets and meet standards at the end of the planning horizon.

Consultant shall submit Draft TM #9 to PMT, Region Traffic, and TPAU within 52 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #9 based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #9 to PAC at least 1 week prior to the relevant meeting. Consultant shall prepare Final TM #9 incorporating PAC comments and submit to PMT within 2 weeks following the relevant PAC Meeting.

#### Task C7.2 Enhanced Review [CONTINGENCY]

If specifically authorized by the APM, Consultant shall conduct enhanced review for projects that would add general vehicle capacity as described in OAR 660-012-0830(1). ODOT will facilitate enhanced review for projects on ODOT facilities.

##### Agency Coordination

Additional meetings and coordination may be needed to support the enhanced review process, including coordination meetings with Agency staff and partners, additional PMT meetings, and City Council meetings.

###### Coordination Meetings (4)

Consultant shall prepare materials for and facilitate up to 4 coordination meetings for staff from Agency, City, affected jurisdictions, and external partners, as appropriate, to identify potential facility impacts, guide community engagement, and inform the development and review of project alternatives. Coordination meetings will not exceed 2 hours each and will be held virtually unless the PMT determines that an in-person meeting is needed to resolve issues. Consultant shall schedule meetings in coordination with PMT, prepare and distribute a draft and final meeting agenda, and provide meeting summary notes following each meeting.

###### Additional PMT Meetings (4)

Consultant shall arrange and conduct up to 4 additional PMT meetings throughout the enhanced review process. PMT meetings will not exceed 1 hour and will be held virtually. Consultant shall submit meeting summary notes to APM after each meeting.

###### City Council Meeting (1)

As requested by Agency, and authorized through a separate NTP, City shall arrange and Consultant shall prepare for and present at a meeting of the City Council to authorize inclusion of a facility that would expand general vehicle capacity on the Financially Constrained Project List as required by OAR 660-012-0830. The purpose of this meeting is to review the Draft Project Authorization Report and determine status of proposed facility as described in OAR 660-012-0830. Consultant shall present the draft project list, identify facilities that require authorization, describe alternative investment scenarios, and describe work conducted and information learned through implementation of the focused public involvement strategy. Consultant shall instruct the City Council on the process required to include facilities requiring authorization on the Financially Constrained Project List and respond to questions.

##### Facility Impact Assessment

For each facility authorized by the City Council, Consultant shall, in consultation with the APM, designate a facility impact area and determine affected jurisdictions consistent with OAR 660-012-0830(3). The facility impact area must include, at a minimum, all areas within 1 mile of the proposed facility and all areas where implementation of the proposed facility is expected to change traffic levels or patterns or would otherwise change the transportation system or patterns of land use development.

Determination of the facility impact area must:

* Be coordinated with all cities and counties with planning jurisdictions within two miles of the limits of the proposed facility;
* Review places with concentrations of underserved populations and consider the context of historic patterns of discrimination, disinvestment, and harmful investments.

Consultant shall review applicable transportation system plans and demographic data to identify within the facility impact area:

* Gaps and deficiencies in pedestrian and bicycle facilities within the designated facility impact area;
* Gaps and deficiencies in public transportation facilities and services within the designated facility impact area;
* Existing transportation demand management services within the facility impact area;
* Underserved populations within the facility impact area, as defined in OAR 660-012-0125.

Consultant shall prepare Draft Technical Memorandum 9.A: Facility Impact Assessment (TM #9.A) describing the purpose and need for the proposed facility, facility impact area, affected jurisdictions and populations, and transportation system gaps and deficiencies. Consultant shall submit the draft TM # 9.A to the PMT, Region Traffic, TPAU, and jurisdictions within the facility impact area for review and comment. APM will consolidate all comments and submit to the Consultant. Consultant shall address and incorporate comments and submit the Final TM #9.A to the PMT within 1 week of receiving comments.

##### Focused Community Engagement Strategy

Consultant shall develop a draft community engagement strategy consistent with the requirements of 660-012-0830(4) and in coordination with the affected jurisdictions identified in Task C7.3.B. This strategy may be integrated with project community engagement described in Task 2 as appropriate. Consultant shall present this strategy in Draft Technical Memorandum 9.B: Public Involvement Strategy (TM #9.B), which must identify:

* Opportunities for meaningful public participation in decision making throughout the authorization process;
* Content and schedule of reports to affected jurisdictions;
* Schedule of public involvement activities, including description of each activity, responsible parties, and any overlap with related projects; and,
* Schedule of specific activities to conduct an engagement-focused equity analysis as provided in OAR 660-012-0135(4), including:
	+ Engaging members of underserved populations, as defined in OAR 660-012-0125, to develop key community outcomes,
	+ Collecting qualitative and quantitative data to better understand potential benefits and burdens of the proposed facility,
	+ Reporting back on outcomes of the analysis and unresolved issues to people who were engaged in the above activities.

Memo shall also include a project information sheet and a draft letter inviting participation from transit service providers, transportation options providers, and cities and counties with planning jurisdictions within two miles of the limits of the proposed facilities.

Consultant shall submit Draft TM #9.B to PMT, Region Traffic, TPAU, and affected jurisdictions for review and comment. APM will consolidate all comments and submit to the Consultant. Consultant shall address and incorporate comments and submit Final TM #9.B to the PMT within 1 week of receiving comments.

##### Alternatives Development

In coordination with the PMT and affected jurisdictions, Consultant shall develop up to 4 alternative investment scenarios that could substantially meet the need for the Project without implementation of the proposed facility, as provided in OAR 660-012-0830(5), subsections (e) through (h). Scenarios must reflect existing plans and consider adopted state, regional, and local targets for reduction of vehicle miles traveled to reduce greenhouse gas emissions.

Scenarios must include, as appropriate:

* Enhanced investments in pedestrian and bicycle facilities, including investments that could be implemented with and without implementation of the proposed facility;
* Enhanced investments in public transportation, including investments that could be implemented with and without implementation of the proposed facility;
* Enhanced investments in transportation options programs, including investments that could be implemented with and without implementation of the proposed facility;
* System pricing approaches appropriate for the facility type and need.

Consultant shall propose alternative investment scenarios in Draft Technical Memorandum 9.C: Alternatives Development. Consultant shall submit Draft TM #9.C to the PMT, Region Traffic, TPAU, and affected jurisdictions for review and comment. APM will consolidate all comments and submit to the Consultant. Consultant shall address and incorporate comments and submit Final TM #9.C to the PMT within 1 week of receiving comments.

##### Alternatives Review Report

Consultant shall conduct an alternatives analysis consistent with OAR 660-012-0830(5) and prepare an alternatives review report as described in OAR 660-012-0830(6). The alternatives analysis must include:

* A forecast of projected household-based light vehicle VMT per capita at the horizon year using the Financially Constrained Project List developed in Task 7.1.B and in accordance with guidance in ODOT’s Analysis Procedures Manual;
* An assessment of expected outcomes from implementing the proposed facility, including:
	+ Ability to meet identified travel needs;
	+ Estimated additional VMT per capita expected to be induced by implementation of the proposed facility over the first 20 years of service, developed using the best available tools and references;
	+ Expected impacts of the proposed facility on underserved populations described in qualitative or order-of-magnitude terms, depending on available data. Expected impacts must include, but are not limited to, additional household costs and changes in access to jobs and services for people walking, bicycling, using public transportation, or otherwise traveling by modes other than a private automobile.
* A description of alternative investment scenarios, as defined in Final TM#9.C, and an assessment of how much of the need for the proposed facility may be met through each alternative;
* A description of system pricing scenarios, as defined in Final TM#9.C, and an assessment of how much each scenario may be able to reduce the need for the proposed facility;
* Identification of at least 1 set of alternative investment and system pricing approaches that would most substantially meet the need for the proposed facility.

Consultant shall present this analysis in Draft Technical Memorandum 9.D: Alternatives Review Report (Draft TM#9.D). Consultant shall submit Draft TM #9.D to the PMT, Region Traffic, TPAU, and affected jurisdictions for review and comment. APM will consolidate all comments and submit to the Consultant. Consultant shall address and incorporate comments and submit Final TM #9.D to the PMT within 2 weeks of receiving comments.

##### Draft Authorization Report

If specifically authorized by the City Council, Consultant shall prepare Draft Technical Memorandum 9.E: Draft Authorization Report (Draft TM#9.E), as described in OAR 660-012-0830(8), including:

* A record of the initiation of the authorization process;
* A summary of the public involvement strategy as planned and implemented;
* The alternatives review report (Final TM#9.D);
* A summary of estimated long-term maintenance costs and anticipated maintenance funding sources for the proposed facility.

CCPM shall compile and resolve discrepancies among comments and direction provided by the City Council and provide a compiled set of comments and direction to Consultant within 1 week of City Council hearing. Consultant shall prepare Final TM#9.E based on direction received and provide to PMT within 2 weeks of receipt of comments.

#### C7.3 Project Summary Prospectus Sheets

Consultant shall prepare up to 10 project summary prospectus sheets, including planning-level project costs, location map, cross-section, and a summary of outcomes and tradeoffs for different travel modes, to provide an overview of projects that are identified as high priority items based on PMT, PAC, and community input.

## Task 8: Draft Transportation System Plan, Implementing Ordinances and Findings

#### Draft Implementing Ordinances

Consultant shall prepare Draft Technical Memorandum #10: Draft Implementing Ordinances identifying amendments to City’s Municipal Code and Zoning Ordinance necessary for implementing the draft TSP and its policies and recommendations and consistent with Oregon’s Transportation Planning Rule. The amendments identified in Implementing Ordinances are expected to include, but are not limited to:

1. Performance standards consistent with requirements in OAR 660-012-0215
2. Street-width standards with the goal of ‘right-sizing’ for safety and economy;
3. Updated parking standards;
4. Traffic Impact Analysis requirements, which may reference Agency standards or requirements of other similar cities in Oregon; and
5. State transportation planning requirements, including findings for the Transportation Planning Rules, to support adoption of TSP by City.

Consultant shall submit Draft TM #10 to PMT within 64 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving draft memorandum. Consultant shall revise Draft TM #10 based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #10 to PAC at least 1 week prior to the relevant meeting.

#### Draft Transportation System Plan

Consultant shall prepare Draft Transportation System Plan incorporating all final Technical Memoranda #1 – #10 and any additional comments received from the public, PAC , City, and ODOT. The Draft TSP must be consistent with the current requirements of the Oregon Transportation Plan, OAR 660-012-0100, and include the ‘Shalls’ shown in the TSP Guidelines.

Draft TSP must include, but is not limited to, the following:

1. Relevant policies, including local transportation system plan goals and policies and coordinated land use and transportation planning policies included in the City’s comprehensive plan;
2. Maps and plan elements describing the updated future network for motor vehicle, bicycle, pedestrian, public transportation and the street and highway system;
3. Elements for streets and highways as well as the pedestrian, bicycling, and public transportation systems;
4. Standards for the layout of local streets that provide for safe and convenient bicycle and pedestrian circulation and address changes to the street network and connections to neighborhood destinations;
5. A transportation options element as provided in OAR 660-012-0145;
6. A prioritized, unconstrained project list;
7. Funding projections and a financially constrained list of projects with planning-level cost estimates not to exceed 125% of projected funding;
8. Refinement plans adopted as provided in OAR 660-012-0190;
9. Project summary prospectus sheets, including planning-level project costs, location map, and cross-section, for up to 5 high-priority projects;
10. Access spacing standards;
11. Recommended development code amendments;
12. Areas with concentrations of underserved populations, as provided in OAR 660-012-0125;
13. A record of engagement, public involvement, and decision-making processes used to develop the plan, as provided in OAR 660-012-0135;
14. A major equity analysis as provided in OAR 660-012-0135 and Title VI report which may be accomplished through the Community Profile as describe in Task 2.3.

Additional material developed for Project, including portions of Technical Memoranda and Presentation Materials not included in the Draft TSP, background information used to analyze existing and future conditions, and meeting summaries must be provided in an appendix to the Draft TSP to preserve this information for future readers without requiring formal adoption of that material.

If authorized by the APM, Consultant may also provide a stand-alone appendix describing how the investments and policies in the TSP support the path to meet regional, state, and federal greenhouse gas reduction targets (as applicable) and enable meeting future performance targets, as required under OAR 660-012 and 660-044.

Consultant shall submit Draft TSP to PMT within 64 weeks of receiving NTP; CCPM will submit 1 set of consolidated comments to Consultant within 2 weeks of receiving Draft TSP. Consultant shall revise Draft TSP based on feedback received and submit to PMT within 2 weeks of receiving comments. Consultant shall distribute the revised Draft TM #10 to PAC at least 1 week prior to the relevant meeting.

#### Joint Planning Commission and City Council Work Session

City will arrange and conduct a work session to review and discuss the draft TSP and draft Implementing Ordinances (the “Joint Planning Commission and City Council Work Session”). Consultant shall attend (virtually or in person, as appropriate) Joint Planning Commission and City Council Work Session to present draft TSP, draft Implementing Ordinances and any supporting materials and answer questions. Consultant shall prepare the written meeting agenda, supporting materials and meeting summary afterwards. City will prepare legally required minutes.

#### Draft Findings

City will prepare draft findings addressing local ordinance requirements to support adoption of the draft TSP by City and provide to APM and Consultant for review and comment.

#### Adoption Draft TSP, Adoption Draft Implementing Ordinances and Final Findings

Consultant shall prepare the Adoption Draft Transportation System Plan, an executive summary of the draft findings, and a set of Adoption Draft Implementing Ordinances incorporating Planning Commission and City Council comments on Revised Draft TM #10 and provide to CCPM and APM; APM and CCPM will provide direction if comments must be reconciled. Consultant shall submit electronic copies of the 3 documents to City and Agency. City will post Adoption Draft TSP and Adoption Draft Implementing Ordinances to Project Webpage.

City will submit a copy of the Adoption Draft TSP and Adoption Draft Implementing Ordinances to the Department of Land Conservation and Development at least 35 days prior to the first evidentiary hearing as directed by Oregon Revised Statutes 197.610 and OAR 660-018-0020.

## Task 9: Final TSP Adoption

#### Final TSP and Final Implementing Ordinances

City will arrange and conduct a planning commission hearing and City council hearing for consideration of Adoption Draft TSP, Adoption Draft Implementing Ordinances, and Final Findings for approval and adoption. City will provide APM and Consultant with summary of council actions recorded during the hearings and with a single set of coordinated, non-conflicting comments. Consultant shall prepare a single revised Adoption Draft TSP (the “Final TSP”) and a single set of revised Adoption Draft Implementing Ordinances (the “Final Implementing Ordinances”) to reflect City Council actions and comments received.

If adopted, City will submit electronic copies of the adopted Final TSP and Final Implementing Ordinances to the Department of Land Conservation and Development.

#### C9.2 Project Information Sheet [CONTINGENCY]

Consultant shall prepare and submit to APM a Project Information Sheet, in the form of a 2-page summary of Project analysis, activities, and policy decisions.