

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, February 7, 2025
Time: 9:00 a.m. to 12:00 p.m.
Place: Virtual: [Connect with Zoom](#)
Passcode: 136646 | Phone: 877-853-5257 (Toll Free)

- | | | | |
|------------|-----|---|---|
| 9:00 a.m. | 1. | Call meeting to order, declaration of quorum and introductions | Chair Kloster |
| 9:10 a.m. | 2. | * Comments from the Chair and Committee Members <ul style="list-style-type: none">• Committee member updates around the Region (Chair Kloster & all)• Monthly MTIP Amendments Update (Ken Lobeck)• Fatal crashes update (Anthony Cabadas)• Transit Minute (Ally Holmqvist)• Draft FY 2025-26 UPWP available for review (John Mermin)• In-person TPAC Meeting: March 7th (Tom Kloster) | |
| 9:20 a.m. | 3. | * Public communications on agenda items | |
| | 4. | <u>ACTION ITEMS</u> | |
| 9:22 a.m. | 4.1 | * Approval of TPAC minutes for December 6, 2024 | Chair Kloster |
| 9:25 a.m. | 4.2 | * Resolution 25-5465, For The Purpose of Canceling An ODOT Rail Hazards Safety Project And Adding Three New Metro Planning Studies To The 2024-27 MTIP (Regular Bundle) | Ken Lobeck, Metro |
| 9:35 a.m. | 4.3 | * Resolution 24-5464, For the Purpose of FFY 2025 Redistribution Funding Awards <u>Recommendation</u> | Ken Lobeck, Metro |
| | 5. | <u>INFORMATION/DISCUSSION ITEMS</u> | |
| 9:45 a.m. | 5.1 | * 2028-2030 Regional Flexible Fund Step 1A.1 – Finalized Bond Scenarios and Results | Grace Cho, Metro |
| 10:15 a.m. | 5.2 | * Resolution 25-5463, For the Purpose of Amending Three Related Rose Quarter Improvement Projects to the 2024-27 MTIP to Add \$250 Million Dollars of Approved Funding to the Projects | Ken Lobeck & Blake Perez, Metro, Megan Channell, ODOT |
| 10:55 a.m. | | <u>MEETING BREAK</u> | |
| 11:00 a.m. | 5.3 | * Comprehensive Climate Action Plan (CCAP) Update | Eliot Rose, Metro |
| 11:30 a.m. | 5.4 | * 2023 Regional Transportation Plan Implementation Update
<i>Purpose: Provide an update on implementation of the 2023 Regional Transportation Plan</i> | Kim Ellis, Metro |
| 12:00 p.m. | | ADJOURN | Chair Kloster |

*Material included in meeting notice packet

**Material presented at meeting

All materials will be available electronically post each meeting

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: January 28, 2025
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments: February 2025 Report

BACKGROUND

The following pages contain the list of projects **during January 2025** submitted to complete a formal/full amendment, or administrative modification to the 2024-27 MTIP. A summary of the differences between formal/full amendments and administrative modifications is stated below.

Formal Amendments Approval Process:

Formal/Full MTIP Amendments require approvals from Metro JPACT& Council, ODOT-Salem, and final approval from FHWA/FTA before they can be added to the MTIP and STIP. After Metro Council approves the amendment bundle, final approval from FHWA and/or FTA can take 30 days or more from the Council approval date. This is due to the required review steps ODOT and FHWA/FTA must complete prior to the final approval for the amendment.

Administrative Modifications Approval Process:

Projects requiring only small administrative changes as approved by FHWA and FTA are completed via Administrative Modification bundles. Metro normally accomplishes one "Admin Mod" bundle per month. The approval process is far less complicated for Admin Mods. The list of allowable administrative changes is already approved by FHWA/FTA and are cited in the Approved Amendment Matrix. As long as the administrative changes fall within the approved categories and parameters, Metro has approval authority to make the change and provide the updated project in the MTIP immediately. Approval for inclusion into the STIP requires approval from the ODOT. Final approval into the STIP usually takes between 2-3 weeks to occur depending on the number of submitted admin mods in the approval queue.

MTIP FORMAL/FULL Amendments

January Formal Amendment Bundle: JA25-04-JAN1

2024-2027 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 25-5456

January 2025 Regular Formal Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: JA25-04-JAN1

Total Number of Projects: 9

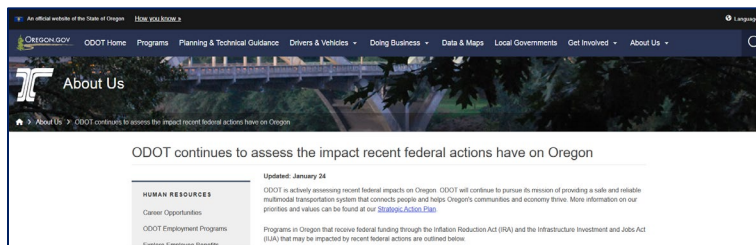
Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Category: Adding New and Amending Existing Projects to the 2024-2027 MTIP:				
(#1) ODOT Key # 23814 MTIP ID TBD <i>New Project</i>	Forest Grove	East Forest Grove Safety Improvement Project	On OR8/N Adair St in eastern Forest Grove at MP 17.35 at the Yew St intersection, install a new traffic signal to reduce crashes and provide better protection for pedestrians to connect a low-income and historically disadvantaged community to transit and commercial options. (CDS 2024 award #225)	<u>ADD NEW PROJECT:</u> The formal MTIP amendment adds the new 2024 Congressionally Directed Spending (CDS) award to the MTIP.
(#2) ODOT Key # 21709 MTIP ID TBD 71195	ODOT	OR120: Columbia Slough Bridge (Portland)	Bridge replacement of the existing timber structure that is obsolete, costly to continuously repair, and can no longer support heavier loads	<u>CANCEL PHASES:</u> The formal amendment cancels the PE and ROW phases leaving only the Planning phase programmed. OTC approval is required and is scheduled to occur during their January 16, 2025, meeting.
Projects 3 to 8	ODOT	The following six projects represent new ADA curb and ramp upgrade projects being added to the MTIP. OTC approval was required and occurred during the December. The impacted projects include Keys 23734, 23762, 23770, 23771, 23772, and 23748		
(#3) ODOT Key # 23734 MTIP ID TBD <i>New Project</i>	ODOT	Portland Metro Area 2024-2027 Curb Ramps, Phase 3	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards on OR99E and US26.	<u>ADD NEW PROJECT:</u> Utility Relocation and Construction phases are being added through the amendment. PE was completed previously through project Key 22798. Specific planned project site locations are included as an attachment to the TPAC, JPACT, and Council agenda staff reports.

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(4) ODOT Key # 23762 MTIP ID TBD New Project	ODOT	Portland Metro Area 2024-2027 Curb Ramps, Phase 5	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards on OR219 and OR8.	<u>ADD NEW PROJECT:</u> Right-of-Way, Utility Relocation and Construction phases are being added through the amendment. PE was completed previously through project Key 22798. Specific planned project site locations are included as an attachment to the TPAC, JPACT, and Council agenda staff reports.
(#5) ODOT Key # 23770 MTIP ID TBD New Project	ODOT	OR8 Curb Ramps (Beaverton & Hillsboro)	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards on OR8.	<u>ADD NEW Project:</u> Preliminary Engineering, Right-of-Way, Utility Relocation and Construction phases are being added through the amendment. At this time, the final site locations are not yet defined.
(#6) ODOT Key # 23771 MTIP ID TBD New Project	ODOT	OR224 & OR213 Curb Ramps (Happy Valley & Mulino)	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards on OR224 and OR213	<u>ADD NEW Project:</u> Preliminary Engineering, Right-of-Way, Utility Relocation and Construction phases are being added through the amendment. At this time, the final site locations are not yet defined.
(#7) ODOT Key # 23772 MTIP ID TBD New Project	ODOT	OR141 Curb Ramps (Durham)	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards on OR224 and OR213	<u>ADD NEW Project:</u> Preliminary Engineering, Right-of-Way, Utility Relocation and Construction phases are being added through the amendment. At this time, the final site locations are not yet defined.
(#8) ODOT Key # 23748 MTIP ID TBD New Project	ODOT	Portland Metro Area 2024-2027 Curb Ramps, Phase 4	Construct curb ramps to meet compliance with the Americans with Disabilities Act (ADA) standards along I-84, US26, US30, OR99E, OR211, OR281, and OR282.	<u>ADD NEW PROJECT:</u> Right-of-Way, Utility Relocation and Construction phases are being added through the amendment. PE was completed previously through project Key 22798. Specific planned project site locations are included as an attachment to the TPAC, JPACT, and Council agenda staff reports.

(#9) ODOT Key # 20304 MTIP ID	ODOT	City of Portland Safety Project	Portland wide safety upgrades including intersection improvements, upgrade curb ramps, utility relocation, signal work, medians, traffic separators, striping and signing to improve safety.	COST INCREASE: The formal amendment adds available Congressionally Directed Spending (CDS) award to the ROW and Construction phases to support updated phase costs to meet project scope requirements.
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Proposed Amendment Review and Approval Steps	
Date	Action
January 2025 (JA25-04-JAN1) Formal Ammendment estimated processing and approval timing	
Monday, January 6, 2025	Completed: Post amendment & begin 30+ day notification/comment period.
Friday, January 10, 2025	Approval recommendation provided: January 2024 TPAC Meeting.
Thursday, January 16, 2025	Approved: January 2024 JPACT meeting.
Tuesday, February 4, 2025	Completed: End the 30-day public comment period:
Thursday, February 6, 2025	Pending: Metro Council meeting. Request final Metro approval for the January FFY 2025 MTIP Formal Amendment bundle under amendment JA25-04-JAN1.
Wednesday, February 12, 2025	Pending: Submit final Metro approved FFY 2025 January Formal amendment bundle to ODOT and FHWA to complete final approval steps.
Early to mid-March, 2025	Pending: Final approval from FHWA estimated will occur.

Added Note: As of January 2025, all project obligation requests have been placed on an “obligation pause”. Staff believes this includes all federal fund requested obligations through the FHWA FMIS system, USDOT Delphi system, and FTA’s TrAMS system. For additional guidance, please see ODOT’s webpage at <https://www.oregon.gov/odot/About/Pages/Federal-Funding-EO-Pause.aspx>. Staff will pass on additional guidance once it is known and verified.



JANUARY 2024 ADMINISTRATIVE MODIFICATIONS

No Administrative Modifications were submitted during January 2025



RoseQuarter

January 15, 2025

Re: I-5 Rose Quarter Improvement Project - Letter of Agreement in Support of Full Project Delivery and Funding

We remain committed partners to complete the I-5 Rose Quarter Improvement Project (project) in its entirety. As partners in this project, we support the project's dual role of addressing critical statewide transportation needs and helping to realize the community vision to reconnect and realize a prosperous Albina neighborhood. This is a project of statewide significance that contributes to the economic output, vitality, and the tax base of the entire state. The project will not only contribute to the statewide economy through improved movement of goods and people and enhancement of key sports and entertainment venues that foster significant economic activity, it will also serve as a national model for how transportation infrastructure and community building can be done together to achieve inclusive economic growth and positive, generational outcomes for our state and region.

Large-scale transportation infrastructure projects do not simply reshape the way that we travel and transport goods, they reshape the economic, socio-environmental and physical realities of working-class Oregonians all over our State. In alignment with the project values of restorative justice, community input and transparent decision making, mobility, and public health, we are embracing a partnership role to support ODOT's delivery of the complete project. Through multi-agency and community partnerships, the state and region has a rare and unique opportunity to position itself as a national leader in transformational, community-driven infrastructure delivery.

This ODOT-led project is significant to all communities in Oregon, and the entire state will benefit from constructing the full I-5 Rose Quarter Improvement Project, which includes the I-5 auxiliary lanes and shoulders between I-84 and I-405, the full highway cover with reconnected streets and new community space on top, multimodal street improvements, the separated pedestrian and bicycle bridge, and the relocation of the I-5 southbound off-ramp to the Wheeler/Williams Off-Ramp Connection. I-5 is the main north-south highway along the U.S. West Coast and is critical for moving people and goods and connecting cities and towns from Mexico to Canada.

The project will reduce congestion and improve safety at Oregon's top bottleneck where three interstates converge to form the nation's 28th worst freight bottleneck and where the traveling public and freight experience 12 hours of congestion each day. The Rose Quarter segment of I-5 also provides about \$115 million in daily commodity flows; congestion and travel delay on I-5 affects businesses throughout the state by reducing economic competitiveness because businesses are unable to reliably move their goods and services. The implications of this bottleneck extend far beyond the Portland

Letter of Agreement in Support of Full Project Delivery and Funding – Page 2

Metro region to across the state, affecting efficient movement of goods, the cost of doing business, and Oregon's economic growth.

In addition, the highway cover and multimodal improvements will knit together communities disproportionately impacted by the interstate's original construction and make streets safer by offering greater visibility, protection, and access to people walking, biking, and rolling. Connected complete streets throughout the district help support the equitable development goals of Lower Albina, creating a new neighborhood and regional destination with entertainment venues and vibrant and inclusive public spaces that will serve as a visitor destination and contributing to the statewide economic impact of tourism.

- While one of the main objectives of the project is to achieve a reconnected and thriving neighborhood district centered on restorative justice, project partners have identified that this happens when we leverage projects for **wealth building and inclusive economic development**. This includes working with the Portland Trail Blazers and Rip City Management and other partners to ensure that our regional entertainment venues continue to thrive and contribute to the social and economic vitality of the city. As an example, the Portland Trail Blazers and Moda Center generate \$600 million in regional annual economic activity, attracting an estimated 1.5 million visitors and supporting thousands of jobs. Local and regional multimodal transportation improvements in the district and the region has the combined benefit of supporting the economic drivers (like the sports and entertainment venues) that benefit the whole state and reconnects a community that suffered economic losses and was divided by the highway construction.
- As elevated by members of the Historic Albina Advisory Board, the Albina Vision Trust and other community members and organizations, **environmental quality and justice** is a key priority to ensure the project contributes to enhanced health, safety and general wellbeing of the community. It is critical that the Project prioritize efforts to mitigate and address air quality, noise and other construction related impacts through each phase of investment.
- The City of Portland is excited to work with partners on the delivery of the "**Lower Albina Streetscape Project**" which was awarded to PBOT during the same Reconnecting Communities and Neighborhoods grant cycle as the \$450 million award allocated toward the Rose Quarter project. These two projects will work seamlessly together to extend the benefits of the highway cover and local street improvements delivered by the Rose Quarter project on N/NE Broadway and N/NE Weidler, creating a continuous connection between the Broadway Bridgehead, through the Lower Albina area, and into nearby Lloyd and Eliot neighborhoods. For both projects be successful, the Lower Albina Streetscape Project and Rose Quarter project will need to coordinate closely on design and implementation.

We recognize the importance of the initial investments to begin building the first phases of the project. The \$450 million federal investment from the US Department of Transportation's Reconnecting Communities and Neighborhoods program is critical to begin construction on the first portion of the highway cover – a primary reconnecting feature of the project. Strong partnerships and community leadership, including from Albina Vision Trust and the Historic Albina Advisory Board, was key to leveraging this level of federal investment. The additional \$250 million in state funding made available by the Oregon Transportation Commission also allows ODOT to kick off project construction in 2025,

Letter of Agreement in Support of Full Project Delivery and Funding – Page 3


expanding upon what will be built concurrently with the first highway cover section starting in 2027. Through this significant start in 2025, ODOT will minimize inflation costs and make progress toward a project goal of community job creation and delivering on the community vision.

The project will create significant opportunities for jobs and economic development, including investing in Disadvantaged Business Enterprises and building capacity for a diverse workforce. This project is a catalyst for economic growth and social equity, and its completion will improve our infrastructure and uplift our communities. The planned sequence of work makes meaningful progress that will seamlessly connect to future funded work.

We understand the need to deliver the project in phases to match funding availability, emphasizing that each phase is done in support of, and with the expectation of, completing the project scope in full. Further, the federal environmental approval for the project under the National Environmental Policy Act (NEPA) is for the full scope completion of the project and our support for delivering all elements of the project is consistent with this federal approval and the NEPA process. As the project progresses, project values and partnerships will be utilized to inform project phasing and decision-making processes. As jurisdictional agencies, ODOT and the City of Portland will work together on permit issuance and scope refinement activities.

Completing the project elements in full is essential to capitalizing on unprecedented federal investment in Oregon and realizing the full statewide benefit of the Rose Quarter project. This infrastructure project is a bold endeavor that will have a generational impact on our city, region and state and we remain in support of delivering the project in full to achieve this outcome.

In Partnership,


Leah HORNER (Jan 15, 2025 16:12 PST)

Leah Horner, ODOT Assistant Director of Delivery and Operations


Donald A Oliveira (Jan 15, 2025 11:43 PST)

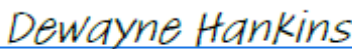
Donnie Oliveria, City of Portland Deputy City Administrator, Community & Economic Development


Priya Dhanapal (Jan 15, 2025 14:25 PST)

Priya Dhanapal, City of Portland Deputy City Administrator, Public Works



Winta Yohannes, Albina Vision Trust Executive Director


Dewayne Hankins (Jan 15, 2025 15:46 PST)

Dewayne Hankins, President of Business Operations, Portland Trail Blazers and Rip City Management

Meeting minutes



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: **Transportation Policy Alternatives Committee (TPAC)**
Date/time: Friday, January 10, 2025 | 9:00 a.m. to 12:00 p.m.
Place: Zoom

Members Attending

Tom Kloster, Chair
Allison Boyd
Chris Ford
Dyami Valentine
Eric Hesse
Gerik Kransky
Indi Namkoong
Jay Higgins
Jeff Owen
Judith Perez Keniston
Kate Lyman
Katherine Kelly
Mike McCarthy
Sara Etter
Sarah Iannarone
Shauna Hanisch-Kirkbride
Will Farley

Affiliate

Metro
Multnomah County
Oregon Department of Transportation
Washington County
City of Portland
Oregon Department of Environmental Quality
Verde
City of Gresham and Cities of Multnomah County
Clackamas County
SW Washington Regional Transportation Council
TriMet
City of Vancouver
City of Tualatin and Cities of Washington County
Oregon Walks
The Street Trust
Washington Department of Ecology
City of Lake Oswego and Cities of Clackamas County

Alternates Attending

Karen Buehrig
Sarah Paulus
Adam Fiss
Francesca Jones
Dayna Webb
Gregg Snyder
Neelam Dorman
Dakota Meyer
Laura Terway
Kristin Hull
Jason Gibbens

Affiliate

Clackamas County
Multnomah County
SW Washington Regional Transportation Council
City of Portland
City of Oregon City and Cities of Clackamas County
City of Hillsboro and Cities of Washington County
Oregon Department of Transportation
City of Troutdale and Cities of Multnomah County
City of Happy Valley and Cities of Clackamas County
City of Portland
Washington State Department of Transportation

Members Excused

Ashley Bryers
Bill Beamer
Danielle Casey
Jasia Mosley
Laurie Lebowsky-Young

Affiliate

Federal Highway Administration
Community member at large
Federal Transit Administration
Community member at large
Washington State Department of Transportation

Call to Order, Declaration of a Quorum and Introductions

Chair Kloster called the meeting to order at 9:00 a.m. Introductions were made. A quorum of members present was declared. Reminders where Zoom features were found online was reviewed.

Comments from the Chair and Committee Members

The following staff and committee member updates were made. Highlights included:

- Updates from committee members around the Region (all)
 - Katherine Kelly: The IBR program has received a \$30 million Reconnecting Communities Grant.
- 2025 TPAC Roster (Tom Kloster)
 - An updated roster is included in the meeting packet.
- Fatal crashes and monthly highlights update (Anthony Cabadas)
 - 7 traffic deaths in Dec and one previously unreported death in November.
 - ODOT upgrading a currently unsignalized crosswalk on SE Powell Blvd at SE 36th Ave.
 - NCHRP, Toole Design, PSU, Safe Streets Research and Consulting and OSU partnered to develop new research with a decision tool and guidelines to reduce conflicts between people bicycling and turning motorists
 - Tualatin has installed Rectangular Rapid Flashing Beacons (RRFBs) at 30 crosswalks on local streets
 - Chris Ford: In December ODOT installed signs lowering the speed limit on N. Lombard Street and on December 31st, a new RRFB was installed on McLaughlin Blvd at SE Maple.
- Transit Minute (Ally Holmqvist)
 - Expects ridership to continue to hold steady around 68-70% of pre-pandemic levels.
 - November ridership expected to be 6.2 million rides, approximately 6% higher than this time last year.
 - New Year's Eve rides were free on TriMet, including Portland Streetcar after 8pm and C-Tran after 6pm.
 - This and next year, Timbers, Thorns or concert ticket holders can ride transit free to Providence Park.
 - C-Tran will introduce seven-day-a-week fixed route transit service to downtown La Center.
- Administrative Amendment for FY 2024-25 UPWP (John Mermin)
 - Two projects are being amended into the UPWP, funded through the Federal Safe Streets for All program (City of Milwaukie Safety Assessment on the Harrison Street corridor and a Clackamas County Consolidate Safe System Planning). Next steps will include forwarding the notice of amendment to the USDOT staff for their approval.
 - Current UPWP document is being assembled and will be presented to the committee for review in January and discussion in March.
- Local TSP support survey (André Lightsey-Walker)
 - Transportation System Plan survey has been developed and committee members will receive a link to the survey on Monday.
- 28-30 Regional Flexible Funds – Step 2 refinement reminder (Grace Cho)
 - Currently in an open refinement period.

PUBLIC COMMUNICATIONS ON AGENDA ITEMS

There were no public communications on agenda items.

Chair Kloster announced an agenda change. The Redistribution Funds Update would occur prior to the Cooling Corridors Study update. He also noted that staff were planning on hosting the March meeting in person.

MEETING MINUTES OF DECEMBER 6, 2024

ACTION TAKEN: Chair Kloster asked the committee to approve the December 6, 2024 TPAC meeting minutes. With no opposition, Judith Perez Keniston and Chris Ford abstaining, the minutes were approved.

METRO TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) FORMAL AMENDMENT 25-5456 RECOMMENDATION TO JPACT (ACTION)

Ken Lobeck, Metro appeared before the committee and provided a presentation on the January 2025 Formal MTIP Amendment, Resolution 25-5456, which would amend or add a total of 9 projects:

- Adding 6 new ADA upgrade projects
- Amending 2 existing projects
- 1 partial cancelation

Ken provided an overview of these projects and proposed approval timing.

Sarah Iannarone inquired about the funding source for the ADA curb ramps. Chris Ford responded that it's about a billion-dollar program, ensuring that all the existing curb ramps and state facilities are meeting ADA standards. He added that it is primarily STIP money, with a good portion of the 27-30 STIP allocated to the ADA program. Additionally, he noted that bonds would be issued to pay for that program, with all the ramps being remediated by 2032.

Sarah Iannarone, as a member of the Highway Cost Allocation Oversight Committee, she expressed concern about how the ADA liability and bike/ped funding shows up in the Highway Cost Allocation Study (HCAS) and whether the bicycle and pedestrians of Oregon are getting their fair share out of those dollars.

Indi inquired about the funding changes to the OR-120 bridge project moving dollars into the Abernathy Bridge and added the importance of tracking how money is moving and where opportunity costs are being incurred in the region.

ACTION TAKEN: Chris Ford moved and Gregg Snyder Seconded to approve Resolution 25-5456. With all in favor, the motion was approved.

82ND AVENUE TRANSIT PROJECT

Melissa Ashbaugh, Kelly Betteridge and Brian Harper, Metro, appeared before the committee to present an update and project overview on the 82nd Avenue Transit Project, the Locally Preferred Alternative (LPA) and next steps.

Brian Harper provided an update on the Equitable Development Strategy (EDS), which will help ensure project-related policies and investments in this corridor would assist in stabilizing communities and business against exiting displacement pressures.

Melissa asked the committee if they needed any additional information on the LPA and this project in general before returning in May for a recommendation to JPACT.

Sara Etter inquired about lane dedication, how that would be determined and who would decide. Melissa responded that the decisions around physical priority haven't been made yet. The plan is to have a series of technical and engagement work occur through the Spring that will inform that decision. This includes several open houses, the first happening on January 22nd. Additionally, a new community advisory committee will be formed and will review the technical and public input and advice on that decision. A policy and budget committee, with representatives from the different roadway jurisdictions and funders will also be formed to advise. The final decision would be made by the roadway authority, Oregon Department of Transportation (ODOT) and the City of Portland.

Indi Namkoong asked for confirmation of the terminus location. Melissa noted that when the steering committee meets next week, their LPA vote will lock in the terminus location at Cully and Killingsworth area.

2028-30 REGIONAL FLEXIBLE FUND STEP 1A.1 NEW PROJECT BOND – BOND SCENARIOS AND REFERENCE SCENARIOS ANALYSIS

Grace Cho, Metro staff presented an overview of bond scenarios and reference scenario options:

- Bond mechanism option 1 – single bond: use of a single bond mechanism to advance funds for projects identified in the preferred bond scenario, as long as the projects meet bond requirements and administrative criteria. Requires additional partnerships to facilitate the ability to utilize a single bond mechanism to meet the bond mechanism requirements or administrative criteria.
- Bond mechanism option 2 – multiple bonds: use of more than one bond mechanism to advance funds for projects identified in the preferred bond scenario. Allows for different types of projects without additional partnerships to meet bond mechanism requirements or administrative criteria.

Grace noted that staff are seeking input from the committee on utilizing an approach that balances maximizing acceptable performance across all the bond themes of: RTP outcomes performance, leveraging of other funds, inclusion of all transit category types, corridor scale projects, project readiness, and geographical representation, to develop bond package scenarios and a preferred bond package, and where there are local factors or priorities for consideration.

The committee asked questions around the length and cost of the bond repayment.

Grace outlined timeline for review and decision making, noting that Metro staff will request TPAC and JPACT for recommendation to approve the full 2028-2030 Regional Flexible Fund Allocation at their July 2025 meetings.

REDISTRIBUTION UPDATE

Ken Lobeck and Ted Leybold appeared before the committee to provide two FFY 2025 Redistribution funding options to review, evaluate and provide them with feedback. Metro received nine

applications requesting \$12,413,835 of Redistribution funds. However, with only \$10 million available, either project funding reductions must occur, or one or more projects are eliminated from funding consideration. During November and December, staff identified several funding adjustment options to consider as the funding mechanism. Each of the possible funding options provides various pros and cons along with opportunity cost if selected. Upon review of the options, two final options emerged and are being proposed for TPAC consider. Ken reviewed the options, and they included:

- Option 1: The “806” or 80.6% Funding Level Approach
- Option 2: Targeted Reduction Funding Approach.

Ken noted that next steps would include revising options based on any feedback received today, with a draft funding option presented to the committee in February.

Ted inquired if the committee preferred either option 1 or 2.

Dyami Valentine, indicated that Washington County was in favor of Option 1. Jeff Owen indicated no strong preference. Jay Higgins expressed a preference for Option 1.

Jean Biggs, Metro, noted some consensus among the committee for Option 1. She added that staff would reach out to the lead agencies and to let them know if there were any other follow up actions for the team before they come back to the committee.

COOLING CORRIDORS STUDY

Due to time constraints, Chair Kloster announced that this agenda item would be presented at a future meeting. He added that questions could be directed to Metro staff member, André Lightsey-Walker.

ADJOURN

There being no further business, Chair Kloster adjourned the meeting at 12:01 p.m.

Respectfully submitted,
Jessica Martin, TPAC Recorder

Attachments to the Public Record, TPAC meeting, January 10, 2025

	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
*	Agenda	01/10/25	01/10/25 TPAC Agenda	011025-01
*	Work Program	12/31/24	2025 TPAC Work Program as of 12/31/2024	011025-02
*	Document	12/31/24	TPAC Member list	011025-03
*	Memo	12/31/24	To: TPAC and Interested Parties From: Ken Lobeck Re: TPAC Metropolitan Transportation Improvement Program (MTIP) Monthly Submitted Amendments: January 2024 Report	011025-04
*	Memo	1/3/25	To: TPAC and Interested Parties From: John Mermin Re: Administrative amendment to the 2024-25 Unified Planning Work Program (UPWP) for City of Milwaukie – Safety Assessment of Harrison St Corridor and Clackamas County – Consolidated Safe System Planning	011025-05
*	Minutes	12/06/24	Draft 12/06/24 TPAC Minutes	011025-06
*	Resolution		Resolution No. 25-XXXX For the Purpose of Adding or Amending Nine Projects to the 2024-27 MTIP Including six new Americans with Disabilities Act Upgrade Projects to Meet Federal Project Delivery Requirements.	011025-07
*	Document/Map		82 nd Avenue Transit Project LPA	011025-08
*	Memo	1/3/24	To: TPAC and Interested Parties From: Grace Cho Re: 2028-2030 Regional Flexible Fund Step 1A.1 – Bond Scenarios and Reference Scenarios	011025-09
*	Factsheet	December 2024	Cooling Corridors Study	011025-10
*	Memo	1/2/24	To: TPAC and Interested Parties From: Ken Lobeck Re: FFY 2025 Redistribution Supplemental Funding Call Funding Options	011025-11
**	Presentation	1/8/25	December Traffic Deaths (Anthony Cabadas)	011025-12
**	Presentation	1/10/25	December/January Transit News Highlight (Ally Holmqvist)	011025-13
**	Presentation	1/10/25	January 2025 Formal MTIP Amendment (Ken Lobeck)	011025-14
**	Presentation	1/10/25	2028-30 Regional Flexible Funds Allocation (RFFA) Step 1A.1 (Grace Cho)	011025-15

**	Presentation	1/10/25	FFY 2025 Redistribution Funding Options (Ken Lobeck)	011025-16
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* Included in meeting notice packet

**Distributed after meeting notice packet or presented at meeting

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF CANCELING AN) RESOLUTION NO. 25-5465
ODOT RAIL HAZARDS SAFETY PROJECT)
AND ADDING THREE NEW METRO) Introduced by: Chief Operating
PLANNING STUDIES TO THE 2024-27) Officer Marissa Madrigal in
MTIP) concurrence with Council President
) Lynn Peterson

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation-related funding; and

WHEREAS, the U.S. Department of Transportation (USDOT) requires federal funding for transportation projects located in a metropolitan area to be programmed in an MTIP; and

WHEREAS, in July 2023, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved Resolution No. 23-5335 to adopt the 2024-27 MTIP; and

WHEREAS, the 2024-27 MTIP includes Metro approved RTP and federal performance-based programming requirements and demonstrates compliance and further progress towards achieving the RTP and federal performance targets; and

WHEREAS, pursuant to the USDOT MTIP amendment submission rules, JPACT and the Metro Council must approve any subsequent amendments to the MTIP to add new projects or substantially modify existing projects; and

WHEREAS, SB 5701, Section 503, awarded \$500,000 for Metro to complete a planning study that evaluates the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes which is now being added to the MTIP for historical accounting purposes; and

WHEREAS, Metro also received two \$2,000,000 planning awards from the USDOT Reconnecting Communities Pilot (RCP) program that also are being added to the MTIP; and

WHEREAS, the Reconnecting 82nd Ave Community and the Tualatin Valley Highway Community Connections planning studies will develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision; and

WHEREAS, ODOT has assessed that their US30B - (NE Lombard St) NE Lombard Pl - NE 11th rail crossing hazards safety improvement project does not possess an adequate construction funding plan or sufficient available funding to be completed and is now canceling the preliminary engineering phase and will return the \$1,882,000 of committed Rail Crossing Hazards federal funds back to the Rail program; and

WHEREAS, the programming updates to the four projects are stated in Exhibit A to this resolution; and

WHEREAS, on February 7, 2025, Metro's Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on February 20, 2025, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopt this resolution to add or cancel the four projects as stated within Exhibit A to the 2024-27 Metropolitan Transportation Improvement Program to meet federal project delivery requirements.

ADOPTED by the Metro Council this ___ day of _____ 2025.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Exhibit A
February #2, 2025, (Regular) Formal/Full MTIP Amendment Summary
Formal Amendment #: FB25-06-FEB2

The February 2025 Regular Quarter MTIP Formal Amendment contains four projects. One ODOT Rail crossing hazards mitigation is being canceled. Three new Metro planning projects are being added through the formal amendment for historical purposes. The three new planning projects will be included in the Metro Unified Planning Work Program (UPWP) as well. A summary of the nine projects includes the following:

- **Key 23834 (New Project) - Regional Rail Futures Study (Metro)**: Key 23834 is a Oregon Legislature SB5701 awarded planning study totaling \$500,000 to evaluate the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes.
- **Key TBD (New Project) - Reconnecting 82nd Ave Community Planning Study (Metro)**: The MTIP formal amendment adds the new awarded Reconnecting Communities Pilot (RCP) program discretionary grant funded project on 82nd Ave in Portland to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.
- **Key TBD (New Project) - TV Highway Community Connections Planning Study (Metro)**: The MTIP formal amendment adds the new awarded Reconnecting Communities Pilot (RCP) program discretionary grant funded study on and around Tualatin Valley Highway Hwy/OR8 to develop equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision
- **Key 23090 - US30B: (NE Lombard St) NE Lombard PI - NE 11th (ODOT)**: The formal amendment cancels the Preliminary Engineering phase which effectively cancel the project.

Exhibit A Tables (MTIP Worksheets) follow on the next pages and contain the specific project changes for the FFY 2025 February #2 Formal MTIP Amendment bundle of projects.

2024-2027 Metropolitan Transportation Improvement Program
Exhibit A to Resolution 25-5465

February #2 2025 Rose Quarter Formal Amendment Bundle Contents
Amendment Type: Formal/Full
Amendment #: FB25-06-FEB2
Total Number of Projects: 4

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Category: Adding New Projects to the 2024-2027 MTIP:				
(#1) ODOT Key # 23834 MTIP ID TBD <i>New Project</i>	Metro	Regional Rail Futures Study	Key 23834 is a new approved Oregon Legislature SB5701 funded study to evaluate the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes	<u>ADD NEW PROJECT:</u> The formal amendment is adding the project to the 2024-27 for historical purposes. Inclusion in Metro’s Unified Planning Work Program (UPW) also will occur.
(#2) ODOT Key # TBD - New MTIP ID TBD – New <i>New Project</i>	Metro	Reconnecting 82nd Ave Community Planning Study	On 82nd Ave in Portland from approximately PDX airport and then south to Clackamas Town Center, complete a planning study to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.	<u>ADD NEW PROJECT:</u> The formal amendment is adding the new 2024 Reconnecting Communities Pilot (RCP) awarded planning project to the 2024-27 for historical purposes. Inclusion in Metro’s Unified Planning Work Program (UPW) also will occur.

(#3) ODOT Key # TBD - New MTIP ID TBD – New <i>New Project</i>	Metro	TV Highway Community Connections Planning Study	On OR8/Tualatin Valley Highway from Beaverton west to Forest Grove, complete a planning to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision	<u>ADD NEW PROJECT:</u> The formal amendment is adding the new 2024 Reconnecting Communities Pilot (RCP) awarded planning project to the 2024-27 for historical purposes. Inclusion in Metro’s Unified Planning Work Program (UPW) also will occur
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Category: Projects Cancellationsto the 2024-2027 MTIP:

(#3) ODOT Key # 23090 MTIP ID 71370	ODOT	US30B: (NE Lombard St) NE Lombard PI - NE 11th	Design and right-of-way to improve the rail crossing on NE11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave.	<u>CANCEL PHASE/PROJECT:</u> The formal amendment cancels the Preliminary Engineering phase which effectively cancel the project. Presently, a lack of identified construction phase funding, and the (unfunded) expense of ongoing maintenance fees greatly hinder the ability of the agency to successfully finish the project. ODOT has decided to cancel the project as a result.
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Proposed Amendment Review and Approval Steps

February #2 2025 (FB25-05-FEB2) Regular Formal Amendment estimated processing and approval timing

Date	Action
Wednesday, February 5, 2025	Post amendment & begin 30-day notification/comment period. (Comment period is February 5, 2025 to March 6, 2025.)
Friday, February 7, 2025	TPAC meeting – Rose Quarter formal amendment introduction and overview.
Thursday, February 20, 2025	JPACT Meeting – Rose Quarter amendment introduction and overview.
Thursday, March 13, 2025	Metro Council Meeting – Final Metro amendment approval request provided
Mid-April 2025	Estimated final FHWA MTIP amendment approval and inclusion in the approved STIP completed.



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD NEW PROJECT
 Add the planning project to the
 2024-27 MTIP

Project #1

Project Details Summary							
ODOT Key #	23834	RFFA ID:	N/A	RTP ID:	11103	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-06-FEB2	STIP Amendment ID:		TBD		

Summary of Amendment Changes Occurring:
 The formal amendment adds the new Metro planning project to the 2024-27 MTIP for historical accounting purposes. The is included in Metro's UPWP. The project has moved forward and been implemented.

Project Name:	Regional Rail Futures Study						
Lead Agency:	Metro	Applicant:	Metro		Administrator:		
Certified Agency Delivery:	Yes	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	No	

Short Description:
 SB5701 funded study to evaluate the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes.

MTIP Detailed Description (Internal Metro use only):
 In and around the Portland area complete a rail transit study to evaluate the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes to assess heavy rail corridors for their ability to serve travel markets

STIP Description:
 TBD

Project Classification Details			
Project Type	Category	Features	System Investment Type
Planning	Planning - System	N/A	Planning
ODOT Work Type:	TBD		

Phase Funding and Programming

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									\$ -
									\$ -
Federal Totals:			\$ -		\$ -	\$ -		\$ -	\$ -

State Funds

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State	S010	2024	\$ 500,000						\$ 500,000
									\$ -
State Totals:			\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Note: State funds award originate from SB5701.

Local Funds

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -		\$ -	\$ -

Phase Totals	Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
Total Estimated Project Cost							\$ 500,000
Total Cost in Year of Expenditure:							\$ 500,000

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
Phase Change Percent:	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Phase Matching Percent:	0.0%	N/A	N/A	N/A	N/A	0.00%	0.00%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -		\$ -	\$ -		\$ -	\$ -
State	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
Local	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Total	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.00%	0.00%	0.0%	0.00%	0.0%	0.00%
State	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Local	0.0%	0.00%	0.00%	0.0%	0.00%	0.0%	0.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
State	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated							Aid ID
Federal Funds Obligated:							N/A - state funded
EA Number:							FHWA or FTA
Initial Obligation Date:							N/A - state funded
EA End Date:							FMIS or TRAMS
Known Expenditures:							N/A - state funded
						Estimated Project Completion Date:	6/30/2026
Completion Date Notes:							
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:			N/A	

Fiscal Constraint Consistency Review
1. What is the source of funding? Oregon Legislature SB5701 grant award funding.
2. Does the amendment include changes or updates to the project funding? Yes. New State awarded funds are being added to the MTIP.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via approval of SB5701.
4. Level of required funding approval?: Oregon Legislature approval.
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes.

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	No	Not Applicable	Not Applicable	Not Applicable	
Cross Streets	Route or Arterial		Cross Street	Cross Street	
	Not Applicable		Not Applicable	Not Applicable	

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2025	Years Active	0	Project Status	D	Project implementation in progress.	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	Not Applicable	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Non-capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	Yes. The project is exempt per 40 CFR 93.126, Table 2
Exemption Reference:	Other - Planning and Technical Studies.
Was an air analysis required as part of RTP inclusion?	No. Not Applicable
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	No. Not applicable. The project is not capacity enhancing
RTP Constrained Project ID and Name:	RTP ID - 11103: Regional MPO Activities for 2023-2030
RTP Project Description:	Transportation planning, programming, monitoring and federal reporting that Metro must conduct in order to remain certified as a metropolitan planning organization (MPO) by the federal government for the region and be eligible to receive federal transportation funding dollars.

Additional RTP Consistency Check Areas	
1.	Is the project designated as a Transportation Control Measure? No.
2.	Is the project identified on the Congestion Management Process (CMP) plan? No.
3.	Is the project included as part of the approved: UPWP? Yes. The project is included in the Metro UPWP.
3a.	If yes, is an amendment required to the UPWP? No.
3b.	Can the project MTIP amendment proceed before the UPWP amendment? Yes.
3c.	What is the UPWP category (Primary Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Non-Metro funded, but Metro managed stand-alone
4.	<p>Applicable RTP Goals:</p> <p><u>Goal # 1 - Mobility Options:</u> Objective 1.1 - Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.</p> <p><u>Goal #4 - Thriving Economy:</u> Objective 4.1 - Connected region: Focus growth and transportation investment in designated 2040 growth areas to build an integrated system of throughways, arterial streets, freight routes and intermodal facilities, transit services and bicycle and pedestrian facilities, with efficient connections between modes and communities that provide access to jobs, markets and community places within and beyond the region.</p>
5.	Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Wednesday, February 5, 2025 to Thursday, March 6, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are not expected**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **No comments expected. If comments are received, they will be logged, reviewed, and sent on to Metro Council and Council staff for their assessment.**

Fund Codes References

State	General State funds committed to support the project. For this project, the State funds originate from SB5071.
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Modeling Network , NHS, and Performance Measure Designations

Not applicable. This is a planning study

National Highway System and Functional Classification Designations

System	Y/N	Route	Designation
NHS Project	No	Not applicable	Not applicable
Functional Classification	No	Not applicable	Not applicable
Federal Aid Eligible Facility	No	Not applicable	Not applicable

Anticipated Required Performance Measurements Monitoring

Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Supports Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
			X		X			

Added notes:

**Enrolled
Senate Bill 5701**

Sponsored by JOINT COMMITTEE ON WAYS AND MEANS

CHAPTER

AN ACT

Relating to state financial administration; creating new provisions; amending section 3, chapter 452, Oregon Laws 2023, section 2, chapter 475, Oregon Laws 2023, sections 87, 159, 232, 248 and 318, chapter 605, Oregon Laws 2023, and section 40, chapter ___, Oregon Laws 2024 (Enrolled House Bill 5204); repealing section 275, chapter 605, Oregon Laws 2023; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

(2) If any of the moneys appropriated under subsection (1) of this section are not allocated by the Emergency Board prior to December 1, 2024, the moneys remaining on that date become available for any purpose for which the Emergency Board lawfully may allocate funds.

SECTION 502. In addition to and not in lieu of any other appropriation, there is appropriated to the Water Resources Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$60,000, for distribution to the City of Sodaville for water hauling

SECTION 503. In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Transportation, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$500,000, for distribution to the metropolitan service district organized under ORS chapter 268 to study the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to existing transportation modes.

SECTION 504. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 4 (3), chapter 475, Oregon Laws 2023, for the biennium



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new planning project to
 the 2024-27 MTIP

Project #2

Project Details Summary							
ODOT Key #	TBD - New	RFFA ID:	N/A	RTP ID:	11103	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-06-FEB2		STIP Amendment ID:		TBD	

Summary of Amendment Changes Occurring:
 The formal amendment adds the new Reconnecting Communities Pilot (RCP) awarded planning project to the 2024-27 MTIP. Inclusion in the Metro UPWP also will occur.

Project Name:	Reconnecting 82nd Ave Community Planning Study						
Lead Agency:	Metro	Applicant:	Metro		Administrator:	USDOT	
Certified Agency Delivery:	Yes	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	No	

Short Description:
 A study to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.

MTIP Detailed Description (Internal Metro use only):
 On 82nd Ave in Portland from approximately PDX airport and then south to Clackamas Town Center, complete a planning study to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision. Planning actions will plan includes support for community engagement, workforce development strategies, a transit-oriented development (TOD) and affordable housing study, as well as heat island mitigation and green infrastructure initiatives.

STIP Description:
 TBD

Project Classification Details									
Project Type	Category			Features				System Investment Type	
Planning ODOT Work Type:	Planning - Corridor Area Planning PLANING							Planning	
Phase Funding and Programming									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
AC-RCP24	ACPO	2025	\$ 2,000,000						\$ 2,000,000
									\$ -
Federal Totals:			\$ 2,000,000		\$ -	\$ -		\$ -	\$ 2,000,000
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Local	Match	2025	\$ 500,000						\$ 500,000
									\$ -
Local Totals:			\$ 500,000	\$ -	\$ -	\$ -		\$ -	\$ 500,000
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals			\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000
Total Estimated Project Cost									\$ 2,500,000
Total Cost in Year of Expenditure:									\$ 2,500,000

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000
Phase Change Percent:	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
Amended Phase Matching Percent:	20.00%	N/A	N/A	N/A	N/A	N/A	20.00%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ 2,000,000		\$ -	\$ -		\$ -	\$ 2,000,000
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ 500,000	\$ -	\$ -	\$ -		\$ -	\$ 500,000
Total	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	80.0%	0.0%	0.0%	0.0%	0.0%	0.0%	80.00%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	80.0%	0.0%	0.0%	0.0%	0.0%	0.0%	80.00%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated							Aid ID
Federal Funds Obligated:							Not Assigned Yet
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS or Delphi
						Estimated Project Completion Date:	12/31/2028
Completion Date Notes:							
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:			N/A	

Fiscal Constraint Consistency Review
1. What is the source of funding? FFY 2024 USDOT Reconnecting Communities Pilot Program planning grant awarded funds
2. Does the amendment include changes or updates to the project funding? Yes. New RCP awarded funds are being added to the MTIP.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via the USDOT award letter and project awards confirmation list.
4. Level of funding approval? USDOT Reconnecting Communities Pilot Program grant award approval was required.
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes.

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	No	OR213/82nd Ave	Not Applicable	Not Applicable	See local cross references
Cross Streets	Route or Arterial	Cross Street	Cross Street		
	82nd Ave	PDX	Clackamas Town Center		

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2025	Years Active	0	Project Status	A	Pre-implementation	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	Not Applicable	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Non-capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	Yes. The project is exempt per 40 CFR 93.126, Table 2
Exemption Reference:	Other - Planning and Technical Studies
Was an air analysis required as part of RTP inclusion?	No. Not Applicable
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	No. Not applicable. The project is not capacity enhancing
RTP Constrained Project ID and Name:	RTP ID - 11103: Regional MPO Activities for 2023-2030
RTP Project Description:	Transportation planning, programming, monitoring and federal reporting that Metro must conduct in order to remain certified as an metropolitan planning organization (MPO) by the federal government for the region and be eligible to receive federal transportation funding dollars.
Additional RTP Consistency Check Areas	
1. Is the project designated as a Transportation Control Measure? No.	
2. Is the project identified on the Congestion Management Process (CMP) plan? No.	
3. Is the project included as part of the approved: UPWP? Yes. The project is being added to the current UPWP.	
3a. If yes, is an amendment required to the UPWP? Yes. An administrative modification will occur to the UPWP to include the project.	
3b. Can the project MTIP amendment proceed before the UPWP amendment? Yes.	
3c. What is the UPWP category (Primary Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Discretionary funded, Metro led stand-alone project.	
4. Applicable RTP Goals the planning study support: <u>Goal # 3 - Equitable Transportation:</u> Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs <u>Goal #4 - Thriving Economy:</u> Objective 4.1 - Connected Regions: Focus growth and transportation investment in designated 2040 growth areas to build an integrated system of throughways, arterial streets, freight routes and intermodal facilities, transit services and bicycle and pedestrian facilities, with efficient connections between modes and communities that provide access to jobs, markets and community places within and beyond the region. <u>Goal #5: Climate Action and Resilience:</u> Objective 5.2 - Climate Friendly Communities: Increase the share of jobs and households in walkable, mixed-use areas served by current and planned frequent transit service.	
5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.	

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Wednesday, February 5, 2025 to Thursday, March 6, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are not expected**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **No comments expected. If comments are received, they will be logged, reviewed, and sent on to Metro Council and Council staff for their assessment.**

Fund Codes References

Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-RCP24	Advance Construction funds with the expected conversion code to be ISDOT Reconnecting Communities Program (RCP) federal funds.



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- [Reconnecting Communities Pilot \(RCP\) Program](#) >
- [Awarded Projects](#) >
- [Reconnecting Communities Pilot \(RCP\) Program FY24 Awards](#)**
- [Reconnecting Communities and Neighborhoods \(RCN\) Grant FY23 Awards](#)

Reconnecting Communities Pilot (RCP) Program FY24 Awards

On January 10, 2025, [U.S. Department of Transportation announced](#) \$544.6 million in grant awards for 81 projects in 31 states through the Reconnecting Communities Pilot (RCP) Program. These awards include 15 Capital Construction Grants and 66 Community Planning Grants.

Expressions of interest in RCP FY24 greatly outpaced the level of available funding. The RCP program received 403 applications requesting over \$3 billion in funding.

Round	Project Type	UEI	State, U.S. Territory, or Tribe	Project Name	Applicant	Award Amount
RCP FY2024	Community Planning Grant	KEE8T4H68H88	OR	Reconnecting 82nd Ave Community Planning Study	Metro	\$2,000,000
RCP FY2024	Community Planning Grant	LZHQWPQTPNY3	OR	TV Highway Community Connections Planning Study	Metro	\$2,000,000

Modeling Network , NHS, and Performance Measure Designations

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	No	82nd Ave/OR213	MAP-21 Principal Arterial
Functional Classification	Yes	82nd Ave/OR213	3 = Other Principal Arterial
Federal Aid Eligible Facility	Yes	82nd Ave/OR213	Urban Other Principal Arterial

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Supports Equity Focus Area Goals	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
		X	X	X				

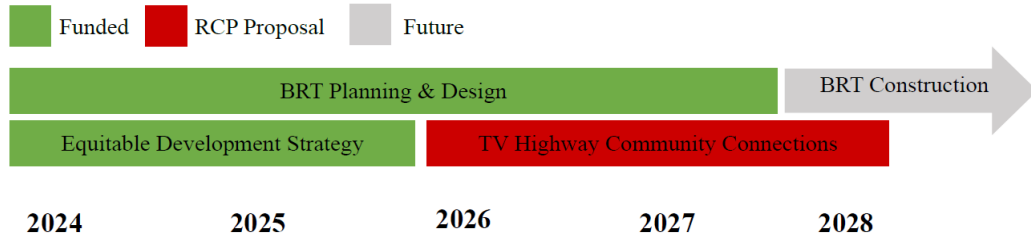
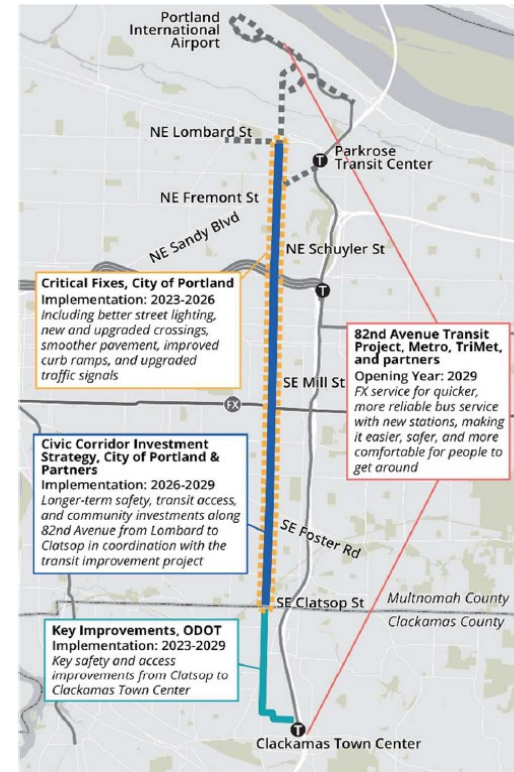


Figure 1. The TV Highway BRT Project Components including the Reconnecting Communities Pilot (RCP) proposal





Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD NEW PROJECT
 Add the new planning project to
 the 2024-27 MTIP

Project #3

Project Details Summary							
ODOT Key #	TBD - New	RFFA ID:	N/A	RTP ID:	11103	RTP Approval Date:	11/30/2023
MTIP ID:	TBD	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-06-FEB2		STIP Amendment ID:		TBD	

Summary of Amendment Changes Occurring:
 The formal amendment adds the new Reconnecting Communities Pilot (RCP) awarded planning project to the 2024-27 MTIP. Inclusion in the Metro UPWP also will occur.

Project Name:	TV Highway Community Connections Planning Study						
Lead Agency:	Metro	Applicant:	Metro		Administrator:	USDOT	
Certified Agency Delivery:	Yes	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	No	

Short Description:
 A study on TV Hwy/OR8 to develop equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.

MTIP Detailed Description (Internal Metro use only):
 On OR8/Tualatin Valley Highway from Beaverton west to Forest Grove, complete a planning to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.

STIP Description:
 TBD

Project Classification Details									
Project Type	Category			Features				System Investment Type	
Planning ODOT Work Type:	Planning - Corridor Area Planning PLANING							Planning	
Phase Funding and Programming									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
AC-RCP24	ACPO	2025	\$ 2,000,000						\$ 2,000,000
									\$ -
Federal Totals:			\$ 2,000,000		\$ -	\$ -		\$ -	\$ 2,000,000
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Local	Match	2025	\$ 500,000						\$ 500,000
									\$ -
Local Totals:			\$ 500,000	\$ -	\$ -	\$ -		\$ -	\$ 500,000
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amended Programming Totals			\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000
Total Estimated Project Cost									\$ 2,500,000
Total Cost in Year of Expenditure:									\$ 2,500,000

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is not short programmed.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000
Phase Change Percent:	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
Amended Phase Matching Percent:	20.00%	N/A	N/A	N/A	N/A	N/A	20.00%

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ 2,000,000		\$ -	\$ -		\$ -	\$ 2,000,000
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ 500,000	\$ -	\$ -	\$ -		\$ -	\$ 500,000
Total	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	80.0%	0.0%	0.0%	0.0%	0.0%	0.0%	80.00%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	80.0%	0.0%	0.0%	0.0%	0.0%	0.0%	80.00%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.00%
Total	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated							Aid ID
Federal Funds Obligated:							Not Assigned Yet
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS or Delphi
						Estimated Project Completion Date:	12/31/2028
Completion Date Notes:							
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:			N/A	

Fiscal Constraint Consistency Review
1. What is the source of funding? FFY 2024 USDOT Reconnecting Communities Pilot Program planning grant awarded funds
2. Does the amendment include changes or updates to the project funding? Yes. New RCP awarded funds are being added to the MTIP.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, via the USDOT award letter and project awards confirmation list.
4. Level of funding approval? USDOT Reconnecting Communities Pilot Program grant award approval was required.
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes.

Project Location References					
On State Highway	Yes/No	Route	Approximate MP Begin	Approximate MP End	Length
	No	TV Hwy/OR8	3.2	17.9	14.7
Approximate Cross Streets	Route or Arterial		Cross Street		Cross Street
	TV Hwy		SW 117th Ave		Pacific Ave/OR47 intersection

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2025	Years Active	0	Project Status	A	Pre-implementation	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	Not Applicable	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Non-capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	Yes. The project is exempt per 40 CFR 93.126, Table 2
Exemption Reference:	Other - Planning and Technical Studies
Was an air analysis required as part of RTP inclusion?	No. Not Applicable
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	No. Not applicable. The project is not capacity enhancing
RTP Constrained Project ID and Name:	RTP ID - 11103: Regional MPO Activities for 2023-2030
RTP Project Description:	Transportation planning, programming, monitoring and federal reporting that Metro must conduct in order to remain certified as an metropolitan planning organization (MPO) by the federal government for the region and be eligible to receive federal transportation funding dollars.

Additional RTP Consistency Check Areas

1. Is the project designated as a Transportation Control Measure? **No.**
2. Is the project identified on the Congestion Management Process (CMP) plan? **No.**
3. Is the project included as part of the approved: UPWP? **Yes. The project is being added to the current UPWP.**
- 3a. If yes, is an amendment required to the UPWP? **Yes. An administrative modification will occur to the UPWP to include the project.**
- 3b. Can the project MTIP amendment proceed before the UPWP amendment? **Yes.**
- 3c. What is the UPWP category (Primary Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? **Discretionary funded, Metro led stand-alone project.**
4. Applicable RTP Goals the planning study support:
 - Goal # 3 - Equitable Transportation:**
Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs
 - Goal #4 - Thriving Economy:**
Objective 4.1 - Connected Regions: Focus growth and transportation investment in designated 2040 growth areas to build an integrated system of throughways, arterial streets, freight routes and intermodal facilities, transit services and bicycle and pedestrian facilities, with efficient connections between modes and communities that provide access to jobs, markets and community places within and beyond the region.
 - Goal #5: Climate Action and Resilience:**
Objective 5.2 - Climate Friendly Communities: Increase the share of jobs and households in walkable, mixed-use areas served by current and planned frequent transit service.
5. Does the project require a special performance assessment evaluation as part of the MTIP amendment? **No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.**

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Wednesday, February 5, 2025 to Thursday, March 6, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are not expected**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **No comments expected. If comments are received, they will be logged, reviewed, and sent on to Metro Council and Council staff for their assessment.**

Fund Codes References

Local	General Local funds committed by the lead agency that normally cover the minimum match requirement to the federal funds
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules.
AC-RCP24	Advance Construction funds with the expected conversion code to be ISDOT Reconnecting Communities Program (RCP) federal funds.



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- [Reconnecting Communities Pilot \(RCP\) Program](#) >
- [Awarded Projects](#) >
- [Reconnecting Communities Pilot \(RCP\) Program FY24 Awards](#)**
- [Reconnecting Communities and Neighborhoods \(RCN\) Grant FY23 Awards](#)

Reconnecting Communities Pilot (RCP) Program FY24 Awards

On January 10, 2025, [U.S. Department of Transportation announced](#) \$544.6 million in grant awards for 81 projects in 31 states through the Reconnecting Communities Pilot (RCP) Program. These awards include 15 Capital Construction Grants and 66 Community Planning Grants.

Expressions of interest in RCP FY24 greatly outpaced the level of available funding. The RCP program received 403 applications requesting over \$3 billion in funding.

Round	Project Type	UEI	State, U.S. Territory, or Tribe	Project Name	Applicant	Award Amount
RCP FY2024	Community Planning Grant	KEE8T4H68H88	OR	Reconnecting 82nd Ave Community Planning Study	Metro	\$2,000,000
RCP FY2024	Community Planning Grant	LZHQPQTPNY3	OR	TV Highway Community Connections Planning Study	Metro	\$2,000,000

Modeling Network , NHS, and Performance Measure Designations

National Highway System and Functional Classification Designations			
System	Y/N	Route	Designation
NHS Project	No	TV Hwy/OR8	Other NHS Route
Functional Classification	Yes	TV Hwy/OR8	3 = Other Principal Arterial
Federal Aid Eligible Facility	Yes	TV Hwy/OR8	Urban Other Principal Arterial

Anticipated Required Performance Measurements Monitoring								
Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Supports Equity Focus Area Goals	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
			X	X	X			

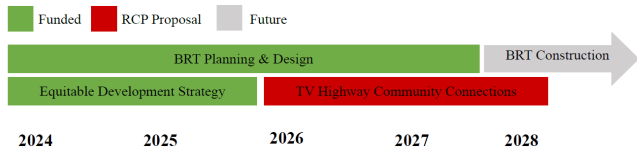


Figure 1. The TV Highway BRT Project Components including the Reconnecting Communities Pilot (RCP) proposal

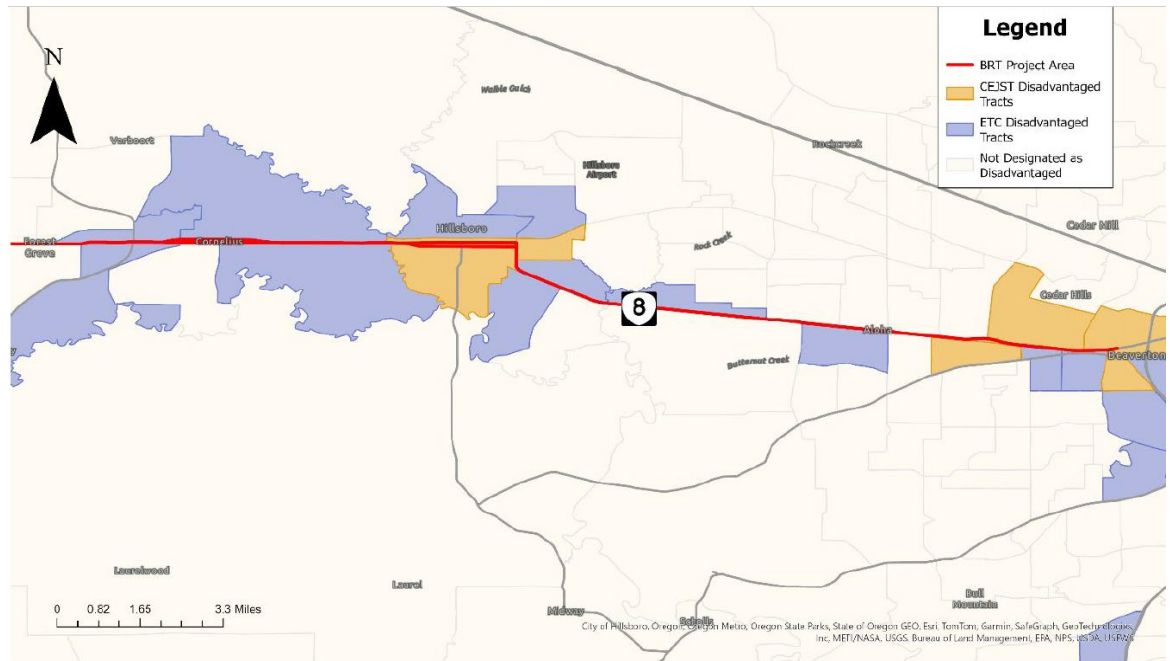


Figure 3. USDOT ETC identifies 50 percent of census tracts along TV Highway are disadvantaged (purple)



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
CANCEL PROJECT
 Cancel the PE phase effectively
 canceling the project

Project #4**CANCEL PROJECT**

Project Details Summary							
ODOT Key #	23090	RFFA ID:	N/A	RTP ID:	10334	RTP Approval Date:	11/30/2023
MTIP ID:	71370	CDS ID:	N/A	Bridge #:	N/A	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-06-FEB2	STIP Amendment ID:		24-27-2283		

Summary of Amendment Changes Occurring:

The formal amendment cancels the Preliminary Engineering phase which effectively cancel the project. Presently, a lack of identified construction phase funding, and the (unfunded) expense of ongoing maintenance fees greatly hinders the ability of the agency to successfully finish the project. No project kick-off has yet occurred for the project/ As a result of the funding situation, ODOT has decided to cancel the project and is returning the funding to their Rail Crossing program for later reallocation.

Project Name:	US30B: (NE Lombard St) NE Lombard PI - NE 11th						
Lead Agency:	ODOT	Applicant:	ODOT	Administrator:	ODOT		
Certified Agency Delivery:		Non-Certified Agency Delivery:		Delivery as Direct Recipient:			

Short Description:

Design and right-of-way to improve the rail crossing on NE11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave.

MTIP Detailed Description (Internal Metro use only):

Design and right-of-way to improve the rail crossing on NE11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave. Construct sidewalk infill west from NE 11th Ave to existing sidewalk . This project aims to improve safety at this location.

STIP Description:

Design and right-of-way to improve the rail crossing on NE 11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave. Construct sidewalk infill west from NE 11th Ave to existing sidewalk. This project aims to improve safety at this location.

Project Classification Details									
Project Type	Category		Features				System Investment Type		
Highway ODOT Work Type:	Highway - Motor Vehicle SAFETY		Lane Modification or Reconfiguration				Capital Improvement		
Phase Funding and Programming									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
Rail	YS40	2025		\$ 1,882,000					\$ -
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Note: Rail fund type code = federal Railway-Highway Crossing Hazard Elimination IJJA and is 100% federal funds. No required match									
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ 1,882,000	\$ -	\$ -	\$ -	\$ -	\$ 1,882,000
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Estimated Project Cost									N/A
Total Cost in Year of Expenditure:									N/A

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	No	The project is being canceled due to lack of sufficient funding.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ (1,882,000)	\$ -	\$ -	\$ -	\$ -	\$ (1,882,000)
Phase Change Percent:	0.0%	100.0%	100.0%	0.0%	0.0%	0.0%	100.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Local	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
State	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		N/A					Aid ID
Federal Funds Obligated:							
EA Number:							FHWA or FTA
Initial Obligation Date:							FHWA
EA End Date:							FMIS or TRAMS
Known Expenditures:							FMIS
					Estimated Project Completion Date:		N/A
Completion Date Notes:							
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:			N/A	

Fiscal Constraint Consistency Review
1. What is the source of funding? ODOT federal Rail Hazard crossing funding which is be canceled.
2. Does the amendment include changes or updates to the project funding? Yes. The Rail funds are being canceled from the project.
3. Was proof-of-funding documentation provided to verify the funding change? Yes, the ODOT confirmation memo
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? ODOT Director.
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? Yes.

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	US30B	Not stated	Not stated	Not stated
Cross Streets	Route or Arterial		Cross Street	Cross Street	
	NE Lombard St		N Lombard Ct	NE 11th Ave	

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2025	Years Active	0	Project Status	1	Pre-first phase obligation activities (IGA development, project scoping, scoping refinement,	
Total Prior Amendments	0	Last Amendment	Not Applicable	Date of Last Amendment	Not Applicable	Last MTIP Amend Num	Not Applicable
Last Amendment Action	Not Applicable						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Non-capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	Yes. The project is exempt per 40 CFR 93.126, Table 2
Exemption Reference:	Safety - Projects that correct, improve, or eliminate a hazardous location or feature.
Was an air analysis required as part of RTP inclusion?	No. Not Applicable
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	No. Not applicable. The project is not capacity enhancing
RTP Constrained Project ID and Name:	10034 - 2018-23 RTP - Not carried over into 2023 RTP
RTP Project Description:	Note - RTP ID reference now becomes MTIP Project description as follows: Design and right-of-way to improve the rail crossing on NE11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave. Construct sidewalk infill west from NE 11th Ave to existing sidewalk . This project aims to improve safety at this location.

Additional RTP Consistency Check Areas	
1.	Is the project designated as a Transportation Control Measure? No.
2.	Is the project identified on the Congestion Management Process (CMP) plan? No.
3.	Is the project included as part of the approved: UPWP? No. Not applicable.
3a.	If yes, is an amendment required to the UPWP? No.
3b.	Can the project MTIP amendment proceed before the UPWP amendment? Yes.
3c.	What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable
4.	Applicable RTP Goals: Not applicable. The project is being canceled.
5.	Does the project require a special performance assessment evaluation as part of the MTIP amendment? No. The project is not capacity enhancing nor does it exceed \$100 million in total project cost.

Public Notification/Opportunity to Comment Consistency Requirement	
1.	Is a 30-day/opportunity to comment period required as part of the amendment? Yes.
2.	What are the start and end dates for the comment period? Estimated to be Wednesday, February 5, 2025 to Thursday, March 6, 2025
3.	Was the comment period completed consistent with the Metro Public Participation Plan? Yes.
4.	Was the comment period included on the Metro website allowing email submissions as comments? Yes.
5.	Did the project amendment result in a significant number of comments? Comments are not expected
6.	Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? No comments expected. If comments are received, they will be logged, reviewed, and sent on to Metro Council and Council staff for their assessment.

Fund Codes References

Rail	Federal funds supporting the Railway-Highway Crossing Hazard Elimination program funded from the IIJA legislation. The Railway-Highway Crossings (Section 130) Program provides funds for the elimination of hazards at public railway-highway crossings. The funds are apportioned to States by formula. The funds are 100% federal. No match is required.
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Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	YS40	Railway-Highway Crossing Hazard Elimination IIJA	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
PE Totals			0.00%	0.00		0.00		0.00		0.00
Grand Totals				0.00		0.00		0.00		0.00

Modeling Network , NHS, and Performance Measure Designations

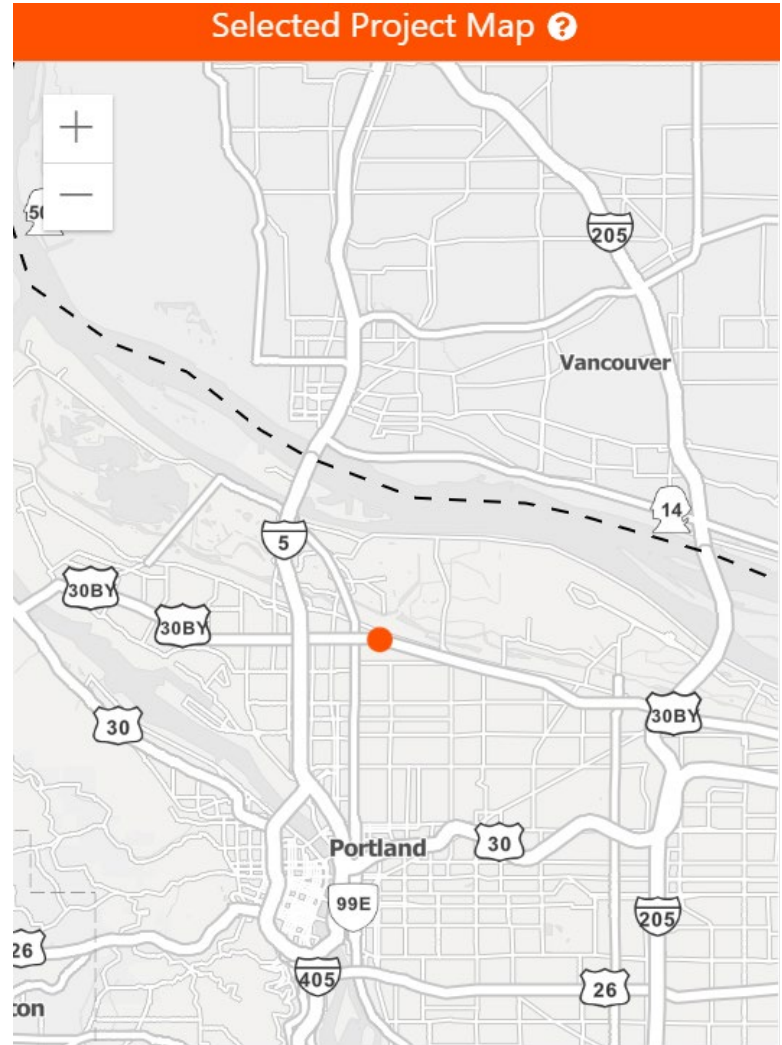
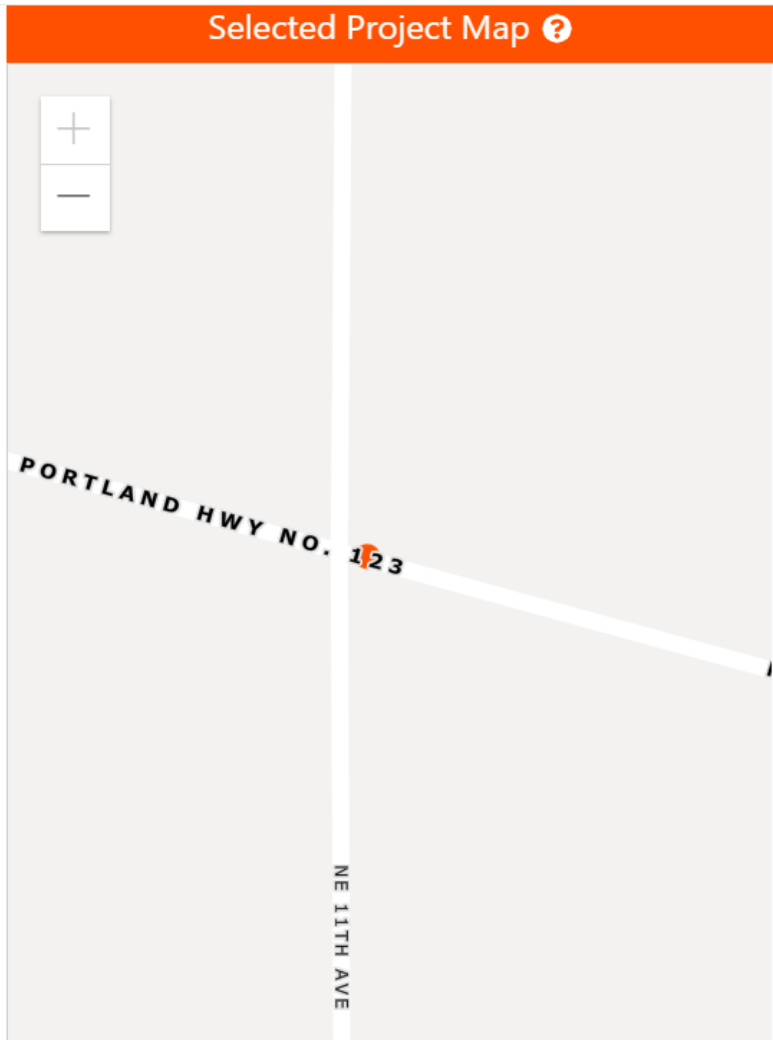
National Highway System and Functional Classification Designations

System	Y/N	Route	Designation
NHS Project	No	US30B/NE Lombard St	MAP-21 Principal Arterials
Functional Classification	Yes	US30B/NE Lombard St	3 = Other Principal Arterial
Federal Aid Eligible Facility	Yes	US30B/NE Lombard St	Urban Other Principal Arterial

Anticipated Required Performance Measurements Monitoring

Metro RTP Performance Measurements	Provides Congestion Mitigation	Provides Climate Change Reduction	Provides Economic Prosperity	Located in an Equity Focus Area (EFA)	Provides Mobility Improvement	Safety Upgrade Type Project	Safety High Injury Corridor	Notes
	N/A						→	

Added notes:





Oregon

Tina Kotek, Governor

Department of Transportation

Region 1 Headquarters

123 NW Flanders Street

Portland, OR 97209

Phone: (503) 731-8200

DATE:

TO: Kristopher W. Strickler
ODOT Director

FROM: Rian Windsheimer
Region 1 Manager

SUBJECT: Amend the 2024-2027 Statewide Transportation Improvement Program (STIP) to cancel the *US30B: (NE Lombard St) NE Lombard Pl - NE 11th Ave* project.

Requested Action:

Amend the 2024-2027 Statewide Transportation Improvement Program (STIP) to cancel the *US30B: (NE Lombard St) NE Lombard Pl - NE 11th Ave* project (K23090) and return funds to the SW Rail Crossing financial plan.

US30B: (NE Lombard St) NE Lombard Pl - NE 11th Ave (K23090)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2025	\$1,882,000	\$0.00
TOTAL		\$1,882,000	\$0.00

Background:

The *US30B: (NE Lombard St) NE Lombard Pl - NE 11th Ave* project is intended improve the rail crossing on NE 11th Ave by closing the crossing at NE Lombard place, installing new railroad signals and gates, and improving the signalized intersection at NE Lombard St. and 11th Ave. Union Pacific Railroad has



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: January 29, 2025
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: February #2 2025 MTIP Regular Formal Amendment & Resolution 25-5465
Approval Request – FB25-06-FEB2

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

**FOR THE PURPOSE OF CANCELING AN ODOT RAIL HAZARDS SAFETY PROJECT AND
ADDING THREE NEW METRO PLANNING STUDIES TO THE 2024-27 MTIP**

BACKGROUND

What This Is - Amendment Summary:

The February #2 2025 Regular Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment represents the regular monthly formal amendment submission and contains four projects. Three projects are new planning projects being added to the MTIP for historical monitoring purposes. One ODOT rail crossing hazards mitigation project is being canceled.

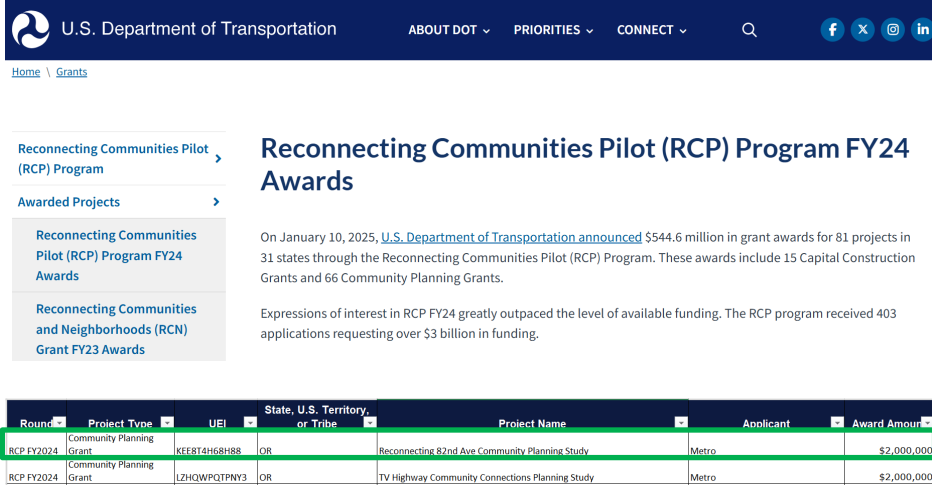
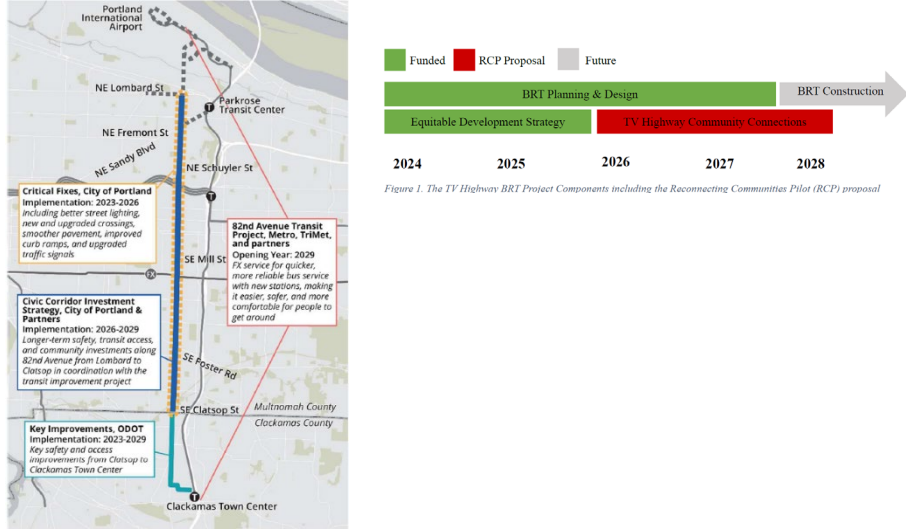
What is the requested action?

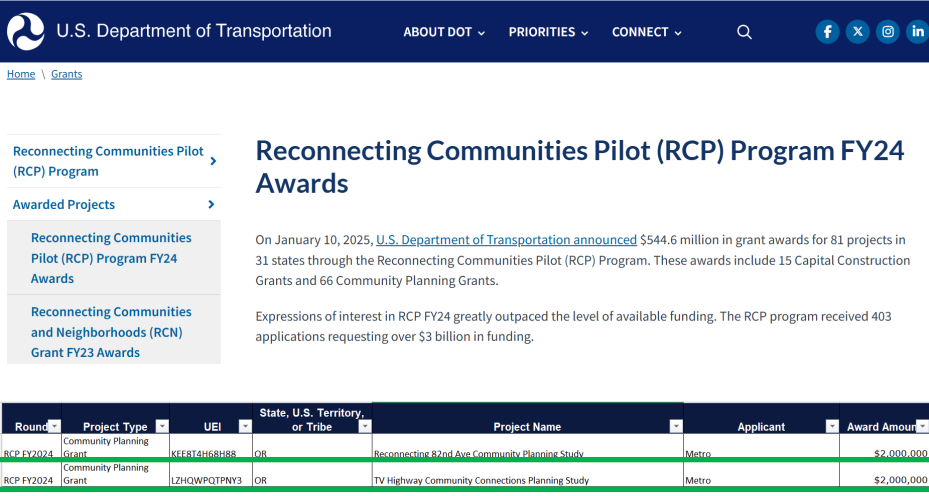
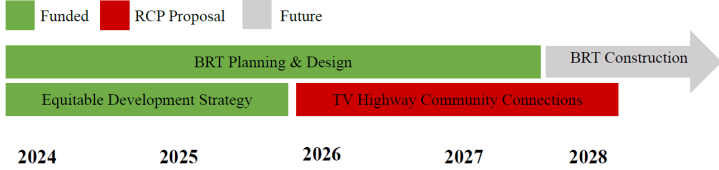
Staff is providing TPAC their official notification and requests an approval recommendation to JPACT to complete all required MTIP programming actions for the four projects in the February #2 2025 Regular MTIP Formal Amendment under Resolution 25-5465.

The following pages provide a more detailed summary of the required changes to all nine projects

Project Number: 1	Key Number: 23834	Status: Add New Project
Project Name:	Regional Rail Futures Study (Metro)	
Lead Agency:	Metro	
Description:	SB 5701 funded study to evaluate the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to augment existing transportation modes.	
Funding Summary:	<p>The project received a \$500,000 planning award from SB5701, Section 503. The funds are state funds.</p> <p style="text-align: center;">Enrolled Senate Bill 5701</p> <p style="text-align: center;">Sponsored by JOINT COMMITTEE ON WAYS AND MEANS</p> <p style="text-align: center;">CHAPTER</p> <p style="text-align: center;">AN ACT</p> <p style="text-align: center;">Relating to state financial administration; creating new provisions; amending section 3, chapter 452, Oregon Laws 2023, section 2, chapter 475, Oregon Laws 2023, sections 87, 159, 232, 248 and 318, chapter 605, Oregon Laws 2023, and section 40, chapter ___, Oregon Laws 2024 (Enrolled House Bill 5204); repealing section 275, chapter 605, Oregon Laws 2023; and declaring an emergency.</p> <p style="text-align: center;">Be It Enacted by the People of the State of Oregon:</p> <p>for Medicare and Medicaid Services of the use of Federal Medical Assistance matching funds by the Oregon Health Authority for this purpose.</p> <p>(2) If any of the moneys appropriated under subsection (1) of this section are not allocated by the Emergency Board prior to December 1, 2024, the moneys remaining on that date become available for any purpose for which the Emergency Board lawfully may allocate funds.</p> <p>SECTION 502. In addition to and not in lieu of any other appropriation, there is appropriated to the Water Resources Department, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$60,000, for distribution to the City of Sodaville for water hauling.</p> <p>SECTION 503. In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Transportation, for the biennium ending June 30, 2025, out of the General Fund, the amount of \$500,000, for distribution to the metropolitan service district organized under ORS chapter 268 to study the use of existing heavy freight rail assets in the Portland metropolitan area for passenger rail alternatives to existing transportation modes.</p> <p>SECTION 504. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 4 (3), chapter 475, Oregon Laws 2023, for the biennium ending June 30, 2025, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal</p>	
Amendment Action:	The formal amendment adds the new Metro Rail planning study to the 2024-27 MTIP for historical monitoring purposes. Inclusion in the Metro Unified Planning Work Program also will occur.	
Added Notes:	Project Location: NA: Regional application	

Project Number: 2	Key Number: New - TBD	Status: Add New Project
Project Name:	Reconnecting 82nd Ave Community Planning Study	
Lead Agency:	Metro	
Description:	A study to develop and deliver equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged	

	<p>communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.</p>																					
<p>Funding Summary:</p>	<p>The project received a \$2,000,000 planning grant from the USDOT Reconnecting Communities Pilot (RCP) program. The grant requires a 20% match (or \$500,000). The total programming amount for the study is \$2,500,000.</p>  <table border="1" data-bbox="488 856 1414 955"> <thead> <tr> <th>Round</th> <th>Project Type</th> <th>UEI</th> <th>State, U.S. Territory, or Tribe</th> <th>Project Name</th> <th>Applicant</th> <th>Award Amount</th> </tr> </thead> <tbody> <tr> <td>RCP FY2024</td> <td>Community Planning Grant</td> <td>KEE8T4H68H88</td> <td>OR</td> <td>Reconnecting 82nd Ave Community Planning Study</td> <td>Metro</td> <td>\$2,000,000</td> </tr> <tr> <td>RCP FY2024</td> <td>Community Planning Grant</td> <td>LZHQWPQTPNY3</td> <td>OR</td> <td>TV Highway Community Connections Planning Study</td> <td>Metro</td> <td>\$2,000,000</td> </tr> </tbody> </table>	Round	Project Type	UEI	State, U.S. Territory, or Tribe	Project Name	Applicant	Award Amount	RCP FY2024	Community Planning Grant	KEE8T4H68H88	OR	Reconnecting 82nd Ave Community Planning Study	Metro	\$2,000,000	RCP FY2024	Community Planning Grant	LZHQWPQTPNY3	OR	TV Highway Community Connections Planning Study	Metro	\$2,000,000
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RCP FY2024	Community Planning Grant	LZHQWPQTPNY3	OR	TV Highway Community Connections Planning Study	Metro	\$2,000,000																
<p>Amendment Action:</p>	<p>The formal amendment adds the new RCP federally funded planning grant for Metro to the 2024-27 MTIP.</p>																					
<p>Added Notes:</p>	<p>Project Location: On 82nd Ave from approximately PDX in the north and then south to Clackamas Town Center.</p>  <p>Legend: ■ Funded ■ RCP Proposal ■ Future</p> <p>Timeline: ▬ BRT Planning & Design (2024-2028) ▬ TV Highway Community Connections (2024-2027) ▬ BRT Construction (2026-2028)</p> <p>Figure 1. The TV Highway BRT Project Components including the Reconnecting Communities Pilot (RCP) proposal</p>																					

Project Number: 3	Key Number: New - TBD	Status: Add New Project																					
Project Name:	TV Highway Community Connections Planning Study																						
Lead Agency:	Metro																						
Description:	A study on TV Hwy/OR8 to develop equitable outcomes through zero-emission, bus-rapid transit that connects disadvantaged communities to jobs, education, economic opportunity, public space, and parks, while further advancing the community's vision.																						
Funding Summary:	<p>The project received a \$2,000,000 planning grant from the USDOT Reconnecting Communities Pilot (RCP) program. The grant requires a 20% match (or \$500,000). The total programming amount for the study is \$2,500,000.</p>  <table border="1" data-bbox="493 1050 1416 1138"> <thead> <tr> <th>Round</th> <th>Project Type</th> <th>UEI</th> <th>State, U.S. Territory, or Tribe</th> <th>Project Name</th> <th>Applicant</th> <th>Award Amount</th> </tr> </thead> <tbody> <tr> <td>RCP FY2024</td> <td>Community Planning Grant</td> <td>KEERT4H6H888</td> <td>OR</td> <td>Reconnecting \$2nd Ave Community Planning Study</td> <td>Metro</td> <td>\$2,000,000</td> </tr> <tr> <td>RCP FY2024</td> <td>Community Planning Grant</td> <td>LZHQPQTPNY3</td> <td>OR</td> <td>TV Highway Community Connections Planning Study</td> <td>Metro</td> <td>\$2,000,000</td> </tr> </tbody> </table>		Round	Project Type	UEI	State, U.S. Territory, or Tribe	Project Name	Applicant	Award Amount	RCP FY2024	Community Planning Grant	KEERT4H6H888	OR	Reconnecting \$2nd Ave Community Planning Study	Metro	\$2,000,000	RCP FY2024	Community Planning Grant	LZHQPQTPNY3	OR	TV Highway Community Connections Planning Study	Metro	\$2,000,000
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Amendment Action:	The formal amendment adds the new RCP federally funded planning grant for Metro to the 2024-27 MTIP.																						
Added Notes:	<p>Project Timing and approximate Location</p>  <p>Figure 1. The TV Highway BRT Project Components including the Reconnecting Communities Pilot (RCP) proposal</p>																						

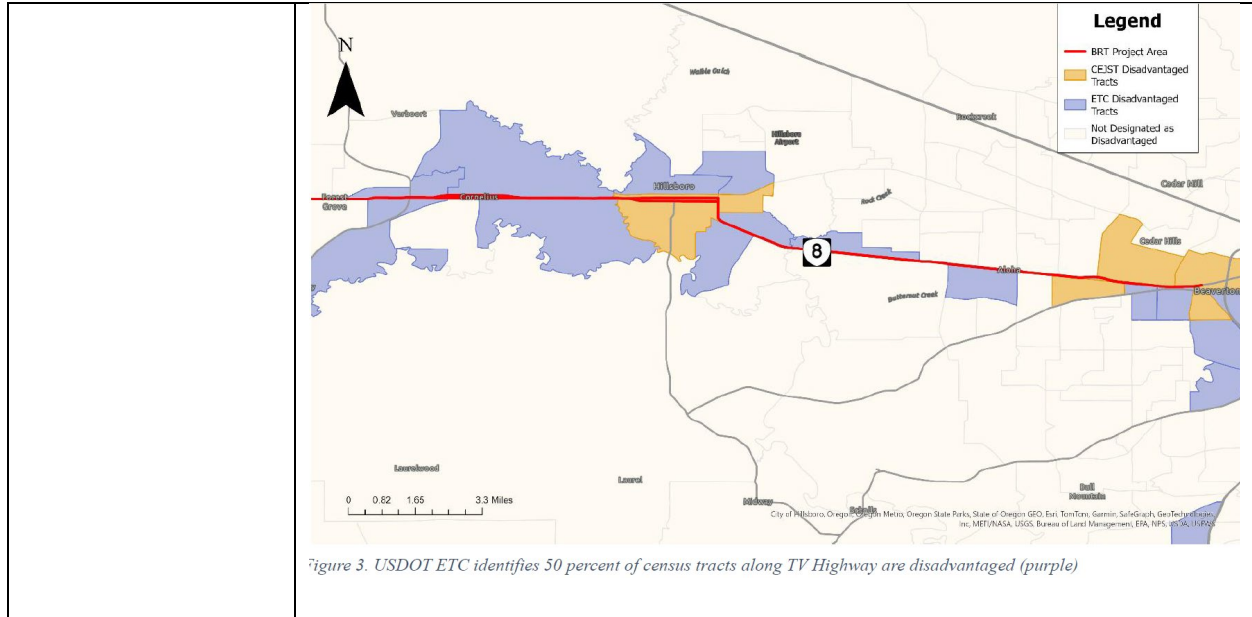


Figure 3. USDOT ETC identifies 50 percent of census tracts along TV Highway are disadvantaged (purple)

Project Number: 4	Key Number: 23090	Status: Cancel Phase/Project
Project Name:	US30B: (NE Lombard St) NE Lombard Pl - NE 11th	
Lead Agency:	ODOT	
Description:	Design and right-of-way to improve the rail crossing on NE 11th Ave and close the crossing at NE Lombard Place while retaining business access. Install new railroad signals and gates and improve the signalized intersection at NE Lombard St and 11th Ave. Construct sidewalk infill west from NE 11th Ave to existing sidewalk. This project aims to improve safety at this location.	
Funding Summary:	The project currently has \$1,882,000 of federal Rail Crossing Hazard mitigation funds programmed in the PE phase. The federal funds are 100% federal. There is no required match. ODOT's most recent project review indicates insufficient funding is available to complete the construction phase. The funding will be returned to the Rail program.	
Amendment Action:	The formal MTIP amendment cancels the PE phase. This effectively cancels the project.	
Added Notes:	<p>Project location:</p>	

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. They primarily are designed to ensure the MTIP is fiscally constrained, consistent with the approved RTP, and provides transparency in their updates, changes, and/or implementation. The programming factors include ensuring that the project amendments:

APPROVAL STEPS AND TIMING

Metro's approval process for formal amendment includes multiple steps. The required approvals for the February #2 2025 Formal MTIP amendment (FB25-06-FEB2) will include the following actions:

- Are eligible and required to be programmed in the MTIP.
- Properly demonstrate fiscal constraint.
- Pass the RTP consistency review which requires a confirmation that the project(s) are identified in the current approved constrained RTP either as a stand-alone project or in an approved project grouping bucket.
- Are consistent with RTP project costs when compared with programming amounts in the MTIP.
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and included in transportation demand modeling for performance analysis.
- Supports RTP goals and strategies.
- Contains applicable project scope elements that can be applied to Metro's performance requirements.
- Verified to be part of the Metro's annual Unified Planning Work Program (UPWP) for planning projects that may not be specifically identified in the RTP.
- Verified that the project location is part of the Metro regional transportation network, and is considered regionally significant, or required to be programmed in the MTIP per USDOT direction.
- Verified that the project and lead agency are eligible to receive, obligate, and expend federal funds.
- Does not violate supplemental directive guidance from FHWA/FTA's approved Amendment Matrix.
- Reviewed and evaluated to determine if Performance Measurements will or will not apply.
- Successfully complete the required 30-day Public Notification/Opportunity to Comment period.
- Meets other MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

Proposed Processing and Approval Actions:

<u>Action</u>	<u>Target Date</u>
• TPAC agenda mail-out.....	January 31, 2025
• Initiate the required public notification/comment process.....	February 5, 2025
• TPAC approval recommendation to JPACT.....	February 7, 2025
• JPACT approval and recommendation to Council.....	February 20, 2025
• Completion of public notification/comment process.....	March 6, 2025
• Metro Council approval.....	March 13, 2025

Notes:

- * The above dates are estimates. JPACT and Council meeting dates could change.
- ** If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

USDOT Approval Steps. The below timeline is an estimation only and assume no changes to the proposed JPACT or Council meeting dates occur:

<u>Action</u>	<u>Target Date</u>
• Final amendment package submission to ODOT & USDOT.....	March 19, 2025
• USDOT clarification and final amendment approval.....	Mid-April 2025

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:**
 - a. Amends the 2024-27 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 23-5335 on July 20, 2023 (FOR THE PURPOSE OF ADOPTING THE 2024-2027 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA)
 - b. Oregon Governor approval of the 2024-27 MTIP on September 13, 2023.
 - c. 2024-2027 Statewide Transportation Improvement Program (STIP) Approval and 2024 Federal Planning Finding on September 25, 2023.
3. **Anticipated Effects:** Enables the new and amended projects to be added and updated into the MTIP and STIP. Follow-on fund obligation and expenditure actions can then occur to meet required federal delivery requirements.
4. **Metro Budget Impacts:** Metro’s UPWP budget will be adjusted accordingly to incorporate the new state and federal grant awards.

RECOMMENDED ACTION:

Staff is providing TPAC their official notification and requests an approval recommendation to JPACT to complete all required MTIP programming actions for the four projects in the February #2 2025 Regular MTIP Formal Amendment under Resolution 25-5465.

No Attachments.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING NINE	)	RESOLUTION NO. 25-5464
EXISTING METRO REGIONAL FLEXIBLE)	
FUNDING ALLOCATION (RFFA)	)	Introduced by: Chief Operating
PROJECTS WITH AWARDED FFY 2025	)	Officer Marissa Madrigal in
REDISTRIBUTION SUPPLEMENTAL	)	concurrence with Council President
FUNDING INTO THE 2024-27 MTIP	)	Lynn Peterson

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation-related funding; and

WHEREAS, the U.S. Department of Transportation (USDOT) requires federal funding for transportation projects located in a metropolitan area to be programmed in an MTIP; and

WHEREAS, in July 2023, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved Resolution No. 23-5335 to adopt the 2024-27 MTIP; and

WHEREAS, the 2024-27 MTIP includes Metro approved RTP and federal performance-based programming requirements and demonstrates compliance and further progress towards achieving the RTP and federal performance targets; and

WHEREAS, pursuant to the USDOT MTIP amendment submission rules, JPACT and the Metro Council must approve any subsequent amendments to the MTIP to add new projects or substantially modify existing projects; and

WHEREAS, the final Redistribution Funding awarded projects are consistent with and support approved Resolution 24-5414 which committed \$10 million from the FFY 2025 \$13.6 million total Redistribution Funding allocation to help mitigate prior awarded Regional Flexible Funding Allocation (RFFA) project inflationary impacts; and

WHEREAS, the Redistribution Funding eligibility criteria mandated that funding requests must demonstrate that they support existing prior RFFA funded projects, will not supplant other committed funding, clearly addresses the inflationary impact to the project, resolves the funding shortfall, plus supports project readiness delivery requirements; and

WHEREAS, Metro received nine funding requests from six agencies totaling \$12.4 million to address inflationary impacts that have produced serious project delivery delays and barriers; and

WHEREAS, Metro’s review of nine submitted funding applications determined all nine met the eligibility criteria to receive FFY 2025 Redistribution Funds; and

WHEREAS, on January 7, 2025, Metro’s Transportation Policy Alternatives Committee (TPAC) endorsed the “80.6%” funding strategy enabling all nine submitted project funding requests to receive FFY 2025 Redistribution Funding at 80.6% of their original submitted funding request; and

WHEREAS, the lead agencies and project managers confirmed they could cover added local overmatch requirements if they emerged based on the 80.6% funding reduction approach; and

WHEREAS, awarded project managers continued to work with their ODOT Local Agency Liaison (LAL) to determine if project delivery scalability was an option to help reduce or eliminate the local overmatch requirement; and

WHEREAS, the ODOT LALs have provided financial cost estimating assistance and overall guidance to ensure the funding adjustments are correct and the required project intergovernmental agreements can be amended in a timely fashion to move forward and obligate the awarded funds; and

WHEREAS, the FFY 2025 Redistribution Funding awards are considered supplemental funding to the project and will utilize Surface Transportation Block Grant federal funds; and

WHEREAS, on February 7, 2025, Metro’s Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on February 20, 2025, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to amend the nine FFY 2025 Redistribution Funding awarded projects as identified in the staff narrative to the 2024-27 Metropolitan Transportation Improvement Program to meet federal project delivery requirements.

ADOPTED by the Metro Council this ____ day of _____ 2025.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney



Memo

Date: January 29, 2025

To: TPAC and Interested Parties

From: Ken Lobeck, Funding Programs Lead

Subject: FFY 2025 Redistribution Supplemental Funding Call Funding Recommendations – Resolution 25-5464

PURPOSE STATEMENT

FOR THE PURPOSE OF AMENDING NINE EXISTING METRO REGIONAL FLEXIBLE FUNDING ALLOCATION (RFFA) PROJECTS WITH AWARDED FFY 2025 REDISTRIBUTION SUPPLEMENTAL FUNDING INTO THE 2024-27 MTIP

Requested TPAC action:

Provide an approval recommendation to JPACT to award the nine projects at the 80.6% level of the available \$10 million of FFY 2025 Redistribution Funding in support of Resolution 25-5464.

BACKGROUND

The FFY 20205 Redistribution Funding Call commits \$10 million dollars (of the \$13.6 million Redistribution allocation to Metro) of federal Surface Transportation Block Grant (STBG) funds to support prior funded Regional Flexible Funding Allocation (RFFA) awarded projects that have experienced external inflationary or added delivery requirements outside of the agency’s control resulting in delayed delivery and/or significant cost increases. Metro received nine applications requesting \$12,413,835 of Redistribution funds.

FFY 2025 Redistribution Finding Call Funding Submissions			
Lead Agency	Key	Project Name	Requested Funding
Clackamas County	22131	Courtney Ave Complete Street: River Road - OR99E	\$2,421,841
Gresham	20808	NE Cleveland Ave.: SE Stark St - NE Burnside	\$2,166,504
Milwaukie	22141	Washington/Monroe Street: SE 37th - SE Linwood Ave	\$1,805,526
Portland	18837	NE Columbia Blvd: Cully Blvd and Alderwood Rd	\$ 471,027
Portland	20814	Jade and Montavilla Multi-modal Improvements	\$2,494,095
Portland	22134	NE 122nd Ave Safety: Access:	\$ 821,084
Portland	22135	NE MLK Blvd Safety & Access to Transit: Cook-Highland	\$412,758
Tigard	23253	Fanno Creek: SW Durham Rd to SW Bonita Rd Project Development	\$500,000
THPRD	19357	Beaverton Creek Trail: Westside Trail - SW Hocken Ave	\$1,321,000
Total:			\$12,413,835
Available Redistribution Funding:			\$10,000,000
Over Subscription Amount:			(\$2,413,835)

During the January 10, 2025 TPAC meeting, TPAC members directed Metro staff to pursue the 80.6% funding option to resolve the funding over subscription issue and bring the total awards back down to the \$10 million dollar threshold. Based on this direction, the proposed Redistribution Funding awards distribution are as follows:

Recommended FFY 2025 Redistribution Funding Project Awards at the 80.6% Level				
Lead Agency	Key	Project Name	Original Request	Redistribution Award at 80.6%
Clackamas County	22131	Courtney Ave	\$2,421,841	\$1,952,003
Gresham	20808	Cleveland Ave	\$2,166,504	\$1,746,202
Milwaukie	22141	Washington/Monroe	\$1,805,526	\$1,455,253
Portland	18837	Columbia Blvd	\$ 471,027	\$379,647
Portland	20814	Jade and Montavilla	\$2,494,095	\$2,010,240
Portland	22134	NE 122 nd Ave	\$ 821,084	\$661,793
Portland	22135	NE MLK Blvd	\$412,758	\$332,682
Tigard	23253	Fanno Creek Trail	\$500,000	\$403,000
THPRD	19357	Beaverton Creek Trail	\$1,321,000	\$1,064,726
			Total:	\$10,005,546

Next Steps:

Assuming Metro Council approves the final award recommendations, the final objective is to complete the ODOT intergovernmental agreements (IGA) and programming updates enabling the added funds to be obligated in FHWA’s Financial Management Information System (FMIS). A summary of the next-step tasks includes the following:

1. Continue Amendment Processing: proposed award recommendations for JPACT and Metro Council final approval (February/March 2025)
2. Evaluate the Feasibility of Applying Project Delivery Scalability (February 2025):
The initial 80.6% funding tables provided one scenario based on a fixed total phase and project cost estimate that would not change. Awarded agencies have the option to consider other delivery options that still meet the scope of work and IGA requirements (February 2025). If the revised delivery option results in an adjusted phase and total project cost and reduces the delivery phase required local overmatch, then awarded agencies can pursue this option. The awarded project managers should begin discussions with their ODOT Local Agency Liaison (LAL) to explore this option.
3. Complete Draft MTIP Worksheets and send over to ODOT Local Delivery to initiate the Intergovernmental Agreement (IGA) amendments (February-April 2025).
4. Complete MTIP and STIP programming updates (April 2025).
5. Complete and execute updated IGA amendments (April through June 2025).
6. Obligate added Redistribution funds in FFY 2025 programmed projects (July/August 2025)

Added Programming Note: Awarded fund programming in the MTIP and STIP will use the federal Surface Transportation Block Grant – Urban allocation (STBG-U) fund type code. The awarded STBG-U funds will be added on top of any existing STBG funds already programmed for the project.

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the February #3 2025 Redistribution Formal MTIP amendment (FB25-07-FEB3) will include the following review actions:

- Are eligible and required to be programmed in the MTIP.
- Properly demonstrate fiscal constraint.
- Pass the RTP consistency review which requires a confirmation that the project(s) are identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket.
- Are consistent with RTP project costs when compared with programming amounts in the MTIP.
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and included in transportation demand modeling for performance analysis.
- Supports RTP goals and strategies.
- Contains applicable project scope elements that can be applied to Metro’s performance requirements.
- Verified to be part of the Metro’s annual Unified Planning Work Program (UPWP) for planning projects that may not be specifically identified in the RTP.
- Verified that the project location is part of the Metro regional transportation network, and is considered regionally significant, or required to be programmed in the MTIP per USDOT direction.
- Verified that the project and lead agency are eligible to receive, obligate, and expend federal funds.
- Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
- Reviewed and evaluated to determine if Performance Measurements will or will not apply.
- Successfully complete the required 30-day Public Notification/Opportunity to Comment period.
- Meets other MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

Proposed Processing and Approval Actions:

<u>Action</u>	<u>Target Date</u>
• Initiate the public notification/comment process.....	January 15, 2025
• February 2025 TPAC agenda mail-out.....	January 31, 2025
• TPAC amendment approval recommendation.....	February 7, 2025

- End Public notification/comment process..... February 13, 2025
- JPACT amendment approval request..... February 20, 2025
- Metro Council approval request..... April 13, 2025

Notes:

- * The above dates are estimates. JPACT and Council meeting dates could change.
- ** If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT and/or Metro Council Office.

USDOT Approval Steps. The below timeline is an estimation only and assume no changes to the proposed JPACT or Council meeting dates occur:

<u>Action</u>	<u>Target Date</u>
• Final amendment package submission to ODOT & USDOT.....	April 18, 2025
• USDOT clarification and final amendment approval.....	Mid-May 2025

Note: Final Metro amendment submission approval by FHWA is dependent upon a successful reinstatement of the FHWA obligation process.

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:**
 - a. Amends the 2024-27 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 23-5335 on July 20, 2023 (FOR THE PURPOSE OF ADOPTING THE 2024-2027 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA)
 - b. Oregon Governor approval of the 2024-27 MTIP on September 13, 2023.
 - c. 2024-2027 Statewide Transportation Improvement Program (STIP) Approval and 2024 Federal Planning Finding on September 25, 2023.
3. **Anticipated Effects:** Enables the committed \$10 million of FFY 2025 Redistribution Funding to be awarded, programmed, and obligated to their respective projects.
4. **Metro Budget Impacts:** The FFY 2025 Redistribution Funding awarded funding represents a bonus allocation to Metro’s annual STBG allocation. The final awards should not have any impact upon Metro’s regular MPO annual budget.

Recommended Action:

Provide an approval recommendation to JPACT to award the nine projects at the 80.6% level of the available \$10 million of FFY 2025 Redistribution Funding in support of Resolution 25-5464.

Two Attachments:

1. Approved Resolution 24-5414
2. Current Project STIP Programming Tables (Non-Redistribution funding status)

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF DIRECTNG THE	)	RESOLUTION NO. 24-5414
ALLOCATION OF \$13.6 MILLION OF)	
FEDERAL TRANSPORTATION	)	Introduced by Chief Operating Officer
REDISTRIBUTION FUNDS TO PROJECTS AND	)	Marissa Madrigal in concurrence with
PROGRAMS	)	Council President Lynn Peterson
)	

WHEREAS, Metro is the regional government responsible for regional land use and transportation planning under state law and the federally-designated metropolitan planning organization (MPO) for the Portland metropolitan area; and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are authorized per Code of Federal Regulations Title 23, Section 450.324 to allocate certain federal surface transportation funding to projects and programs in the metropolitan region; and

WHEREAS, the Oregon Department of Transportation (ODOT) on occasion applies for and receives federal redistribution funds; and

WHEREAS, ODOT makes available a portion of the redistribution funds ODOT receives to MPOs that have met performance targets for contractually obligating the federal surface transportation funds the MPOs allocate; and

WHEREAS, Metro has successfully met its recent obligation targets and has received federal redistribution funds from ODOT; and

WHEREAS, the amount of funds received are more than previously forecasted to be received and are immediately available; and

WHEREAS, the federal redistribution funds allocated by JPACT and the Metro Council will be programmed in the Metropolitan Transportation Improvement Program (MTIP) or the Unified Planning Work Program (UPWP); and

WHEREAS, TPAC recommended direction for the allocation of federal redistribution funds as described in Exhibit A to Resolution 24-5414 to JPACT for approval, and JPACT, in their June 20, 2024 meeting approved TPAC’s recommendation; now therefore,

BE IT RESOLVED that the Metro Council adopt the direction for the allocation of federal redistribution funds as described in Exhibit A.

ADOPTED by the Metro Council this 11th day of July 2024.



Duncan Hwang, Deputy Council President

Approved as to Form:



Carrie MacLaren, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 214-5414, FOR THE PURPOSE OF DIRECTING THE ALLOCATION OF \$13.6 MILLION OF FEDERAL TRANSPORTATION REDISTRIBUTION FUNDS TO PROJECTS AND PROGRAMS

Date: June 21, 2024

Department: Planning, Development, and Research

Meeting Date: July 11, 2024

Prepared by: Ted Leybold,
Ted.Leybold@oregonmetro.gov

Presenter(s): Ted Leybold,
Length: 20 minutes

ISSUE STATEMENT

As a reward for meeting our Metropolitan Planning Organization (MPO) transportation funding obligation target schedule, The Oregon Department of Transportation (ODOT) has made available additional funds for allocation to Metro area transportation projects and programs. Approximately \$13.6 million is available for allocation.

This resolution directs the allocation of these funds to transportation projects and program activities.

ACTION REQUESTED

Adopt Resolution No. 24-5414.

IDENTIFIED POLICY OUTCOMES

The region's policy for priority of investments in the transportation system is identified in the Metro Council adopted Regional Transportation Plan. Resolution No. 24-5414 directs the investment of federal redistribution funds in the region's transportation system in a manner to advance the five RTP goal areas: Equitable Transportation, Safe System, Climate Action and Resilience, Mobility Options, and Thriving Economy.

POLICY QUESTION(S)

This direction on the allocation of federal redistribution funds is an opportunity to advance the region's priority transportation investment goals as identified above, and to ensure the region remains eligible to receive future federal redistribution funds through investments that help the region continue to meet targets for obligating existing federal transportation funds on schedule.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

At the May 7, 2024, Metro Council work session, Council received an update on the regional discussion occurring with TPAC and JPACT on direction for the allocation of federal redistribution funds.

In that work session, Metro staff briefed Council on the proposed options and received general feedback in support to move forward with the allocation direction of:

- advance the region's priority goals as defined in the Regional Transportation Plan (RTP)

- ensure the region continues to meet our obligation targets to
 - remain eligible for future additional redistribution funds,
 - to avoid funding penalties for not meeting our obligation targets
- be able to obligate these funds quickly as they are currently available

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The funding allocation provided in Exhibit A to Resolution 24-5414 is recommended by TPAC, JPACT as best implementing the allocation direction described above. It was also reviewed and supported by Metro Council at the May 7th Council work session.

- 1. Known Opposition:** None known at this time.
- 2. Policy Development Stakeholders:** Input has been received during briefings with Metro Councilors, TPAC and JPACT. By request, Metro staff also briefed and gathered input at county transportation coordinating committees. The RFFA program direction supports and implements the 2023 RTP goals, which were determined through an extensive public process undertaken throughout the development of the Plan.
- 3. Legal Antecedents:** Implements the 2023 RTP adopted on November 30, 2023 by Metro Council Ordinance 23-1496.
- 4. Anticipated Effects:** Adoption of this resolution directs the allocation of \$13.6 million of federal transportation redistribution funds to projects and programs in the region.
- 5. Financial Implications:** There may be a small, required match of 10.27% for a portion of the \$250,000 allocation for data management and project tracking systems. The Planning, Development, & Research Department will provide that from existing local funds over the course of one to three years.

BACKGROUND

As a reward for meeting the Metro area's Metropolitan Planning Organization (MPO) federal transportation funding obligation target schedule, The Oregon Department of Transportation (ODOT) has made available additional funds for allocation to Metro area transportation projects and programs. Approximately \$13.6 million is available for allocation.

To help the region meet its funding obligation targets, several initiatives have been undertaken in recent years improve on-time local project delivery. These efforts have contributed to the region's initial success in meeting our obligation targets and qualifying for the additional redistribution funding. These efforts include:

- better project monitoring and active management of project development progress
- an updated approach to programming of funds for local projects that emphasize local agency demonstration of readiness to proceed
- a more rigorous application question and assessment process for candidate projects regarding risks to project readiness
- improved reporting tools on project progress

It will be necessary to continue to utilize and refine these initial efforts and to instigate new efforts to achieve a sound project delivery pipeline and continue to qualify for additional redistribution

funding. Meeting the federal funding obligation target schedule also keeps the region from being subject to funding penalties against existing federal transportation funds.

JPACT, at its meeting on June 20, 2024, unanimously recommended adoption of Resolution 24-5414.

Exhibit A to Metro Resolution No. 24-5414

Direction for the Allocation of Federal Redistribution Funds

Background: As a reward for meeting the Metro area's Metropolitan Planning Organization (MPO) federal transportation funding obligation target schedule, The Oregon Department of Transportation (ODOT) has made available additional funds for allocation to Metro area transportation projects and programs. Approximately \$13.6 million is available for allocation.

To help the region meet its funding obligation targets, several initiatives have been undertaken in recent years improve on-time local project delivery. These efforts have contributed to the region's initial success in meeting our obligation targets and qualifying for the additional redistribution funding. These efforts include:

- better project monitoring and active management of project development progress
- an updated approach to programming of funds for local projects that emphasize local agency demonstration of readiness to proceed
- a more rigorous application question and assessment process for candidate projects regarding risks to project readiness
- improved reporting tools on project progress

It will be necessary to continue to utilize and refine these initial efforts and to instigate new efforts to achieve a sound project delivery pipeline and continue to qualify for additional redistribution funding.

Funding Allocation Direction: The funding program direction is to invest these funds to:

- advance the region's priority goals as defined in the Regional Transportation Plan (RTP)
- ensure the region continues to meet our obligation targets to
 - remain eligible for future additional redistribution funds
 - not subject the region to funding penalties for not meeting our obligation targets
- be able to obligate these funds quickly as they are currently available

Allocation of federal redistribution funding: Following is how \$13.6 million of federal redistribution funds are to be allocated to meet the allocation direction described above.

Supplemental funding to current capital projects: \$10 Million to address higher than normal inflationary impacts to projects from the 2019-24 RFFA funding cycles that have not yet completed construction delivery contracts for implementation. Metro staff will identify eligible projects and then request project lead agencies to nominate a funding proposal. Metro will evaluate the requests to factors attributable to inflation or changes outside agency control (e.g., changes in ODOT administrative practices or in regulations), for whether the additional funding will or is part of a funding strategy that will close the gap of revenues to project costs, and whether the project would be ready to obligate its funding on an updated schedule. With this information, staff will recommend an allocation package for TPAC consideration and recommendation to JPACT and the Metro Council. In addition to project funding need, the existing RFFA program direction will guide the staff recommendation package. This includes providing the redistribution funding to projects throughout the region.

This portion of the allocation meets the Funding Allocation Direction by advancing projects that have already been evaluated and prioritized as investments that advance the RTP goals. It will also help resolve a significant risk to meeting the region's obligation targets in the future: the unexpected high levels of inflation that impacted projects during the time between their project award and project implementation.

Early project development assistance: \$3 Million for project development assistance needed to adequately complete the Technical Scoping Sheet (TSS) and Environmental Prospectus (EP) for all 2028-30 RFFA projects recommended for funding. The TSS and EP are documents that must be completed for all federal aid projects before instigating the Preliminary Engineering phase of a project. Not having enough support and project information to complete these activities has been a major source of project delay.

Staff anticipates utilizing these funds for approximately 10 to 12 RFFA Step 2 capital projects awarded funding for project completion. A portion of the funds is proposed to be utilized by ODOT technical staff to assist with completion of the TSS and EP. All funds remaining after budgeted ODOT support costs would be made available proportionately to the awarded projects. Depending on ODOT costs and the number of funded projects, it is anticipated somewhere between \$150,000 to \$250,000 per project will be made available.

Immediately following RFFA awards, Metro and ODOT staff would work with local project management staff to determine an appropriate scope of work and budget necessary to adequately complete the TSS and EP. Adequate scope means completing tasks that will provide for a project to enter Preliminary Engineering (PE) with a refined cost estimate, project scope description, and schedule that has a high level of confidence for implementation and contingency plans for known risk factors. The findings of the project risk assessments completed during the RFFA project evaluation process will be used as a starting point for identification of the scope of work for this early project development assistance for each project. Timeframe for this initial project development work would occur by federal fiscal year 2026.

To continue to incentivize well prepared applications that have completed sufficient project development work, funds not needed to do additional project development work to complete the TSS and EP are proposed to be made available to such projects as additional contingency funds. These contingency funds can be programmed in a future project phase to address unidentified risks or for additional project elements that would advance priority RFFA goals. Awarded RFFA funds remaining after project completion return to the regional funding pool for distribution in the next allocation process.

New tools and assistance: The following tools and assistance will increase the ability of local agencies to complete applications for funding that are better prepared to be implemented on time and on budget, and for Metro to better prepare and manage the programming of funds to realistic and accurate obligation schedules. The tools and assistance elements and anticipated budget include:

\$225,000 for on-call consultant technical assistance in completing project applications as resources for consultant services allow. Metro staff will work with a consultant service provider to aid applicant agencies to reduce agency barriers to applying for Regional Flexible Funds and to improve the accuracy of candidate project scope descriptions and estimates of project costs and implementation timelines.

\$125,000 for project delivery risk assessment of applications for upcoming 2028-30 RFFA process.

\$250,000 for improvements to data management systems to track project development and progress toward obligation and implementation.

Current Project STIP Programming Tables
(Pre-Redistribution Funding Awards)

STIP Fund Code Translations			
Fund Code(s)	Fund Type Code Identifier	Name	Type/Note
Y400 Z40E	CMAQ	Congestion Mitigation Air Quality	Federal
YS30	HSIP	State Highway Safety Improvement Program funds	Federal
Y230 Z230	STBG-U	Surface Transportation Block Grant – Urban Allocation	Federal
M240 Z240 Z24E	State STBG	State Surface Transportation Block Grant funds	Federal
M3E1 Y301 Z301	TAP-U TA-U	Transportation Alternatives Program – Populations over 200K	Federal
Other	Other	Other Local funds (normally used to indicate local funding commitments above the required federal minimum match)	Local

Redistribution Funding Summary Awards

Recommended FFY 2025 Redistribution Funding Project Awards at the 80.6% Level				
Lead Agency	Key	Project Name	Original Request	Redistribution Award at 80.6%
Clackamas County	22131	Courtney Ave	\$2,421,841	\$1,952,003
Gresham	20808	Cleveland Ave	\$2,166,504	\$1,746,202
Milwaukie	22141	Washington/Monroe	\$1,805,526	\$1,455,253
Portland	18837	Columbia Blvd	\$ 471,027	\$379,647
Portland	20814	Jade and <u>Montavilla</u>	\$2,494,095	\$2,010,240
Portland	22134	NE 122 nd Ave	\$ 821,084	\$661,793
Portland	22135	NE MLK Blvd	\$412,758	\$332,682
Tigard	23253	Fanno Creek Trail	\$500,000	\$403,000
THPRD	19357	Beaverton Creek Trail	\$1,321,000	\$1,064,726
			Total:	\$10,005,546

Note: The awarded supplemental Redistribution funding will be added to the projects as STBG-U funds.

Key 22131 Clackamas County Courtney Ave Complete Street

Name: Courtney Ave Complete Street: River Rd - OR99E						Key: 22131	
Description: On Courtney Ave from River Rd to OR99E, construct separated sidewalks, bike lanes, storm water management rain gardens, curb ramps, and crosswalk enhancements to improve safety and accessibility.							
Region: 1							
MPO: Portland Metro MPO				Work Type: CMAQ			
Applicant: CLACKAMAS COUNTY				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	CLACKAMAS		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2022	2025	2025	2026		
Total		\$1,122,320.00	\$1,096,695.00	\$5,000.00	\$4,372,900.00		\$6,596,915.00
Fund 1		Z40E \$921,814.24	Y400 \$608,818.05	Y400 \$4,486.50	Y400 \$3,459,629.88		
Match		\$105,505.76	\$69,681.95	\$513.50	\$395,970.12		
Fund 2		Y400 \$85,243.50	OTH0 \$418,195.00		OTH0 \$517,300.00		
Match		\$9,756.50					
Footnote: Total federal funding: RFFA award of \$5,079,992							
Most Recent Approved Amendment							
Amendment No: 24-27-1647				Approval Date: 9/12/2024			
Requested Action: Slip the Utility Relocation and Right of Way phases to start in federal fiscal year 2025.							

Key 20808 Gresham NE Cleveland Ave

Name: NE Cleveland Ave: SE Stark ST - NE Burnside						Key: 20808	
Description: Complete phase two of the project by improving substandard section of Cleveland Ave between Stark and Burnside. Project will fill gap in by providing bike lanes, sidewalks, curbs and gutters to improve safety and accessibility.							
Region: 1							
MPO: Portland Metro MPO				Work Type: MODERN			
Applicant: CITY OF GRESHAM				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2019	2021		2025		
Total		\$503,166.00	\$1,407,318.00		\$3,525,000.00		\$5,435,484.00
Fund 1		Z230 \$451,490.85	OTH0 \$987,649.00		Y400 \$2,313,095.83		
Match		\$51,675.15			\$264,744.17		
Fund 2			Z40E \$376,568.99		OTH0 \$947,160.00		
Match			\$43,100.01				
Footnote: Current funding: \$451,490.85 fed STBG, \$2,689,664.82 fed CMAQ							
Most Recent Approved Amendment							
Amendment No: 24-27-1218				Approval Date: 5/30/2024			
Requested Action: Slip the Construction phase to start in federal fiscal year 2025.							

Key 22141 Milwaukie Washington/Monroe Street

Name: Washington/Monroe Street: SE 37th - SE Linwood Ave						Key: 22141	
Description: Construct bicycle and pedestrian improvements (segments D & E) on Washington & Monroe starting on Washington Street/37th Ave east to Ada Lane to Home Ave to Monroe, and Monroe east to Linwood providing pedestrian/cyclists safety improvements.							
Region: 1							
MPO: Portland Metro MPO				Work Type: BIKPED			
Applicant: CITY OF MILWAUKIE				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	CLACKAMAS		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2022	2025		2026	2026	
Total		\$1,655,156.00	\$671,000.00		\$3,508,750.00	\$100,000.00	\$5,934,906.00
Fund 1		OTH0 \$861,233.00	OTH0 \$671,000.00		Y230 \$3,148,401.38	OTH0 \$100,000.00	
Match					\$360,348.62		
Fund 2		Z301 \$712,387.11					
Match		\$81,535.89					
Footnote: Current 24-27 funding: \$3,148,401 fed STBG							
Most Recent Approved Amendment							
Amendment No: 24-27-0878				Approval Date: 3/7/2024			
Requested Action: Slip the Right of Way phase to start in federal fiscal year 2025.							

Key 18837
Portland Columbia Blvd

Name: NE Columbia Blvd: Cully Blvd & Alderwood Rd						Key: 18837	
Description: Install or replace a signal and construct a taper on Columbia Blvd's east leg at Alderwood for future side-by-side left-turn lanes between Cully and Alderwood. Construct sidewalks at the Columbia/Alderwood intersection and on N side to Cully. The project will keep Columbia Blvd a viable freight route while enhancing neighborhood connections and improving safety.							Region: 1
MPO: Portland Metro MPO				Work Type: BIKPED, MODERN			
Applicant: CITY OF PORTLAND				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2017	2024	2018	2026		
Total		\$1,879,514.00	\$2,840,640.00	\$100,000.00	\$4,085,446.00		\$8,905,600.00
Fund 1		Z24E \$1,018,868.00	Y240 \$2,548,906.27	Z240 \$44,865.00	Y230 \$2,179,846.78		
Match		\$116,614.00	\$291,733.73	\$5,135.00	\$249,493.22		
Fund 2		M240 \$667,619.91		Z24E \$44,865.00	Y240 \$1,468,077.91		
Match		\$76,412.09		\$5,135.00	\$168,028.09		
Fund 3					OTH0 \$20,000.00		
Match							
Footnote: \$4,538,856 MTEP Federal award							
Most Recent Approved Amendment							
Amendment No: 24-27-1635				Approval Date: 8/27/2024			
Requested Action: Reduce the Construction phase by \$1,245,623 and move the funds to increase the Right of Way phase. Slip the Construction phase to start in federal fiscal year 2026.							

Key 20814
Portland Jade and Montavilla Multi-Modal Improvements

Name: Jade and Montavilla multimodal improvements						Key: 20814	
Description: Construct multi-modal improvements on key pedestrian and bicycle routes within and connecting to the Jade District and Montavilla Neighborhood Centers to improve access.							Region: 1
MPO: Portland Metro MPO				Work Type: BIKPED, OPERAT, SAFETY			
Applicant: CITY OF PORTLAND				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2020	2022	2022	2024		
Total		\$2,316,900.00	\$802,423.00	\$50,000.00	\$5,844,676.43		\$9,013,999.43
Fund 1		Z230 \$1,158,450.19	Z301 \$720,014.15	OTH0 \$50,000.00	Y240 \$2,600,000.01		
Match		\$132,589.81	\$82,408.85		\$297,581.63		
Fund 2		OTH0 \$1,025,860.00			Y230 \$1,241,535.69		
Match					\$142,099.31		
Fund 3					OTH0 \$1,117,678.00		
Match							
Fund 4					YS30 \$400,000.00		
Match					\$45,781.79		
Footnote: \$4,241,535.69 total federal funding including \$1,241,535.69 of Metro Urban STBG funds							
Most Recent Approved Amendment							
Amendment No: 24-27-0560				Approval Date: 2/29/2024			
Requested Action: Increase the Construction phase by federal funds in the Construction phase by \$803,884.43, moving funds from project key 23112 and from fix-it region 1 program savings.							

Key 22134
Portland NE 122nd Ave Safety & Access

Name: NE 122nd Ave Safety & Access: Beech St - Wasco St						Key: 22134	
Description: Construct new enhanced & marked crossings on NE 122nd Avenue near NE Beech Street/NE Falling Street, NE Sacramento Street/NE Brazeo Street, NE Broadway/NE Hancock Street, and NE Wasco Street/NE Multnomah Street to improve safety and accessibility.							Region: 1
MPO: Portland Metro MPO				Work Type: BIKPED			
Applicant: CITY OF PORTLAND				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2022	2025	2025	2026		
Total		\$1,666,376.00	\$160,000.00	\$100,000.00	\$4,504,340.00		\$6,430,716.00
Fund 1		Y230 \$854,901.68	Y230 \$143,568.00	Y230 \$89,730.00	Y230 \$3,545,229.61		
Match		\$97,847.32	\$16,432.00	\$10,270.00	\$405,767.39		
Fund 2		OTH0 \$713,627.00			OTH0 \$553,343.00		
Match							
Footnote: Current 24-27 funding: \$3,778,528 in fed STBG							
Most Recent Approved Amendment							
Amendment No: 24-27-0739				Approval Date: 2/12/2024			
Requested Action: Slip the Utility Relocation and Right of Way phases to start in federal fiscal year 2026.							

Key 22135 Portland NE MLK Safety and Access to Transit

Name: NE MLK Blvd Safety & Access to Transit: Cook - Highland						Key: 22135		
Description: Construct pedestrian crossing and intersection channelization improvements on NE MLK Blvd at various locations between Cook St and Highland St. Complete signal upgrades at NE Fremont and NE Killingsworth. Add protected left turn lane at both intersections. These improvements will increase safety and accessibility.							Region: 1	
MPO: Portland Metro MPO				Work Type: BIKPED				
Applicant: CITY OF PORTLAND				Status: PROJECT SCHEDULED FOR CONSTRUCTION				
Location(s)-								
Mileposts	Length	Route	Highway	ACT	County(s)			
				REGION 1 ACT	MULTNOMAH			
Current Project Estimate								
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total	
Year	2022		2025		2026			
Total		\$1,100,000.00	\$87,000.00	\$50,000.00	\$3,401,000.00		\$4,638,000.00	
Fund 1	Y230	\$987,030.00	Y230	\$78,065.10	Y230	\$44,865.00	OTH0	\$1,799,786.00
Match		\$112,970.00		\$8,934.90		\$5,135.00		
Fund 2					Y230	\$1,436,769.32		
Match						\$164,444.68		
Footnote: Current 24-27 funding: \$1,559,699 fed STBG								
Most Recent Approved Amendment								
Amendment No: 24-27-0740				Approval Date: 2/12/2024				
Requested Action: Slip the Right of Way and Utility Relocation phase to start in federal fiscal year 2025.								

Key 23253 Tigard Fanno Creek Planning Study

Name: Fanno Creek: SW Durham Rd - SW Bonita Rd proj development						Key: 23253	
Description: The Fanno Creek (Durham Rd to Bonita Rd) project development study will provide site analysis to prepare for funding, easement acquisition, design, and construction for this commuter trail segment.							Region: 1
MPO: Portland Metro MPO				Work Type: BIKPED			
Applicant: CITY OF TIGARD				Status: PLANNING ACTIVITY			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	WASHINGTON		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year	2025						
Total		\$1,578,600.00					\$1,578,600.00
Fund 1	Y230	\$1,106,704.70					
Match		\$126,667.30					
Fund 2	OTH0	\$345,228.00					
Match							
Footnote:							
Most Recent Approved Amendment							
Amendment No: 24-27-1572				Approval Date: 7/29/2024			
Requested Action: Decrease the project by \$212,000.							

Key 19357 THPRD Beaverton Creek Trail

Name: Beaverton Creek Trail:Westside Trail-SW Hocken Ave						Key: 19357				
Description: Construct a 1.5-mile long, 12-foot wide regional trail consisting of paving, bridges/boardwalks, lighting, road right-of-way improvements, environmental mitigation and bicycle/pedestrian amenities and site furnishings. This section of trail will provide an off-street, safer and more pleasant transportation option to connect with light-rail, bus lines, employment and commercial areas as well as providing recreation opportunities for walkers, joggers and cyclists.							Region: 1			
MPO: Portland Metro MPO				Work Type: BIKPED						
Applicant: TUALATIN HILLS PARK & REC DIST				Status: PROJECT SCHEDULED FOR CONSTRUCTION						
Location(s)-										
Mileposts	Length	Route	Highway	ACT	County(s)					
				REGION 1 ACT	WASHINGTON					
Current Project Estimate										
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total			
Year	2016		2023		2024		2026			
Total	\$749,862.09	\$996,405.49	\$1,400,000.00		\$150,000.00	\$5,827,000.00		\$8,923,267.58		
Fund 1	M3E1	\$672,851.25	Y301	\$766,925.90	Y230	\$702,585.00	Y230	\$134,595.00	Y230	\$4,144,754.32
Match		\$77,010.84		\$87,778.10		\$80,414.00		\$15,405.00		\$474,385.68
Fund 2			M3E1	\$127,148.75	OTH0	\$617,001.00		OTH0	\$1,007,860.00	
Match				\$14,552.74						
Footnote: \$6,548,859 in total Federal STP allocation.										
Most Recent Approved Amendment										
Amendment No: 24-27-1276						Approval Date: 6/27/2024				
Requested Action: Increase the Right of Way phase by \$1,236,840, adding local funds.										



Memo

Date: Friday, January 31, 2025
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Principal Transportation Planner
Jean Senechal-Biggs, Resource Development Section Manager
Ted Leybold, Transportation Policy Director
Subject: 2028-2030 Regional Flexible Fund Step 1A.1 – Finalized Bond Scenarios and Results

Purpose: To provide an overview of the finalized bond scenarios for the Step 1A.1 new project bond and to gather input to get to a preferred bond scenario.

Background & Current Place in Development:

As part of the adoption of the 2028-2030 Regional Flexible Fund Program Direction, JPACT and the Metro Council agreed to move forward in the development of a new project bond proposal (also referred to as Step 1A.1) for consideration by the region. After the candidate project evaluation of the nine transit projects in contention, gathering input towards concepts/themes, and sharing initial bond scenarios, the following materials are to share financially constrained final bond scenarios for consideration and discussion.

28-30 RFFA Step 1A.1: Getting to a Preferred Bond Scenario

As a reminder, the bond scenarios shared are among several pieces to inform and shape an eventual preferred bond scenario/proposal for consideration by TPAC, JPACT, and Metro Council. These pieces include:

- Technical Information
 - Performance evaluation
 - Bond purpose and principles
 - Regional Transportation Plan (RTP) goals and outcomes
 - Project delivery assessment
 - Financial assessment of bond scenarios
- Financial, Administrative, and Regulatory
 - Bond mechanism selection and requirements (e.g. restrictions, reporting, costs)
 - Regulatory and economic outlook
- Policy Direction
 - Objectives of the 28-30 RFFA Program Direction are met
- Partner and Public Input
 - TPAC, JPACT, and Metro Council input bond scenario themes/concepts
 - Public comment
 - TPAC, JPACT, and Metro Council input on local priorities

Summary Input on Initial Bond Scenarios

At the January 2025 meetings of TPAC, JPACT, and at Metro Council work session, Metro staff gathered reactions to the initial bond scenarios placed forward. The analysis of the initial bond scenarios indicated maximizing performance according to an individual theme partners desire to have a bond built around results in no one bond scenario being able to meet all the Program Direction objectives. At this same time, regional partners and Council also received an updated financial picture, limiting the bond to upwards of \$84 million dollars in proceeds while maintaining the outlined financial principles in the Program Direction. With this information in mind, regional partners and Council responded with varying input. The summary of what was heard included the following:

TPAC and JPACT

- Continue to move forwards with the bond proposal despite unknowns.
 - Consider the purchasing power of funds in hand today versus in the future.
 - There remains an appetite in the region to “do big things” and advance regional objectives.
- Bonding is expensive; make it worth it.
 - Prioritize leveraging of discretionary funding.
 - Recognize bonding as a tool for local match and being more competitive in discretionary processes.
- Make impactful investment across the region.
- Consider opportunity costs.
 - What would get accomplished in the bonding timeframe?
 - Will dollars be less valuable in the future?
- Ensure bonding results in community benefits.
 - Center the bond on racial equity.
 - Utilize the bond opportunity to advance regional workforce initiatives.
- Consider the opportunity for applicants to scale requests.

Metro Council

- Keep the region poised to take advantage of opportunities.
 - Continue to move forward with the bond process and prepare for opportunities.
- Bonding comes at a premium.
 - Acknowledge the fiduciary responsibilities and decision.
- The decision to bond will have long term effects to Regional Flexible Fund Allocation.
 - Reduction in available Step 2 funds through 2039.
- Assess for racial equity advancement.

Getting to Final Bond Scenarios

Metro staff took the input received in January and maintained a general approach balancing performance across the five themes of: maximized RTP outcomes, leveraging funds, categorical representation/diversified investment, regional or corridor scale, and readiness. However, from the input received, regional partners made clear three themes would require a higher threshold of performance for a final bond proposal for regional consideration. These themes are:

- Leveraging of other funding opportunities to multiply the effects of the investment
- Honor the deliberation by JPACT to expand bonding for other types of transit projects beyond high capacity transit by having the three transit project categories represented.
- Ensuring investments are made throughout the metropolitan region.

With these three themes in mind, as well as the other themes heard in December, the Program Direction principles for the bond, and the balanced maximum performance approach, this led to five of the nine candidate projects comprising the narrowed pool for developing the final bond scenarios. The updated estimated amount of a maximum \$84 million of available bond proceeds which is less than what was initially shared in April 2024 also played a role in the narrowed pool further emphasizing regional or large corridor scale impact. Table 1. identifies the five candidate projects and the rationale for their selection in building the final bond scenarios.

Table 1. Final Bond Scenario Candidate Projects and Rationale

<i>Candidate Project</i>	<i>Rationale</i>
82 nd Avenue Transit Project	Overall meets bond purpose and principles from Program Direction. Additional considerations of leverage, readiness, RTP outcomes advancement, and advancement of racial equity outcomes.
Tualatin Valley Highway Transit Project	Overall meets bond purpose and principles from Program Direction. Additional considerations of leverage, readiness, RTP outcomes advancement, and advancement of racial equity outcomes.
Montgomery Park Streetcar Extension	Overall meets bond purpose and principles from Program Direction. Additional considerations of leverage, readiness, RTP outcomes advancement, and land use-housing opportunities.
Burnside Bridge Transit Access and Vehicle Priority Project	Meets several bond purpose and principles from Program Direction. Additional considerations for resiliency factor, local funding commitment, RTP outcomes advancement. Funding strategy remains higher risk.
Sunrise Gateway Corridor Project	Meets some bond purpose and principles. Additional considerations for project indicated as the Clackamas County priority. Regional in scale of potential impact.

Note: Candidate projects are listed by nominating category order.

While each candidate project demonstrated strengths consistent with the Program Direction principles for bond proceeds consideration, four candidate projects are not included in the finalized bond scenarios. Table 2. identifies the remaining four candidate projects and their individual rationale for no longer moving forward in the final bond scenarios.

Table 2. Candidate Projects Not Included in Final Bond Scenarios and Rationale

<i>Candidate Project</i>	<i>Rationale</i>
185 th MAX Overcrossing Project	Comparatively, not of regional-corridor scale. Regional input reflects desired emphasis to focus on construction and seeing project completed. Funding leverage potential is high, but concern for funding strategy being an unknown in the region.
Better Bus Program	Input received is to consider for a Step 1B regional program in either the current or future Regional Flexible Fund cycle. To date, ability to leverage discretionary funding remains unclear.
OR99E (McLoughlin Boulevard)	Comparatively, mid-size in regional-corridor scale and of potential impact. Less competitive compared to other candidate projects on ability to leverage funds.
72 nd Avenue Phase I Tigard Triangle	Comparatively, mid-size in regional-corridor scale and of potential impact. Less competitive compared to other candidate projects on ability to leverage funds. Comparatively, less impactful towards advancing regional outcomes.

Note: Candidate projects are listed by nominating category order.

The finalized bond scenarios are built around the five different projects. Each individual scenario reflects the balancing of the performance of themes while maintain fiscal constraint and largely adhering to the Program Direction principles for the bond. Some scenarios consider greater emphasis of specific themes or reflect input received for suggested scenarios. Table 3 outlines eight finalized bond scenarios reflective of themes and input and organized around four main concepts:

- Bond Scenarios 1 – 4: Regional and corridor scale investments balance bond performance goals with varying scope and allocation emphasis.
- Bond Scenario 5: Geographic distribution around the region.
- Bond Scenario 6: Potential to leverage significant amounts of identified funding sources.
- Bond Scenario 7 and 8: Transit-specific projects by mode and federal funding source.

In efforts to maintain financial constraint with the finalized bond scenarios, a single bond mechanism was assumed which limited the allocations in all eight scenarios up to \$84 million. With the requested bond proceeds totaling \$120 million for the five candidate projects comprising the finalized bond scenarios, different scenarios reflect reductions to the bond proceeds requests to individual projects. The rationale behind the reductions for the different bond scenarios were developed by Metro staff and was based on the review of the candidate project's application materials and the details in the project cost estimate and description of the scope of work in which the bond proceeds would be used. The bond proceeds reductions were not verified with the nominating agency of the project and therefore the potential amounts in each scenario may not accurately reflect what can get accomplished with the reduced allocation of bond proceeds. Metro staff intends to work with the nominating agencies for each candidate project to refine and determine possible bond allocation reductions throughout February and after gathering input on a preferred bond scenario from regional partners.

These finalized bond scenarios all reflect some form of tradeoff, whether it is in performance towards maximizing RTP outcomes, project readiness, lack of diversified investment across the transit categories, or confidence in the ability to leverage significant additional funding from federal, state and local sources. A description and analysis of each scenario is provided in Attachment 1 in one-pager of the bond scenario. The largely qualitative analysis drawing from the technical evaluation results reflects the tradeoffs.

Table 3. Finalized Bond Scenarios

Requested Bond Proceeds	Candidate Project	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5	Scenario 6	Scenario 7	Scenario 8
		Regional-Corridor Scale Balancing 5 Theme Areas							
		Low Allocation	Max Allocation	Mid-High Allocation	Mid-High Allocation	Regionally Distributed	Major Leverage	FX Only	CIG Only
\$30M	82nd Avenue Transit Project	\$25M	\$27.5	\$25M	\$25M	\$30M	\$30M	\$30M	\$30M
\$30M	Tualatin Valley Highway Transit Project	\$25M	\$27.5	\$30M	\$30M	\$30M	\$30M	\$30M	\$30M
\$15M	Sunrise Corridor Gateway Project	\$6.5M	\$9M	\$13M	\$6.5M	\$15M	\$ -	\$ -	\$ -
\$25M	Burnside Bridge Transit Priority and Access Project	\$6M	\$10M	\$7M	\$5M	\$ -	\$10M	\$ -	\$ -
\$20M	Montgomery Park Streetcar Extension	\$7.5M	\$10M	\$7.5M	\$15M	\$ -	\$10M	\$ -	\$20M
\$120M	TOTALS	\$70M	\$84M	\$82.5M	\$81.5M	\$75M	\$80M	\$60M	\$80M
82nd Avenue Transit Project: Scenarios 1, 3, and 4 assumes a reduced request which can maintain the proportional contribution for construction local match to the project's Capital Investment Grant application.									
Tualatin Valley Highway: Scenario 1 and 2 assumes a reduced request which can maintain the proportional contribution for construction local match to the project's Capital Investment Grant application.									
Sunrise: Assumes removing funding for NEPA re-evaluation; Scenario 1 and Scenario 4 assumes costs to reach 30% design; Scenario 2 assumes costs to reach 60% design; Scenario 3 assumes full design work.									
Burnside: Scenario 1, 3, and 5 assumes covering one element from each: vehicle priority or pedestrian transit access scope; Scenario 2 and 6 assumes funding one element of the transit vehicle priority elements and the full pedestrian access elements.									
Montgomery Park: Scenario 1 and 3 assumes approximately half of the estimate costs for land purchases/ROW; Scenario 2 and 6 assumes approximately half of construction professional services estimated costs; Scenario 4 assumes approximately full costs for land purchases/ROW.									

Bond Scenarios & Step 2 Implications

As noted in the description for finalizing the bond scenarios, for the purposes of finalizing the bond scenarios Metro assumed use of a single bond mechanism to frame the top end of what a new project bond starting with the 28-30 Regional Flexible Fund Allocation can support. While maintaining assumptions the bond proceeds availability and annual debt serving schedule remains within the financial principles of the Program Direction, the effect of a new bond in the range of \$70 million to \$84 million will result in a Step 2 allocation between \$42M and \$45M starting in 28-30. A new project bond drawing down less proceeds will likely result in a range closer to or slightly greater than \$45 million for Step 2 while a maximum new project bond is likely to range closer to \$42 million or slightly less. For the future funding cycles, the revenue available for Step 2 are forecasts based on historical trends. With that information, it is likely the 31-33 Regional Flexible Fund Step 2 allocation will be the most financially constrained as it will be the cycle with peak debt servicing and the bond proceeds will have been distributed and expended by this time.

A Step 2 allocation in the mid-\$30 to mid-\$40 million range is not uncommon. Previous cycles allocation of Step 2 were the following:

- 25-27 Regional Flexible Fund Step 2 cycle allocated \$47.4 million.
- 22-24 Regional Flexible Fund Step 2 cycle allocated \$45 million
- 19-21 Regional Flexible Fund Step 2 cycle allocated \$34 million

These Step 2 allocations in these funding cycles were with debt service at its peak under existing bonds between \$65 through a little over \$67 million over the three years.

Bond Mechanism Update

At the January 2025 TPAC meeting, Metro staff began to provide initial information on the different bond mechanism options and ultimately an updated estimate as to what a new project bond in the 28-30 Regional Flexible Fund Allocation can support. Information was presented on two specific bond mechanism options: 1) a single bond mechanism; and 2) multiple bond mechanism. Metro staff at this time has not selected a bond mechanism to move forward with in part because the mechanism will depend on the project composition of the preferred bond scenario package. However, based on Metro staff's research, the multiple bond mechanism option would likely necessitate going through the federal bonding programs, which staff assessment determined are not cost effective and a new project bond would not be worth pursuing at the cost level.

Metro staff continue to research further into the single bond mechanism option and the bond scenarios discussion will continue to assume proceeds amounts through a single bond. Depending on the outcome of the region's selected preferred bond scenario, to get to a single bond mechanism may necessitate a local fund exchange. Discussion with entities to support fund exchange are on-going. Metro will explore the bond mechanism in earnest after the action in March once a preferred bond scenario is selected.

Discussion Questions

1. Among the final bond scenarios shared, do TPAC members have a bond scenario preferred more than others?
 - a. Are there combination of scenarios preferred by TPAC members?

Next Steps – 2028-2030 RFFA – New Project Bond Development Process

Table 4 outlines the next steps in the 28-30 Regional Flexible Fund Step 1A.1 New Project Bond development process. To date, the bond development process remains on track to converge with the Step 2 allocation process in the public comment in March 2025.

Table 4. 2028-2030 RFFA – New Project Bond Development – Key Dates

Activity	Date
Bond scenarios development and assessment <ul style="list-style-type: none"> Utilizing concept and themes input Gather Metro Council input Continue to gather regional partner input 	December 2024 – January 2025
First draft bond scenarios and reference scenarios released	January 10 & 16, 2025
Second draft bond scenarios with financial assessment <ul style="list-style-type: none"> Gather regional partner input to identify a preferred bond scenario 	February 7 & 20, 2025
Request action to release recommended preferred bond scenario/proposal (TPAC and JPACT)	March 7 & 20, 2025
2028-2030 RFFA public comment opens	March 24, 2025
2028-2030 RFFA public hearing/testimony	April 17, 2025*
2028-2030 RFFA public comment closes	April 28, 2025
Summary of 2028-2030 RFFA public comments with responses and draft/tentative staff recommendations for refinements to TPAC & JPACT (if needed)	May 2 & 15, 2025*
TPAC and JPACT opportunity to deliberate input received on preferred bond scenario and finalize the preferred bond proposal	June 2025
TPAC and JPACT action on 2028-2030 RFFA including the preferred bond proposal (Step 1A.1) and Step 2	July 2025

*Indicates tentative date. Unconfirmed on committee or Metro Council calendars or delivery date project work is on the aggressive side and may change.

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 1: Regional-Corridor Balanced Performance – Low Allocation

Requested Bond Proceeds	Candidate Project	Allocation Amount
\$30M	82nd Avenue Transit Project	\$25M
\$30M	Tualatin Valley Highway Transit Project	\$25M
\$15M	Sunrise Corridor Gateway Project	\$6.5M
\$25M	Burnside Bridge Transit Priority and Access Project	\$6M
\$20M	Montgomery Park Streetcar Extension	\$7.5M
\$120M	TOTALS	\$70M

Scenario Description

Scenario 1 centers on two overarching factors: 1) maintaining balanced maximum performance across the five themes; and 2) maintaining bond proceed allocation at a level of less risk to Regional Flexible Fund Step 2 and Step 1B. As a result, no candidate project receives full request of bond proceeds. Allocation reductions based on project cost estimate descriptions and Metro staff identified areas for possible allocation reductions.

Outline of Allocation Rationales

82nd Avenue: Proposed allocation is \$5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.

Tualatin Valley Highway: Proposed allocation is \$5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the CIG application.

Sunrise: Proposed allocation assumes cost to reach 30% design. NEPA re-evaluation excluded.

Burnside: Proposed allocation is for one vehicle priority and one pedestrian element in scope.

Montgomery Park: Proposed allocation is for approximately half of the estimated costs for land purchases and right-of-way acquisition, towards matching funds contribution for CIG application.

Performance

Strengths

Invests across all five candidate projects, represents different transit investment types, and investment distributed across the metropolitan region. Greater investment of bond proceeds towards in higher performing candidate projects for funding leveraging and maximizing RTP outcomes, with strategic investment in regionally significant projects for future readiness. Most proceeds are towards construction activities.

Risks

No candidate receives full requested amount. Assumes candidate project sponsor can secure additional matching funds to complete proposed scope of work. Possibility for some candidate projects to struggle to complete the scope proposed with partial funding. Trade off in performance if candidate projects cannot advance.

Theme	Maximized RTP Outcomes	Leverage	Categorical Representation	Geographic Distribution	Readiness
	Better	Good	Yes	Yes	Good

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
Categorical Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 2: Regional-Corridor Balanced Performance – Max Allocation

Requested Bond Proceeds	Candidate Project				Allocation Amount
\$30M	82nd Avenue Transit Project				\$27.5
\$30M	Tualatin Valley Highway Transit Project				\$27.5
\$15M	Sunrise Corridor Gateway Project				\$9M
\$25M	Burnside Bridge Transit Priority and Access Project				\$10M
\$20M	Montgomery Park Streetcar Extension				\$10M
\$120M	TOTALS				\$84M
Scenario Description					
Scenario 2 centers on two overarching factors: 1) maintaining balanced maximum performance across the five themes; and 2) maximizing bond proceed allocation to advance regional objectives. Even with increased allocated bond proceeds, no candidate project receives full request of bond proceeds. Allocation reductions based on project cost estimate descriptions and Metro staff identified areas for possible allocation reductions.					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is \$2.5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is \$2.5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the CIG application.					
Sunrise: Proposed allocation assumes cost to reach 60% design. NEPA re-evaluation excluded.					
Burnside: Proposed allocation is for one vehicle priority and all pedestrian elements in scope.					
Montgomery Park: Proposed allocation is for approximately half of construction professional services costs towards matching funds contribution for CIG application.					
Performance					
<u>Strengths</u>					
Invests across all five candidate projects, represents different transit investment types, and investment distributed across the metropolitan region. Allocations reach maximum amount of bond proceeds to advance all five candidates as far as possible while maintaining high performance for fund leveraging and maximizing RTP outcomes. Most proceeds are towards construction activities.					
<u>Risks</u>					
No candidate receives full requested amount. Assumes candidate project sponsor can secure additional matching funds to complete proposed scope of work. Possibility for some candidate projects to struggle to complete the scope proposed with partial funding. Trade off in performance and debt repayment if candidate projects cannot advance. Max allocation of available bond proceeds and can present risks to Regional Flexible Fund Step 2 and Step 1B.					
Theme	Maximized RTP Outcomes	Leverage	Categorial Representation	Geographic Distribution	Readiness
	Better	Better	Yes	Yes	Good

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorial Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 3: Regional-Corridor Balanced Performance – Mid-High Allocation 1

Requested Bond Proceeds	Candidate Project	Allocation Amount
\$30M	82nd Avenue Transit Project	\$25M
\$30M	Tualatin Valley Highway Transit Project	\$30M
\$15M	Sunrise Corridor Gateway Project	\$13M
\$25M	Burnside Bridge Transit Priority and Access Project	\$7M
\$20M	Montgomery Park Streetcar Extension	\$7.5M
\$120M	TOTALS	\$82.5M

Scenario Description

Scenario 3 centers on two overarching factors: 1) maintaining balanced maximum performance across the five themes; and 2) strategically allocate bond proceeds to maximize candidate project ability to advance. One candidate receives full request while remaining candidates receive strategic level of bond proceeds to move forward. Allocation reductions based on project cost estimate descriptions and Metro staff identified areas for possible allocation reductions.

Outline of Allocation Rationales

82nd Avenue: Proposed allocation is \$5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.

Tualatin Valley Highway: Proposed allocation is for full TriMet requested amount for Metro contribution for construction phase matching funds towards the CIG application.

Sunrise: Proposed allocation is for 100% design completion. NEPA re-evaluation excluded.

Burnside: Proposed allocation is for one vehicle priority and pedestrian elements in scope.

Montgomery Park: Proposed allocation is for approximately half of the estimate costs for land purchases and right-of-way towards matching funds contribution for CIG application.

Performance

Strengths

Invests across all five candidate projects, represents different transit investment types, and investment distributed across the metropolitan region. Selective and strategic allocation of bond proceeds to advance all five candidates while maintaining high performance for fund leveraging and maximizing RTP outcomes. Most proceeds are towards construction activities.

Risks

Assumes candidate project sponsor can secure additional matching funds to complete proposed scope of work. Possibility for some candidate projects to struggle to complete the scope proposed with partial funding. Trade off in performance and debt repayment if candidate projects cannot advance. High allocation of available bond proceeds and can present risks to Regional Flexible Fund Step 2 and Step 1B.

Theme	Maximized RTP Outcomes	Leverage	Categorical Representation	Geographic Distribution	Readiness
	Better	Better	Yes	Yes	Better

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorical Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 4: Regional-Corridor Balanced Performance – Mid-High Allocation 2

Requested Bond Proceeds	Candidate Project				Allocation Amount
\$30M	82nd Avenue Transit Project				\$25M
\$30M	Tualatin Valley Highway Transit Project				\$30M
\$15M	Sunrise Corridor Gateway Project				\$6.5M
\$25M	Burnside Bridge Transit Priority and Access Project				\$5M
\$20M	Montgomery Park Streetcar Extension				\$15M
\$120M	TOTALS				\$81.5M
Scenario Description					
Scenario 4 centers on two overarching factors: 1) maintaining balanced maximum performance across the five themes; and 2) strategically allocate bond proceeds to minimize risks to the bond. One candidate receives full request while remaining candidates receive strategical level of bond proceeds based on funding strategy for completion. Allocation reductions based on project cost estimate descriptions and Metro staff identified areas for possible allocation reductions.					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is \$5M less than TriMet requested amount for Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is for full TriMet requested amount for Metro contribution for construction phase matching funds towards the CIG application.					
Sunrise: Proposed allocation assumes cost to reach 30% design . NEPA re-evaluation excluded.					
Burnside: Proposed allocation is for one vehicle priority and one pedestrian element in scope.					
Montgomery Park: Proposed allocation is for approximately the full estimated costs for land purchases and right-of-way towards matching funds contribution for CIG application.					
Performance					
<u>Strengths</u>					
Invests across all five candidate projects, represents different transit investment types, and investment distributed across the metropolitan region. Selective and strategic allocation of bond proceeds to advance all five candidates, but with protected investment to candidate projects with greater secured funding strategies. Remains high performance for fund leveraging and maximizing RTP outcomes. Most proceeds are towards construction activities. Near even distribution between urban and suburban areas.					
<u>Risks</u>					
Assumes candidate project sponsor can secure additional matching funds to complete proposed scope of work. Possibility for some candidate projects to struggle to complete the scope proposed with partial funding. Trade off in performance and debt repayment if candidate projects cannot advance. High allocation of available bond proceeds and can present risks to Regional Flexible Fund Step 2 and Step 1B.					
Theme	Maximized RTP Outcomes	Leverage	Categorical Representation	Geographic Distribution	Readiness
	Better	Better	Yes	Yes	Good

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorical Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 5: Regionally Distributed Allocation

Requested Bond Proceeds	Candidate Project			Allocation Amount	
\$30M	82nd Avenue Transit Project			\$30M	
\$30M	Tualatin Valley Highway Transit Project			\$30M	
\$15M	Sunrise Corridor Gateway Project			\$15M	
\$25M	Burnside Bridge Transit Priority and Access Project			\$ -	
\$20M	Montgomery Park Streetcar Extension			\$ -	
\$120M	TOTALS			\$75M	
Scenario Description					
Scenario 5 centers on simplified regional distribution of bond proceeds to advance regional objectives. Allocations of bond proceeds are for the full amount requested.					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is for full TriMet requested amount for Metro contribution to construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is for full TriMet requested amount for Metro contribution for construction phase matching funds towards the CIG application.					
Sunrise: Proposed allocation is for full requested funds, supporting the NEPA re-evaluation and 100% design for the local access and safety components on Highway 212.					
Performance					
<u>Strengths</u>					
Allocates a level of bond proceeds which places lesser risk pressure on Regional Flexible Fund Step 2 or Step 1B if revenue forecasts are less than anticipated. Medium to high performance for fund leveraging and maximizing RTP outcomes. Maintains geographic distribution of bond proceeds. Most proceeds are towards construction activities.					
<u>Risks</u>					
Does not include an investment to support transit vehicle priority. Lesser ability to leverage funds and maximize RTP outcomes as number of candidate projects is lesser.					
Theme	Maximized RTP Outcomes	Leverage	Categorial Representation	Geographic Distribution	Readiness
	Good	Good	No	Yes	Good

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorial Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 6: Major Leverage Allocation

Requested Bond Proceeds	Candidate Project		Allocation Amount		
\$30M	82nd Avenue Transit Project		\$30M		
\$30M	Tualatin Valley Highway Transit Project		\$30M		
\$15M	Sunrise Corridor Gateway Project		\$ -		
\$25M	Burnside Bridge Transit Priority and Access Project		\$10M		
\$20M	Montgomery Park Streetcar Extension		\$10M		
\$120M	TOTALS		\$80M		
Scenario Description					
Scenario 6 centers on allocating bond proceeds to those candidate projects which have identified large discretionary funding leveraging opportunities and proceeds would be applied as construction matching funds.					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the CIG application.					
Burnside: Proposed allocation is for one vehicle priority element and all pedestrian elements.					
Montgomery Park: Proposed allocation is for approximately half of estimated construction professional services costs towards matching funds contribution for CIG application.					
Performance					
<u>Strengths</u>					
Does not allocate the maximum amount of bond proceeds available. Represents investment in different transit investment types. High performance for fund leveraging and maximizing RTP outcomes. Proceeds are for construction activities only.					
<u>Risks</u>					
Partially maintains geographic distribution of bond proceeds. Assumes candidate project sponsor can secure additional matching funds to complete proposed scope of work. Possibility for some candidate projects to struggle to complete the scope proposed with partial funding. Trade off in performance and debt repayment if candidate projects cannot advance. High allocation of available bond proceeds and can present risks to Regional Flexible Fund Step 2 and Step 1B.					
Theme	Maximized RTP Outcomes	Leverage	Categorial Representation	Geographic Distribution	Readiness
	Best	Best	Yes	Partial	Better

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorial Representation, Geographic Distribution Ratings: Yes, No, Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 7: FX Allocation

Requested Bond Proceeds	Candidate Project		Allocation Amount		
\$30M	82nd Avenue Transit Project		\$30M		
\$30M	Tualatin Valley Highway Transit Project		\$30M		
\$15M	Sunrise Corridor Gateway Project		\$ -		
\$25M	Burnside Bridge Transit Priority and Access Project		\$ -		
\$20M	Montgomery Park Streetcar Extension		\$ -		
\$120M	TOTALS		\$60M		
Scenario Description					
Scenario 7 centers on allocating a limited amount of bond proceeds to the 82 nd Avenue and Tualatin Valley Highway Transit Projects only.					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the CIG application.					
Performance					
<u>Strengths</u>					
Reflects a scenario heard from regional partners. Provides full bond proceeds funding requests to deliver upon project construction activities and position well for federal discretionary matching funds. Allocates well under the maximum amount of bond proceeds available, placing less risk and strain on Regional Flexible Fund Step 2 and Step 1B if revenue forecasts are not as expected. High performance for fund leveraging and maximizing RTP outcomes. Proceeds are for construction activities only. Easier process to administer bond.					
<u>Risks</u>					
Partially maintains geographic distribution of bond proceeds and does not represent investment in different transit investment types.* Scenario 7 also reflects a bond allocation similar to those of proceeding bond allocations and not reflective of diversifying regional transportation needs.					
Theme	Maximized RTP Outcomes	Leverage	Categorial Representation	Geographic Distribution	Readiness
	Best	Best	No*	Partial	Better

*Scope of work for the two candidate projects include elements of transit vehicle priority and safe access to transit within the project scopes.

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
 Categorial Representation, Geographic Distribution Ratings: Yes, No, or Partial

Attachment 1. Finalized Bond Scenarios Profiles

Bond Scenario 8: Capital Investment Grant (CIG) Allocation

Requested Bond Proceeds	Candidate Project				Allocation Amount
\$30M	82nd Avenue Transit Project				\$30M
\$30M	Tualatin Valley Highway Transit Project				\$30M
\$15M	Sunrise Corridor Gateway Project				\$ -
\$25M	Burnside Bridge Transit Priority and Access Project				\$ -
\$20M	Montgomery Park Streetcar Extension				\$20M
\$120M	TOTALS				\$80M
Scenario Description					
Scenario 7 centers on allocating a limited amount of bond proceeds to the candidate projects eligible for the Federal Transit Administration (FTA).					
Outline of Allocation Rationales					
82 nd Avenue: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the Capital Investment Grant (CIG) application.					
Tualatin Valley Highway: Proposed allocation is for full TriMet requested Metro contribution for construction phase matching funds towards the CIG application.					
Montgomery Park: Proposed allocation is for full requested funds toward construction phase matching funds for CIG application.					
Performance					
<u>Strengths</u>					
Reflects a scenario heard from regional partners. Provides full bond proceeds funding requests to deliver upon project construction activities and position well for federal discretionary matching funds. Allocates under the bond proceeds available. High performance for fund leveraging and maximizing RTP outcomes. Proceeds are for construction activities only. Easier process to administer bond.					
<u>Risks</u>					
Does not maintain geographic distribution of bond proceeds and does not represent investment in different transit investment types.* Scenario 8 also reflects a bond allocation similar to those of proceeding bond allocations and not reflective of diversifying regional transportation needs. May also be leaving different fund leveraging opportunities. High allocation of available bond proceeds and can present risks to Regional Flexible Fund Step 2 and Step 1B.					
Theme	Maximized RTP Outcomes	Leverage	Categorial Representation	Geographic Distribution	Readiness
	Best	Best	No*	Partial	Better

*Scope of work for the two candidate projects include elements of transit vehicle priority and safe access to transit within the project scopes.

Maximized RTP Outcomes, Leverage, Readiness Ratings: Good, Better, Best
Categorial Representation, Geographic Distribution Ratings: Yes, No, or Partial

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING	)	RESOLUTION NO. 25-5463
THREE RELATED I-5 ROSE QUARTER)	
PROJECTS TO THE 2024-27 MTIP TO	)	Introduced by: Chief Operating
ADD \$250 MILLION DOLLARS OF	)	Officer Marissa Madrigal in
APPROVED FUNDING TO THE PROJECTS	)	concurrence with Council President
	)	Lynn Peterson

WHEREAS, the Metropolitan Transportation Improvement Program (MTIP) prioritizes projects from the Regional Transportation Plan (RTP) to receive transportation-related funding; and

WHEREAS, the U.S. Department of Transportation (USDOT) requires federal funding for transportation projects located in a metropolitan area to be programmed in an MTIP; and

WHEREAS, in July 2023, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council approved Resolution No. 23-5335 to adopt the 2024-27 MTIP; and

WHEREAS, the 2024-27 MTIP includes Metro approved RTP and federal performance-based programming requirements and demonstrates compliance and further progress towards achieving the RTP and federal performance targets; and

WHEREAS, pursuant to the USDOT MTIP amendment submission rules, JPACT and the Metro Council must approve any subsequent amendments to the MTIP to add new projects or substantially modify existing projects; and

WHEREAS, the I-5 Rose Quarter Improvement Project's purpose is to improve the safety and operations on I-5 between I-405 and I-84, at the Broadway/Weidler interchange, and on adjacent vicinity surface streets, and enhance multimodal facilities in the project area, and support improved local connectivity and multimodal access plus improve multimodal connections between neighborhoods east and west of I-5.

WHEREAS, the Oregon Transportation Commission (OTC) approved \$250 million in new funding during their December 2024 and January 2025 meetings in support of the I-5 Rose Quarter Improvement Project; and

WHEREAS, ODOT will split the awarded funding across the I-5 Rose Quarter Improvement Project in Key 19071 and the two construction projects in Keys 23672 and 23782; and

WHEREAS, ODOT will add \$12.5 million of awarded funding to support non-construction phase activities for preliminary engineering, right-of-way, utility relocation, and the “Other” phase requirements in Key 19071; and

WHEREAS, ODOT will commit \$177.5 million for the I-5 Rose Quarter - Broadway to Weidler Phase 1 construction package in Key 23672 with the remaining \$60 million committed to the I-5 Rose Quarter - Phase 1A construction package in Key 23682; and

WHEREAS, the OTC award exceeds the \$100 million dollar threshold for capacity enhancing projects requiring Metro to complete a Performance Assessment Evaluation (PAE) as part of the amendment; and

WHEREAS, Metro completed the project PAE which included a transportation modeling analysis and examined the anticipated system performance impacts in support of the 2023 Regional Transportation Plan’s goals of equity, climate, safety, mobility, and economy; and

WHEREAS, Metro completed a 30-day plus public notification and opportunity to comment period as part of formal amendment, and ensured all submitted comments were documented and reviewed in accordance with Metro’s Public Participation Plan; and

WHEREAS, OTC’s double approval requirement process provided the required fiscal constraint demonstration verification for the new awarded funding for inclusion in to the MTIP and STIP; and

WHEREAS, the programming updates to the three projects are stated in Exhibit A to this resolution; and

WHEREAS, on February 7 and February 20, 2025, Metro’s Transportation Policy and Alternatives Committee (TPAC) and Joint Policy Advisory Committee on Transportation (JPACT) respectively received an official amendment overview; and

WHEREAS, on March 7, 2025, Metro’s Transportation Policy and Alternatives Committee recommended that JPACT approve this resolution; and

WHEREAS, on March 20, 2025, JPACT approved and recommended the Metro Council adopt this resolution; now therefore

BE IT RESOLVED that the Metro Council adopts this resolution to amend the three projects as stated within Exhibit A to the 2024-27 Metropolitan Transportation Improvement Program to add the new approved \$250 million dollars for the I-5 Rose Quarter Improvement Project.

ADOPTED by the Metro Council this ____ day of _____ 2025.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

DRAFT

Exhibit A
February #1, 2025, Rose Quarter Formal/Full MTIP Amendment Summary
Formal Amendment #: FB25-05-FEB1

The February 2025 Rose Quarter MTIP Formal Amendment represents a stand-alone formal amendment involving three Rose Quarter improvement projects. The three amended ODOT projects include the following:

- Key 19071: I-5 Rose Quarter Improvement Project (Adds \$12.5 million to the Preliminary Engineering (PE), right-of-way, Utility Relocation (UR), and Other phases).
- Key 23672: I-5 Rose Quarter: Broadway to Weidler Phase 1 (Adds \$177.5 million to the construction phase).
- Key 23682: ~~I-405 and I-5 Stormwater Facilities~~ **I-5 Rose Quarter: Phase 1A** (Adds \$60 million to the construction phase, updates, the project name and description as a result of a scope adjustment).

Note: There is a fourth project that supports various Rose Quarter proposed improvements. This is Key 23646. The project name is Broadway Mainstreet and Supporting Connections. The lead agency is the city of Portland. This project is a separately funded project and not part of the February #1, 2025, MTIP Formal Amendment. There is no amendment action occurring to this project.

On December 4, 2024, the Oregon Transportation Commission (OTC) provided their initial approval of the \$250 million for the Rose Quarter Improvement project. During their January 16, 2025 meeting, OTC received an updated and more detailed summary describing how the \$250 million will be applied. OTC approved this item as well. See Attachments 3 and 4 to the amendment staff report for additional details.

There are no projects being canceled from the MTIP and STIP through this amendment. A summary of the three projects includes the following:

- **Key 19071 - I-5 Rose Quarter Improvement Project (ODOT):** Key 19071 contains the non-construction phase programming to the Rose Quarter Improvement Project. The overall proposed improvements are on I-5 in Portland and will complete multi-modal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new over crossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities. The MTIP formal amendment adds \$12.5 million the PE, ROW, UR, and Other phases. . The net change increases the total programming amount by 4.9%.
- **Key 23672 - I-5 Rose Quarter: Broadway to Weidler Phase 1 (ODOT):** The MTIP formal amendment adds \$177.5 million of the OTC approved \$250 million to the construction phase. The project will replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler and supporting facilities and complete compatibility construction for follow-on packages.

- **Key 23682 - ~~I-405 and I-5 Stormwater Facilities~~ I-5 Rose Quarter: Phase 1A (ODOT):** The formal amendment adds \$60 million of approved OTC funding to the construction phase. The project will construct stormwater facilities for the east end of Fremont Bridge and ramps. Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area. The project scope is updated which results in a modification to the project name and description.

Exhibit A Tables (MTIP Worksheets) follow on the next pages and contain the specific project changes for the FFY 2025 February #1 Formal MTIP Amendment bundle of projects.

2024-2027 Metropolitan Transportation Improvement Program

Exhibit A to Resolution 25-5463

February #1 2025 Rose Quarter Formal Amendment Bundle Contents

Amendment Type: Formal/Full

Amendment #: FB25-05-FEB1

Total Number of Projects: 3

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
Category: Existing Projects Being Canceled in the 2024-27 MTIP: None				

Category: Amending Existing Projects to the 2024-2027 MTIP:

(#1) ODOT Key # 19071 MTIP ID 70784	ODOT	I-5 Rose Quarter Improvement Project	Key 19071 includes the non-construction required phases (e.g. PE, ROW, UR, and Cons). The overall project is on I-5 in Portland. It will complete multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities.	<u>ADD FUNDS:</u> The formal amendment adds \$12.5 million of Oregon Transportation Commission (OTC) approved funds to PE, UR, ROW and Other phases. The Other phase slips to 2026. The net programming change increases the project by 5.3%.
(#2) ODOT Key # 23672 MTIP ID 71444	ODOT	I-5 Rose Quarter: Broadway to Weidler Phase 1	Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and supporting facilities and complete compatibility construction for follow-on packages	<u>ADD FUNDS:</u> The formal amendment adds a total of \$250 million of OTC approved to the three existing Rose Quarter projects including Keys 19071, 23672, and 23682. For Key 23672, \$177,500,000 is being added to support the construction phase activities. The new funding was approved by OTC during their December 2024 and January 2025 meetings.

Key Number & MTIP ID	Lead Agency	Project Name	Project Description	Amendment Action
(#3) ODOT Key # 23682 MTIP ID 71443	ODOT	I-405 and I-5 Stormwater Facilities I-5 Rose Quarter: Phase 1A	Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project. Construct stormwater facilities for the east end of Fremont Bridge and ramps. Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area. PE completed in Key 19071	ADD FUNDS/SCOPE: The formal amendment updates the project segment name and adds \$60 million of the \$250 million OTC award to the construction phase. The project scope is adjusted and requires updates to the project name and description.

Proposed Amendment Review and Approval Steps	
February 2025 (FB25-05-FEB1) Rose Quarter Improvement Project Formal Amendment estimated processing and approval timing	
Note: The Rose Quarter MTIP Formal Amendment requires a 2-step approval process through the Metro TPAC and JPACT committees. The amendment bundle will be introduced to TPAC and JPACT during their February 2025 meetings. Amendment approval requests will occur during their March 2025. Meeting. Final approval from Metro Council is proposed to occurring during April 2025. Key processing milestone dates are shown below.	
Rose Quarter Improvement Project Formal MTIP Amendment Introduction and Overview	
Date	Action
Tuesday, February 4, 2025	Post amendment & begin 30+ day notification/comment period. (Comment period is February 4, 2025 to March 7, 2025.)
Friday, February 7, 2025	TPAC meeting – Rose Quarter formal amendment introduction and overview.
Thursday, February 20, 2025	JPACT Meeting – Rose Quarter amendment introduction and overview.
Rose Quarter Improvement Project Formal MTIP Amendment Approval Actions	
Friday, March 7, 2025	TPAC meeting – Rose Quarter approval recommendation to JPACT requested from TPAC.

Friday, March 7, 2025	Close 30+ day public notification/comment period. Note: Comments still can be submitted via written correspondence to Metro or providing testimony at TPAC, JPACT, or Metro Council meetings.
Thursday, March 20, 2025	JPACT meeting – Rose Quarter amendment approval request and final approval recommendation provided to Metro Council
Thursday, April 3, 2025*	Metro Council Meeting – Final Metro amendment approval request provided
Late April/early May 2025	Estimated final FHWA MTIP amendment approval and inclusion in the approved STIP completed.

* Note: The final Metro Council date is tentative and may change.



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD FUNDS
 Add OTC approved funds to PE,
 UR, and Other phases, slip the
 Other phase to 2026

Project #1

Project Details Summary							
ODOT Key #	19071	RFFA ID:	N/A	RTP ID:	10867 11176	RTP Approval Date:	11/30/2023
MTIP ID:	70784	CDS ID:	N/A	Bridge #:	S8588E N8588E	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-05-FEB1		STIP Amendment ID:		24-27-2202	

Summary of Amendment Changes Occurring:

The formal amendment adds new Oregon Transportation Commission (OTC) funding to the three existing Rose Quarter projects. For Key 19071, \$10 million of approved funding is added to the Preliminary Engineering (PE) phase. The ROW phase adds \$1 million and the Utility Relocation (UR) phase receives a \$1 million increase. The Other phase receives a \$500,000 boost. This totals \$12.5 million of new OTC approved funding. The Other phase is slipped from FFY 2025 to FFY 2026. The cost change increases the total programming from \$236,141,997 to \$248,641,997. This equals a 5.3% increase to the project. The new originates from a new \$250 million total allocation approved by OTC during their December 2024 and January 2025 meetings.

Project Name:	I-5 Rose Quarter Improvement Project						
Lead Agency:	ODOT	Applicant:	ODOT		Administrator:	ODOT	
Certified Agency Delivery:	No	Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes	

MTIP Worksheet/Exhibit A Contents for Key 19071			
Page(s)	Content	Page(s)	Content
1	Project identification and amendment purpose	7	Project limits and cross street references
2	Project descriptions and classifications	8-9	Amendments, RTP consistency review areas and goals
3	Programming details - Federal fund portion	10-11	Public comment period, fund code descriptions, STIP review
4	Programming details - State and local funds	12-13	RTP performance measures completed assessments
5-6	Funding composition and match ratio details	14-15	Project location map and project exhibit
6-7	Known committed funding summary		

Short Description:

On I-5 in Portland, complete multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities.

MTIP Detailed Description (Internal Metro use only):

On and around I-5 from MP 301.40 to MP 303.20, complete multiple system upgrades to help reduce congestion, improve safety and traffic operations, and support economic growth in the Portland Metro region with multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will: provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and the N/NE Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort. (NAE23 grant award \$450 million).

STIP Description:

The Rose Quarter investment will help reduce congestion, improve safety and traffic operations, and support economic growth in the Portland Metro region with multi-modal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will: provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and the N/NE Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	New Capacity - General Purpose	Capital Improvement
		Lane Modification or Reconfiguration	
		System Management and Operations	
	Highway - Bridge	New Capacity - General Purpose	
		Lane Modification or Reconfiguration	
	Highway - Bike	Protected Parallel Facility	
	Highway - Pedestrian	Protected Parallel Facility	
Highway - Other	Other Vehicle Operations		
ODOT Work Type:	MODERN		

Phase Funding and Programming

Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
NHPP Exempt	M002 MOE2	2016		\$ 3,805,500					\$ 3,805,500
AC-HB2017	ACP0	2016		\$ 82,998,000					\$ -
AC-HB2017	ACP0	2016		\$ 119,886,000					\$ 119,886,000
ADVCON (RQ)	ACP0	2016		\$ 9,222,000					\$ 9,222,000
AC-NAE23	ACP0	2016		\$ 30,000,000					\$ -
NAE23	NE01	2016		\$ 30,000,000					\$ 30,000,000
NHPP	Z001	2016		\$ 1,844,400					\$ 1,844,400
NHFP	Z460	2016		\$ 15,000,000					\$ 15,000,000
AC-HB2017	ACP0	2020			-\$ 10,072,002				\$ -
AC-HB2017	ACP0	2020			\$ 10,144,200				\$ 10,144,200
AC-NAE23	ACP0	2020			\$ 30,000,000				\$ 30,000,000
ADVCON (RQ)	ACP0	2020			\$ 922,200				\$ 922,200
AC-NAE23	ACP0	2025				-\$ 7,500,000			\$ -
NAE23	NE01	2025				\$ 7,500,000			\$ 7,500,000
ADVCON (RQ)	ACP0	2025				\$ 922,200			\$ 922,200
AC-NAE23	ACP0	2025						-\$ 250,000	\$ -
AC-NAE23	ACP0	2026						\$ 250,000	\$ 250,000
ADVCON (RQ)	ACP0	2026						\$ 461,100	\$ 461,100
Federal Totals:			\$ -	\$ 179,757,900	\$ 41,066,400	\$ 8,422,200	\$ -	\$ 711,100	\$ 229,957,600

Federal fund code notes:

1. AC-HB2017 = Advance Construction funds used as a funding placeholder which originate from authorized HB2017 funding for the project. The final conversion code could another type of eligible federal funds. This is why the advance construction are shown a federal funds.
2. ADVCON = Advance Construction funds. These funds are used as a generic funding placeholder until the final federal fund code is known and committed to the project. When this occurs the use of the Advance Construction fund type code (ADVCON and ACP0) will be converted to the final eligible fund code.
3. NHPP Exempt = Federal National Highway Performance Program funding that are not subject (or Exempt) from various federal-aid restrictions
4. NHPP = Federal National Highway Performance Program funds that are s subject to the usual federal-aid obligation limitations
5. NHFP = Federal National Highway Freight Program funds
6. NAE23 = Neighborhood Access Equity Grant awarded during the 2023. These funds are 100% federal. No required matching funds.

State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (NHPP EX)	Match	2016		\$ 321,045					\$ 321,045
State (ACHB2017)	Match	2016		\$ 7,002,000					\$ -
State (ACHB2017)	Match	2016		\$ 10,114,000					\$ 10,114,000
State (ACPO)	Match	2016		\$ 778,000					\$ 778,000
State	S010	2016		\$ 1,000,000					\$ 1,000,000
State (Z001)	Match	2016		\$ 155,600					\$ 155,600
NHPP (State)	Y001	2016		\$ 40,000,000					\$ -
State (Z460)	Match	2016		\$ 1,265,452					\$ 1,265,452
State (ACHB2017)	Match	2020			\$ 927,998				\$ -
State (ACHB2017)	Match	2020			\$ 855,800				\$ 855,800
State (ADVCON)	Match	2020			\$ 77,800				\$ 77,800
State (ADVCON)	Match	2025				\$ 77,800			\$ 77,800
State (ADVCON)	Match	2026						\$ 38,900	\$ 38,900
State Totals:			\$ -	\$ 13,634,097	\$ 933,600	\$ 77,800	\$ -	\$ 38,900	\$ 14,684,397
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Other	OTH0	2016		\$ 4,000,000					\$ 4,000,000
									\$ -
Local Totals:			\$ -	\$ 4,000,000	\$ -	\$ -		\$ -	\$ 4,000,000
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ 187,391,997	\$ 41,000,000	\$ 7,500,000	\$ -	\$ 250,000	\$ 236,141,997
Amended Programming Totals			\$ -	\$ 197,391,997	\$ 42,000,000	\$ 8,500,000	\$ -	\$ 750,000	\$ 248,641,997
Total Estimated Project Cost :									\$1.5B to \$1.9B
Total Cost in Year of Expenditure:									\$1.5B to \$1.9B

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	Yes and No	Programming only supports non-construction phase requirements. PE, ROW, UR, and Other phase programming is considered fully programmed. Partial construction phase programming is in Keys 23672 and 23682 (also part of the February #1 Formal Amendment bundle).					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ 10,000,000	\$ 1,000,000	\$ 1,000,000	\$ -	\$ 500,000	\$ 12,500,000
Phase Change Percent:	0.0%	5.34%	2.4%	13.33%	0.0%	200.0%	5.3%
Amended Phase Matching Funds:	\$ -	\$ 12,634,097	\$ 855,800	\$ 77,800	\$ -	\$ 38,900	\$ 13,606,597
Amended Phase Matching Percent:	N/A	6.57%	7.13%	7.78%	N/A	7.78%	

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ 179,757,900	\$ 41,066,400	\$ 8,422,200	\$ -	\$ 711,100	\$ 229,957,600
State	\$ -	\$ 13,634,097	\$ 933,600	\$ 77,800	\$ -	\$ 38,900	\$ 14,684,397
Local	\$ -	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000
Total	\$ -	\$ 197,391,997	\$ 42,000,000	\$ 8,500,000	\$ -	\$ 750,000	\$ 248,641,997

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	91.07%	97.78%	0.0%	0.0%	0.0%	92.49%
State	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	5.9%
Local	0.0%	2.03%	0.00%	0.0%	0.0%	0.0%	1.61%
Total	0.0%	93.1%	100.0%	0.0%	0.0%	0.0%	100.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	0.0%	72.3%	16.5%	3.4%	0.0%	0.3%	92.49%
State	0.0%	5.5%	0.4%	0.0%	0.0%	0.0%	5.9%
Local	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	1.61%
Total	0.0%	79.4%	16.9%	3.4%	0.0%	0.3%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ 197,391,997	\$ 42,000,000	\$ 8,500,000			Aid ID
Federal Funds Obligated:		\$ 179,757,900	\$ 41,066,400	\$ 8,422,200			S001(483)
EA Number:		PE002591	R9470000	U0000212			FHWA or FTA
Initial Obligation Date:		9/21/2015	9/4/2020	11/18/2024			FHWA
EA End Date:		12/31/2027	12/31/2029	12/31/2027			FMIS or TRAMS
Known Expenditures:		\$ 131,841,060	\$ 655,202	\$ -			FMIS
				Estimated Project Completion Date:		Not Specified	
Completion Date Notes:		Construction phases for Key 23682 is proposed to start in 2025 with construction in Key 23672 in 2027.					
Are federal funds being flex transferred to FTA?		No		If yes, expected FTA conversion code:		N/A	

Identified Funding Sources for Key 19071 (per the STIP Summary Report Financial Estimates Section)							
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes	
ODOT Enhance	PE	\$ 1,500,000	\$ 126,545	\$ -	\$ 1,626,545		
ODOT Region 1 Fix-It Program	PE	\$ 1,844,400	\$ 155,600	\$ -	\$ 2,000,000		
ODOT Statewide Fix-it Program	PE	\$ -	\$ 1,000,000	\$ -	\$ 1,000,000		
HB2017 Discretionary	PE	\$ 119,886,000	\$ 10,114,000	\$ -	\$ 130,000,000		
Local contributions	PE	\$ -	\$ -	\$ 4,000,000	\$ 4,000,000		
ODOT Region 1	PE	\$ 2,305,500	\$ 194,500	\$ -	\$ 2,500,000		
Rose Quarter	PE	\$ 9,222,000	\$ 778,000	\$ -	\$ 10,000,000	OTC approval December 2024	
SW Natl Hwy Freight (NHFP)	PE	\$ 15,000,000	\$ 1,265,452	\$ -	\$ 16,265,452	FHWA discretionary National Highway Freight Program	
USDOT Grants 2023	PE	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000	
Phase Totals:		\$ 179,757,900	\$ 13,634,097	\$ 4,000,000	\$ 197,391,997	\$ 197,391,997	
AC-HB2017 Discretionary	ROW	\$ 10,144,200	\$ 855,800	\$ -	\$ 11,000,000		
Rose Quarter	ROW	\$ 922,200	\$ 77,800	\$ -	\$ 1,000,000		
USDOT Grants 2023	ROW	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	Part of NAE grant award	
Phase Totals:		\$ 41,066,400	\$ 933,600	\$ -	\$ 42,000,000		
Rose Quarter	UR	\$ 922,200	\$ 77,800	\$ -	\$ 1,000,000	Added OTC December 2024 action	
USDOT Grants 2023	UR	\$ 7,500,000	\$ -	\$ -	\$ 7,500,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000	
Phase Totals:		\$ 8,422,200	\$ 77,800	\$ -	\$ 8,500,000		

					\$ -		
Rose Quarter	Other	\$ 461,100	\$ 38,900	\$ -	\$ 500,000	Added OTC December 2024 action	
USDOT Grants 2023	Other	\$ 250,000	\$ -	\$ -	\$ 250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000	
	Phase Totals:	\$ 711,100	\$ 38,900	\$ -	\$ 750,000		
Program Totals All Phases						Total	
					ODOT Enhance	\$ 1,626,545	
					ODOT Region 1 Fix-It Program	\$ 2,000,000	
					ODOT Statewide Fix-it Program	\$ 1,000,000	
					HB2017 Discretionary	\$ 141,000,000	
					Local contributions	\$ 4,000,000	
					ODOT Region 1	\$ 2,500,000	
					SW Natl Hwy Freight (NHFP)	\$ 16,265,452	
					Rose Quarter	\$ 12,500,000	Total OTC approval = \$250 million
					USDOT Grants 2023	\$ 67,750,000	Total grant award = \$450 million
					Total:	\$ 248,641,997	TPC estimate = \$1.5B to \$1.9B

1. What is the source of funding? **Various Federal discretionary plus ODOT state funds including HB2017 and specific ODOT funding programs.**
2. Does the amendment include changes or updates to the project funding? **Yes. New OTC approved funds (\$250 million total from their December 2024 meeting)) are being added to the MTIP.**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, via OTC approval during their 12-4-2024 meeting.**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **OTC approval was required.**
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? **Yes.**

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	I-5	301.2	303.4	2.2
Cross Streets	Route or Arterial	Cross Street	Cross Street	Cross Street	
	Interstate 5	Just north of N. Russell Street		South to the southbound ramp portion of the I-5/I-84 intersection	

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2016	Years Active	10	Project Status	7	Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated.	
Total Prior Amendments	11 (Since 2016)	Last Amendment	Formal	Date of Last Amendment	July 2024	Last MTIP Amend Num	JL24-11-JUL2
Last Amendment Action	<p>ADD PHASES and FUNDING: The formal amendment adds \$30 million from the new USDOT RCN/NAE23 grant award to ODOT to PE swaps out NAE23 funds in the ROW phase and adds a Utility Relocation (UR) phase plus adds an Other phase to the project</p>						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Yes. The project is a capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	No. The project is not exempt from a air conformity and transportation modeling analysis
Exemption Reference:	Not applicable.
Was an air analysis required as part of RTP inclusion?	Yes. The project completed a conformity assessment as part of the 2023 RTP Update
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	Yes. The project completed required transportation modeling analysis as part of the 2023 RTP Update.
Additional Completed Reviews:	As part of the February 2025 Formal MTIP Amendment, the project completed a special Performance Assessment Evaluation (PAE) to examine the expected performance benefits to the transportation system and to reconfirm the project as project is still consistent with the 2023 RTP.
RTP Constrained Project ID and Name:	RTP IDs: ID 10867: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (PE, NEPA, ROW) ID 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

RTP Project Description:	<p>ID 10867: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter</p> <p>ID 11176: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.</p>
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Additional RTP Consistency Check Areas	
1.	Is the project designated as a Transportation Control Measure? No.
2.	Is the project identified on the Congestion Management Process (CMP) plan? Yes.
3.	Is the project included as part of the approved: UPWP? No. Not applicable.
3a.	If yes, is an amendment required to the UPWP? No.
3b.	Can the project MTIP amendment proceed before the UPWP amendment? Yes.
3c.	What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable
4.	<p>Applicable RTP Goals:</p> <p><u>Goal # 1 - Mobility Options:</u> Objective 1.1 Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.</p> <p><u>Goal #2 - Safe System:</u> Objective 2.1 - Vision Zero: fatal and severe injury crashes for all modes of travel by 2035.</p> <p><u>Goal #3 - Equitable Transportation:</u> Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs</p>
5.	Does the project require a special performance assessment evaluation (PAE) as part of the MTIP amendment? Yes. The project is capacity enhancing and exceeds \$100 million in total project cost. A PAE has been complete as part of this amendment.

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Tuesday, February 4, 2025 to Friday, March 7, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Possibly. The nature of the submitted comments will determine any required follow-on comment reviews by Metro Communications Department staff, Council Office, JPACT, and Metro Council. Submitted comments will be logged and monitored from their on-line submissions to any testimony provided at committees, and from written correspondence submitted to Metro.**

Fund Codes References

Local	Local funds used to support the federal match or contributes to the phase cost.
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules. The use of a generic AC "ADVCON" indicates the expected federal conversion fund is not yet specified
AC-HB2017	Advance Construction placeholder funds that originate from the HB2017 legislation, but could result in a federal conversion code other than HB-2017
AC-NAE23	Advance Construction placeholder funds with the expected conversion code to be the federal Neighborhood Access Equity funding program
NAE23	Neighborhood Access and Equity (NAE) program: This program provides Federal funds for projects that improve walkability, safety, and affordable transportation access through context-sensitive strategies and address existing transportation facilities that create barriers to community connectivity or negative impacts on the human or natural environment, especially in disadvantaged or underserved communities. The program also provides funding for planning and capacity building activities in disadvantaged or underserved communities as well as funding for technical assistance to units of local government to facilitate efficient and effective contracting, design, and project delivery and to build capacity for delivering surface transportation projects. The "23" tag refers to the grant cycle award year.
NHFP	Federal National Highway Freight Program funding that supports the improvement of the efficient movement of freight on the National Highway Freight Network (NHFN) and support several goals, including the investment in infrastructure and operational improvements that strengthen economic competitiveness, reduce congestion, reduce the cost of freight transportation, improve reliability, and increase productivity; improving the safety, security, efficiency, and resiliency of freight transportation in rural and urban areas; improving the state of good repair of the NHFN; using innovation and advanced technology to improve NHFN safety, efficiency, and reliability; improving the efficiency and productivity of the NHFN; improving State flexibility to support multi-State corridor planning and address highway freight connectivity

NHPP	A federal funding source (FHWA based) appropriated to the State DOT. The purposes of this program are to provide support for the condition and performance of the National Highway System (NHS); to provide support for the construction of new facilities on the NHS; to ensure that investments of Federal-aid funds in highway construction are directed to support progress toward the achievement of performance targets established in a State's asset management plan for the NHS; and [NEW] to provide support for activities to increase the resiliency of the NHS to mitigate the cost of damages from sea level rise, extreme weather events, flooding, wildfires, or other natural disasters.
Other	General local or state funds committed to the project above the required minimum match to the federal funds. Other funds may also represent the lead agency's ability to fund the entire phase with local funds.
State	General state funds used usually in support of the required minimum match to the federal funds. They also can be added overmatch to the project phase.

Response:

Programmed Funding	\$ 858,000,000
State Funds	\$ 135,000,000
Federal Formula	\$ 23,000,000
FY23 RCN Grant Award	\$ 450,000,000
OTC-Approved Investment (December 2024 Urban Mobility Strategy Finance Plan, pending TIP Amendment)	\$ 250,000,000
Total Project Cost	\$1.5 B - \$1.9B
Funding Gap	\$642M - \$1.042B

Key Number: 19071 **2024-2027 STIP**

Project Name: I-5 Rose Quarter Improvement Project **(DRAFT AMENDMENT PP**

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
PE	ACPO	ADVANCE CONSTRUCT PR	70.92%	140,000,000.00	92.22%	129,108,000.00	7.78%	10,892,000.00	0.00%	0.00
	M002	NHPP-EXEMPT	0.81%	1,598,736.16	92.22%	1,474,354.49	7.78%	124,381.67	0.00%	0.00
	M0E2	NATL HWY PERF EXMPT	1.28%	2,527,808.84	92.22%	2,331,145.31	7.78%	196,663.53	0.00%	0.00
	NE01	Neighborhood Access Equity Grant	15.20%	30,000,000.00	100.00%	30,000,000.00	0.00%	0.00	0.00%	0.00
	OTH0	OTHER THAN STATE OR	2.03%	4,000,000.00	0.00%	0.00	0.00%	0.00	100.00%	4,000,000.00
	S010	STATE	0.51%	1,000,000.00	0.00%	0.00	100.00%	1,000,000.00	0.00%	0.00
	Z001	NATIONAL HIGHWAY PERF FAST	1.01%	2,000,000.00	92.22%	1,844,400.00	7.78%	155,600.00	0.00%	0.00
	Z460	NATIONAL HWY FREIGHT PROGRAM	8.24%	16,265,452.18	92.22%	15,000,000.00	7.78%	1,265,452.18	0.00%	0.00
PE Totals			100.00%	197,391,997.18		179,757,899.80		13,634,097.38		4,000,000.00
RW	ACPO	ADVANCE CONSTRUCT PR	100.00%	41,000,000.00	92.22%	37,810,200.00	7.78%	3,189,800.00	0.00%	0.00
	RW Totals			100.00%	41,000,000.00		37,810,200.00		3,189,800.00	0.00
UR	ACPO	ADVANCE CONSTRUCT PR	11.76%	1,000,000.00	92.22%	922,200.00	7.78%	77,800.00	0.00%	0.00
	NE01	Neighborhood Access Equity Grant	88.24%	7,500,000.00	100.00%	7,500,000.00	0.00%	0.00	0.00%	0.00
	UR Totals			100.00%	8,500,000.00		8,422,200.00		77,800.00	0.00
OT	ACPO	ADVANCE CONSTRUCT PR	100.00%	750,000.00	0.00%	711,100.00	0.00%	38,900.00	0.00%	0.00
	OT Totals			100.00%	750,000.00		711,100.00		38,900.00	0.00
Grand Totals					247,641,997.18		226,701,399.80		16,940,597.38	4,000,000.00

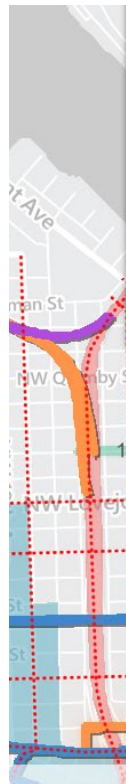
Modeling Network , NHS, and Performance Measure Designations

National Highway System and Functional Classification Designations

System	Y/N	Route	Designation
NHS Project	Yes	Interstate 5	Interstate
Functional Classification	Yes	Interstate 5	1 = Urban Interstate
Federal Aid Eligible Facility	Yes	Interstate 5	Interstate

Anticipated Required Performance Measurements Monitoring

Rose Quarter Improvement Project under RTP ID 10867



This project (RTP # 10867) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County.**

Description: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter.

Project Time Frame: 2023-2030

Estimated Cost: \$338,000,000

This project **is** located in an **equity focus area.**

This project **is not** an **equity priority project.**

This project **will not** reduce **greenhouse gas emissions.**

This project **does** have identified **safety benefits.**

This project **is** located in a **high injury corridor.**

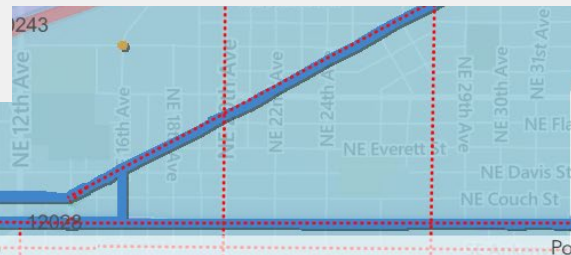
This project **is** located on the **regional emergency transportation/state seismic lifeline route.**

This project **is** located in a **current job center.**

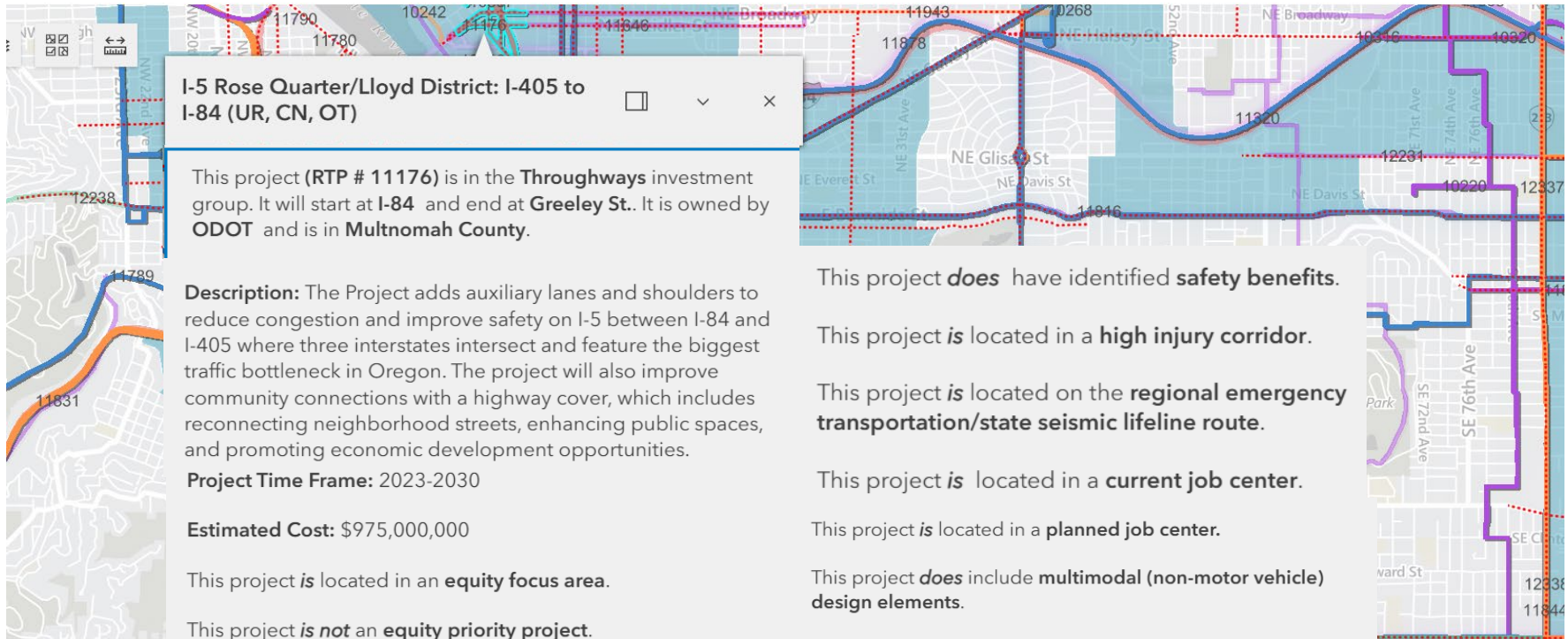
This project **is** located in a **planned job center.**

This project **does** include **multimodal (non-motor vehicle) design elements.**

This project **does not** address a **multimodal gap** in the transportation system.



Rose Quarter Improvement Project under RTP ID 11176



I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

This project (RTP # 11176) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County**.

Description: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.

Project Time Frame: 2023-2030

Estimated Cost: \$975,000,000

This project *is* located in an **equity focus area**.

This project *is not* an **equity priority project**.

This project *will not* **reduce greenhouse gas emissions**.

This project *does* have identified **safety benefits**.

This project *is* located in a **high injury corridor**.

This project *is* located on the **regional emergency transportation/state seismic lifeline route**.

This project *is* located in a **current job center**.

This project *is* located in a **planned job center**.

This project *does* include **multimodal (non-motor vehicle) design elements**.

This project *does not* **address a multimodal gap** in the transportation system.

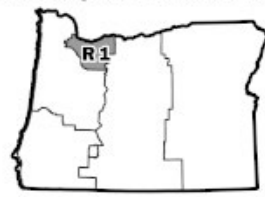
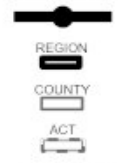
K23682

Agenda Item G, Attachment 01

I-5 ROSE QUARTER: PHASE 1A

Attachment 4: I-5 Rose Quarter January 2025 OTC Item

PROJECT LOCATION



DATE: 12/11/2024
 PROJECT NO: 23-52
 ODOT | GIS UNIT

This product is a professional product and may not be suitable for legal engineering, or other professional purposes. Users of this product should exercise care and verify the accuracy of information. The liability of this information is assumed by the user. For more information, visit the website at http://www.oregon.gov/odot/odot_gis/odot_gis_products/odot_gis_products.htm



FIRST PHASES FOR ROSE QUARTER DELIVERY

\$850 MILLION IN FUNDING PROVIDES:



Scope	Benefit
<ul style="list-style-type: none"> • Build first highway cover section • Build full southbound aux lane and shoulders, partial extension of existing northbound aux lane and shoulder under highway cover • Construct sign bridges & Intelligent Transportation Systems • Bridge work in southern project area • Stormwater facilities near I-405 • Widen Holladay/Hassalo bridge and build walls • Project planning, design, right of way and utility relocation 	<ul style="list-style-type: none"> • Highway cover at Broadway/Weidler, with multimodal improvements • Completes full extension of the southbound aux lane, completing a continuous auxiliary lane between I-405 and Morrison Bridge exit • Extends existing northbound auxiliary lane from I-84 to north of Weidler • Provides signage necessary for tunnel safety and improved highway operations, supports full project construction signage needs • Preserves I-5 bridge structures • Provides required stormwater facilities for ODOT's Portland Harbor agreement



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD FUNDS
 Add OTC approved funds to
 construction phase

Project #2

Project Details Summary							
ODOT Key #	23672	RFFA ID:	N/A	RTP ID:	10867 11176	RTP Approval Date:	11/30/2023
MTIP ID:	71444	CDS ID:	N/A	Bridge #:	S8588E N8588E	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-05-FEB1		STIP Amendment ID:	24-27-2200		

Summary of Amendment Changes Occurring:
 The formal amendment adds a total of \$250 million of Oregon Transportation Commission (OTC) to the three existing Rose Quarter projects that include Keys 19071, 23672, and 23682. For Key 23672, \$177,500,000 is being added to support the construction phase activities. The new funding originates from a new \$250 million total allocation approved by OTC during their December 2024 and January 2025 meetings.

Project Name:	I-5 Rose Quarter: Broadway to Weidler Phase 1						
Lead Agency:	ODOT		Applicant:	ODOT		Administrator:	ODOT
Certified Agency Delivery:	No		Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes

MTIP Worksheet/Exhibit A Contents for Key 19071			
Page(s)	Content	Page(s)	Content
1	Project identification and amendment purpose	8	Public comment period, and fund code descriptions
2	Project descriptions and classifications	9	Programming and cost estimate summaries
3	Programming details - Federal, State, and Local	10-11	RTP performance measures completed assessments
4	Funding composition and match ratio details	12-13	Project location maps and scope description and exhibits
5	Committed Funding Summary and limits		
6-7	Amendments and RTP consistency review areas		

Short Description:

Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and supporting facilities and complete compatibility construction for follow-on packages

MTIP Detailed Description (Internal Metro use only):

On I-5 from MP 301.40 to MP 303.20 in Portland, Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement Project (Chiles project to Key 19071, USDOT NAE23 grant funds for construction)

STIP Description:

Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. Construct portion of NB & SB auxiliary lanes. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement project.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	Lane Modification or Reconfiguration	Capital Improvement
ODOT Work Type:	MODERN		

Phase Funding and Programming									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
AC-NAE23	ACPO	2025					\$ 382,250,000		\$ 382,250,000
ADVCON	ACPO	2025					\$ 163,690,500		\$ 163,690,500
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ 545,940,500	\$ -	\$ 545,940,500
Federal fund code notes:									
1. ADVCON = Advance Construction funds. These funds are used as a generic funding placeholder until the final federal fund code is known and committed to the project. When this occurs the use of the Advance Construction fund type code (ADVCON and ACPO) will be converted to the final eligible fund code. For the above programming, ADVCON represents a portion of the new \$250 million approved by OTC for the Rose Quarter project during their December 2024 meeting									
2. NAE23 = Neighborhood Access Equity Grant awarded during the 2023. These funds are 100% federal. No required matching funds.									
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (ADVCON-RQ)	Match	2025					\$ 13,809,500		\$ 13,809,500
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ 13,809,500	\$ -	\$ 13,809,500
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ -	\$ -	\$ -	\$ 382,250,000	\$ -	\$ 382,250,000
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ 559,750,000	\$ -	\$ 559,750,000
Total Estimated Project Cost (RTP entries for 10867 and 11176):									\$1.5B to \$1.9B
Total Cost in Year of Expenditure:									\$1.5B to \$1.9B

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	Yes & No	The construction phase funding represents the approved funding for this phase segment. The segment funding is fully programmed. Additional Rose Quarter funding is programmed in Keys 19071 and 23682.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ -	\$ -	\$ -	\$ 177,500,000	\$ -	\$ 177,500,000
Phase Change Percent:	0.0%	0.00%	0.0%	0.00%	46.4%	0.0%	46.4%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ 13,809,500	\$ -	\$ 13,809,500
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	7.78%	N/A	7.78%
Note: Match ratios appear lower than the usual required minimums due to the inclusion of the NAE23 grant funds which are 100% federal.							

Phase Programming Summary Totals							
Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ 545,940,500	\$ -	\$ 545,940,500
State	\$ -	\$ -	\$ -	\$ -	\$ 13,809,500	\$ -	\$ 13,809,500
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ 559,750,000	\$ -	\$ 559,750,000

Phase Composition Percentages							
Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	97.5%	0.0%	97.53%
State	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	2.5%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
Total	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Phase Programming Percentage							
Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	97.5%	0.0%	97.53%
State	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	2.5%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
Total	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ -	\$ -	\$ -			Aid ID
Federal Funds Obligated:		\$ -	\$ -	\$ -			S001(483)
EA Number:		PE002591	R9470000	U0000212			FHWA or FTA
Initial Obligation Date:		9/21/2015	9/4/2020	11/18/2024			FHWA
EA End Date:		12/31/2027	12/31/2029	12/31/2027			FMIS or TRAMS
Known Expenditures:		\$ 131,841,060	\$ 655,202	\$ -			FMIS
					Estimated Project Completion Date:		Not Specified
Completion Date Notes:		Construction is proposed to start in 2027					
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:		N/A		

Identified Funding Sources for Key 23672 (per the STIP Summary Report Financial Estimates Section)						
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes
Rose Quarter	Cons	\$ 163,690,500	\$ 13,809,500	\$ -	\$ 177,500,000	OTC approval December 2024. Total OTC approval = \$250 million
USDOT Grants 2023	Cons	\$ 382,250,000	\$ -	\$ -	\$ 382,250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 545,940,500	\$ 13,809,500	\$ -	\$ 559,750,000	

1. What is the source of funding? **Federal NAE/RCP grant funds plus OTC approved funds.**
2. Does the amendment include changes or updates to the project funding? **Yes. New OTC approved funds (\$250 million total from their December 2024 meeting)) are being added to the MTIP.**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, via OTC approval during their 12-4-2024 meeting.**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **OTC approval was required.**
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? **Yes.**

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	I-5	301.2	303.4	2.2
Cross Streets	Route or Arterial	Cross Street	Cross Street	Cross Street	
	Interstate 5	Just north of N. Russell Street		South to the southbound ramp portion of the I-5/I-84 intersection	

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2024	Years Active	1	Project Status	7	Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated.	
Total Prior Amendments	0	Last Amendment	Formal	Date of Last Amendment	July 2024	Last MTIP Amend Num	JL24-11-JUL2
Last Amendment Action	ADD PHASES and FUNDING: The formal amendment adds \$382 million from the new USDOT RCN/NAE23 grant award to ODOT to support construction activities.						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Yes. The project is a capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	No. The project is not exempt from a air conformity and transportation modeling analysis
Exemption Reference:	Not applicable.
Was an air analysis required as part of RTP inclusion?	Yes. The project completed a conformity assessment as part of the 2023 RTP Update
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	Yes. The project completed required transportation modeling analysis as part of the 2023 RTP Update.
Additional Completed Reviews:	As part of the February 2025 Formal MTIP Amendment, the project completed a special Performance Assessment Evaluation (PAE) to examine the expected performance benefits to the transportation system and to reconfirm the project as project is still consistent with the 2023 RTP.
RTP Constrained Project ID and Name:	RTP IDs: ID 10867: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (PE, NEPA, ROW) ID 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

RTP Project Description:	<p>ID 10867: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter</p> <p>ID 11176: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.</p>
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Additional RTP Consistency Check Areas	
1.	Is the project designated as a Transportation Control Measure? No.
2.	Is the project identified on the Congestion Management Process (CMP) plan? Yes.
3.	Is the project included as part of the approved: UPWP? No. Not applicable.
3a.	If yes, is an amendment required to the UPWP? No.
3b.	Can the project MTIP amendment proceed before the UPWP amendment? Yes.
3c.	What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable
4.	<p>Applicable RTP Goals:</p> <p><u>Goal # 1 - Mobility Options:</u> Objective 1.1 Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.</p> <p><u>Goal #2 - Safe System:</u> Objective 2.1 - Vision Zero: fatal and severe injury crashes for all modes of travel by 2035.</p> <p><u>Goal #3 - Equitable Transportation:</u> Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs</p>
5.	Does the project require a special performance assessment evaluation (PAE) as part of the MTIP amendment? Yes. The project is capacity enhancing and exceeds \$100 million in total project cost. A PAE has been complete as part of this amendment.

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Tuesday, February 4, 2025 to Friday, March 7, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Possibly. The nature of the submitted comments will determine any required follow-on comment reviews by Metro Communications Department staff, Council Office, JPACT, and Metro Council. Submitted comments will be logged and monitored from their on-line submissions to any testimony provided at committees, and from written correspondence submitted to Metro.**

Fund Codes References

Local	Local funds used to support the federal match or contributes to the phase cost.
Advance Construction ADVCON (AC funds)	A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules. The use of a generic AC "ADVCON" indicates the expected federal conversion fund is not yet specified
AC-NAE23	Advance Construction placeholder funds with the expected conversion code to be the federal Neighborhood Access Equity funding program
NAE23	Neighborhood Access and Equity (NAE) program: This program provides Federal funds for projects that improve walkability, safety, and affordable transportation access through context-sensitive strategies and address existing transportation facilities that create barriers to community connectivity or negative impacts on the human or natural environment, especially in disadvantaged or underserved communities. The program also provides funding for planning and capacity building activities in disadvantaged or underserved communities as well as funding for technical assistance to units of local government to facilitate efficient and effective contracting, design, and project delivery and to build capacity for delivering surface transportation projects. The "23" tag refers to the grant cycle award year.
State	General state funds used usually in support of the required minimum match to the federal funds. They also can be added overmatch to the project phase.

STIP Programming Summary

Key Number: **23672**

2024-2027 STIP

Project Name: **I-5 Rose Quarter: Broadway to Weidler Phase 1** (DRAFT AMENDMENT DR

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
CN	ACPO	ADVANCE CONSTRUCT PR	100.00%	559,750,000.00	0.00%	545,940,500.00	0.00%	13,809,500.00	0.00%	0.00
	CN Totals		100.00%	559,750,000.00		545,940,500.00		13,809,500.00		0.00
Grand Totals						545,940,500.00		13,809,500.00		0.00

Rose Quarter Full Project Summary Cost Estimate

Key 23672 Broadway to Weidler Construction Phase Summary Cost Estimate

Response:

Programmed Funding	\$ 858,000,000
State Funds	\$ 135,000,000
Federal Formula	\$ 23,000,000
FY23 RCN Grant Award	\$ 450,000,000
OTC-Approved Investment (December 2024 Urban Mobility Strategy Finance Plan, pending TIP Amendment)	\$ 250,000,000
Total Project Cost	\$1.5 B - \$1.9B
Funding Gap	\$642M - \$1.042B

I-5 Rose Quarter: Broadway to Weidler Phase 1 (ODOT K23672, MTIP ID 71444, RTP ID 11176)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	NA	\$0	\$0
Right of Way	NA	\$0	\$0
Utility Relocation	NA	\$0	\$0
Construction	2025	\$382,250,000	\$559,750,000
Other	NA	\$0	\$0
TOTAL		\$382,250,000	\$559,750,000

Broadway to Weidler Phase 1 - \$559.75 million:

Funded with \$450 million in awarded 2023 Reconnecting Communities Grant funds from the USDOT (STIP KN 23682) and an additional \$177.5 million from the OTC appropriation for the Urban Mobility Strategy Finance Plan update approved on December 4, 2024.

Modeling Network , NHS, and Performance Measure Designations

National Highway System and Functional Classification Designations

System	Y/N	Route	Designation
NHS Project	Yes	Interstate 5	Interstate
Functional Classification	Yes	Interstate 5	1 = Urban Interstate
Federal Aid Eligible Facility	Yes	Interstate 5	Interstate

Anticipated Required Performance Measurements Monitoring

Rose Quarter Improvement Project under RTP ID 10867



This project (RTP # 10867) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County.**

Description: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter.

Project Time Frame: 2023-2030

Estimated Cost: \$338,000,000

This project **is** located in an **equity focus area.**

This project **is not** an **equity priority project.**

This project **will not reduce** **greenhouse gas emissions.**

This project **does** have identified **safety benefits.**

This project **is** located in a **high injury corridor.**

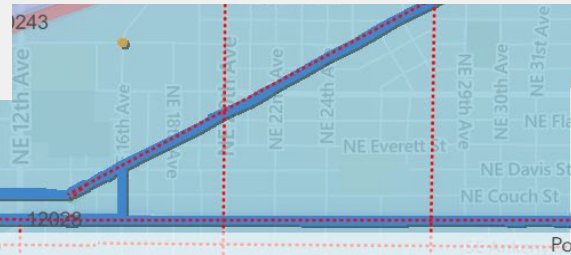
This project **is** located on the **regional emergency transportation/state seismic lifeline route.**

This project **is** located in a **current job center.**

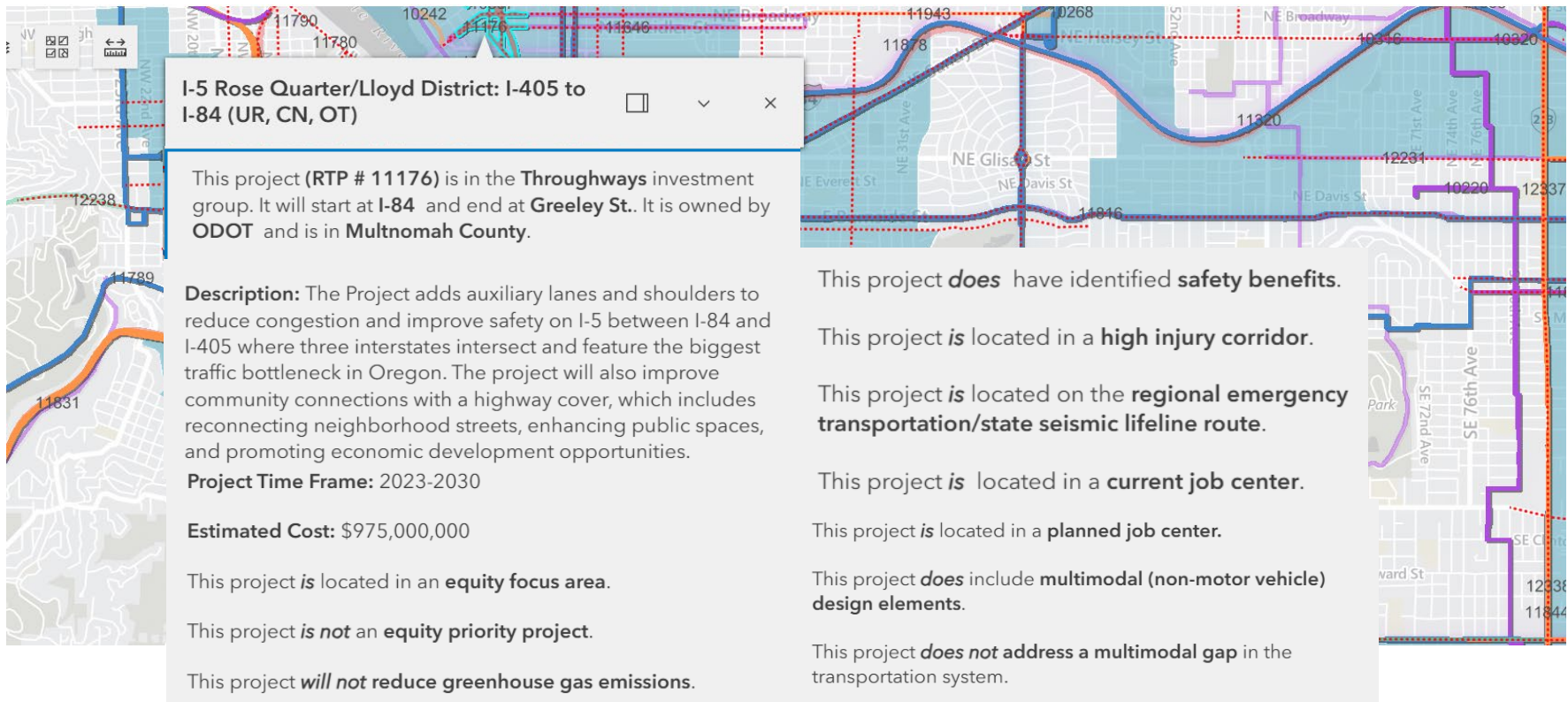
This project **is** located in a **planned job center.**

This project **does** include **multimodal (non-motor vehicle) design elements.**

This project **does not** address a **multimodal gap** in the transportation system.



Rose Quarter Improvement Project under RTP ID 11176



I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

This project (RTP # 11176) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County**.

Description: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.

Project Time Frame: 2023-2030

Estimated Cost: \$975,000,000

This project **is** located in an **equity focus area**.

This project **is not** an **equity priority project**.

This project **will not reduce greenhouse gas emissions**.

This project **does** have identified **safety benefits**.

This project **is** located in a **high injury corridor**.

This project **is** located on the **regional emergency transportation/state seismic lifeline route**.

This project **is** located in a **current job center**.

This project **is** located in a **planned job center**.

This project **does** include **multimodal (non-motor vehicle) design elements**.

This project **does not address a multimodal gap** in the transportation system.

Depiction of Phase 1A (Blue) and Broadway to Weidler Phase 1 (Orange and Purple) Improvements



Summary of planned improvements - K23672 I-5 Rose Quarter: Broadway to Weidler Phase 1

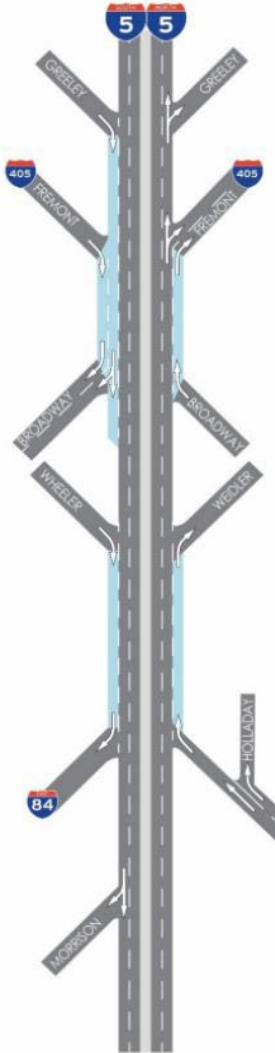
With the increase of \$177,500,000 for the construction phase, the original scope of building the initial portion of the highway cover as funded by the U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant will be expanded. The added scope will be to:

- Construct an added portion of the highway cover so that the first portion of the cover to be constructed would be between the cover's southern portal (south of Weidler) to north of the Broadway structure
- Include removing and replacing the Broadway, Weidler and Williams structures)
- Construct initial portions of the I-5 safety and operational improvements:
 - Including widening the Holladay/Hassalo bridge and build walls
 - Building the full southbound auxiliary lane and shoulders
 - Extending a portion of the existing northbound auxiliary lane and shoulders under the highway cover area,
 - Construct two sign bridges and associated Intelligent Transportation Systems.

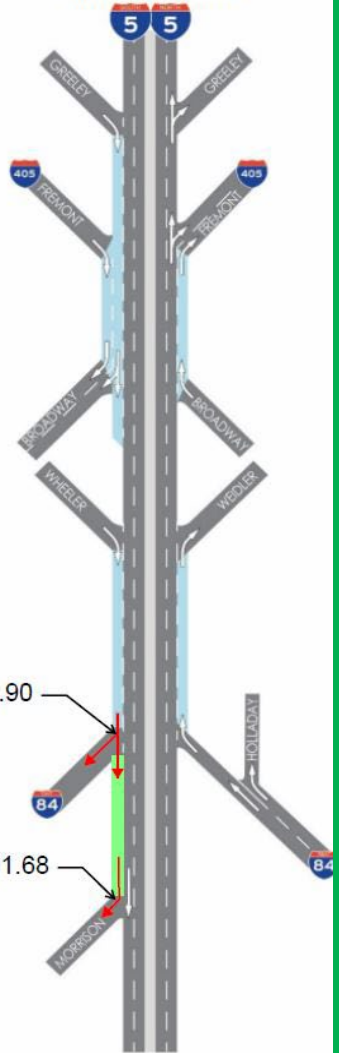
Construction is proposed to begin by 2027.

Key 23672 Proposed I-5 System Upgrades

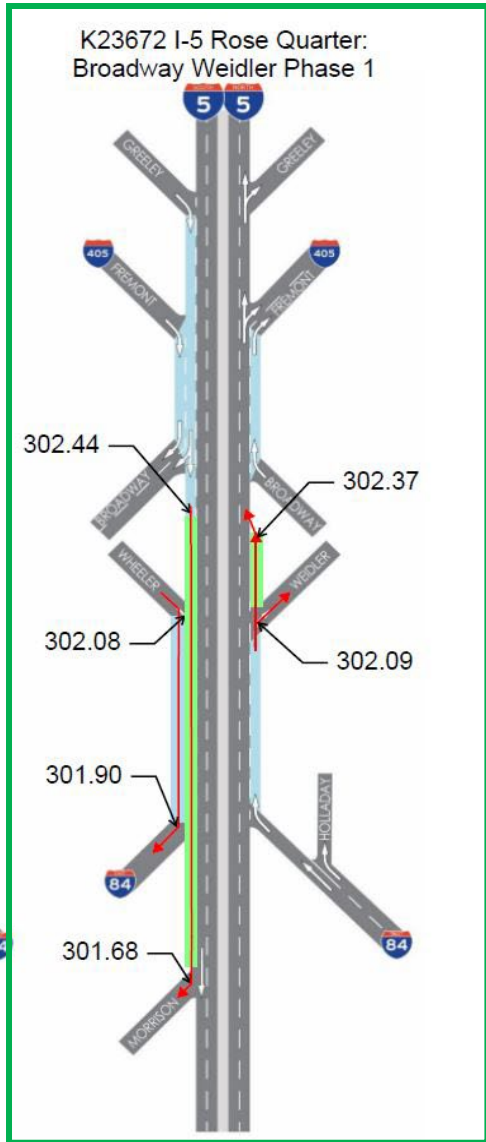
Existing Conditions



K23682 I-5 Rose Quarter: Phase 1A



K23672 I-5 Rose Quarter: Broadway Weidler Phase 1



Legend: Existing I-5 Travel Lanes (Grey)
New Auxiliary Lanes (Green)

Existing Auxiliary Lanes (Light Blue)

Note: All mile points labeled based on Hwy ID 001, Roadway ID #1 (I-5 SB)



Metro
2024-27 Metropolitan Transportation Improvement Program (MTIP)
PROJECT AMENDMENT DETAIL WORKSHEET
Federal Fiscal Year 2025

MTIP Formal Amendment
ADD FUNDS/SCOPE
 Add OTC approved funds, update
 name and description

Project #3

Project Details Summary							
ODOT Key #	23682	RFFA ID:	N/A	RTP ID:	10867 11176	RTP Approval Date:	11/30/2023
MTIP ID:	71443	CDS ID:	N/A	Bridge #:	S8588E N8588E	FTA Flex & Conversion Code	No
MTIP Amendment ID:		FB25-05-FEB1		STIP Amendment ID:	24-27-2201		

Summary of Amendment Changes Occurring:
 The formal amendment updates the project segment name and adds \$60 million of the \$250 million OTC award to the construction phase. The new originates from a new \$250 million total allocation approved by OTC during their December 2024 meeting. A project scope adjustment is also occurring resulting in an update to the project name and description.

Project Name:	I-405 and I-5 Stormwater Facilities I-5 Rose Quarter: Phase 1A						
Lead Agency:	ODOT		Applicant:	ODOT		Administrator:	ODOT
Certified Agency Delivery:	No		Non-Certified Agency Delivery:	No		Delivery as Direct Recipient:	Yes

MTIP Worksheet/Exhibit A Contents for Key 23682			
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5	Committed Funding Summary and limits		
6-7	Amendments and RTP consistency review areas		

Short Description:

~~Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.~~

Construct stormwater facilities for the east end of Fremont Bridge and ramps. Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area. PE completed in Key 19071

MTIP Detailed Description (Internal Metro use only):

On I-5 from ~~MP 301.40 to MP 303.20~~ **MP 301.20 to MP 303.40** in Portland, Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. **Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area.** Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.

STIP Description:

Construct stormwater facilities for the east end of Fremont Bridge and ramps to be in compliance with the Portland Harbor Settlement Agreement. Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area. Preliminary design activities have been completed under project key 19071 I-5 Rose Quarter Improvement Project.

Project Classification Details			
Project Type	Category	Features	System Investment Type
Highway	Highway - Motor Vehicle	Lane Modification or Reconfiguration	Capital Improvement
ODOT Work Type:	BRIDGE		

Phase Funding and Programming									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation (UR)	Construction (Cons)	Other	Total
Federal Funds									
AC-HB2017	ACPO	2025					\$ 4,611,000		\$ 4,611,000
ADVCON	ACPO	2025					\$ 55,332,000		\$ 55,332,000
									\$ -
Federal Totals:			\$ -	\$ -	\$ -	\$ -	\$ 59,943,000	\$ -	\$ 59,943,000
Federal fund code notes:									
1. ADVCON = Advance Construction funds. These funds are used as a generic funding placeholder until the final federal fund code is known and committed to the project. When this occurs the use of the Advance Construction fund type code (ADVCON and ACPO) will be converted to the final eligible fund code. For the above programming, ADVCON represents a portion of the new \$250 million approved by OTC for the Rose Quarter project during their December 2024 meeting									
2. NAE23 = Neighborhood Access Equity Grant awarded during the 2023. These funds are 100% federal. No required matching funds.									
State Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
State (ACHB2017)	Match	2025					\$ 389,000		\$ 389,000
State (RCADVCON)	Match	2025					\$ 4,668,000		\$ 4,668,000
									\$ -
State Totals:			\$ -	\$ -	\$ -	\$ -	\$ 5,057,000	\$ -	\$ 5,057,000
Local Funds									
Fund Type	Fund Code	Year	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
									\$ -
									\$ -
Local Totals:			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Phase Totals			Planning	PE	ROW	UR	Cons	Other	Total
Existing Programming Totals:			\$ -	\$ -	\$ -	\$ -	\$ 5,000,000	\$ -	\$ 5,000,000
Amended Programming Totals			\$ -	\$ -	\$ -	\$ -	\$ 65,000,000	\$ -	\$ 65,000,000
Total Estimated Project Cost:									\$1.5B to \$1.9B
Total Cost in Year of Expenditure:									\$1.5B to \$1.9B

Programming Summary	Yes/No	Reason if short Programmed					
Is the project short programmed?	Yes & No	The construction phase funding represents the approved funding for this phase segment. The segment funding is fully programmed. Additional Rose Quarter funding is programmed in Keys 19071 and 23672.					
Programming Adjustments Details	Planning	PE	ROW	UR	Cons	Other	Totals
Phase Programming Change:	\$ -	\$ -	\$ -	\$ -	\$ 60,000,000	\$ -	\$ 60,000,000
Phase Change Percent:	0.0%	0.00%	0.0%	0.00%	1200.0%	0.0%	1200.0%
Amended Phase Matching Funds:	\$ -	\$ -	\$ -	\$ -	\$ 5,057,000	\$ -	\$ 5,057,000
Amended Phase Matching Percent:	N/A	N/A	N/A	N/A	7.78%	N/A	8.37%
Note: Match ratios appear lower than the usual required minimums due to the inclusion of the NAE23 grant funds which are 100% federal.							

Phase Programming Summary Totals

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	\$ -	\$ -	\$ -	\$ -	\$ 59,943,000	\$ -	\$ 59,943,000
State	\$ -	\$ -	\$ -	\$ -	\$ 5,057,000	\$ -	\$ 5,057,000
Local	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ 65,000,000	\$ -	\$ 65,000,000

Phase Composition Percentages

Fund Type	Planning	PE	ROW	UR	Cons	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	92.2%	0.0%	92.22%
State	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	7.8%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
Total	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Phase Programming Percentage

Fund Category	Planning	Preliminary Engineering (PE)	Right of Way (ROW)	Utility Relocation	Construction	Other	Total
Federal	0.0%	0.0%	0.0%	0.0%	92.2%	0.0%	92.22%
State	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	7.8%
Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%
Total	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Project Phase Obligation History							
Item	Planning	PE	ROW	UR	Cons	Other	Federal
Total Funds Obligated		\$ -	\$ -	\$ -			Aid ID
Federal Funds Obligated:		\$ -	\$ -	\$ -			S001(483)
EA Number:		PE002591	R9470000	U0000212			FHWA or FTA
Initial Obligation Date:		9/21/2015	9/4/2020	11/18/2024			FHWA
EA End Date:		12/31/2027	12/31/2029	12/31/2027			FMIS or TRAMS
Known Expenditures:		\$ 131,841,060	\$ 655,202	\$ -			FMIS
					Estimated Project Completion Date:		Not Specified
Completion Date Notes:		Construction phase is proposed to begin in 2025					
Are federal funds being flex transferred to FTA?		No	If yes, expected FTA conversion code:		N/A		

Identified Funding Sources for Key 23682 (per the STIP Summary Report Financial Estimates Section)						
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes
Rose Quarter	Cons	\$ 55,332,000	\$ 4,668,000	\$ -	\$ 60,000,000	OTC approval December 2024. Total OTC approval = \$250 million
USDOT Grants 2023	Cons	\$ 4,611,000	\$ 389,000	\$ -	\$ 5,000,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 59,943,000	\$ 5,057,000	\$ -	\$ 65,000,000	

1. What is the source of funding? **HB2017 authorized funding plus OTC approved funds.**
2. Does the amendment include changes or updates to the project funding? **Yes. New OTC approved funds (\$250 million total from their December 2024 meeting)) are being added to the MTIP.**
3. Was proof-of-funding documentation provided to verify the funding change? **Yes, via OTC approval during their 12-4-2024 meeting.**
4. Did the funding change require OTC, ODOT Director, or ODOT program manager approval? **OTC approval was required.**
5. Has the fiscal constraint requirement been properly demonstrated and satisfied as part of the MTIP amendment? **Yes.**

Project Location References					
On State Highway	Yes/No	Route	MP Begin	MP End	Length
	Yes	I-5	301.40 301.20	303.20 303.40	2.20
Cross Streets	Route or Arterial	Cross Street	Cross Street		
	Interstate 5	Just north of N. Russell Street	South to the southbound ramp portion of the I-5/I-84 intersection		

Summary of MTIP Programming and Last Formal/Full Amendment or Administrative Modification							
1st Year Programmed	2024	Years Active	1	Project Status	7	Construction activities or project implementation activities (e.g. for transit and ITS type projects) initiated.	
Total Prior Amendments	1	Last Amendment	Formal	Date of Last Amendment	July 2024	Last MTIP Amend Num	JL24-11-JUL2
Last Amendment Action	<p>ADD NEW PROJECT: Add new child project to the 2024-27 MTIP in support of the Rose Quarter Improvement Project in Key 19071. Funding is from canceled project Key 21219.</p>						

RTP Air Quality Conformity and Transportation Modeling Designations	
Is this a capacity enhancing or non-capacity enhancing project?	Yes. The project is a capacity enhancing project
Is the project exempt from a conformity determination per 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3?	No. The project is not exempt from a air conformity and transportation modeling analysis
Exemption Reference:	Not applicable.
Was an air analysis required as part of RTP inclusion?	Yes. The project completed a conformity assessment as part of the 2023 RTP Update
If capacity enhancing, was transportation modeling analysis completed as part of RTP inclusion?	Yes. The project completed required transportation modeling analysis as part of the 2023 RTP Update.
Additional Completed Reviews:	As part of the February 2025 Formal MTIP Amendment, the project completed a special Performance Assessment Evaluation (PAE) to examine the expected performance benefits to the transportation system and to reconfirm the project as project is still consistent with the 2023 RTP.
RTP Constrained Project ID and Name:	RTP IDs: ID 10867: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (PE, NEPA, ROW) ID 11176: I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

RTP Project Description:	<p>ID 10867: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter</p> <p>ID 11176: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.</p>
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Additional RTP Consistency Check Areas	
1.	Is the project designated as a Transportation Control Measure? No.
2.	Is the project identified on the Congestion Management Process (CMP) plan? Yes.
3.	Is the project included as part of the approved: UPWP? No. Not applicable.
3a.	If yes, is an amendment required to the UPWP? No.
3b.	Can the project MTIP amendment proceed before the UPWP amendment? Yes.
3c.	What is the UPWP category (Master Agreement, Metro funded stand-alone, Non-Metro funded Regionally Significant)? Not applicable
4.	<p>Applicable RTP Goals:</p> <p><u>Goal # 1 - Mobility Options:</u> Objective 1.1 Travel Options: Plan communities and design and manage the transportation system to increase the proportion of trips made by walking, bicycling, shared rides and use of transit, and reduce per capita vehicle miles traveled.</p> <p><u>Goal #2 - Safe System:</u> Objective 2.1 - Vision Zero: fatal and severe injury crashes for all modes of travel by 2035.</p> <p><u>Goal #3 - Equitable Transportation:</u> Objective 3.2 - Barrier Free Transportation: Eliminate barriers that people of color, low income people, youth, older adults, people with disabilities and other marginalized communities face to meeting their travel needs</p>
5.	Does the project require a special performance assessment evaluation (PAE) as part of the MTIP amendment? Yes. The project is capacity enhancing and exceeds \$100 million in total project cost. A PAE has been complete as part of this amendment.

Public Notification/Opportunity to Comment Consistency Requirement

1. Is a 30-day/opportunity to comment period required as part of the amendment? **Yes.**
2. What are the start and end dates for the comment period? **Estimated to be Tuesday, February 4, 2025 to Friday, March 7, 2025**
3. Was the comment period completed consistent with the Metro Public Participation Plan? **Yes.**
4. Was the comment period included on the Metro website allowing email submissions as comments? **Yes.**
5. Did the project amendment result in a significant number of comments? **Comments are expected.**
6. Did the comments require a comment log and submission plus review by Metro Communications staff and to Council Office? **Possibly. The nature of the submitted comments will determine any required follow-on comment reviews by Metro Communications Department staff, Council Office, JPACT, and Metro Council. Submitted comments will be logged and monitored from their on-line submissions to any testimony provided at committees, and from written correspondence submitted to Metro.**

Fund Codes References

<p>Advance Construction ADVCON (AC funds)</p>	<p>A funding placeholder tool. This fund management tool allows agencies to incur costs on a project and submit the full or partial amount later for Federal reimbursement if the project is approved for funding. Advance construction can be used to fund emergency relief efforts and for any project listed in the STIP, including surface transportation, interstate, bridge, and safety projects. The use of Advance Construction is normally only by the state DOT to help leverage their funding resources and keep projects on their respective delivery schedules. The use of a generic AC "ADVCON" indicates the expected federal conversion fund is not yet specified</p>
<p>AC-NAE23</p>	<p>Advance Construction placeholder funds with the expected conversion code to be the federal Neighborhood Access Equity funding program</p>
<p>NAE23</p>	<p>Neighborhood Access and Equity (NAE) program: This program provides Federal funds for projects that improve walkability, safety, and affordable transportation access through context-sensitive strategies and address existing transportation facilities that create barriers to community connectivity or negative impacts on the human or natural environment, especially in disadvantaged or underserved communities. The program also provides funding for planning and capacity building activities in disadvantaged or underserved communities as well as funding for technical assistance to units of local government to facilitate efficient and effective contracting, design, and project delivery and to build capacity for delivering surface transportation projects. The "23" tag refers to the grant cycle award year.</p>
<p>State</p>	<p>General state funds used usually in support of the required minimum match to the federal funds. They also can be added overmatch to the project phase.</p>

STIP Programming Summary

Key Number: **23682**

2024-2027 STIP

Project Name: **I-5 Rose Quarter: Phase 1A**

(DRAFT AMENDMENT DP)

Fund Codes										
Phase	Fund Code	Description	Percent of Phase	Total Amount	Federal Percent	Federal Amount	State Percent	State Amount	Local Percent	Local Amount
CN	ACPO	ADVANCE CONSTRUCT PR	100.00%	65,000,000.00	92.22%	59,943,000.00	7.78%	5,057,000.00	0.00%	0.00
	CN Totals		100.00%	65,000,000.00		59,943,000.00		5,057,000.00		0.00
	Grand Totals			65,000,000.00		59,943,000.00		5,057,000.00		0.00

Rose Quarter Full Project Summary Cost Estimate

Key 23682 Rose Quarter Phase 1A I-405 and I-5 Stormwater Facilities Summary Cost Estimate

Response:

Programmed Funding	\$ 858,000,000
State Funds	\$ 135,000,000
Federal Formula	\$ 23,000,000
FY23 RCN Grant Award	\$ 450,000,000
OTC-Approved Investment (December 2024 Urban Mobility Strategy Finance Plan, pending TIP Amendment)	\$ 250,000,000
Total Project Cost	\$1.5 B - \$1.9B
Funding Gap	\$642M - \$1.042B

I-405 and I-5 Stormwater Facilities Project (ODOT K23682, MTIP ID 71443, RTP ID 11176) - to be known as I-5 Rose Quarter: Phase 1A			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	NA	\$0	\$0
Right of Way	NA	\$0	\$0
Utility Relocation	NA	\$0	\$0
Construction	2025	\$5,000,000	\$65,000,000
Other	NA	\$0	\$0
TOTAL		\$5,000,000	\$65,000,000

Phase 1A- \$65 million:

Funded with \$60 million from an OTC appropriation approved on December 4, 2024, and \$5 million currently programmed in STIP KN 21219. |

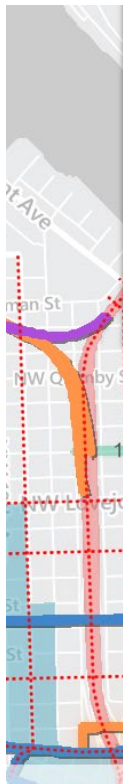
Modeling Network , NHS, and Performance Measure Designations

National Highway System and Functional Classification Designations

System	Y/N	Route	Designation
NHS Project	Yes	Interstate 5	Interstate
Functional Classification	Yes	Interstate 5	1 = Urban Interstate
Federal Aid Eligible Facility	Yes	Interstate 5	Interstate

Anticipated Required Performance Measurements Monitoring

Rose Quarter Improvement Project under RTP ID 10867



This project (RTP # 10867) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County**.

Description: Conduct preliminary engineering and National Environmental Policy Act review, and right of way work to improve safety and operations on I-5, connection between I-84 and I-405, and multimodal access to and connectivity between the Lloyd District and Rose Quarter.

Project Time Frame: 2023-2030

Estimated Cost: \$338,000,000

This project **is** located in an **equity focus area**.

This project **is not** an **equity priority project**.

This project **will not reduce greenhouse gas emissions**.

This project **does** have identified **safety benefits**.

This project **is** located in a **high injury corridor**.

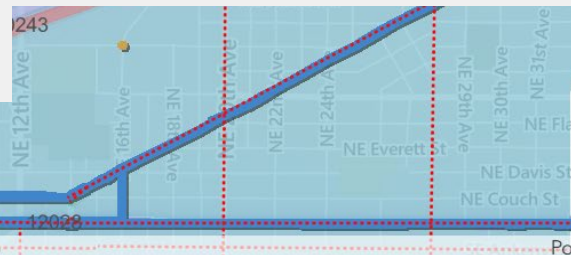
This project **is** located on the **regional emergency transportation/state seismic lifeline route**.

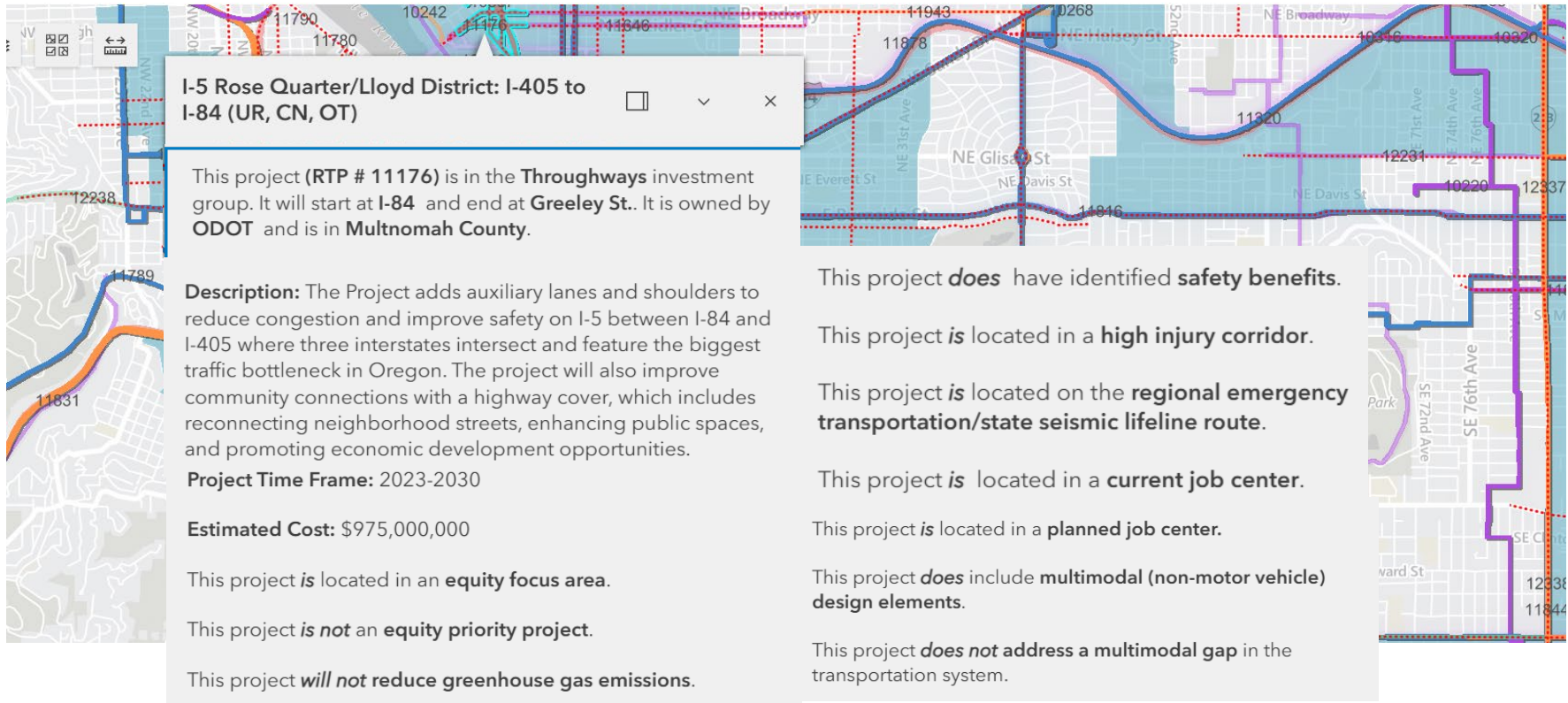
This project **is** located in a **current job center**.

This project **is** located in a **planned job center**.

This project **does** include **multimodal (non-motor vehicle) design elements**.

This project **does not address a multimodal gap** in the transportation system.





I-5 Rose Quarter/Lloyd District: I-405 to I-84 (UR, CN, OT)

This project (RTP # 11176) is in the **Throughways** investment group. It will start at **I-84** and end at **Greeley St.** It is owned by **ODOT** and is in **Multnomah County**.

Description: The Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on I-5 between I-84 and I-405 where three interstates intersect and feature the biggest traffic bottleneck in Oregon. The project will also improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.

Project Time Frame: 2023-2030

Estimated Cost: \$975,000,000

This project *is* located in an **equity focus area**.

This project *is not* an **equity priority project**.

This project *will not* reduce **greenhouse gas emissions**.

This project *does* have identified **safety benefits**.

This project *is* located in a **high injury corridor**.

This project *is* located on the **regional emergency transportation/state seismic lifeline route**.

This project *is* located in a **current job center**.

This project *is* located in a **planned job center**.

This project *does* include **multimodal (non-motor vehicle) design elements**.

This project *does not* address a **multimodal gap** in the transportation system.

Project Exhibits and Location Maps

Depiction of Phase 1A (Blue) and Broadway to Weidler Phase 1 (Orange and Purple) Improvements

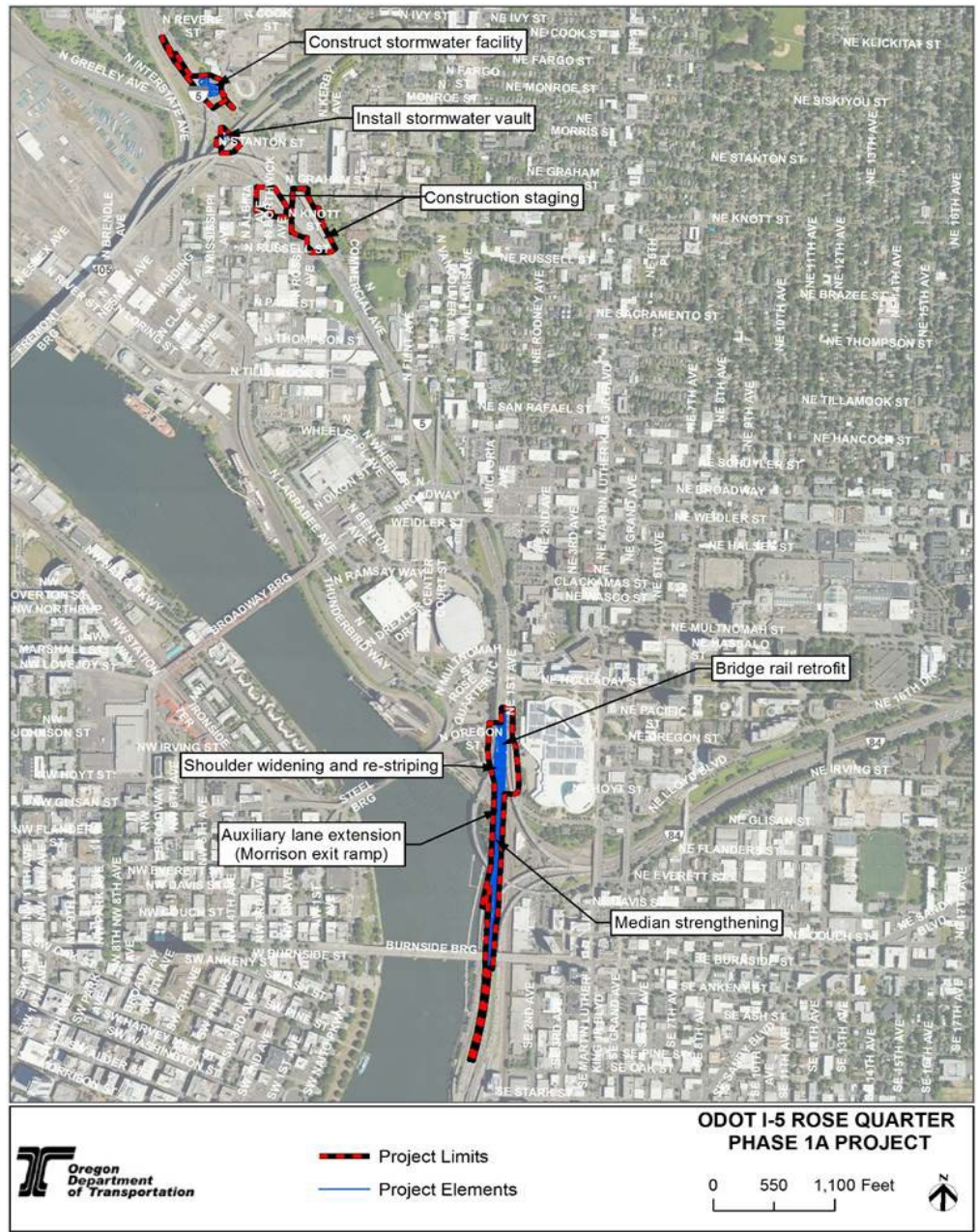


Summary of planned improvements - K23682 I-5 Rose Quarter: Phase 1A

Phase 1A consists of freeway stormwater elements at the north end of the Project area (east end of Fremont Bridge) as well as bridge preservation elements and operational improvements on the I-5 mainline spanning over NE Lloyd Boulevard and Union Pacific Railroad (UPRR) tracks near the I-5/I-84 Banfield interchange on the southernmost portion of the project area. Work in this package can be completed efficiently and independently from other work north of this project area. Proposed improvements include:

- Structural deck overlay
- Seismic retrofits
- Structural work to modify the gore between bridges
- Relocating median barrier and restriping NB and SB lanes to include the southern portion of the new auxiliary lane between I-84 and the Morrison Bridge exit to eliminate the weave at the off-ramp.
- Relocating the median barrier and restriping both NB and SB travel lanes to accommodate the SB auxiliary lane extension to the Morrison Street exit ramp.
- Retrofitting NB and SB bridge rails with crash compliant bridge railing.
- Strengthening of existing median overhang to support traffic lanes.
- Sign structure installation (Inclusive) and removal of sign structure in the gore of SB exit ramp
- Stormwater quality facility construction
- Stormwater vault installation

Planned Phase IA Improvement Locations





Memo

Date: January 30, 2025
To: TPAC and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: February #1 Rose Quarter 2025 MTIP Formal Amendment & Resolution 25-5463 Amendment Overview – FB25-05-FEB1

FORMAL MTIP AMENDMENT STAFF REPORT

Amendment Purpose Statement

FOR THE PURPOSE OF AMENDING THREE RELATED I-5 ROSE QUARTER PROJECTS TO THE 2024-27 MTIP TO ADD \$250 MILLION DOLLARS OF APPROVED FUNDING TO THE PROJECTS

BACKGROUND

What This Is - Amendment Summary:

The February #1 Rose Quarter 2025 Formal Metropolitan Transportation Improvement Program (MTIP) Formal/Full Amendment represents a stand-alone formal amendment containing three Rose Quarter related projects. Four attachments are included that provide a summary of current STIP project programming, include a summary of the Performance Assessment Evaluation (PAE), and prior Oregon Transportation Commission (OTC) items.

What is the requested action?

None. There is no approval recommendation provided for TPAC at this time.

Staff is providing TPAC their official notification and is presenting the amendment materials and an overview for TPAC to consider a later approval recommendation to JPACT for Resolution 25-5463.

Rose Quarter Improvement Projects Prior Formal Amendment Summary

The last formal amendment to the Rose Quarter project occurred during July 2024. This amendment added the Reconnecting Communities Pilot/Neighborhood Access and Equity (RCP/NAE) to both the Rose Quarter Improvement Project and to the city of Portland's new Rose Quarter related Broadway Main Street and Supporting Connections project. The Rose Quarter Improvement Project received a \$450 million discretionary grant award with Portland's Broadway/Main Street project awarded \$38 million.

The Rose Quarter Improvement Project added \$68 million of the RCP/NAE grant award to non-construction phases in Key 19071. Two new exempt, non-capacity enhancing

projects were created as well. The remaining \$382 million RCP/NAE funding was committed to the to the new I-5 Rose Quarter: Broadway to Weidler Phase 1 construction phase project and programmed in Key 23672.

Additionally, the existing \$5 million dollars from ODOT’s I-5 Over NE Hassalo St and NE Holladay St (Portland) project in Key 21219 was transferred to the second Rose Quarter construction project, I-405 and I-5 Stormwater Facilities now programmed in Key 23682 (now being renamed to be [I-5 Rose Quarter: Phase 1A](#).)

Finally, the July 2024 Rose Quarter formal MTIP amendment added Portland’s \$38 million RCP/NAE grant award to their Broadway Main Street and Supporting Connections project in Key 23646. The Portland project will complete multiple “Complete Street” project elements including enhanced sidewalks, ADA compliant curb ramps upgrades, and reduced crossing distances for safer pedestrian crossings, plus enhanced access to Rose Quarter Transit Center

The July 2024 Rose Quarter formal amendment was approved and incorporated the updates to approved STIP during the beginning of September 2024. The below tables summaries the Rose Quarter projects now in the approved MTIP and STIP. The current STIP programming pages for the four projects are attached to the staff report as Attachment 1 and shown below:

I-5 Rose Quarter Improvement Project MTIP/STIP Programming After Approval of the July 2024 Rose Quarter MTIP Formal Amendment			
STIP Key Number	Lead Agency	Project Name	Description
19071	ODOT	Rose Quarter Improvement Project (parent project)	Non- construction phase programming to preliminary engineering, right-of-way, utility relocation, and Other phases. Considered the “parent project.” Summary description: On I-5 in Portland, complete multimodal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike & pedestrian crossing, and improved bike and pedestrian facilities.
23672	ODOT	I-5 Rose Quarter: Broadway to Weidler Phase 1	Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and supporting facilities and complete compatibility construction for follow-on packages
23682	ODOT	I-405 and I-5 Stormwater Facilities Now renamed to be I-5 Rose Quarter: Phase 1A	Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.
23646	Portland	Broadway Main Street and Supporting Connections	Complete multiple “Complete Street” project elements including enhanced sidewalks, ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services.

The effect of the July 2024 I-5 Rose Quarter MTIP Formal Amendment creates the first delivery package/segment for the Rose Quarter project. Construction elements for the Rose Quarter project will occur through multiple delivery packages/segments based on the available funding. For large projects, this is a delivery strategy often employed to better leverage the available funding. Keys 23672 and 23682 represent the construction delivery package based on the awarded RCP/NAE grant.

December 2024 Oregon Transportation Commission (OTC) Action

During OTC's December 4, 2024, meeting, the Commission approved a \$250 million funding award supporting the Rose Quarter Improvement Project. During their January 16, 2025, meeting, the Rose Quarter project team provided OTC with their funding plan to apply the \$250 million dollar award. A copy of both OTC staff reports (December and January) is included as attachments to this report for reference. Note: The OTC funding award does not impact Portland Broadway/Main St project in 23646. This project is not part of the February #1 2025 Rose Quarter MTIP Formal Amendment.

The February #1 2025 Rose Quarter MTIP Formal Amendment provides the programming updates to apply the \$250 million OTC funding allocation to the applicable Rose Quarter projects. A short summary of the updates includes the following:

- Key 19071 – I-5 Rose Quarter Improvement Project:
The formal amendment adds a total of \$12.5 million as follows:
 - \$10 million is added to the preliminary engineering (PE) phase.
 - \$1 million is added to the right-of-way phase
 - The utility relocation (UR) phase receives a \$1 million increase.
 - The Other phase receives a \$500,000 boost.
 - Key 19071 increases from \$236,141,997 to \$238,141, 997 or 5.3%.
- Key 23672 - I-5 Rose Quarter: Broadway to Weidler Phase 1:
The formal amendment adds \$177,500,000 to support the construction phase activities. The project increases from \$382,250,000 to \$559,750,000.
- Key 23682 – ~~I-405 and I-5 Stormwater Facilities~~ I-5 Rose Quarter: Phase 1A:
The formal amendment updates the project segment name and description, plus expands the scope of work. As a result, \$60 million of the \$250 million OTC award to the construction phase is being added to the project. The net increase takes the project from \$5 million to \$65 million.

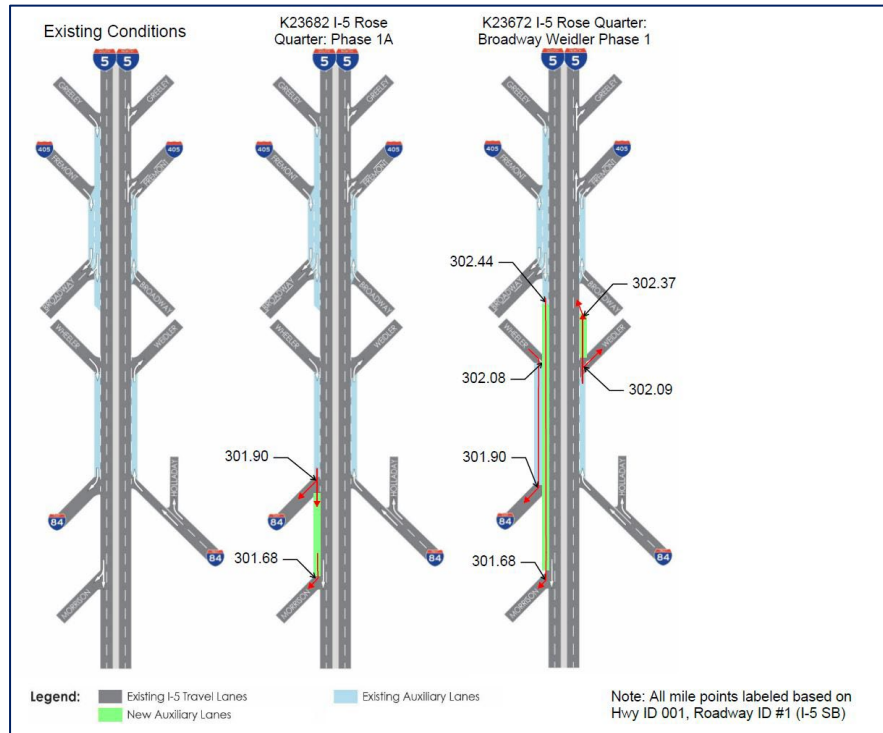
Consistency of the Proposed MTIP Amendment with the Regional Transportation Plan

All MTIP Amendments are reviewed for consistency with the Regional Transportation Plan (RTP). There are three elements of the consistency review.

Consistency of the Proposed MTIP Amendment with RTP Project Scope Description:

The RTP project scope consistency review is to determine if the amended or new project is consistent with the project as entered in the RTP. To determine RTP consistency for very large capacity enhancing projects like the I-5 Rose Quarter Improvement Project, Metro RTP modeling staff reviewed the project scope and how it was modelled in the regional travel demand model for the RTP analysis. This review found that the partial build-out project as submitted for amendment is consistent with the full project build-out as entered into the 2023 RTP. There are no capacity scope elements included in the project amendment that are not included in the project as submitted in the RTP

Figure 1: I-5 Rose Quarter System Elements as proposed in the February #1 Formal Amendment



Performance Assessment and the RTP:

MTIP amendments are assessed for their expected performance in making progress toward adopted RTP goals. These goals include Equitable Transportation, Safe System, Climate Action and Resilience, Mobility Options, and Thriving Economy. Large projects that add capacity to the transportation system receive a more rigorous Performance Assessment Evaluation (PAE). These are defined as projects generally costing \$100 million or more and that include project elements that have inputs to the regional travel demand and emissions models. Inputs to these models are generally transportation project elements that are not included as an eligible exemption as referenced in 40 CFR 93.126, Table 2 or 40 CFR 93.127, Table 3. This proposed amendment met the threshold for conducting a PAE.

The results from the completed Performance Assessment Evaluation are included in Attachment 2 to the staff report. Consistent with federal regulations, the performance analysis examined how the overall package of 2024-27 MTIP investments with the addition of this amendment would make progress toward the RTP goals.

Fiscal Constraint and RTP Consistency Results:

A key review component of all MTIP formal amendments requires the project changes involving the addition or removal of federal funds be properly verified. This is known as the MTIP’s demonstration of fiscal constraint verification requirement. All MTIP formal amendments must provide a verification of the new funding and that the MTIP is not overprogrammed as a result of the amendment.

The \$250 million award for the Rose Quarter Improvement Project required OTC approval. The approved funds are ODOT managed funds. They are not Metro allocated are awarded funds. Fund award approval occurred during OTC’s December 2024 meeting. During OTC’s January 2025 meeting, the Rose Quarter project team submitted their project summary scope and expenditure plan for the new \$250 million dollars. OTC provided their approval for the proposed use of the funds. The OTC actions meet the MTIP fiscal constraint verification requirement ensuring the MTIP maintains fiscal constraint.

For MTIP amendment compliance purposes with 23 CFR 450.326-328, the I-5 Rose Quarter Improvement Project submitted amendment to add the \$250 million among Keys 19071, 23672, and 23682 has met fiscal constraint demonstration requirements.

The below tables provide a summary of project changes occurring to the three projects.

Project Number: 1	Key Number: 19071	Status: Add Funds
Project Name:	I-5 Rose Quarter Improvement Project	
Lead Agency:	ODOT	
Description:	<p>The Rose Quarter investment is intended to help reduce congestion, improve safety and traffic operations, and support economic growth in the Portland Metro region with multi-modal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will: provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and the N/NE Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort.</p> <p>Note: Key 19071 is considered the Rose Quarter parent project and contains programming for non-construction phases.</p>	
Funding Summary:	<p>The February #1 formal amendment adds \$12.5 million from the \$250 million allocation to the project. PE picks up \$10 million with \$1 million for ROW. UR adds \$1 million and the Other phase adding \$500,000. Key 19071 net funding change increases the project from \$236,141,997 to \$248,641,997. This equals a 5.3% cost increase to</p>	

the project. A fund type composition summary for Key 19071 is shown below.

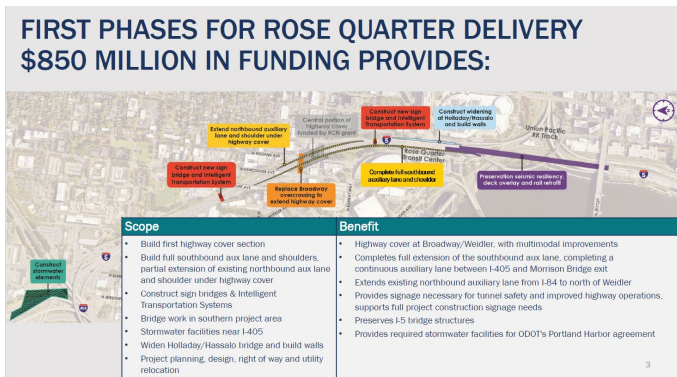
Identified Funding Sources for Key 19071 (per the STIP Summary Report Financial Estimates Section)						
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes
ODOT Enhance	PE	\$ 1,500,000	\$ 126,545	\$ -	\$ 1,626,545	
ODOT Region 1 Fix-It Program	PE	\$ 1,844,400	\$ 155,600	\$ -	\$ 2,000,000	
ODOT Statewide Fix-it Program	PE	\$ -	\$ 1,000,000	\$ -	\$ 1,000,000	
HB2017 Discretionary	PE	\$ 119,886,000	\$ 10,114,000	\$ -	\$ 130,000,000	
Local contributions	PE	\$ -	\$ -	\$ 4,000,000	\$ 4,000,000	
ODOT Region 1	PE	\$ 2,305,500	\$ 194,500	\$ -	\$ 2,500,000	
Rose Quarter	PE	\$ 9,222,000	\$ 778,000	\$ -	\$ 10,000,000	OTC approval December 2024
SW Natl Hwy Freight (NHFP)	PE	\$ 15,000,000	\$ 1,265,452	\$ -	\$ 16,265,452	FHWA discretionary National Highway Freight Program
USDOT Grants 2023	PE	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 179,757,900	\$ 13,634,097	\$ 4,000,000	\$ 197,391,997	\$ 197,391,997
AC-HB2017 Discretionary	ROW	\$ 10,144,200	\$ 855,800	\$ -	\$ 11,000,000	
Rose Quarter	ROW	\$ 922,200	\$ 77,800	\$ -	\$ 1,000,000	
USDOT Grants 2023	ROW	\$ 30,000,000	\$ -	\$ -	\$ 30,000,000	Part of NAE grant award
Phase Totals:		\$ 41,066,400	\$ 933,600	\$ -	\$ 42,000,000	
Rose Quarter	UR	\$ 922,200	\$ 77,800	\$ -	\$ 1,000,000	Added OTC December 2024 action
USDOT Grants 2023	UR	\$ 7,500,000	\$ -	\$ -	\$ 7,500,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 8,422,200	\$ 77,800	\$ -	\$ 8,500,000	
Rose Quarter	Other	\$ 461,100	\$ 38,900	\$ -	\$ 500,000	Added OTC December 2024 action
USDOT Grants 2023	Other	\$ 250,000	\$ -	\$ -	\$ 250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000
Phase Totals:		\$ 711,100	\$ 38,900	\$ -	\$ 750,000	
Program Totals All Phases					Total	
					ODOT Enhance	\$ 1,626,545
					ODOT Region 1 Fix-It Program	\$ 2,000,000
					ODOT Statewide Fix-it Program	\$ 1,000,000
					HB2017 Discretionary	\$ 141,000,000
					Local contributions	\$ 4,000,000
					ODOT Region 1	\$ 2,500,000
					SW Natl Hwy Freight (NHFP)	\$ 16,265,452
					Rose Quarter	\$ 12,500,000
					USDOT Grants 2023	\$ 67,750,000
					Total:	\$ 248,641,997
					Total OTC approval =	\$250 million
					Total grant award =	\$450 million
					TPC estimate =	\$1.5B to \$1.9B

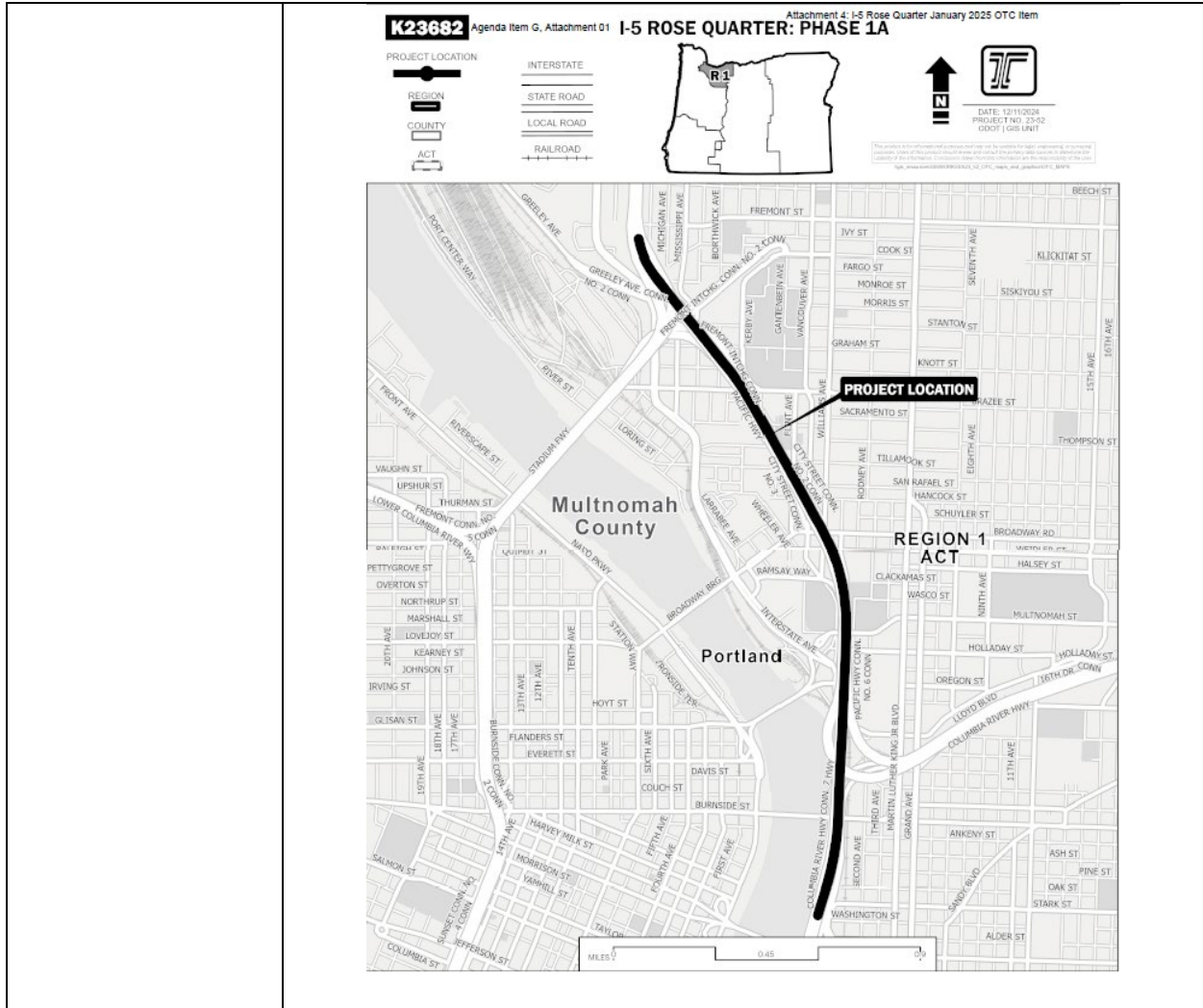
Amendment Action:

The formal amendment adds the \$12.5 million from the total \$250 million award to the PE, ROW, UR, and Other phases. The project funding support non-construction phase activities. Construction activities are programmed in Keys 23672 and 23682. Both construction projects are included in this amendment bundle.

Added Notes:

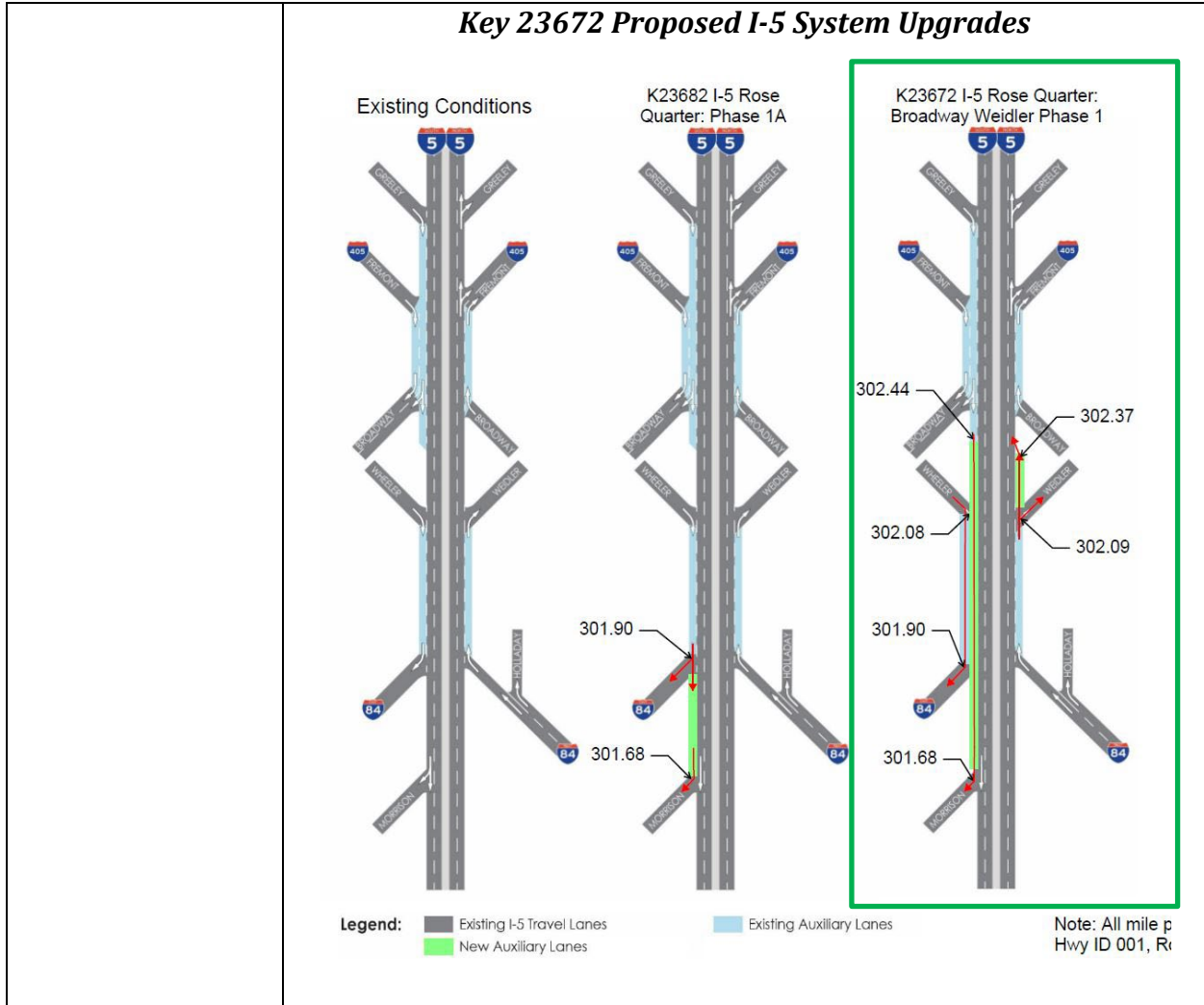
Delivery goals project location summary (*Location map from Key 23682 used as over project location representation*)





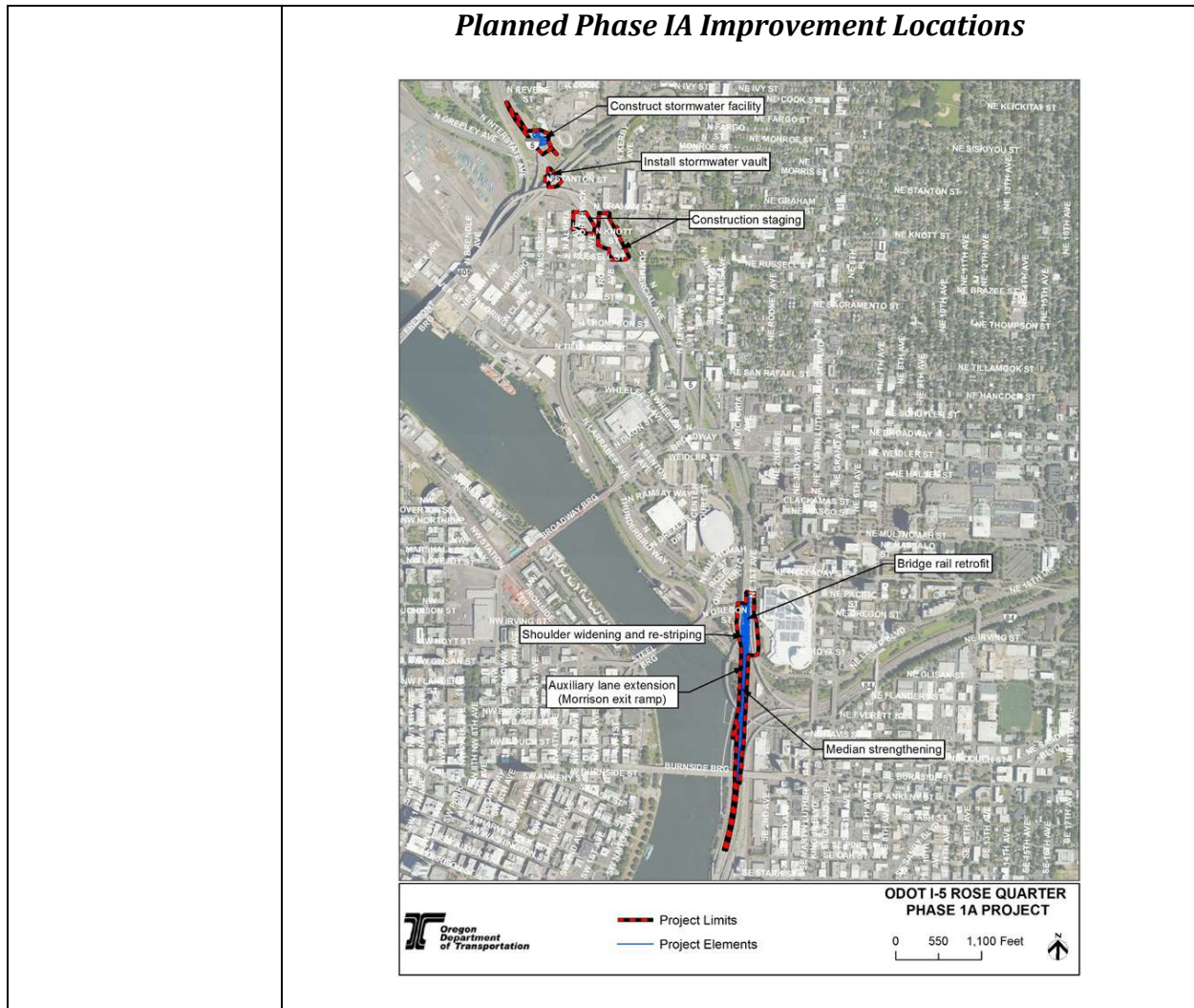
Project Number: 2	Key Number: 23672	Status: Add Funds
Project Name:	I-5 Rose Quarter: Broadway to Weidler Phase 1	
Lead Agency:	ODOT	
Description:	<p>Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. Construct portion of NB & SB auxiliary lanes. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement project.</p>	
Funding Summary:	<p>\$177,500,000 from the overall \$250,000,000 OTC award is being added to the construction phase. The project net programming change increase the construction phase from \$382,250,000 to \$559,750,000. This equals a 46.4% increase to the project which triggers the need for a formal amendment.</p>	

	<table border="1"> <thead> <tr> <th colspan="7">Identified Funding Sources for Key 23672 (per the STIP Summary Report Financial Estimates Section)</th> </tr> <tr> <th>Funding Responsibility Source</th> <th>Phase</th> <th>Federal</th> <th>State</th> <th>Local</th> <th>Total</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Rose Quarter</td> <td>Cons</td> <td>\$ 163,690,500</td> <td>\$ 13,809,500</td> <td>\$ -</td> <td>\$ 177,500,000</td> <td>OTC approval December 2024. Total OTC approval = \$250 million</td> </tr> <tr> <td>USDOT Grants 2023</td> <td>Cons</td> <td>\$ 382,250,000</td> <td>\$ -</td> <td>\$ -</td> <td>\$ 382,250,000</td> <td>USDOT NAE/RCN 2023 100% federal, total = \$450,000,000</td> </tr> <tr> <td colspan="2">Phase Totals:</td> <td>\$ 545,940,500</td> <td>\$ 13,809,500</td> <td>\$ -</td> <td>\$ 559,750,000</td> <td></td> </tr> </tbody> </table>	Identified Funding Sources for Key 23672 (per the STIP Summary Report Financial Estimates Section)							Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes	Rose Quarter	Cons	\$ 163,690,500	\$ 13,809,500	\$ -	\$ 177,500,000	OTC approval December 2024. Total OTC approval = \$250 million	USDOT Grants 2023	Cons	\$ 382,250,000	\$ -	\$ -	\$ 382,250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000	Phase Totals:		\$ 545,940,500	\$ 13,809,500	\$ -	\$ 559,750,000	
Identified Funding Sources for Key 23672 (per the STIP Summary Report Financial Estimates Section)																																				
Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes																														
Rose Quarter	Cons	\$ 163,690,500	\$ 13,809,500	\$ -	\$ 177,500,000	OTC approval December 2024. Total OTC approval = \$250 million																														
USDOT Grants 2023	Cons	\$ 382,250,000	\$ -	\$ -	\$ 382,250,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000																														
Phase Totals:		\$ 545,940,500	\$ 13,809,500	\$ -	\$ 559,750,000																															
<p>Amendment Action:</p>	<p>The formal amendment adds the \$177,500,000 portion from the OTC approved \$250,000,000 award to the construction phase. ADA upgrade project to the MTIP.</p>																																			
<p>Added Notes:</p>	<p style="text-align: center;">Summary of planned project elements - K23672 I-5 Rose Quarter: Broadway to Weidler Phase 1</p> <p>With the increase of \$177,500,000 for the construction phase, the original scope of building the initial portion of the highway cover as funded by the U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant will be expanded. The added scope will be to:</p> <ul style="list-style-type: none"> • Construct an added portion of the highway cover so that the first portion of the cover to be constructed would be between the cover’s southern portal (south of Weidler) to north of the Broadway structure • Include removing and replacing the Broadway, Weidler and Williams structures) • Construct initial portions of the I-5 safety and operational improvements: <ul style="list-style-type: none"> ○ Including widening the Holladay/Hassalo bridge and build walls ○ Building the full southbound auxiliary lane and shoulders ○ Extending a portion of the existing northbound auxiliary lane and shoulders under the highway cover area • Construct two sign bridges and associated Intelligent Transportation Systems. • Construction is proposed to begin by 2027. <p style="text-align: center;">Depiction of Phase 1A (Blue) and Broadway to Weidler Phase 1 (Orange and Purple) Improvements</p>																																			



Project Number: 3	Key Number: 23682	Status: Add Funds/Scope
Project Name:	I-405 and I-5 Stormwater Facilities I-5 Rose Quarter: Phase 1A	
Lead Agency:	ODOT	
Description:	<p>Construct stormwater facilities for the east end of Fremont Bridge and ramps to comply with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project Key 19071 I-5 Rose Quarter Improvement Project.</p> <p>Construct stormwater facilities for the east end of Fremont Bridge and ramps. Construct structural deck overlay, bridge rail upgrades and seismic retrofit on two bridges in the southern portion of the project area. PE completed in Key 19071</p>	
Funding Summary:	\$60 million of the total OTC approved \$250 million is being added to the construction phase. The total programming increases from \$5	

	<p>million to \$65 million. This equals a 1,200% net increase to the project and triggers the need for a formal amendment.</p> <table border="1" data-bbox="492 306 1403 447"> <thead> <tr> <th colspan="7">Identified Funding Sources for Key 23682 (per the STIP Summary Report Financial Estimates Section)</th> </tr> <tr> <th>Funding Responsibility Source</th> <th>Phase</th> <th>Federal</th> <th>State</th> <th>Local</th> <th>Total</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Rose Quarter</td> <td>Cons</td> <td>\$ 55,332,000</td> <td>\$ 4,668,000</td> <td>\$ -</td> <td>\$ 60,000,000</td> <td>OTC approval December 2024. Total OTC approval = \$250 million</td> </tr> <tr> <td>USDOT Grants 2023</td> <td>Cons</td> <td>\$ 4,611,000</td> <td>\$ 389,000</td> <td>\$ -</td> <td>\$ 5,000,000</td> <td>USDOT NAE/RCN 2023 100% federal, total = \$450,000,000</td> </tr> <tr> <td colspan="2">Phase Totals:</td> <td>\$ 59,943,000</td> <td>\$ 5,057,000</td> <td>\$ -</td> <td>\$ 65,000,000</td> <td></td> </tr> </tbody> </table>	Identified Funding Sources for Key 23682 (per the STIP Summary Report Financial Estimates Section)							Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes	Rose Quarter	Cons	\$ 55,332,000	\$ 4,668,000	\$ -	\$ 60,000,000	OTC approval December 2024. Total OTC approval = \$250 million	USDOT Grants 2023	Cons	\$ 4,611,000	\$ 389,000	\$ -	\$ 5,000,000	USDOT NAE/RCN 2023 100% federal, total = \$450,000,000	Phase Totals:		\$ 59,943,000	\$ 5,057,000	\$ -	\$ 65,000,000	
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Funding Responsibility Source	Phase	Federal	State	Local	Total	Notes																														
Rose Quarter	Cons	\$ 55,332,000	\$ 4,668,000	\$ -	\$ 60,000,000	OTC approval December 2024. Total OTC approval = \$250 million																														
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Phase Totals:		\$ 59,943,000	\$ 5,057,000	\$ -	\$ 65,000,000																															
<p>Amendment Action:</p>	<p>The formal amendment adds the OTC approved \$60 million to the construction phase. The project name and description are update in support of the project scope update.</p>																																			
<p>Added Notes:</p>	<p style="text-align: center;">Summary of planned project elements - K23682 I-5 Rose Quarter: Phase 1A</p> <p>Phase 1A consists of freeway stormwater elements at the north end of the Project area (east end of Fremont Bridge) as well as bridge preservation elements and operational improvements on the I-5 mainline spanning over NE Lloyd Boulevard and Union Pacific Railroad (UPRR) tracks near the I-5/I-84 Banfield interchange on the southernmost portion of the project area. Work in this package can be completed efficiently and independently from other work north of this project area. Proposed project elements include:</p> <ul style="list-style-type: none"> • Structural deck overlay • Seismic retrofits • Structural work to modify the gore between bridges • Relocating median barrier and restriping NB and SB lanes to include the southern portion of the new auxiliary lane between I-84 and the Morrison Bridge exit to eliminate the weave at the off-ramp. • Relocating the median barrier and restriping both NB and SB travel lanes to accommodate the SB auxiliary lane extension to the Morrison Street exit ramp. • Retrofitting NB and SB bridge rails with crash compliant bridge railing. • Strengthening of existing median overhang to support traffic lanes. • Sign structure installation (Inclusive) and removal of sign structure in the gore of SB exit ramp • Stormwater quality facility construction • Stormwater vault installation 																																			



METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. They primarily are designed to ensure the MTIP is fiscally constrained, consistent with the approved RTP, and provides transparency in their updates, changes, and/or implementation. The programming factors include ensuring that the project amendments:

APPROVAL STEPS AND TIMING

Metro’s approval process for formal amendment includes multiple steps. The required approvals for the February #1 2025 Formal MTIP amendment (FB25-05-FEB1) will include the following review actions:

- Are eligible and required to be programmed in the MTIP.
- Properly demonstrate fiscal constraint.

- Pass the RTP consistency review which requires a confirmation that the project(s) are identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket.
- Are consistent with RTP project costs when compared with programming amounts in the MTIP.
- If a capacity enhancing project, the project is identified in the approved Metro modeling network and included in transportation demand modeling for performance analysis.
- Supports RTP goals and strategies.
- Contains applicable project scope elements that can be applied to Metro’s performance requirements.
- Verified to be part of the Metro’s annual Unified Planning Work Program (UPWP) for planning projects that may not be specifically identified in the RTP.
- Verified that the project location is part of the Metro regional transportation network, and is considered regionally significant, or required to be programmed in the MTIP per USDOT direction.
- Verified that the project and lead agency are eligible to receive, obligate, and expend federal funds.
- Does not violate supplemental directive guidance from FHWA/FTA’s approved Amendment Matrix.
- Reviewed and evaluated to determine if Performance Measurements will or will not apply.
- Successfully complete the required 30-day Public Notification/Opportunity to Comment period.
- Meets other MPO responsibility actions including project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.

Proposed Processing and Approval Actions:

<u>Action</u>	<u>Target Date</u>
• February 2025 TPAC agenda mail-out.....	January 31, 2025
• Initiate the required public notification/comment process.....	February 4, 2025
• TPAC amendment introduction.....	February 7, 2025
• JPACT amendment introduction.....	February 20, 2025
• March 2025 TPAC agenda mail-out.....	February 28, 2025
• End Public notification/comment process.....	March 7, 2025
• TPAC approval recommendation request to JPACT.....	March 7, 2025
• JPACT approval request.....	March 20, 2025
• Metro Council approval request.....	April 3, 2025

Notes:

- * The above dates are estimates. JPACT and Council meeting dates could change.
- ** If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT and/or Metro Council Office.

USDOT Approval Steps. The below timeline is an estimation only and assume no changes to the proposed JPACT or Council meeting dates occur:

<u>Action</u>	<u>Target Date</u>
• Final amendment package submission to ODOT & USDOT.....	April 9, 2025
• USDOT clarification and final amendment approval.....	Early May 2025

Note: Final Metro amendment submission approval by FHWA is dependent upon a successful reinstatement of the FHWA obligation process.

ANALYSIS/INFORMATION

1. **Known Opposition:** Based on previous testimony on similar projects, there may be opposition to this amendment, specifically from the No Freeways Coalition (NFC), and/or other groups or agencies that do not support capacity/expansion changes to the interstate and State highway system.
2. **Legal Antecedents:**
 - a. Amends the 2024-27 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 23-5335 on July 20, 2023 (FOR THE PURPOSE OF ADOPTING THE 2024-2027 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM FOR THE PORTLAND METROPOLITAN AREA)
 - b. Oregon Governor approval of the 2024-27 MTIP on September 13, 2023.
 - c. 2024-2027 Statewide Transportation Improvement Program (STIP) Approval and 2024 Federal Planning Finding on September 25, 2023.
3. **Anticipated Effects:** Enables the updated Rose Quarter Improvement project to initiate expanded construction phase activities including the construction of auxiliary lanes on I-5 within the project limits.
4. **Metro Budget Impacts:** None. The project funding is not Metro allocated or managed funds. All project funding is under ODOT management.

RECOMMENDED ACTION:

None. There is no approval recommendation provided for TPAC at this time.

Staff is providing TPAC their official notification and is presenting the amendment materials and an overview for TPAC to consider a later approval recommendation to JPACT for Resolution 25-5463.

Attachments:

- Attachment 1: Rose Quarter STIP Programming Summary
- Attachment 2: Project Performance Assessment Evaluation Summary
- Attachment 3: Unit Mobility December 2024 OTC Finance Strategy Item
- Attachment 4: I-5 Rose Quarter January 2025 OTC Item

Current Rose Quarter STIP Project Programming
Includes Project Keys 19071, 23646, 23672, and 23782

STIP Fund Code References					
Fund Code	Type	Name	Fund Code	Type	Name
ACP0	Federal	Advance Construction	M0E2 M002 Z001	Federal	National Highway Performance Program
NE01	Federal	Neighborhood Access and Equity (NAE) grant funding	S010	State	General State funds usually reflecting the minimum match requirement
Z460	Federal	National Highway Freight Program (NHPP)	Other	State or Local	General state or local funds above the minimum match

Note: Advance Construction reflects a placeholder fund code. The final committed fund code will be applied at a later date. The final conversion code could be from the NAE grant program, NHPP, HB2017, or another eligible federal fund code for the project.

Key 19071

Represents the non-construction phase project programming (Planning, Preliminary Engineering (PE), Right-of-Way (ROW), Utility Relocation (UR), and Other phases.

Name: I-5 Rose Quarter Improvement Project		Key: 19071	
Description: The Rose Quarter investment will help reduce congestion, improve safety and traffic operations, and support economic growth in the Portland Metro region with multi-modal improvements that include ramp-to-ramp (auxiliary) lanes, highway shoulders and cover, new overcrossing, I-5 southbound ramp relocation, new bike and pedestrian crossing, and improved bike and pedestrian facilities. This specific project will provide additional funds to project development and right of way efforts of the Broadway-Weidler facility plan and the N/E Quadrant; relocate utilities in the cover grant and stormwater areas; acquire permanent VMS signs and software early in the project to support movement of traffic during cover construction. Subsequent projects will advance other elements of the Rose Quarter effort.			Region: 1
MPO: Portland Metro MPO	Work Type: MODERN		Status: FUNDED THROUGH UTILITY RELOCATION
Applicant: ODOT			
Location(s)-			
Mileposts	Length	Route	Highway
301.40 to 303.20	1.80	I-5	PACIFIC HIGHWAY
		ACT	County(s)
		REGION 1 ACT	MULTNOMAH
Current Project Estimate			
	Planning	Prelim. Engineering	Right of Way
		2016	2020
		2025	2025
Year			
Total		\$187,391,997.18	\$41,000,000.00
		\$7,500,000.00	\$250,000.00
Fund 1	ACP0	\$119,886,000.00	\$37,810,200.00
Match		\$10,114,000.00	\$3,189,800.00
Fund 2	NE01	\$30,000,000.00	
Match			
Fund 3	Z460	\$15,000,000.00	
Match		\$1,265,452.18	
Fund 4	OTH0	\$4,000,000.00	
Match			
Fund 5	M0E2	\$2,331,145.31	
Match		\$196,663.53	
Fund 6	Z001	\$1,844,400.00	
Match		\$155,800.00	
Fund 7	M002	\$1,474,354.49	
Match		\$124,381.87	
Fund 8	S010	\$1,000,000.00	
Match			
Project Total: \$236,141,997.18			
Footnote: Current funding: \$67,750,000 USDOT FY23 Grant, \$1,626,545 Enhance, \$2.5M FAST ACT, \$16,265,452.18 NHFP, \$5M Metro Bond per IGA 31954, \$2M Redistribution, \$102M HB2017			
Most Recent Approved Amendment			
Amendment No: 24-27-1281		Approval Date: 8/30/2024	
Requested Action: Add project to the current STIP by adding Utility Relocation and Other phases. Increase the Preliminary Engineering phase by \$30,000,000. Update the project scope.			

Key 23646

This is the city of Portland related project to the overall Rose Quarter Improvement project.

Name: Broadway Main Street and Supporting Connections						Key: 23646	
Description Project will include enhanced sidewalks including ADA curb ramps and reduced crossing distances for safer pedestrian crossings, enhanced access to Rose Quarter Transit Center, Portland Streetcar, and other transportation services. Upgraded and protected lanes for biking and scooting. Restoration of managed on-street parking and loading. Additional tree canopy, green infrastructure, street lighting, and other streetscape amenities. Placemaking opportunities to honor the district's history through public art, street activation, and monumentation. Project will result in greater access and connectivity to Portland's Lower Albina neighborhood.							Region: 1
MPO: Portland Metro MPO				Work Type: BIKPED			
Applicant: CITY OF PORTLAND				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2025	2026	2026	2026		
Total		\$8,255,000.00	\$591,000.00	\$130,000.00	\$29,418,000.00		\$38,394,000.00
Fund 1		ACPD \$8,255,000.00	ACPD \$591,000.00	ACPD \$130,000.00	ACPD \$29,418,000.00		
Match							
Footnote: \$38,394,000 in federal funds from Reconnection Communities and Neighborhoods Grant Program.							
Most Recent Approved Amendment							
Amendment No: 24-27-1081				Approval Date: 9/13/2024			
Requested Action: Add new project, using the Reconnecting Communities and Neighborhoods federal grant.							

Key 23672

This ODOT project represents a construction segment that will focus on the replacement of three aging I-5 bridges by constructing the highway cover.

Name: I-5 Rose Quarter: Broadway to Weidler Phase 1						Key: 23672	
Description Replace 3 of the 5 aging bridges over I-5 by constructing the central portion of the highway cover from Broadway to the southern end and beyond Weidler, and the facilities to support it; as well as performing construction work necessary to make this cover work forward compatible with follow-on construction packages. This will provide greater connectivity for the lower Albina neighborhood. Preliminary design and right of way are programmed under project key 19071 I-5 Rose Quarter Improvement project.							Region: 1
MPO: Portland Metro MPO				Work Type: MODERN			
Applicant: ODOT				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
301.40 to 303.20	1.80	I-5	PACIFIC HIGHWAY	REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2025		
Total					\$382,250,000.00		\$382,250,000.00
Fund 1					ACPD \$382,250,000.0		
Match							
Footnote:							
Most Recent Approved Amendment							
Amendment No: 24-27-1241				Approval Date: 9/13/2024			
Requested Action: Add new project, using the Reconnecting Communities and Neighborhoods federal grant for the initial construction of the central part of the highway cover on I-5.							

Key 23682

This ODOT project will complete required Stormwater mitigation actions at and around the Fremont bridge

Name: I-405 and I-5 Stormwater Facilities						Key: 23682	
Description: Construct stormwater facilities for the east end of Fremont Bridge and ramps to be in compliance with the Portland Harbor Settlement Agreement. Preliminary design activities have been completed under project key 19071 I-5 Rose Quarter Improvement Project.							Region: 1
MPO: Portland Metro MPO				Work Type: BRIDGE			
Applicant: ODOT				Status: PROJECT SCHEDULED FOR CONSTRUCTION			
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
301.40 to 303.20	1.80	I-5	PACIFIC HIGHWAY	REGION 1 ACT	MULTNOMAH		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2025		
Total					\$5,000,000.00		\$5,000,000.00
Fund 1					ACP0 \$4,611,000.00		
Match					\$389,000.00		
Footnote:							
Most Recent Approved Amendment							
Amendment No: 24-27-1279				Approval Date: 9/13/2024			
Requested Action: Add new project, moving funds from project key 21219.							

MTIP Amendment for Phase 1 of the Rose Quarter Interstate 5 and Investment Priority Policies Major Project Assessment Summary

This attachment is a summary assessment of a proposed amendment to the 2024-27 MTIP to add design, right of way acquisition, utility relocation, and construction phases of the Rose Quarter (RQ) project. The assessment reviews and evaluates the Phase 1 (partial build) of the Interstate 5 Rose Quarter project. It is provided to inform the amendment decision process regarding consistency with investment priority policies.

History of Rose Quarter Interstate 5 Project and Proposed MTIP amendment

Decades of planning and partnership by ODOT and the City of Portland (City) have occurred to address the safety and operational needs on Interstate 5 (I-5) and within the Broadway/Weidler interchange through the Rose Quarter. I-5 is the main north-south highway moving people and goods and connecting cities and towns across the west coast of the U.S. between Mexico and Canada. I-5 between I-84 and I-405 is the top traffic bottleneck in Oregon, and the 28th-worst freight bottleneck in the nation.

The purpose of the Project is to improve the safety and operations on I-5 between I-405 and I-84, at the Broadway/Weidler interchange, and on adjacent surface streets in the vicinity of the Broadway/Weidler interchange, and to enhance multimodal facilities in the Project Area. In achieving the purpose, the Project also would support improved local connectivity and multimodal access in the vicinity of the Broadway/Weidler interchange and improve multimodal connections between neighborhoods east and west of I-5.

The Oregon Transportation Commission, at its December 4, 2024, meeting, allocated an additional \$250 million to the I-5 Rose Quarter Improvement Project as part of the Urban Mobility Strategy Finance Plan update. Combined with existing funding and the recently secured U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant of \$450 million, this additional allocation provides sufficient funding to begin project construction in 2025 and deliver many of the project's most critical improvements.

The increase of \$250 million from House Bill 2017 Urban Mobility Strategy funds, and the proposed amendment, will do the following:

- *K19071 I-5 Rose Quarter Improvement Project:* An increase of \$12,500,000 will advance design, right of way acquisition, utility relocation and other activities needed to ready K23672 and K23682, as articulated below, for construction.
- *K23672 I-5 Rose Quarter: Broadway to Weidler Phase 1:* With the increase of \$177,500,000 for the construction phase, the original scope of building the initial portion of the highway cover as funded by the U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant will be expanded. The added scope will be to construct an added portion of the highway cover so that the first portion of the cover to be constructed would be between the cover's southern portal (south of Weidler) to north of the Broadway structure (including removing and replacing the Broadway, Weidler and Williams structures) and to construct initial portions of the I-5 safety and operational improvements, including widening the Holladay/Hassalo bridge and build walls, building the full southbound auxiliary lane and shoulders, extending a portion of the existing northbound auxiliary lane and shoulders under

the highway cover area, and constructing two sign bridges and associated Intelligent Transportation Systems. Construction will begin by 2027.

- *K23682 I-405 and I-5 Stormwater Facilities Project*: The project name will change to I-5 Rose Quarter: Phase 1A. With the increase of \$60,000,000 for the construction phase, the original scope of building stormwater improvements within the project area near I-405 will be expanded and the mile points will change to MP 301.4 to 303.2 from MP 301.2-303.4. The added scope will be to construct a structural deck overlay, make bridge rail upgrades and seismically retrofit two bridges (S8588E and N8588E) in the southern portion of the project area. Construction will begin in 2025.

Consistency with Metro’s I-5 Rose Quarter Project: Values, Outcomes and Action

JPACT and Metro Council are currently considering an MTIP amendment to program funds for a construction package that partially completes the improvements to the Interstate 5 mainline that are included in the I5 Rose Quarter (I5RQ) project. Metro Council approved a set of Values, Outcomes and Actions for the I5RQ project in April 2020 that has guided Metro’s engagement in the project ever since. This document reviews the current status of the project in implementing each action identified in the Values, Outcomes and Actions document, and summarizes overall progress with respect to each of the three values.

Value / action	Status	Staff comments
<i>1. Advancing racial equity and committing to restorative justice</i>	<i>Complete / ongoing</i>	
1A. Coordinate with the Albina Vision Community Investment plan (funded by a Metro grant) to take into account the land value created by this project and the urban design features described in the Albina Vision.	Ongoing	Albina Vision Trust (AVT) has completed their Metro-funded Community Investment grant project. This work continues to inform their engagement with I5RQ, including through partnership with PBOT on two federally-funded Reconnecting Communities grant projects ¹ that focus on development strategies and surface street improvements in and around the project area. Coordination between AVT and ODOT is ongoing. In March 2024 the OTC directed ODOT to work with AVT to prioritize offering AVT the right to develop new parcels created by I5RQ. AVT also recently signed a letter of commitment indicating its intent to continue coordinating with ODOT and other partners on I5RQ.
1B. Appoint a landscape design team to inform a community-led decision-making process on highway cover design.	Complete	The consultant team completed the Independent Cover Assessment in July 2021, which recommended a cover design that maximized developable space on and around the cover, as well as changes to surrounding

¹ For more information on these projects, see <https://www.portland.gov/bps/planning/reconnecting-albina/about> and <https://www.portland.gov/transportation/news/2024/3/8/pbot-news-release-portland-mayor-commissioner-and-transportation>.

Value / action	Status	Staff comments
		transportation facilities to improve access to and foster development on the cover. ² All project partners subsequently agreed to a cover design through a letter of agreement with the Governor's office signed in January 2022.
1C. Set a new standard for State design and contracting practices for local minority-owned contractors and small businesses that incorporates prime-contractor development programs, workforce development opportunities, anti-displacement and restorative community building investment, and wealth creation and land ownership opportunities.	Ongoing	The goals and strategies outlined in the Project's Diversity and Subcontracting Plan ³ are designed to help develop, mentor, expand expertise and build the capacity of DBEs, as well as to promote workforce development and economic opportunities for historically underrepresented populations. Other topics discussed in this outcome, including anti-displacement, restorative community building investment, wealth creation, and land ownership opportunities are the subject of one of the collaborative PBOT-AVT projects discussed under item 1A. ⁴
Establish a committee to oversee implementation of the DBE contracting process.	Complete	ODOT established the Community Oversight Advisory Committee ⁵ to oversee implementation of DBE contracting in 2020. The committee last met in January 2023 and will resume a regular meeting schedule when construction on the project begins.
<i>2. Increase multi-modal mobility and implement congestion pricing to reduce greenhouse gas emissions</i>	<i>Not on track</i>	
2A. Synchronize the project timeline with the I-5 tolling program, so that any analysis of traffic and greenhouse gas emission benefits of the project also incorporates pricing strategies for managing traffic.	Not on track	In March 2024, Governor Kotek and the Oregon Transportation Commission ordered ODOT to stop work on the Regional Mobility Pricing Project (RMPP; the official project name of the I-5 tolling program); the project is now on hold indefinitely. ⁶ This decision poses an obstacle to achieving all actions associated with pricing.
2B. Link the project with larger I-5 corridor planning efforts by taking into account the transportation needs of the entire corridor, as well as the potential impacts to	Ongoing	As discussed in more detail in the project Supplemental Environmental Assessment (SEA), ⁷ the modeling assumptions provided by Metro to the project account for all projects up and down I-5 that were then included on the

² https://www.i5rosequarter.org/pdfs/independent_cover_assessment/RQ-CAP-Report.pdf

³ https://www.i5rosequarter.org/media/izoepgpn/ch_2_reconciled_diversity_subcontracting_plan.pdf

⁴ <https://www.portland.gov/bps/planning/reconnecting-albina/about>

⁵ <https://www.i5rosequarter.org/committees/>

⁶ <https://www.oregon.gov/odot/tolling/pages/i-5-tolling.aspx>

⁷ https://www.i5rosequarter.org/media/kxjgs5t/i5rq_rsea_appendixa_traffic_508.pdf

Value / action	Status	Staff comments
people living along the entire I-5 corridor.		Regional Transportation Plan project list, and the SEA analyzed potential project impacts to traffic speeds and volumes at locations on I-5 outside the immediate project area. However, the decision to pause RMPP (see 2A) eliminates some of the needs and/or opportunities for this project to coordinate with larger I-5 corridor planning activities
2C. Implement congestion pricing on this segment of I-5 as soon as possible and prior to completing the project.	Not on track	According to a progress report provided by ODOT to project partners in April 2023, which characterized pricing work as in progress and ongoing as part of the project development process, congestion pricing for I5RQ “is being addressed through the Regional Mobility Pricing Project.” Now that RMPP is on hold there is no plan to price the project prior to completion.
<i>3. Engaging stakeholders through a transparent and inclusionary decision-making process</i>	<i>Complete</i>	
3A. Provide more detail about the roles and expected deliverables of the Community Advisory Committee (CAC) and Executive Steering Committee (ESC), as well as how committee feedback will be incorporated into project timelines and milestones.	Complete	The project website provides extensive detail about the COAC (the official name of the CAC), ESC, and other project committees, including their charters, membership, and meeting minutes. ⁸
3B. Clearly define how feedback mechanisms will function between the CAC, ESC, participating agencies, ODOT staff, and the Oregon Transportation Commission (OTC).	Complete	See response to 3A—this information is described in the charters of these committees, which are available via the project website.
3C. Clearly describe to agency partners how the OTC’s 11 actions will be incorporated into the project and have timelines synchronized in a way that ensures transparency and accountability.	Mostly complete	These 11 actions largely align with Metro Council’s Values, Outcomes and Actions; they include calls for ODOT to establish committees, document decision-making processes, conduct an independent cover evaluation, apply congestion pricing, and coordinate with partners. The majority of these actions are complete except for those related to pricing.

⁸ <https://www.i5rosequarter.org/committees/>

Value / action	Status	Staff comments
3D. Develop a partner agency agreement (e.g., IGA, MOU) that outlines how collaboration will continue as part of a process that incorporates these outcomes, completes these identified actions, and commits to project principles and values.	Complete	In August 2022, the Portland City Council unanimously adopted an Intergovernmental Agreement to formalize a partnership between ODOT and the City in delivering the project. ODOT and TriMet also executed an IGA related to I5RQ in August 2022.

Consistency with the Congestion Management Process and Oregon Highway Plan

Consistency with OHP Policy 1G and Action 1G.1

Oregon Highway Plan (OHP) Policy 1G and Action 1G.1 directs ODOT to maintain highway performance and improve safety by improving system efficiency and management before adding capacity. As public documents and presentations on the Interstate 5 Rose Quarter project to date have shown the known elements to the project includes: freeway cap, auxiliary lanes, on and off ramp improvements and spacing, active transportation enhancements, and local street connectivity. The scope elements are consistent with the first two steps of the OHP Action 1G.1 in addressing the overarching needs of the Interstate 5 corridor. The Project has documented consistency with the state and regional policy by focusing the project scope on the first two steps of the Oregon Highway Plan (OHP) Action 1G.1. These two steps are:

1. Protect the existing system. The highest priority is to preserve the functionality of the existing highway system by means such as access management, local comprehensive plans, transportation demand management, improved traffic operations, and alternative modes of transportation.
2. Improve efficiency and capacity of existing highway facilities. The second priority is to make minor improvements to existing highway facilities such as widening highway shoulders or adding auxiliary lanes, providing better access for alternative modes (e.g., bike lanes, sidewalks, bus shelters), extending or connecting local streets, and making other off-system improvements.

Consistency with Regional Transportation Functional Plan

Additionally, the Rose Quarter Interstate 5 project is consistent with Section 3.08.220 of the Regional Transportation Functional Plan in prioritizing four of the six strategies as part of the project outcomes, which includes:

1. TSMO strategies, including localized Travel Demand Management (TDM), safety, operational and access management improvements.
2. Transit, bicycle and pedestrian system improvements.
3. Connectivity improvements to provide parallel arterials, collectors or local streets that include pedestrian and bicycle facilities, consistent with the connectivity standards in section 3.3.4 and design classifications in Table 3.9 of the RTP, to provide alternative routes and encourage walking, biking and access to transit; and

4. Motor vehicle capacity improvements, consistent with the RTP Regional motor vehicle network vision and policies in Table 3.8 and section 3.3.3 of the RTP, only upon a demonstration that other strategies in this subsection are not appropriate or cannot adequately address identified transportation needs.

Consistency with Local Plans

Lastly, the Rose Quarter project would provide transportation infrastructure to support the land use plans for the Rose Quarter and the Albina neighborhood. The I-5 Rose Quarter Improvement Project also is included in adopted Portland regional land use and transportation plans. Specifically, the project would support the City of Portland's Central City 2035 Plan and Transportation System Plan, adopted in June 2018. The Project includes related goals developed through the joint ODOT and City of Portland N/NE Quadrant and I-5 Broadway/Weidler Interchange Plan process, which included extensive coordination with other public agencies and citizen outreach. The Metro Council and the Joint Policy Advisory Committee on Transportation adopted the proposed Project as part of the Regional Transportation Plan in 2014, 2018 and again in 2023. The current proposed amendment is a partial build of the full project, but this initial phase is consistent with the full build that was included in the most recent RTP with no new project elements.

Policies on RTP Investment Priorities

The following is an assessment of how the proposed MTIP project amendment advances the RTP investment priorities of Equity, Climate, Safety, Mobility and Economy and how the project impacts the package of MTIP investments towards those RTP goals. It is based on the similar assessment completed as part of the initial evaluation and adoption process for the 2024-27 MTIP. Economy was recently included in the 2023 RTP but was not part of the 24-27 MTIP assessment process. It has been included in this assessment. A summary of the evaluation results based on the RTP investment priorities is provided in Table 1. The detailed analysis by performance measure for each RTP investment priority is outlined following the summary table. In addition to the proposed amendments that were evaluated, staff performed a full build analysis of the project to ensure consistency with the RTP. Included is both a summary evaluation in Table 2 and a detailed analysis for each performance measure.

Table 1. Summary of RTP Investment Priorities Evaluation – Rose Quarter Interstate 5 Phase 1

RTP Priority	Measure 1	Measure 2	Measure 3
Equity	o	o	+/o
Climate	o	o	+/o
Safety	o	+	N/A
Mobility	o	o	N/A
Economy	+	+	N/A

Table 2. Summary of RTP Investment Priorities Evaluation – Rose Quarter Interstate 5 Full Build

RTP Priority	Measure 1	Measure 2	Measure 3
Equity	o	o	+/o
Climate	o	o	+/o
Safety	o	+	N/A
Mobility	o	o	N/A
Economy	+	+	N/A

***The full build is not a part of the proposed amendment, but the evaluation is included to show RTP consistencies.**

Key:

- o neutral or still to be determined until further details are known
- ^ not directly addressing the region’s desired outcome; has other related benefits
- + trending towards the desired outcome for that priority
- trending away from the desired outcome for that priority
- +/o potential to trend toward desired outcome but still to be determined until further details are known
- /o risk to trend away from desired outcome but still to be determined until further details are known

Equity

To measure equity in the context of the project, Metro staff describe whether the project increases access to travel options in Equity Focus Areas and summarize information provided by project staff on how the project has been identified as a priority transportation improvement by BIPOC and low-income persons or communities.

Desired Outcome	Performance Measures	Project Performance Assessment (Phase 1a & 1)	Full build
Increase Access to jobs	1. Weighted average household access to jobs within a 30-minute driving commute or 45-minute transit commute.	<p>TIP Modeling shows small but positive increase in access to jobs both region wide and in the MPA equity focus areas.</p> <p>Modeling shows an increase of access to jobs via drive commute from 437,713 to 437,916 region wide and an increase from 73,711 to 73,715 for transit trips. For equity focus areas, there is an increase in access to jobs via drive commute from 450,816 to 451,005. For jobs accessible via transit there is an increase from 89,378 to 89,386.</p>	<p>TIP Modeling shows small but positive increased access to jobs both region wide and in the MPA equity focus areas.</p> <p>Modeling shows us an increase in access to jobs via auto trips across the MPA area from 437,713 to 438,129. An increase to jobs via transit from 73,711 to 73,725. There is also a small increase in MPA Equity Focus Areas as well. Access to jobs via auto trips in equity focus areas increased from 450,816 to 451,145. For transit, there is an increase from 89,378 to 89,402.</p>
Increase access to community places	2. Weighted average household access to community places within a 20-minute driving commute or 30-minute transit commute.	<p>TIP modeling shows a small increase access to community places. There is no increase in access to community places via transit in the modelling. There is an increase of access to community places via auto trips from 2,734 to 2,735 in the MPA area and an increase from 2,863 to 2,864 in equity focus areas.</p>	<p>TIP modeling shows small but positive increase in access to community places. Results were the same from the phased build out.</p>
Complete any gaps in the active transportation system in an equity focus area	3. Miles and percentage of active transportation infrastructure added to the completeness of the regional active transportation work.	<p>The phase 1a & 1 project is not located on a gap in the AT network, and thus cannot close a gap. However, the full build may include components of closing gaps in the active transportation network.</p>	<p>The full build does include a new bicycle and pedestrian bridge over I-5. Additional GIS analysis is required to determine whether the full build closes gaps in the active transportation system.</p>

Safety

To measure safety in the context of the project, a description of whether the project includes scope elements to address documented safety issues that contribute to crashes that result in fatal and serious injuries and include recognized safety counter measures is provided. An assessment of the scope is also compared against the region’s high injury corridors to better understand whether the project is addressing the locations with a propensity of crashes leading to fatalities and serious injuries. Additional relevant safety related information as provided by project staff is also summarized.

Desired Outcome	Performance Measures	Project Performance Assessment (Phase 1a & 1)	Full Build
Increase level of investment to address fatalities and serious injuries	1. Amount of investment of safety activities which address fatalities and serious injuries crashes.	Additional analysis needed on approximate amount of the proposed amendment is going towards RTP defined safety projects.	Similar to the phase 1a and 1 build, additional analysis on approximate amount of investment is going to wards safety projects.
Increase level of safety investment on high injury corridors, and high injury corridors in equity focus areas	2. Amount of investment of safety activities which address fatalities and serious injuries crashes on high injury corridors, equity focus areas, and high injury corridors in equity focus areas.	The Project is in both a High Injury Corridor and an Equity Focus Area.	The Project is in both a High Injury Corridor and an Equity Focus Area.

Climate

To measure climate in the context of the project, a summary of how the project aligns with Metro’s RTP climate goals and polices and whether the project includes elements that will increase access to and use of multi-modal options or increase motor vehicle travel is provided.

Desired Outcome	Performance Measures	Project Performance Assessment (Phase 1a & 1)	Full Build
Reduction of greenhouse gases per capita	1. Projected daily metric tons of greenhouse gas emissions reduction per capita.	TIP modeling shows a very small increase of emission (less than 0.01%).	TIP modeling shows a very small increase (approx. 0.017%).
Reduction in daily metric tons of greenhouse gas emissions	2. Projected daily metric tons of greenhouse gas emissions reduction	TIP modeling shows a 1 metric ton increase in greenhouse gas emission. Up from 12,565 to 12,566.	TIP modeling shows a 2 metric ton increase in greenhouse gas emission. Up from 12,565 to 12,567.
Improves system completeness of active transportation network	3. Miles and percentage of active transportation infrastructure added to the completeness of the regional active transportation work.	The project is not located on a gap in the AT network, and thus cannot close a gap. However, the full build will include components of closing gaps in the active transportation network.	The complete build of the Rose Quarter does include completing gaps in the active transportation network. More specifically, the project aims to close gaps in the Green Loop through Llyod District. Additional GIS analysis is needed to confirm that gaps are being addressed.

Mobility

To measure mobility relief in the context of the project, an assessment of whether the project proposes impacts to mode split (e.g. driving, transit, bike) and miles traveled by mode per capita.

Desired Outcome	Performance Measures	Project Performance Assessment (Phase 1a & 1)	Full Build
Achieve a more equitable mode split amongst driving, transit, and biking	1. Mode split	<p>TIP modeling shows virtually no impact to mode splits.</p> <p>Total SOV trips remain the same (42.515%). There is a small increase from 38.681% to 38.683% for total HOV trips. All other trips remain the same, total transit trips (4.641%), total bike trips (3.826%), total walk trips (7.548%), and total school bus trips (3.282%).</p>	<p>TIP modeling shows the same amount of SOV trips (42.515%), a very small increase in HOV trips (increase of .003% from MTIP and .001 from phase 1), very small increase in transit trips (.001%), very small increase in school bus trips (.001%), and same amount for bike trips and walk trips.</p>
Decrease miles traveled by vehicle and increase miles done by bike and transit	2. Miles traveled by mode	<p>TIP modeling shows a very small impact in miles traveled by mode.</p> <p>There is an increase of personal vehicle driver miles traveled from 21,256,521 to 21,257,411. A small increase in personal vehicle passenger miles traveled from 7,575,447 to 7,575,724. A slight decrease in bike miles traveled from 842,597 to 842,412. A slight decrease in pedestrian miles traveled from 292,789 to 292,772. A small increase in transit miles traveled from 2,020,953 to 2,021,685.</p>	<p>TIP modeling shows small but negative impacts on vehicle miles traveled, bike miles traveled, and pedestrian miles traveled. There is a small positive impact on transit miles traveled.</p> <p>There is an increase in personal vehicle miles traveled from 21,256,521 to 21,257,976. An increase in personal vehicle passenger miles traveled from 7,575,447 to 7,575,986. An increase in transit miles traveled from 2,020,953 to 2,021,685. There is a decrease in bike miles traveled from 842,597 to 842,412 and a decrease in pedestrian miles traveled from 292,789 to 292,765.</p>

Economy

To measure economic vitality in the context of the project, an assessment of whether the project is in an area that is prioritized for future job growth and if the project is in an area with higher-than-average job activity.

Desired Outcome	Performance Measures	Project Performance Assessment (Phase 1 & 1a)	Full Build
Increase transportation option in areas prioritized for future job growth.	1. Is the project located in an area that is prioritized for future job growth?	The project is in the Central City, an area that is prioritized for job growth under the 2040 Growth Concept, which is the region’s land use vision. This helps to ensure that the project supports access not only to jobs that exist today, but to new jobs that will be added as the region continues to grow.	The project is in the Central City, an area that is prioritized for job growth under the 2040 Growth Concept, which is the region’s land use vision. This helps to ensure that the project supports access not only to jobs that exist today, but to new jobs that will be added as the region continues to grow.
Increase transportation options in an area with higher-than-average job activity	2. Is the project located in an area with higher-than-average job activity?	According to Metro’s Economic Value Atlas , the Census Tract that aligns with the project area has over 50% more jobs than the average Census Tract in the Metro region, and has historically experienced more rapid job growth than the average tract.	According to Metro’s Economic Value Atlas , the Census Tract that aligns with the project area has over 50% more jobs than the average Census Tract in the Metro region, and has historically experienced more rapid job growth than the average tract.



Oregon

Tina Kotek, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: November 20, 2024
TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: Agenda Item F – Urban Mobility Strategy Finance Plan Update

Requested Action:

Approve an updated conceptual plan to close the funding gap for the Urban Mobility Strategy.

Background:

In May and June 2024 the Oregon Transportation Commission (OTC) discussed the funding gap for elements of the Urban Mobility Strategy (UMS) and options to close that funding gap. Multiple factors require ODOT to secure additional resources to move UMS projects forward, including:

- Higher costs for the I-205 Abernethy Bridge project and the loss of expected tolling revenue have created a significant funding gap on this project.
- The I-5 Rose Quarter Improvements Project lacks sufficient funding to complete the project or even to begin construction in 2025.

The Commission took action to close this gap:

- The Commission approved transferring \$100 million from the I-405 Fremont Bridge painting project to close a portion of the funding gap on I-205 Abernethy. This was effectuated in the August Statewide Transportation Improvement Program (STIP) amendment.
- In May the Commission agreed to provide up to \$250 million from the \$30 million per year UMO set-aside from HB 2017 to match up to \$750 million in federal INFRA grant funding for the I-5 Rose Quarter. This funding would come from shifting HB 2017 Urban Mobility Strategy funds from I-205 Abernethy back to the Rose Quarter as originally intended.
- In June the Commission approved a conceptual finance plan that would close the remaining gap on I-205 Abernethy through issuance of additional Highway User Tax Revenue bonds that would be repaid by HB 2017 Bridge and Seismic funds otherwise programmed to projects in the STIP.

At the time, ODOT pledged to return to the OTC to complete work on the finance plan once the outcome of the INFRA grant for Rose Quarter was known. Events since June have provided ODOT greater clarity on funding for both I-205 and Rose Quarter.

I-205 Abernethy

ODOT has been working closely with Kiewit, the project contractor, to reach a settlement of existing claims to move the project forward to completion expeditiously. ODOT secured this settlement in November, which requires adding funding to the project's budget; ODOT is requesting this in a STIP amendment that will be considered separately from this finance plan. Based on this settlement, ODOT now estimates the project's total cost to be \$815 million, including preliminary engineering, construction, and a separate contract for soil stabilization needed for seismic resilience. This does not include pricing a number of known risks that have been identified by ODOT and the contractor, particularly risks associated with work on an aging bridge. Additional funding needed to cover these higher costs would come from Highway User Tax Revenue bonds repaid by HB 2017 Bridge and Seismic funds, which would reduce funding for projects in the STIP Bridge program for the next 25 years.

I-5 Rose Quarter

ODOT did not receive the federal INFRA grant and the project's currently available funding of \$608 million is not sufficient to begin construction in 2025. Absent additional funding, the earliest construction could begin on the initial portion of the highway cover, funded by the Reconnecting Communities and Neighborhoods (RCN) grant, would be 2027.

ODOT will present the Commission an option for adding \$250 million to the funding for Rose Quarter to move to construction on significant elements of the project beginning in 2025 and expand upon the construction funded by the RCN grant. Adding this funding would allow ODOT to:

- Build the full southbound auxiliary lane and shoulder from I-405 to the Morrison Bridge exit.
- Extend an initial portion of the northbound auxiliary lane and shoulder under the highway cover.
- Extend the initial, central portion of highway cover to be built with the RCN grant and lower the highway to its finished profile and final pavement under the constructed portion of the highway cover.
- Complete bridge work in the southern project area, construct stormwater facilities near I-405, and construct sign bridges & Intelligent Transportation Systems.

An investment of this size would reduce the funding gap for the project, and beginning construction in 2025 would lock in pricing and prevent continued cost escalation of these elements.

The additional funding for Rose Quarter would come from shifting HB 2017 Urban Mobility Strategy funds from I-205 Abernethy back to the Rose Quarter project, for which they were originally intended. The funding gap on Abernethy would grow, requiring ODOT to issue Highway User Tax Revenue bonds repaid by HB 2017 Bridge and Seismic funds. This will have impacts to projects that would otherwise be funded from the state's Bridge program for the next 25 years.

Outcomes

ODOT seeks Commission feedback and approval on two items.

- Direction on additional investments for the I-5 Rose Quarter.

Oregon Transportation Commission

Page 3

- Approval of an updated Urban Mobility Strategy finance plan that lays out the additional amounts of Highway User Tax Revenue Bonds needed.

If the Commission approves additional funding for I-5 Rose Quarter, ODOT will return with a STIP amendment to officially add these resources so the project can move to a construction start in 2025.

Attachments:

- Attachment 01 – Urban Mobility Strategy Finance Plan Updated (December 2024)

Urban Mobility Strategy Finance Plan Update

December 2024

Introduction

In June 2023 the Oregon Transportation Commission approved a finance plan for the Urban Mobility Strategy at the direction of Governor Tina Kotek after she directed ODOT to delay the collection of tolls until 2026. The finance plan laid out the available resources for the UMS in light of this decision, allocated available funding among projects to meet key milestones, estimated remaining funding gaps for each project, and offered potential funding sources to close these gaps and complete the projects.

In the nearly one year since approval of this initial plan, a number of major factors have impacted the original plan approved by the Commission.

- In March 2024, Governor Kotek directed ODOT to stand down on tolling for the time being by canceling the Regional Mobility Pricing Project, transferring toll collections for the Interstate Bridge Replacement Program to WSDOT, and indefinitely pausing work on the I-205 Tolling Project. This will lead to substantial reductions in expenditures compared to the funding allocated to tolling in the UMS Finance Plan but will also eliminate \$385 million in projected funding from tolls on I-205.
- The estimated cost to complete construction of the I-205 Abernethy Bridge Project, which is already under construction, has increased for a number of reasons, including structural engineering elements, unanticipated project changes, delay, escalation and risk for a multi-year project.
- The I-5 Rose Quarter received a \$450 million Reconnecting Communities and Neighborhoods (RCN) grant from the U.S. Department of Transportation, allowing the project to expand its scope of work to complete design on the main construction package and construct an initial portion (but not all) of the highway cover that will help knit back together the Albina neighborhood that was torn apart by the original construction of the Interstate through a thriving Black community. ODOT is developing plans to get this portion of the project under construction and is developing options for adding elements if additional funding is provided.

The net effect of these impacts is that there is a shortfall in the funding needed to complete the I-205 Abernethy Bridge, and also an opportunity to get the Rose Quarter under construction if additional funding can be identified.

This December 2024 update to the UMS Finance Plan approved by the OTC in June 2024 is designed to provide a path forward to closing the I-205 Abernethy Bridge funding gap now that the project's current cost estimate is known; it also offers the option to provide funding to the I-5 Rose Quarter to start construction in 2025. This document is designed as a conceptual finance plan to help frame up the Commission's decisions around allocation of funding. All figures in this document are estimates as of December 2024 and subject to change as actual project costs and expenditures are updated with

additional time. Similarly, the available funding from HB 2017 Urban Mobility Strategy bonds is subject to significant uncertainty, and the timing of expenditures and cash flow needs that will determine bond sales timing and debt service amounts for each year into the future will be determined as projects move forward. ODOT also maintains a more in-depth operational finance plan for the UMS projects that tracks expenditures and funding needs by quarter, which is used to determine the timing of bond issuance.

Program Funding

Since the June 2023 UMS Finance Plan, a number of factors have changed the amount of funding available for the UMS.

- The decision to halt tolling on I-205 has reduced estimated resources for the I-205 Abernethy Bridge by \$385 million.
- The \$450 million RCN grant for the Rose Quarter has opened up new opportunities to make progress on a critical project.
- In June the OTC approved a proposal to redirect \$100 million of Bridge program funds from the I-405 Fremont Bridge to the Abernethy Bridge.

With all these changes, the UMS has \$1.267 billion in total resources available.

Table 1: Total Resources for UMS After June 2024 Update

Revenue Sources	Amount	Notes
HB 2017 UMS	\$560	Bond proceeds and cash from the \$30 million annual set-aside of HB 2017 funds. Originally directed by HB 2017 to Rose Quarter; HB 3055 in 2021 allowed for use on other elements of the UMS.
Other Federal/State/Local	\$257	Includes a variety of federal, state and local revenue sources, including \$100 million approved by OTC to transfer from I-405 Fremont to I-205 Abernethy in June 2024.
Federal Competitive Grants	\$450	Reconnecting Communities and Neighborhoods Grant for I-5 Rose Quarter.
I-205 Tolls	\$0	Tolling revenue is no longer included in UMS Finance Plan.
Total Resources	\$1,267	

Note: All dollar figures throughout this document are in millions of dollars.

The revenue estimate from cash and bonds from the \$30 million allocation to the UMS from HB 2017 remains unchanged, though it has elements of uncertainty. ODOT has sold the first tranche of bonds backed by these resources, totaling about \$240 million in net proceeds, and expects a second sale in the 2025-2027 biennium, with the timing dependent on cash flow needs and other factors. The total resources available from HB 2017 will depend on key details of financing, including bond interest rates and maturities, as well as when the bonds are sold; ODOT will continue to receive cash from this allocation until funds are fully dedicated to debt service payments after the second tranche of bonds is sold.

Project Costs and Expenditures

Since June 2023 a number of changes have occurred that impact expected costs and expenditures for the UMS projects.

Tolling

The original UMS Finance Plan allocated \$263 million to implement tolling, including costs of developing and constructing tolling infrastructure on I-205 and I-5 and building the back office and customer service center necessary to collect tolls. Due to cancellation of the RMPP, pausing tolling on I-205, and transferring toll collection on IBR to the Washington State Department of Transportation, ODOT now anticipates spending about \$70 million on tolling across three toll projects, presenting savings of approximately \$193 million. The net loss of I-205 toll revenue due to the pause on tolling is about \$192 million.

I-205 Abernethy Bridge

The total cost of completing the I-205 Abernethy Bridge project is currently estimated at \$815 million. This includes the anticipated total cost of three elements.

- Preliminary engineering for the I-205 corridor improvements.
- I-205 Abernethy Bridge construction (currently underway).
- Soil stabilization necessary for seismic resilience on the I-205 Abernethy Bridge.

ODOT anticipates completing the base construction project by the end of 2026, with soil stabilization work likely to begin in 2027 under a separate contract.

The 2023 UMS Finance Plan projected a total cost of the I-205 Abernethy Project of \$662 million; the June 2024 update estimated \$750 million. Drivers of the higher cost include:

- Structural engineering elements, including additional steel reinforcement for existing bridge cross beams, additional structural steel fabrication and materials, reconciling as-built conditions vs. contract plans, delay related to changes during construction, and additional engineering.
- Unanticipated project changes, including additional underground storage tanks, blast caps, soundwall panel changes, and environmental permit required changes.

This current estimate of \$815 million does not include the likely price of additional risks that have been identified by the project team, so ODOT will return to update the Commission on the total cost of the project as risks are either addressed or become real. Additional funding will be likely be needed to address these risks and will be requested as needed in future STIP amendments to be approved by the Commission.

I-5 Rose Quarter

The 2023 UMS Finance Plan provided the I-5 Rose Quarter an allocation of \$158 million from HB 2017 funds and other state, federal and local funds. This allocation allows ODOT to complete design of the three early work packages (formerly known as early work packages A, B and C), reach 30% design of the

main construction package and prepare for property acquisitions needed for construction. However, this funding will not allow the project to start construction.

The \$450 million federal RCN grant, awarded in March 2024, will fund design completion (including right of way acquisitions and utility relocations) and construction of an initial portion of the highway cover, which will be forward compatible with the construction of the remainder of the highway cover and I-5 mainline improvements. The grant did not fund the proposed bicycle/pedestrian bridge over I-5, the project's auxiliary lanes and shoulders, the I-5 southbound off-ramp relocation, nor multimodal street improvements. Grant funding is secured, with the design funding available now and construction funding to become available in advance of construction, now that ODOT has completed a grant agreement with the Federal Highway Administration. Construction on the RCN portion of the project is anticipated to begin by 2027.

Even with this grant, the Rose Quarter faces a significant funding gap of about \$1.3 billion, based on the project's high-end estimate of \$1.9 billion. This is in part because UMS funds originally dedicated to Rose Quarter by HB 2017 were set aside for I-205 Abernethy and implementation of tolling after passage of HB 3055 to move the construction-ready I-205 Abernethy bridge project forward and jumpstart work on tolling. ODOT intended to repay these funds borrowed from Rose Quarter after selling bonds backed by toll revenue. This plan has been complicated by the cost increases required to complete the Abernethy Bridge and the loss of projected tolling revenue.

In May the OTC agreed to contingently allocate up to \$250 million in HB 2017 funds to match an INFRA grant request of up to \$750 million. This funding would have closed a significant portion of the project's funding gap and allowed construction to begin in 2025, but ODOT did not receive this grant. However, ODOT has developed an option to allocate an additional \$250 million to the Rose Quarter that would fund the following elements, with construction able to start in 2025 if funding is provided in December and to expand upon the construction funded by the RCN grant.

- Build the full southbound auxiliary lane and shoulder from I-405 to the Morrison Bridge exit.
- Extend an initial portion of the northbound auxiliary lane and shoulder under the highway cover.
- Extend the initial, central portion of highway cover built with RCN grant, and lower the highway to its finished profile and final pavement under the constructed portion of the highway cover.
- Complete bridge work in the southern project area, construct stormwater facilities near I-405, and construct sign bridges & Intelligent Transportation Systems.

These improvements would have significant value, both in terms of providing a significant improvement to traffic flow and safety on I-5 (with the most robust improvements in the southbound direction) and also in extending the highway cover to north of Broadway.

If the Commission approves the additional \$250 million for Rose Quarter construction, the following elements of the project would remain to be funded:

- Completing the highway cover between Flint and Broadway

- Constructing the Hancock crossing (as part of the completed highway cover between Flint and Broadway)
- Completing multimodal local street improvements outside of RCN-funded highway cover area
- Constructing the pedestrian and bicycle bridge
- Completing the northbound auxiliary lane and shoulder (between the Broadway on-ramp and the Greeley off-ramp and between the I-84 on-ramp and Weidler off-ramp)
- Relocating the I-5 southbound off-ramp and new flyover structure

Based on the project cost range of \$1.5 to \$1.9 billion, the project's remaining costs would be approximately \$650 million to \$1.05 billion. The Urban Mobility Office will update and validate the Rose Quarter cost estimate, including this identified funding gap, in coordination with the Federal Highway Administration in spring of 2025.

Closing the Urban Mobility Strategy Funding Gap

With higher costs and reduced revenues available to complete the I-205 Abernethy Bridge Project, ODOT faces the need to close the immediate funding gap for that project to ensure completion. A plan to close this gap needs to be developed in the near future, as ODOT does not have the cash on hand to spend hundreds of millions of dollars on UMS projects over the next few years without a funding source.

ODOT has covered expenditures prior to toll revenue coming available in 2026 through short-term borrowing using a commercial paper program. ODOT has taken out about \$280 million in commercial paper, which the agency originally planned to pay back using toll revenue. Plans for additional commercial paper draws against the program's total cap of \$500 million are temporarily on hold now that tolling isn't available as a repayment source. ODOT may need additional short-term borrowing from our commercial paper program or other sources to meet cash flow needs for I-205 construction costs prior to selling bonds to pay off the short-term borrowing. Taking out additional short-term debt requires identifying a replacement revenue source to pay back this short-term debt.

Table 2 shows the funds allocated to each UMS project in the June 2024 UMS Finance Plan Update, as well as a base update for December 2024 based on new cost estimates of I-205 Abernethy, tolling, and short-term financing. It also offers the option of providing the Rose Quarter an additional \$250 million of HB 2017 UMS funds to start construction in 2025. Under any of these scenarios, the funding gap would be covered using proceeds from Highway User Tax Revenue (HUTR) bonds backed by ODOT's HB 2017 Bridge and Seismic State Highway Fund revenues. If the Commission chooses to provide the additional funding for Rose Quarter, funding from the HB 2017 Urban Mobility Strategy funds would be shifted from I-205 Abernethy back to Rose Quarter, requiring the sale of more bonds backed by Bridge/Seismic funds.

As shown here, the impact to the Bridge/Seismic program differs based on the scenario, with approximately \$18 million in annual debt service needed under the base scenario and up to about \$35 million needed under the scenario that invests \$250 million in the Rose Quarter.

Table 2: Estimated Funds Needed For UMS Projects

Project	June 2024 Update	December 2024 Update Base	December 2024 + RQ Construction
I-205 Abernethy	\$750	\$815	\$815
I-5 Rose Quarter	\$608	\$608	\$858
I-5 Boone Bridge	\$4	\$4	\$4
Tolling	\$73	\$70	\$70
Short Term Financing Costs	\$36	\$15	\$15
Total Funds Needed	\$1,471	\$1,512	\$1,762
Total Resources	\$1,267	\$1,267	\$1,267
Funding Gap	\$(204)	\$(245)	\$(495)
Annual Debt Service	\$15	\$18	\$35

Additional bonds would need to be sold if the cost of I-205 Abernethy increases, as is expected based on the identified known risks. ODOT may also choose to sell additional bonds to cover cost escalation on other HB 2017 projects, such as the OR 22 Center Street Bridge, which faces a significant shortfall. Bonds would likely be issued in multiple tranches starting in the 2025-2027 biennium when funds are needed to pay project expenses. Legislative authorization for these bonds would be required in the 2025 bond bill.

Funding to pay back these bonds would be drawn from bridge projects statewide that are programmed in the 2024-2027 STIP or would be programmed in future STIPs. The bonds would likely be paid off in about 25 years from their date of issuance. Because all of the bonds will not be sold for several years, impacts to the Bridge program would likely be relatively small in the 2024-2027 STIP—likely in the range of \$45-50 million-- though ODOT would likely need to cancel or delay some projects. ODOT will return to OTC for actions to cancel or delay projects in the 2024-2027 STIP once we have greater insight into the amount of bonds to be issued, the timing of bond sales, and debt service amounts. The full impact would hit the 2027-2030 STIP after all the bonds are issued, but projects have not yet been programmed in this STIP. In the 2027-2030 STIP, the Bridge Program funding is \$272 million total and an estimated \$105 million will go towards debt service. For future STIP cycles, debt service will be a line item in the program budget and there will be less money available for delivering other projects.

Depending on the timing of long-term bond sales, these options may require additional short-term borrowing through the commercial paper program to meet immediate cash flow needs on I-205, and this borrowing comes with financing costs. To avoid the use of short-term financing, and its associated costs, ODOT may elect to move up the sale of the legislatively-authorized HB 2017 UMS bonds to meet immediate cash flow needs. However, it should be noted that moving up the issuance of HB 2017 bonds will reduce the total resources available from HB 2017 UMS funding in two ways:

- ODOT generates about \$1 million in additional cashflow each month from the portion of the funding that is not yet being paid in debt service; and

- The longer ODOT is able to wait to sell the remaining portion of UMS bonds, the more proceeds it can generate. Conversely, the sooner ODOT sells the remaining portion, the less proceeds it can generate.

While ODOT has strong credit ratings from rating agencies—including a AAA rating from S&P—the issuance of additional debt against existing State Highway Funds without additional revenue enhancements, combined with the projected decline in the gas tax and the agency’s funding challenges, could lead to a rating downgrade or other negative guidance from the rating agencies that could increase the agency’s cost of borrowing.

Funding Needed to Complete the Urban Mobility Strategy Projects

While closing the short-term funding gap for the I-205 Abernethy Bridge project is urgent and critical, it is also important to lay out options for completing other unfunded work in the UMS, including:

- Construction of the full I-5 Rose Quarter, including completing the auxiliary lanes and shoulders to address the traffic bottleneck and safety issues, as well as constructing the remainder of the highway cover, the multimodal local street improvements, and the relocation of the I-5 southbound off-ramp.
- Construction of I-205 Phase 2, which includes the missing lane between Stafford Road and the Abernethy Bridge as well as bridge investments for seismic resilience through the southern end of the corridor. Further design work on this project was put on indefinite hold in 2023 when tolling was delayed; additional funding is needed to complete environmental review, design and undertake construction.
- Replacement of the I-5 Boone Bridge for seismic resilience and congestion relief. This project has only undertaken preliminary planning and requires funding to complete environmental review, design and enter construction.

The total cost of I-5 Rose Quarter, I-205 Improvements (both Abernethy Bridge and Phase 2), and I-5 Boone Bridge totals an estimated \$4.3 billion, with a \$3.1 billion funding gap, as shown in Table 3.

The Commission, Legislature, and ODOT have a variety of methods to seek to close this gap.

- **Additional funding in the STIP.** The Oregon Transportation Commission could dedicate additional funding from discretionary resources in the Statewide Transportation Improvement Program (STIP). However, these funds are already allocated among programs through 2030, with no additional funding dedicated to UMS projects. What’s more, discretionary resources are increasingly constrained due to the need to fund the ADA program and other programs required under law: in the 2027-2030 STIP the Commission had less than \$100 million in discretionary resources to allocate among programs, and many areas including Fix-It and Public and Active Transportation took cuts.

Table 3: Project Funding Gaps

Project	Notes	Cost (High)	Available Funding*	Funding Gap*
I-5 Rose Quarter	Cost estimate will be updated in 2025. Available funding includes the RCN grant and previously allocated funding. Does not include \$250 million proposed for project construction.	\$1,900	\$608	\$(1,292)
I-205 Abernethy	Incorporates additional costs as noted above. Available funds includes all remaining HB 2017 funds.	\$815	\$570	\$(245)
I-205 Phase 2	Updated to assume project construction begins in 2031.	\$800	\$0	\$(800)
I-5 Boone Bridge	Cost estimate has not been updated since 2023 finance plan. A new cost estimate range will be developed in late 2024.	\$725	\$4	\$(721)
Total		\$4,300	\$1,182	\$(3,058)
*Based on December 2024 base funding scenario, with all remaining HB 2017 UMS funds dedicated to Abernethy. **Estimated annual debt service on 25 year Highway User Tax Revenue bonds, rounded to nearest \$10 million. ***Increase in the statewide fuels tax along with complementary weight-mile tax to pay debt service, rounded to nearest penny.		Annual Debt Service**		\$210-240
		Fuels Tax Equivalent***		9-11 cents/gallon

- Federal discretionary grants.** In the last year major highway projects in the Portland metro region have secured over \$2.5 billion in federal discretionary funding available under the Infrastructure Investment and Jobs Act. In addition to the Rose Quarter’s \$450 million RCN grant, the Interstate Bridge Replacement secured a \$600 million MEGA grant and a \$1.5 billion Bridge Investment Program grant. ODOT intends to continue seeking other federal grants for the UMS projects—particularly the Rose Quarter. However, ODOT did not receive an INFRA grant for Rose Quarter, and INFRA grants have now been awarded through 2026, when the Infrastructure Investment and Jobs Act expires. Funding for discretionary grant programs beyond that timeframe are dependent on congressional action to reauthorize the IJJA, which could be challenging given a significant shortfall in user fee revenue flowing into the Highway Trust Fund. UMS projects may be eligible to receive other grants, though most are likely to be much more modest in size than those received to date.
- Additional statewide tax revenue.** Additional statewide tax revenue could be dedicated to the UMS projects. Generating \$3 billion in bond proceeds to close the funding gap would require about \$215 million in annual funding for debt service, which amounts to a statewide gas tax increase of nearly 10 cents per gallon, along with complementary weight-mile tax revenue.
- Regional funding.** A portion of the UMS funding gap could be raised through transportation taxes and fees within the Portland metro region, as was originally contemplated as part of HB 2017; this option was set aside in favor of tolling.

- **Tolling revenue.** While implementation of tolling has been paused, it remains an option if other funding sources are unable to close the gap and policymakers wish to complete major congestion relief projects.

Completing these three major projects will likely require some combination of multiple of the above funding sources rather than relying on a single source.



Oregon

Tina Kotek, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

DATE: January 6, 2025
TO: Oregon Transportation Commission

FROM: Kristopher W. Strickler
Director

SUBJECT: **Agenda Item G** – Amend the 2024-2027 Statewide Transportation Improvement Program (STIP) to 1) increase funding for the preliminary engineering, right of way, utility relocation, construction and other phases of the *I-5 Rose Quarter Improvement Project* (K19071); 2) increase funding and add scope to the *I-5 Rose Quarter: Broadway to Weidler Phase 1* (K23672) project; and 3) change the project name and mile points, and increase funding to the construction phase of the *I-405 and I-5 Stormwater Facilities Project* (K23682).

Requested Action:

Amend the 2024-2027 Statewide Transportation Improvement Program (STIP) to increase funding for the I-5 Rose Quarter Improvement Project from \$623,391,997 to \$873,391,997. This new funding of \$250,000,000 is from House Bill 2017 Urban Mobility Strategy funds, as directed by the Oregon Transportation Commission at its December 4, 2024, meeting, for the three projects related to the I-5 Rose Quarter Improvement Project as follows:

1. Increase funding for *K19071 I-5 Rose Quarter Improvement Project* from \$236,141,997 to \$248,641,997. This funding will provide \$12,500,000 from HB2017 Urban Mobility Strategy funds to the preliminary engineering, right of way, utility relocation, and other phases.
2. Increase funding and add scope to *K23672 I-5 Rose Quarter: Broadway to Weidler Phase 1* from \$382,250,000 to \$559,750,000. This project will increase by \$177,500,000 in HB2017 Urban Mobility Strategy funds to the construction phase and the scope will be expanded to build an additional portion of the highway cover and provide initial investments in I-5 safety and operational improvements.
3. Increase funding, change the project name and mile points, and add scope to *K23682 I-405 and I-5 Stormwater Facilities* project from \$5,000,000 to \$65,000,000. This project will increase by \$60,000,000 in HB2017 Urban Mobility Strategy funds to the construction phase. The project name will change to I-5 Rose Quarter: Phase 1A, the project mile points will change to MP 301.2-303.4 (from MP 301.4 to 303.2), and the scope will expand to include bridge and seismic improvements in the project area in addition to already planned stormwater improvements.

STIP Amendment Funding Summary

I-5 Rose Quarter Improvement Project (K19071)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	2016	\$187,391,997	\$197,391,997
Right of Way	2020	\$41,000,000	\$42,000,000
Utility Relocation	2025	\$7,500,000	\$8,500,000
Construction	NA	\$0	\$0
Other	2025	\$250,000	\$750,000
TOTAL		\$236,141,997	\$248,641,997

I-5 Rose Quarter: Broadway to Weidler Phase 1 (K23672)			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	NA	\$0	\$0
Right of Way	NA	\$0	\$0
Utility Relocation	NA	\$0	\$0
Construction	2025	\$382,250,000	\$559,750,000
Other	NA	\$0	\$0
TOTAL		\$382,250,000	\$559,750,000

I-405 and I-5 Stormwater Facilities Project (K23682) - to be known as I-5 Rose Quarter: Phase 1A			
PHASE	YEAR	COST	
		Current	Proposed
Preliminary Engineering	NA	\$0	\$0
Right of Way	NA	\$0	\$0
Utility Relocation	NA	\$0	\$0
Construction	2025	\$5,000,000	\$65,000,000
Other	NA	\$0	\$0
TOTAL		\$5,000,000	\$65,000,000

Background:

The purpose of the I-5 Rose Quarter Project is to improve the safety and operations on Interstate 5 (I-5) between Interstate 405 (I-405) and Interstate 84 (I-84), as well as the local streets in the I-5 Broadway/Weidler interchange within the city of Portland.

The I-5 Rose Quarter Improvement Project adds auxiliary lanes and shoulders to reduce congestion and improve safety on the main north-south freeway on the West Coast and redesigns the multimodal local street network. The project will smooth traffic flow on I-5 between I-84 and I-405 where three interstates intersect and currently feature the biggest traffic bottleneck in Oregon. The project will also

improve community connections with a highway cover, which includes reconnecting neighborhood streets, enhancing public spaces, and promoting economic development opportunities.

In March 2024, the U.S. Department of Transportation awarded ODOT's I-5 Rose Quarter Improvement Project with a \$450 million grant to build an initial portion of the highway cover. In August 2024, the Oregon Transportation Commission and Metro Council unanimously agreed to approve the spending of this grant award and respectively approved amendments to the State Improvement Transportation Program (STIP) and Metropolitan Transportation Improvement Program (MTIP) to program these funds for the design activities and construction of the initial, central segment of the highway cover around Broadway and Weidler.

Building on this federal funding, the Oregon Transportation Commission, at their December 4, 2024, meeting, allocated an additional \$250 million to the I-5 Rose Quarter Improvement Project as part of the Urban Mobility Strategy Finance Plan update. Combined with existing funding and the recently secured U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant of \$450 million, this additional allocation provides sufficient funding to begin project construction in 2025 and deliver many of the project's most critical improvements.

Funding Summary

The increase of \$250,000,000 from HB2017 Urban Mobility Strategy funds will do the following:

- *K19071 I-5 Rose Quarter Improvement Project*: An increase of \$12,500,000 will advance design, right of way acquisition, utility relocation and other activities needed to ready K23672 and K23682, as articulated below, for construction.
- *K23672 I-5 Rose Quarter: Broadway to Weidler Phase 1*: With the increase of \$177,500,000 for the construction phase, the original scope of building the initial portion of the highway cover as funded by the U.S. Department of Transportation Reconnecting Communities and Neighborhoods grant will be expanded. The added scope will be to construct an added portion of the highway cover to include the Broadway structure and to construct initial portions of the I-5 safety and operational improvements, including widening the Holladay/Hassalo bridge and build walls, building the full southbound auxiliary lane and shoulders, extending a portion of the existing northbound auxiliary lane and shoulders under the highway cover area, and constructing two sign bridges and associated Intelligent Transportation Systems. Construction will begin by 2027.
- *K23682 I-405 and I-5 Stormwater Facilities Project*: The project name will change to I-5 Rose Quarter: Phase 1A. With the increase of \$60,000,000 for the construction phase, the original scope of building stormwater improvements within the project area near I-405 will be expanded and the mile points will change to MP 301.4 to 303.2 from MP 301.2-303.4. The added scope will be to construct a structural deck overlay, make bridge rail upgrades and seismically retrofit two bridges (S8588E and N8588E) in the southern portion of the project area. Construction will begin in 2025.

Outcomes:

With approval, the Oregon Department of Transportation (ODOT) will move forward with design and other activities for the *K19071 I-5 Rose Quarter Improvement Project*. With approval, ODOT also will advance construction for two other phases of the project: *K23672 I-5 Rose Quarter: Broadway to*

Weidler Phase 1 to build the initial portion of the highway cover from the southern portal to north of Broadway, build the full southbound auxiliary lane and shoulder from I-405 to the Morrison Bridge exit, extend an initial portion of the existing northbound auxiliary lane and shoulder under the highway cover, and build sign bridges and associated Intelligent Transportation Systems, with construction starting by 2027 and *K23682 I-5 Rose Quarter: Phase 1A* to build bridge work in the southern project area and construct stormwater facilities near I-405 with construction starting in 2025. This approval would be consistent with the Commission's approved December 2024 Urban Mobility Strategy Finance Plan update.

Without approval, ODOT would not begin construction in 2025 and would not construct any portions of the project beyond what is funded by the \$450 million Reconnecting Communities and Neighborhoods grant and \$5 million for stormwater improvements. Ultimately, without approval, this would delay timely project delivery and would be inconsistent with the Commission's approved December 2024 Urban Mobility Strategy Finance Plan update.

Attachments:

- Attachment 01 – KEY 23682 Vicinity and Location Map
- Attachment 02 – KEY 19071 Vicinity and Location Map

STIP PROJECT LOCATION

Attachment 4: I-5 Rose Quarter January 2025 OTC Item

K23682

Agenda Item G, Attachment 01

I-5 ROSE QUARTER: PHASE 1A

PROJECT LOCATION



REGION



COUNTY



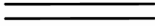
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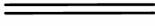
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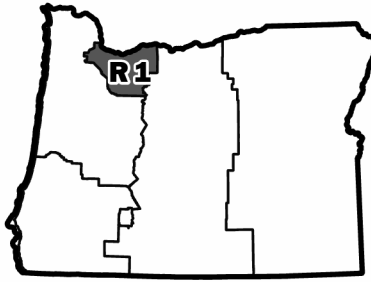
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RAILROAD



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STIP PROJECT VICINITY

da Item G, Attachment 01

Attachment 4: I-5 Rose Quarter January 2025 OTC Item

K23682

I-5 ROSE QUARTER: PHASE 1A

PROJECT LOCATION



REGION



COUNTY



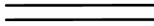
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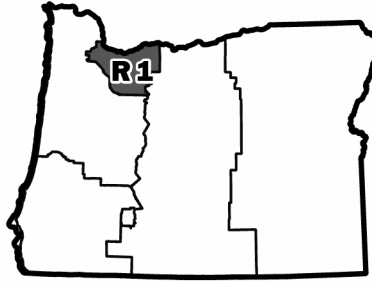
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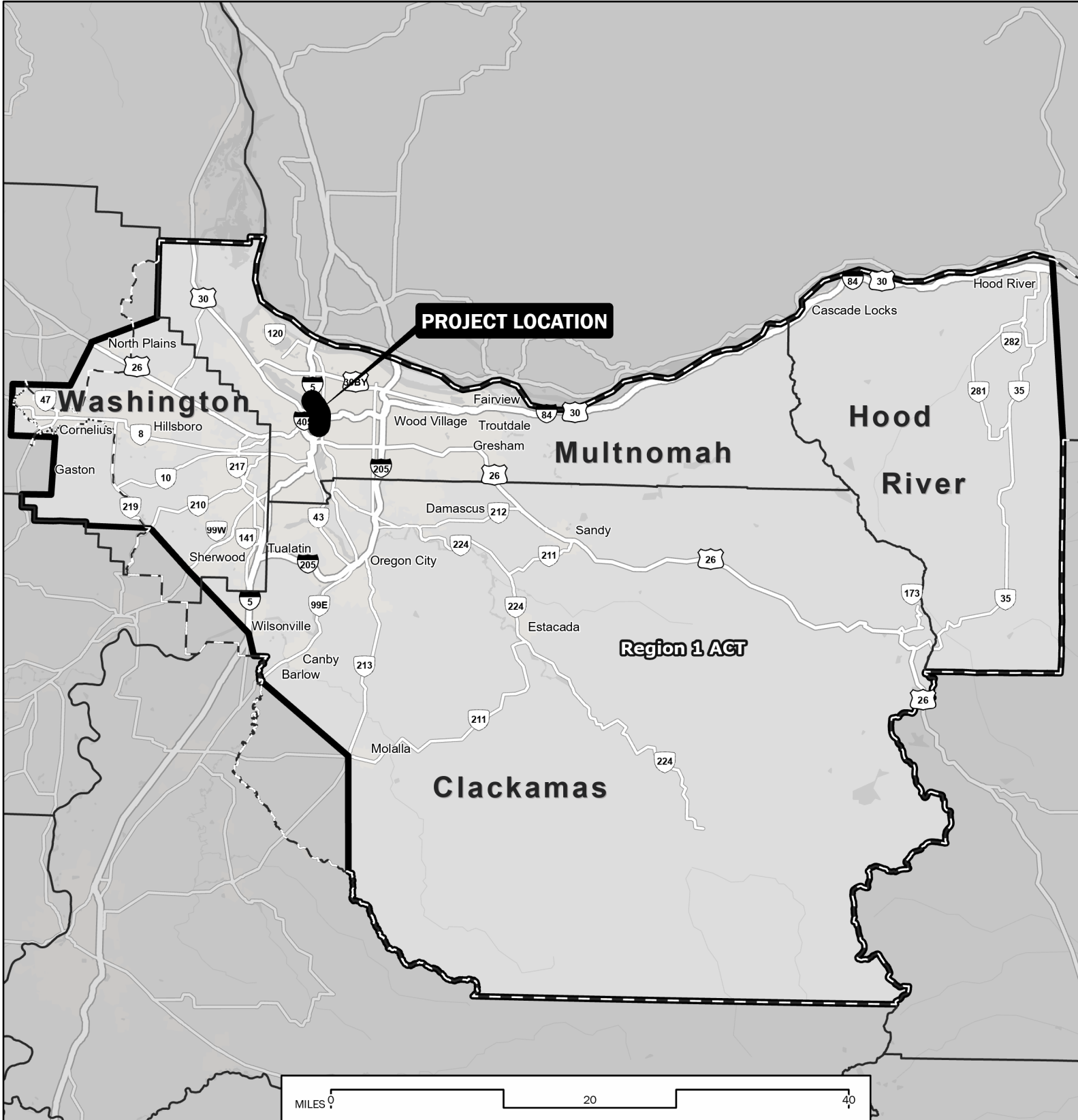


RAILROAD



DATE: 12/11/2024
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STIP PROJECT LOCATION

Attachment 4: I-5 Rose Quarter January 2025 OTC Item

K19071

I-5 ROSE QUARTER IMPROVEMENT PROJECT

Agenda Item G, Attachment 02

PROJECT LOCATION



REGION



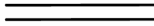
COUNTY



INTERSTATE



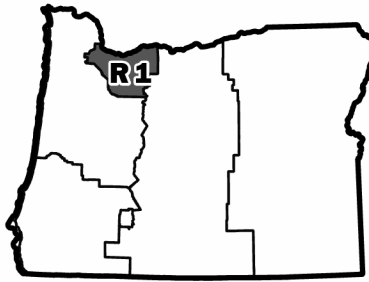
STATE ROAD



LOCAL ROAD

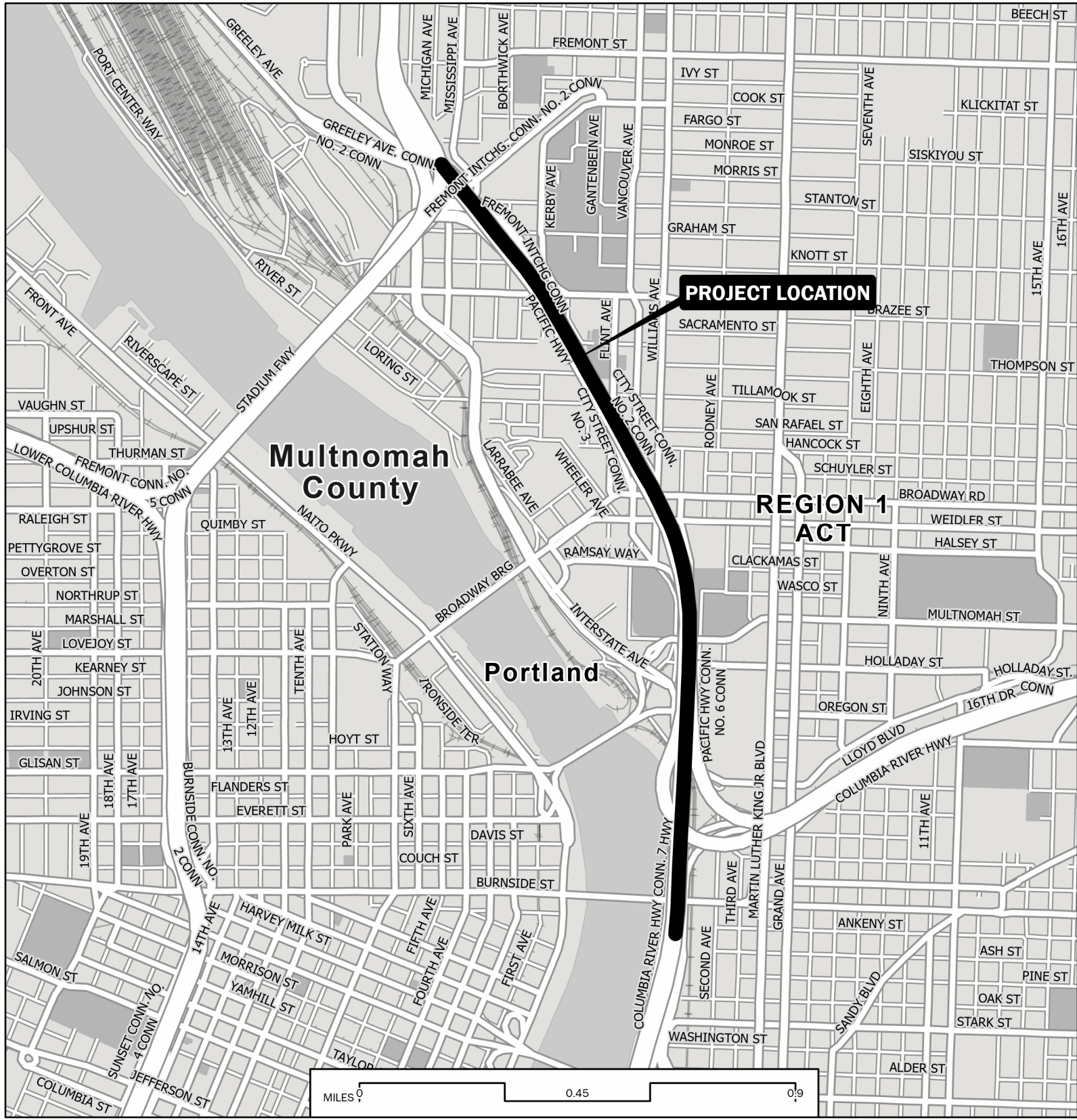


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DATE: 12/11/2024
PROJECT NO. 23-52
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Attachment 4: I-5 Rose Quarter January 2025 OTC Item

I-5 ROSE QUARTER IMPROVEMENT PROJECT

PROJECT LOCATION



REGION



COUNTY



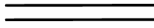
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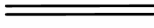
INTERSTATE



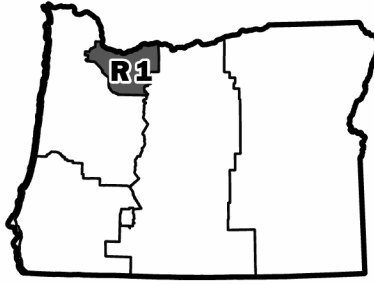
STATE ROAD



LOCAL ROAD

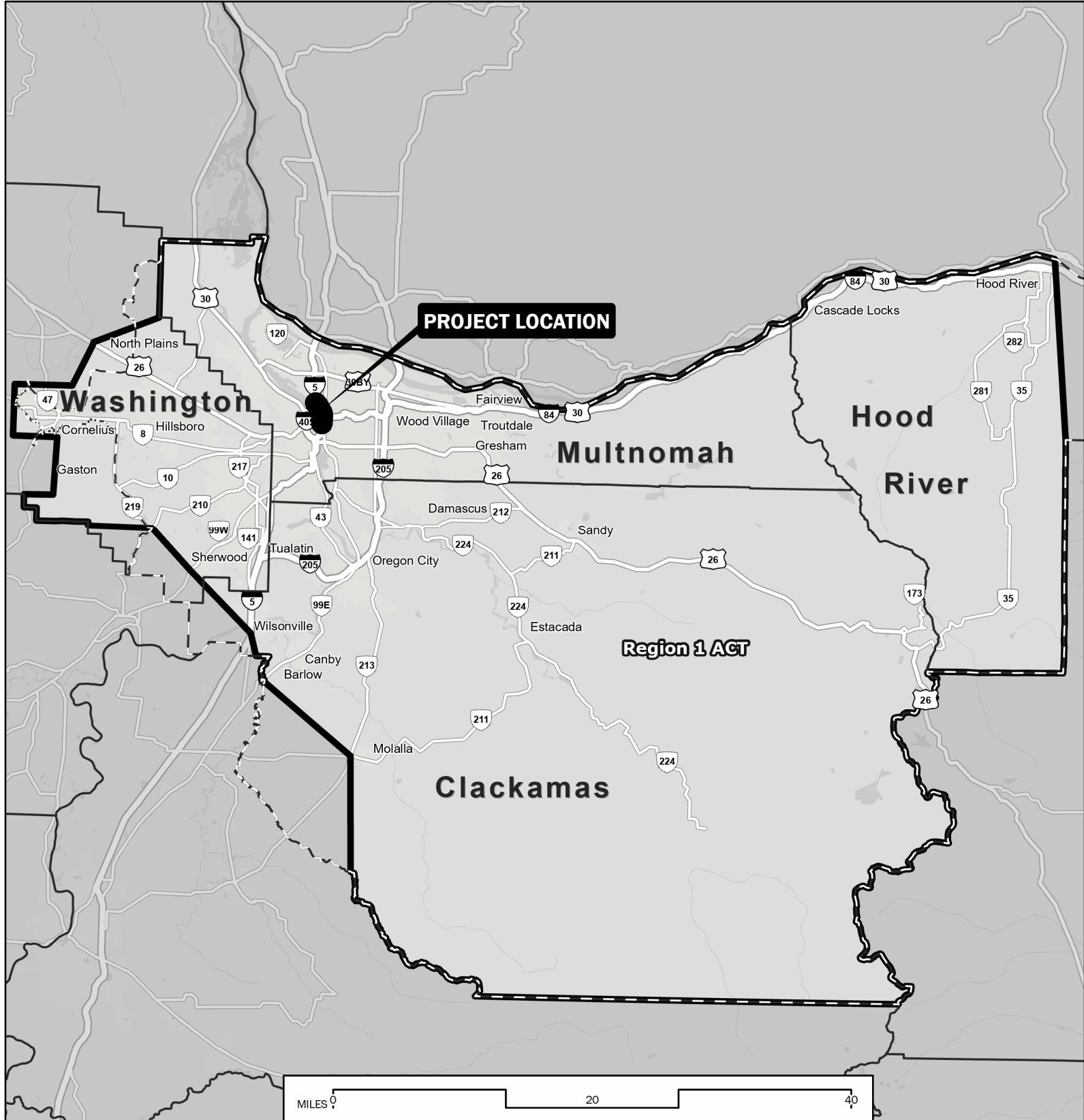


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Memo

Date: January 31, 2025
To: Transportation Policy Alternatives Committee members and interested parties
From: Eliot Rose, Senior Transportation Planner
Subject: Portland-Vancouver area Comprehensive Climate Action Plan: progress update and recommended targets

Introduction

In 2023, Metro received a Climate Pollution Reduction Grant (CPRG) Planning Grant from the US Environmental Protection Agency (EPA). The grant supports planning work to create a regional climate action plan for the Portland-Vancouver metropolitan area. Metro is leading this work in close coordination with regional partners.

This grant funds Metro to produce three deliverables over the four-year grant period:

- A **Priority Climate Action Plan (PCAP)**, submitted in February 2024, that identified high-priority, implementation-ready greenhouse gas (GHG) reduction measures that could be delivered with current staffing and funded with available resources—including competitive CPRG implementation grants that EPA made available in Spring 2024.¹
- A **Comprehensive Climate Action Plan (CCAP)**, due at the end of 2025, that includes a comprehensive inventory of GHG emissions for the metro area and a set of proposed measures to reduce emissions.
- A **Status Report**, due late 2027, that updates EPA on the status of the actions identified in the PCAP and CCAP.

Metro staff are seeking feedback and direction from Metro policy and technical committees as they develop the CCAP.

The CCAP is the most comprehensive climate plan that Metro has ever developed and is a valuable opportunity to advance Metro's climate leadership. Building on the PCAP, the CCAP will provide a unifying framework for addressing climate in the Portland-Vancouver metropolitan area that:

- Strengthens coordination on climate by identifying the GHG reduction measures that are most cost-effective and implementation-ready and describing where, when and how they could be implemented.
- Identifies policy and process changes that can help local and regional governments combat climate change more effectively.
- Clarifies how state, regional and local governments can best work together to combat climate change given their overlapping and complimentary roles.
- Supports Metro and its partner agencies in pursuing state, foundation, and federal funding to implement projects that benefit the climate.

¹ Metro and partner agencies submitted 5 applications for implementation grants in April 2024 totaling roughly \$100 million. None of these applications were funded, but Oregon received funding for a statewide implementation grant for \$197 million focuses on reducing emissions from waste and materials, buildings, and transportation, which are the largest contributors to climate pollution in Oregon. Oregon's grant includes resources for local and regional climate programs that focus on reducing emissions in each of these three areas. See <https://www.oregon.gov/deg/ghgp/Documents/CPRGVisual-ODOE.pdf> for a summary of how the state plans to spend these funds.

This approach recognizes that the plan covers the 7-county metropolitan statistical area, which includes communities outside of Metro’s boundaries, and applies to emission sources that Metro and its partner agencies have historically not had much influence over.

Below is a summary of progress to date on key elements of the CCAP.

Engagement

During development of the PCAP, Metro engaged with agency partners throughout the Portland-Vancouver Metro Area through:

- A Climate Partners’ Forum consisting of agency technical staff working on climate issues, which met three times.
- Presentations to Metro Council, Metro technical and policy committees, county-level coordinating committees, and the and Southwest Washington Regional Transportation Council (RTC).
- One-on-one meetings with project partners, particularly with non-agency staff who wanted to engage in the process.²

For the CCAP, Metro is building on the PCAP engagement approach, maintaining the robust agency engagement that informed the PCAP while also engaging community partners and the general public. CCAP engagement consists of:

- **Climate Partners’ Forum** meetings, which in addition to agency staff now also include staff from community-based organizations and environmental non-profits that are engaged in climate work. Attachment 1 lists the organizations currently represented in the Forum.
- **Online open houses** with the general public, often including representatives from Metro’s agency and community partners.
- **Agency engagement**, including with Metro Council, Metro technical and policy committees, county-level coordinating committees, and the and Southwest Washington Regional Transportation Council (RTC).
- **One-on-one meetings with project partners**, potentially including agencies, businesses or non-profits that are focused on supporting specific climate actions.

The broader engagement approach for the CCAP reflects the broader scope of the plan. Whereas the PCAP was explicitly focused on agency-led climate action, the CCAP must consider projects that could be led by other organizations. In addition, the longer timeline for the CCAP (18 months, compared to only 6 months for the PCAP) allows for more intensive engagement with the groups listed above.

To date, engagement for the CCAP has centered on the Climate Partner’s Forum meetings and an online open house, which are described below. Upcoming agency engagement is described in the Next Steps section.

Climate Partners’ Forum

The Climate Partners’ Forum is the technical steering group for Metro’s CPRG grant. During development of the PCAP, which was focused on pursuing agency-led implementation grants, the Forum began as a group of technical staff working on climate issues at local and regional agencies from across the metropolitan area and met three times. For the CCAP, which has a broader scope,

² See Section 9 of Metro’s PCAP for more information on PCAP engagement:

<https://www.oregonmetro.gov/sites/default/files/2024/02/29/Priority-Climate-Action-Plan.pdf>.

Metro expanded the Forum to include representatives from community-based organizations³ and environmental non-profit organizations involved in climate work. See Attachment 1 for a list of current Climate Partners' Forum member organizations.

So far, the Climate Partners' Forum has met three times to discuss the CCAP, with a fourth meeting planned soon:

- July 2024: preview the CCAP work plan and collect feedback on Forum engagement in developing the plan
- October 2024: review CCAP scope, work plan, and engagement plan
- December 2024: discuss targets and projections
- February 2025: review updated GHG inventory results, kick off GHG reduction measure screening process

Most of these meetings have also featured presentations from agencies who are doing parallel climate work in order to promote general collaboration and knowledge-sharing. Forum minutes and materials are available at Metro's CPRG website.⁴

Online open house

The CCAP is the most comprehensive climate plan Metro has ever created, and it provides an opportunity to collect broad feedback from the public on which climate actions most benefit different communities in the metropolitan area. Metro is hosting two online open houses during development of the CCAP to collect feedback from across all seven counties in the Portland-Vancouver area.

The first open house was held from November 2024 to January 2025, and focused on understanding which climate actions people see as most beneficial to them and their communities. Highly rated actions include:

- **Upgrade older home heating, cooling, and hot water** heating systems with newer, more energy-efficient models (82%)
- **Make transit faster**, more convenient, and more reliable (73%)
- **Upgrade the windows and walls of older homes** so that they stay cooler in the summer and warmer in the winter (70%)
- **Recover more food waste** for donation, energy and composting (64%)
- **Increase energy efficiency** of commercial and industrial buildings (55%)

A brief summary of findings from the first open house is in Attachment 2, and a complete summary of the open house is in Attachment 3.

The second open house is planned for May-June 2025 and will solicit feedback on the GHG reduction measures that are recommended for inclusion in the CCAP.

Greenhouse gas inventory

The CCAP is required to include an inventory of all of the metropolitan area's GHG emissions, organized by sectors that indicate their general source: buildings (by use: residential, commercial, and industrial), transportation, industrial processes, agriculture and land use, and waste). Metro staff and consultants already completed a relatively thorough GHG inventory in 2023-24 for the

³ Consistent with Metro policies, representatives of community-based organizations are offered compensation for their participation and access to technical support from Metro staff so that they can engage fully in the development of the CCAP.

⁴ <https://www.oregonmetro.gov/climategrant>

PCAP, and plan to update that data and provide additional information and analysis to address questions that arose during development of the PCAP.

Figure 1: Greenhouse gas emissions inventory results from the Portland-Vancouver area Priority Climate Action Plan

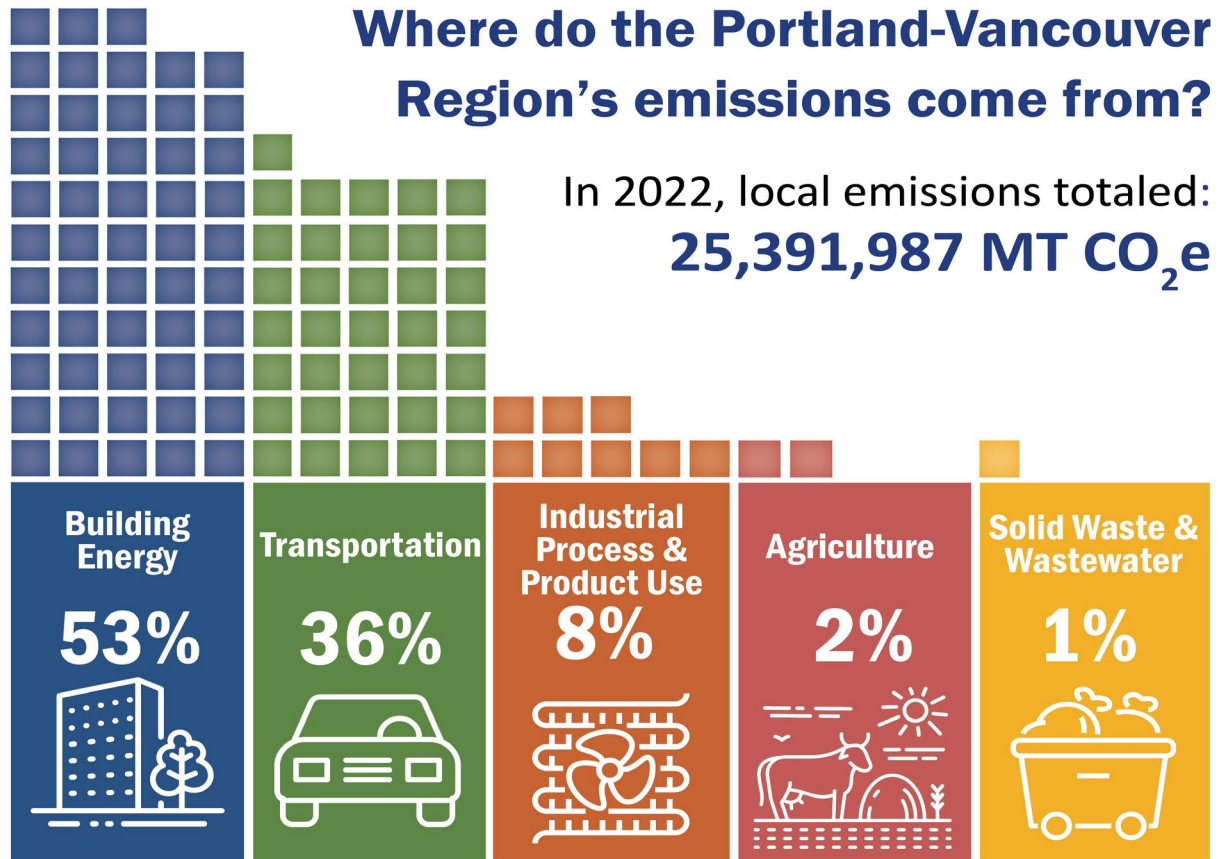


Figure 1 summarizes the results of the PCAP inventory. The inventory revealed that **transportation and residential buildings⁵ account for over half of the metro area's GHG emissions**. These two sectors emerged as a focus for the GHG reduction measures in the PCAP, both because they account for a significant share of emissions and because local and regional governments often have the authority to reduce these emissions. **Waste also emerged as a focus for the PCAP due to Metro's history of coordinated regional waste management**, and because focusing on emissions from waste leads this inventory to underestimate the climate impact of the food, goods and services that people consume.⁶

⁵ Figure 1 does not break out emissions by building type, but the PCAP inventory revealed that roughly one half of total emissions from energy use in buildings (~27% of total emissions) come from homes, while roughly one third (~18% of total emissions) come from industrial buildings and one sixth (~8% of total emissions) come from commercial buildings.

⁶ For more information, see the Oregon Department of Environmental Quality's work on consumption-based inventories (<https://www.oregon.gov/deq/mm/pages/consumption-based-ghg.aspx>). Consumption-based inventories account for the emissions involved in producing and distributing the food and goods that people use, and are designed to complement sector-based inventories, which have traditionally been used for the transportation and buildings sectors and which EPA requires grantees to include in their CCAPs.

The CCAP will expand on the PCAP inventory results shown above with:

- Deeper analysis of emissions that come from the food and goods people consume, drawn from Metro WPES' Consumption-Based Emissions Inventory.
- Deeper analysis of emissions that are sequestered in natural areas.
- Information on how emissions sources vary by county.

Greenhouse gas projections, goals, and targets

In addition to inventorying current GHG emissions, the CCAP must also outline a path to reducing emissions. The plan will:

- Include **projections** of how emissions will change through 2050 if local and regional agencies in the metropolitan area take no further action to reduce emissions. Projections will still account for the impact of Oregon and Washington's ambitious state-level climate policies and programs.
- Identify applicable climate **goals**. These goals should be consistent with both existing policy and with scientific consensus around how much global emissions need to be reduced to avoid catastrophic climate change.
- Recommend **targets** describing how much Metro and its partners need to reduce the GHG emissions generated in our metropolitan area to meet the CCAP goals. Targets are designed to make up the difference between projected emissions and goals.

The sections below describe recent progress and feedback requested with respect to developing projections and goals for the CCAP. Once these projections and goals are finalized the team will recommend targets for the CCAP based on the difference between projected GHG emissions and goals.

Projections

The CCAP team shared the proposed approach to developing GHG projections with the Climate Partners' Forum for feedback at its December meeting. The proposed approach accounts for anticipated population and economic changes, as well as existing state climate policies. Given that Metro and partner agencies maintain in-depth population and economic forecasts, the conversation focused on which policies to include in the projections.

The team recommended a set of policy assumptions that are consistent with Oregon and Washington states' approach to projecting future GHG emissions in their CCAPs (which are very consistent with each other because both states are pursuing similar state-level climate policies and programs) and with many recently adopted local climate actions in the region. These recommended assumptions are:

- Clean energy policies (Oregon's Clean Energy Targets and Washington's Clean Energy Transformation Act) will **eliminate emissions from electricity use in buildings by 2040-45**.
- Clean vehicle standards (Oregon's Advanced Clean Cars II rule and Washington's Clean Vehicles Program Rule) will **require all new vehicles sold in Oregon and Washington to be zero-emission vehicles by 2035**.
- Clean fuel policies (Oregon's Clean Fuels Program and Washington's Clean Fuel Standard) will **reduce the carbon content of vehicle fuel by 20-37% below 2015 levels by 2034-35**. This will mainly affect emissions from the older, non-zero-emission vehicles that are still on the road.
- Cap and reduce/invest policies (Oregon's Climate Protection Program and Washington's Climate Commitment Act) will **reduce emissions from the use of natural gas, solid fuels,**

liquid fuels and process emissions in distribution and manufacturing by 90-95% below 1990 levels by 2050.

Forum members provided feedback on the recommended assumptions through breakout discussion groups. **There was general agreement that the assumptions above cover the key high-impact state-level climate efforts in both Oregon and Washington.** Participants also discussed additional, smaller-scale efforts that the projections should account for if possible, such as Washington's state-level policies focused on reducing the use of refrigerants that contribute to climate change. Finally, many participants noted that implementation of some state-level climate efforts has been slower and/or less effective than originally envisioned, and **encouraged the CCAP team to project a range of potential emissions that accounts for what might happen if state efforts do not meet the milestones outlined in the policies above.** The team is now developing draft projections that address this feedback.

Goals

The CCAP must select a single set of climate goals to use as the basis for targets. Both Oregon and Washington have robust approaches to climate action that rely on close coordination between different levels of government and that guide local and regional agencies' climate efforts, so **Metro staff recommend basing the targets in the Portland-Vancouver metro area CCAP on state-level climate goals.** Oregon and Washington have slightly different climate goals, so **the CCAP team is seeking feedback on which goals to use in the CCAP.**

Three different sets of climate goals are in play within Oregon and Washington:

- **Adopted Oregon goals**, which were adopted by the Oregon legislature in 2007 and updated by executive order in 2020.⁷
- **Adopted Washington goals**,⁸ which were adopted by the Washington legislature in 2020.
- **Recommended Oregon goals**, which were recommended by the Oregon Climate Action Commission in 2023 as part of the Climate Action Roadmap to 2030⁹ but have not yet been formally adopted. The recommended Oregon goals are consistent with adopted Washington goals.

Table 1 summarizes each set of goals.

⁷ <https://climate.oregon.gov/meeting-our-goals>

⁸ <https://ecology.wa.gov/air-climate/reducing-greenhouse-gas-emissions/tracking-greenhouse-gases>

⁹ <https://climate.oregon.gov/tighger>

Table 1: Summary of Oregon and Washington climate goals

Milestone year	Adopted Oregon goals	Adopted Washington goals	Recommended Oregon goals
2020		1990 levels	
2030		45% below 1990 levels	45% below 1990 levels
2035	45% below 1990 levels		
2040		70% below 1990 levels	70% below 1990 levels
2050	80% below 1990 levels	95% below 1990 levels, achieve net zero emissions	95% below 1990 levels, achieve net zero emissions

Staff recommend basing CCAP targets on Oregon’s recommended goals (shown in gray shading in Table 1 above) for three reasons:

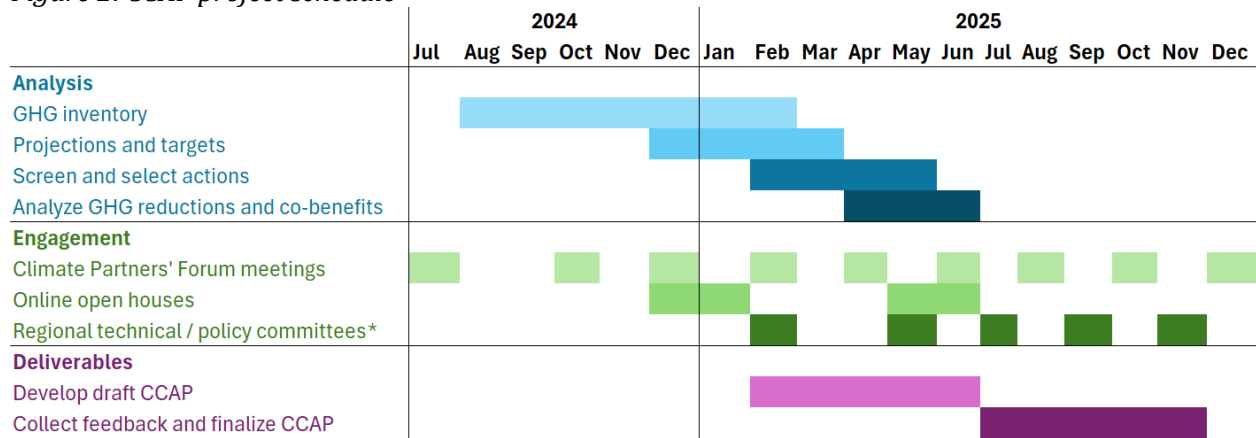
- These goals and Washington’s adopted goals are largely consistent, and having consistent goals across both states lays a foundation for collaborative bistate action.
- The only difference between Oregon’s recommended goals and Washington’s adopted goals is that the former does not specify a 2020 milestone, and the 2020 milestone is no longer useful for tracking progress in the year 2025.
- As discussed in Oregon’s Climate Action Roadmap to 2030,¹⁰ the recommended Oregon goals (and by extension, the adopted Washington goals) are more consistent with today’s scientific consensus that we must reduce climate pollution by more than was previously thought necessary in order to avoid catastrophic climate change.

Next steps

Between now and the end of 2025, when the CCAP is due to EPA, the CCAP team will be conducting further analysis and engagement to identify the set of GHG reduction measures that will be included in the CCAP and guide creation of the draft plan. Figure 2 summarizes the project schedule.

¹⁰ <https://climate.oregon.gov/tighger>

Figure 2: CCAP project schedule



* "Regional technical and policy committees" include Metro Council, Metro technical and policy committees, county coordinating committees, and engagements with other technical and policy committees outside of Metro's boundaries, such as the Southwest Washington Regional Transportation Commission.

Table 2 provides more details on the timing, audience and content of upcoming CCAP engagements.

Table 2: Timing, audience and content of planned 2025 CCAP engagements

Month	Audience and content
February	Climate Partners' Forum, Metro Council, and regional committees: inventory, targets/projections, and Online Open House #1 results
April	Climate Partners' Forum: GHG reduction measure screening results
May	Metro Council and regional committees: screening results and recommended GHG reduction measures
May-June	Online Open House #2: feedback on recommended GHG reduction measures
June	Climate Partners' Forum: Review draft CCAP
July	Regional committees: Review draft CCAP
August	Climate Partners' Forum: Update on regional climate adaptation work, resolve feedback on draft CCAP
September	Metro Council: Review draft CCAP
October	Climate Partners' Forum: Review implementation and funding sources, resolve feedback on draft CCAP
November	Metro Council: Action on final CCAP (by Metro Resolution)
December	Final CCAP due to EPA

Attachment 1: Climate Partners' Forum members

The Climate Partners' Forum is the technical steering group for Metro's EPA-funded Climate Pollution Reduction Grant (CPRG), and offers feedback on key elements of CPRG deliverables, such as greenhouse gas inventories and reduction measures. The Forum consists of staff from public agencies, community-based organizations, and environmental non-profits who are engaged in climate work. Members are well-positioned to ensure that CPRG-funded plans are coordinated with and supportive of partner organizations' climate efforts. The Forum is an open body; any eligible organization is welcome to join at any time, and organizations may send different staff to different meetings based on their capacity and/or on the topic at hand.

As of January 2025, the following organizations are monitoring and/or participating in the Forum:

- City of Beaverton
- Clackamas County
- Clark County
- Columbia County
- City of Gresham
- City of Hillsboro
- City of Lake Oswego
- Metro
- City of Milwaukie
- Multnomah County
- Oregon Department of Transportation
- Oregon Department of Environmental Quality
- Port of Columbia County
- City of Portland
- Portland Public Schools
- Southwest Washington Regional Transportation Commission
- Skamania County
- Southwest Clean Air Agency
- Tualatin Hills Parks and Recreation District
- City of Tigard
- TriMet
- City of Tualatin
- City of Vancouver
- Washington County
- The Street Trust
- Neighbors for Clean Air
- Getting There Together
- Oregon Walks
- Fourth Plain Forward
- EnerCity Collaborative
- Alliance for Community Engagement
- Latino Network
- Energy Trust of Oregon
- WorkSystems
- Climate Solutions
- Eco Lloyd
- Forth
- Zero Now Fund
- Earth Advantage

Attachment 2: CCAP Winter 2024-25 online open house findings

Metro hosted the first CCAP online open house from November 19, 2024, to January 6, 2025. 116 people participated in the online open house, including two who participated in Spanish and 21 who submitted feedback via adaptive screen-reader technology. Open house participants could view a video, text and graphics about the CCAP and about climate work to date in the region, and then respond to a series of four surveys about which greenhouse gas reduction measures most benefit their communities. These surveys were organized according to the key sources of greenhouse gas emissions in the region: transportation; commercial/industrial buildings and processes; residential emissions; and food, goods and services. Each of the four surveys presented a list of seven to nine greenhouse gas reduction measures, described in non-technical language at a general level of detail (i.e., with few details on when, how, or where within the region measures would be implemented). Participants were asked to select the three measures in each survey that they saw as most beneficial to themselves and their communities.

Below is a list of the three measures that were seen as most beneficial in each emissions category, as well as information on the percentage of participants who selected that measure as one of their top three.

Transportation

- **Make transit faster**, more convenient, and more reliable (73%)
- **Expand transit service** to neighborhoods that lack it (46%)
- Create **compact and walkable communities** (46%)

Commercial and industrial buildings

- **Increase energy efficiency** of commercial and industrial buildings (55%)
- Install solar panels or other equipment that **generates clean energy** on commercial and industrial properties (48%)
- Support new, local **renewable energy development projects** (43%)

Residential buildings

- **Upgrade older home heating, cooling, and hot water** heating systems with newer, more energy-efficient models (82%)
- **Upgrade the windows and walls of older homes** so that they stay cooler in the summer and warmer in the winter (70%)
- **Require new homes to have energy-efficient appliances** and/or meet energy efficiency standards (54%)

Food, goods, and services

- **Recover more food waste** for donation, energy and composting (64%)
- Help people and businesses **reduce food waste by changing purchasing practices** (52%)
- Increase **reuse of building materials in construction projects**, and salvage valuable materials when buildings are demolished or retrofitted (44%)

Initial findings from the survey include:

- **Four actions—improving transit service, upgrading HVAC systems in older homes, upgrading windows and walls of older homes, and recovering more food waste—scored significantly higher than the rest.** In each case, at least 64 percent of respondents

said that these strategies benefitted them and their communities. There is a significant gap between the popularity of these measures and other measures included in the open house.

- **Responses emphasized the value of climate actions that have multiple benefits.** Many open-ended comments recommended climate measures that have other co-benefits related to the environment (e.g., planting more trees and better preserving them, wetlands preservation, reducing plastic use and pollution), equity (increased affordable housing, supporting community-led climate projects), and health (reducing transportation-related deaths, improving air quality). Some of these options were not included in the survey because research has demonstrated that they have little to no impact on climate emissions, and the CCAP is focused on identifying significant measures that can meet ambitious climate targets. Nonetheless, this feedback highlights the need to prioritize measures that not only benefit the climate, but also have safety, health, environmental, and equity co-benefits.
- **Respondents were skeptical about efforts to reduce emissions through education and outreach alone.** Three of the four categories included measures designed to help people understand the climate impacts of their current choices and/or make more climate-friendly choices. Fewer than 35% of respondents identified these measures as beneficial, putting them in the lower-scoring end of the range wherever they were included. However, many education and outreach efforts seek to connect people with opportunities to reduce emissions that were seen as highly beneficial. For instance, transportation education and outreach programs are often focused on helping people take advantage of new or improved transit service, and residential outreach programs often help people connect with free home energy audits and retrofits. This suggests that outreach and education programs benefit people to the extent that they are designed to help people make the most of opportunities created by investments in other GHG reduction measures.
- **Making older buildings more energy efficient is seen as more beneficial than greening newer buildings.** Both categories that were related to building emissions included both actions focused on older buildings and actions focused on newer ones. In every case more people saw the former as more beneficial than the latter. This makes sense given that older homes make up the majority of the region's building stock, so investing in existing buildings stands to benefit more people.
- **Many people recommended actions to promote a large-scale shift to cleaner energy sources.** Local and regional agencies have typically focused on smaller-scale renewable energy systems or greening energy sources for the municipally owned utilities that serve some communities. Larger-scale shifts to cleaner energy among the investor-owned utilities that serve most of the metropolitan area are typically led at the state level by Public Utilities Commissions with the authority to regulate these utilities. As discussed below, both Oregon and Washington already have ambitious requirements to shift to cleaner energy sources, which the CCAP will account for in its GHG projections. The CCAP team will coordinate with state agencies to determine whether there are additional local/regional actions that can effectively advance clean energy.
- **Respondents have a broader range of opinions about measures to reduce transportation and residential emissions than they do about other measures.** The percentage of respondents who selected each measure ranged from 5-73% for transportation and 12-82% for residential, versus 24-55% for commercial/industrial buildings and 30-64% for food, goods, and services. This could be because transportation and residential buildings have often been the focus of climate work in Oregon and our region, so people have more knowledge of and have formed stronger opinions about these measures. The low-end scores in the transportation and residential categories (both of which included measures that fewer than 20% of people identified as beneficial, including measures related to parking pricing, electric vehicles, and energy efficiency education)

could indicate that people see these measures as having negative impacts, such as increasing household costs or diverting resources from more impactful measures. Notably, multiple open-ended responses explicitly encouraged agencies not to pursue a specific transportation measure—widening or expanding throughways. When evaluating potential CCAP measures, particularly in the transportation and residential categories, it is important to not only consider measures' GHG reductions and co-benefits, but also consider the potential negative impacts that might result from increasing household costs or diverting resources away from more beneficial strategies.

Attachment 3: Summary of CCAP Winter 2024-25 online open house survey responses

Prepared by JLA Public Involvement, January 2025.

Metro hosted an online open house from November 19, 2024, to January 6, 2025, to inform the development of Metro's Comprehensive Climate Action Plan (CCAP) under the Environmental Protection Agency's (EPA) Climate Pollution Reduction Grant (CPRG). The online open house survey asked for input on climate action priorities to better understand community needs, enhance public understanding of climate change actions, and shape strategies to reduce climate pollution. The online open house and survey was offered in English and Spanish, with modifications to ensure screen-reader compatibility. It received input from 116 participants, including two submissions in Spanish and 21 submissions via the screen-reader adaptation. The following is a high-level summary of the input received.

To adapt to screen reader limitations, participants using the tool were invited to select their top three priorities using a multiple-choice format. Participants not using the tool were invited to rank the climate actions according to what would most benefit their communities. To create a unified result for evaluation while maintaining consistency between the two question formats, we combined data from the ranking responses. Rankings for first, second, and third were grouped together, reflecting the community's top three priorities without considering their specific order. This method aligns with the multiple-choice format, enabling a direct comparison.

The survey asked participants to identify four categories of actions that would most benefit their communities:

- Actions to reduce transportation emissions
- Actions to reduce emissions from commercial / industrial buildings and processes
- Actions to reduce emissions from residential buildings
- Actions to reduce emissions from food, goods and services

Out of these four categories, the **top three most popular actions** are:

- **Upgrade older home heating, cooling, and hot water heating systems with newer, more energy-efficient models** (Category: Actions to reduce emissions from residential buildings)
- **Make transit faster, more convenient, and more reliable** (Category: Actions to reduce transportation emissions)
- **Upgrade the windows and walls of older homes so that they stay cooler in the summer and warmer in the winter** (Category: Actions to reduce emissions from residential buildings)

Actions to reduce transportation emissions

There were nine proposed climate actions to reduce transportation emissions. The survey asked participants to identify the top actions that would most benefit their communities from the following list. *Note: The percentages shown below may not sum to 100%. The percentages derived from taking the number of times each action is selected as a top three priority dividing it over the total number of participants.*

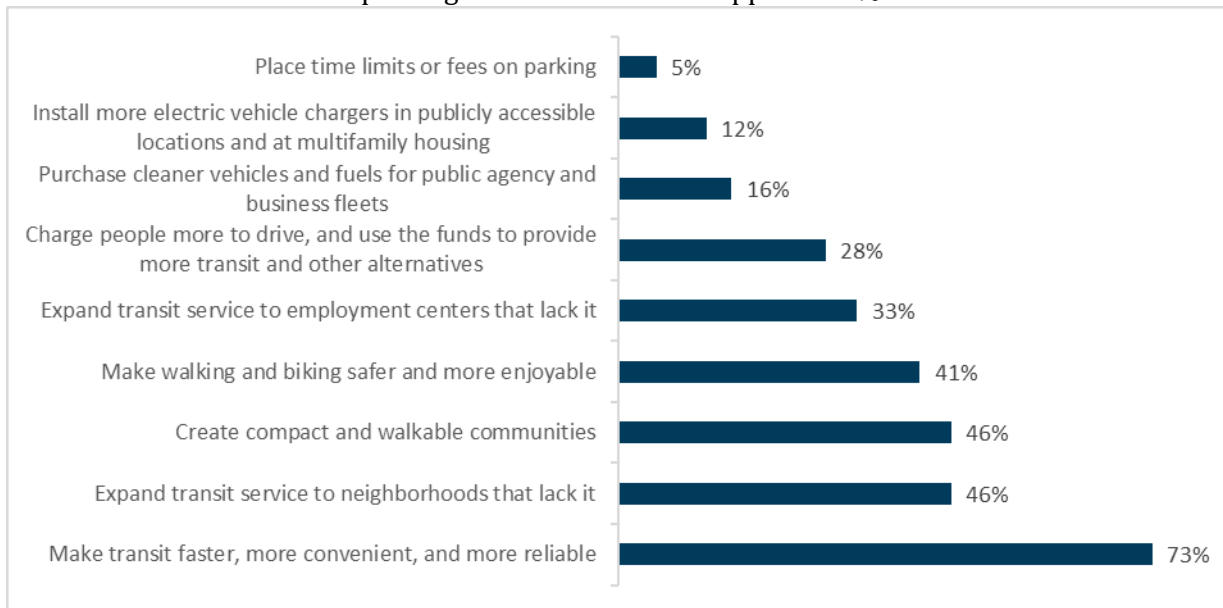
- Expand transit service to neighborhoods that lack it
- Expand transit service to employment centers that lack it

- Make transit faster, more convenient, and more reliable
- Create compact and walkable communities
- Make walking and biking safer and more enjoyable
- Install more electric vehicle chargers in publicly accessible locations and at multifamily housing
- Purchase cleaner vehicles and fuels for public agency and business fleets
- Place time limits or fees on parking
- Charge people more to drive, and use the funds to provide more transit and other alternatives

The most frequently selected actions were:

- Make transit faster, more convenient, and more reliable (73%)
- Expand transit services to neighborhoods that lack it (46%)
- Create compact and walkable communities (46%)

"Place time limits or fees on parking" received the least support at 5%.



Actions to reduce emissions from commercial / industrial buildings and processes

There were eight proposed climate actions to reduce emissions from commercial/industrial buildings and processes. The survey asked participants to identify the top actions that would most benefit their communities from the following list. *Note: The percentages shown below may not sum to 100%. The percentages are derived from taking the number of times each action is selected as a top three priority dividing it over the total number of participants.*

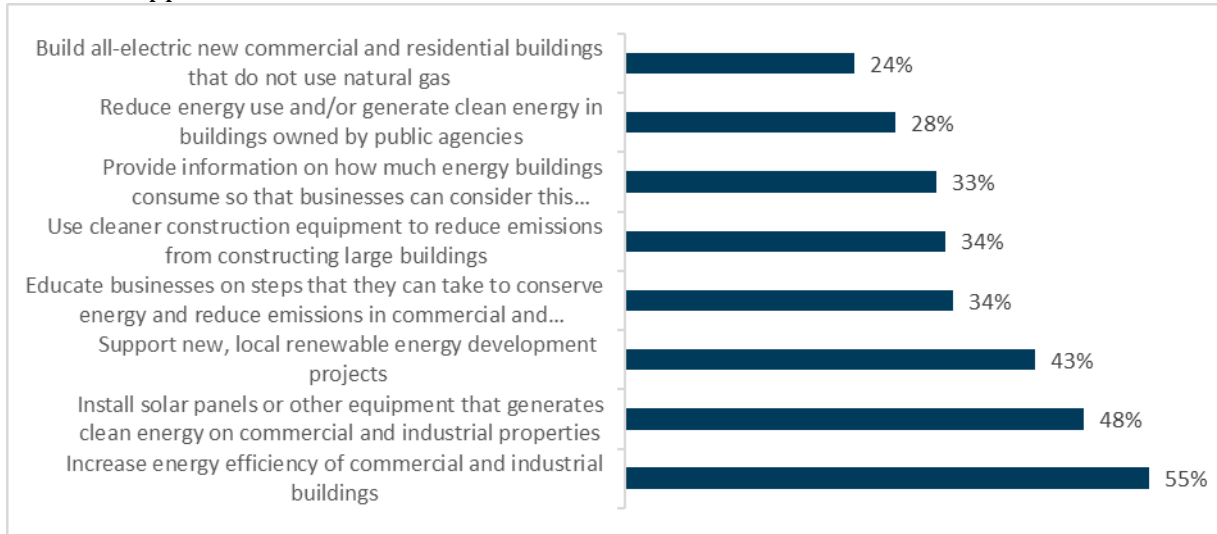
- Provide information on how much energy buildings consume so that businesses can consider this information when purchasing or leasing property
- Educate businesses on steps that they can take to conserve energy and reduce emissions in commercial and industrial buildings
- Use cleaner construction equipment to reduce emissions from constructing large buildings
- Increase energy efficiency of commercial and industrial buildings
- Install solar panels or other equipment that generates clean energy on commercial and industrial properties
- Reduce energy use and/or generate clean energy in buildings owned by public agencies

- Build all-electric new commercial and residential buildings that do not use natural gas
- Support new, local renewable energy development projects

The most frequently selected actions were:

- Increase energy efficiency of commercial and industrial buildings (55%)
- Install solar panels or other equipment that generates clean energy on commercial and industrial properties (48%)
- Support new, local renewable energy development projects (43%)

“Build all-electric new commercial and residential buildings that do not use natural gas” received the least support at 24%.



Actions to reduce emissions from residential buildings

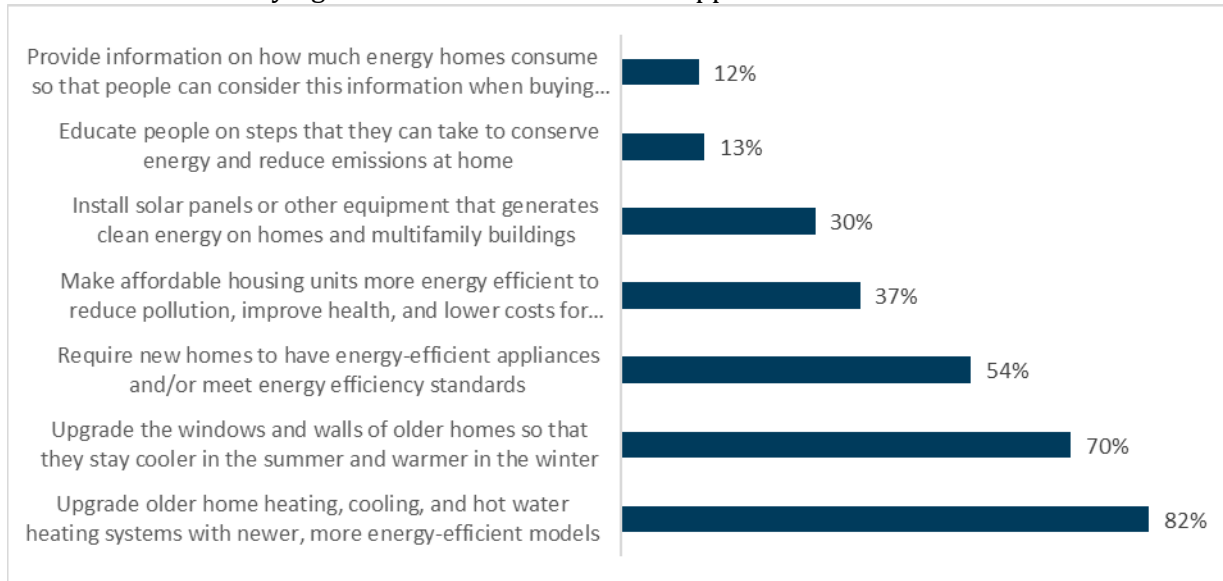
There were seven proposed climate actions to reduce emissions from residential buildings. The survey asked participants to identify the top actions that would most benefit their communities from the following list. *Note: The percentages shown below may not sum to 100%. The percentages are derived from taking the number of times each action is selected as a top three priority dividing it over the total number of participants.*

- Upgrade older home heating, cooling, and hot water heating systems with newer, more energy-efficient models
- Upgrade the windows and walls of older homes so that they stay cooler in the summer and warmer in the winter
- Require new homes to have energy-efficient appliances and/or meet energy efficiency standards
- Install solar panels or other equipment that generates clean energy on homes and multifamily buildings
- Provide information on how much energy homes consume so that people can consider this information when buying a home
- Educate people on steps that they can take to conserve energy and reduce emissions at home
- Make affordable housing units more energy efficient to reduce pollution, improve health, and lower costs for residents most in need

The most frequently selected actions were:

- Upgrade older home heating, cooling, and hot water heating systems with newer, more energy-efficient models (82%)
- Upgrade the windows and walls of older homes so that they stay cooler in the summer and warmer in the winter (70%)
- Require new homes to have energy-efficient appliances and/or meet energy efficiency standards (54%)

“Provide information on how much energy homes consume so that people can consider this information when buying a home” received the least support at 12%.



Actions to reduce emissions from food, goods and services

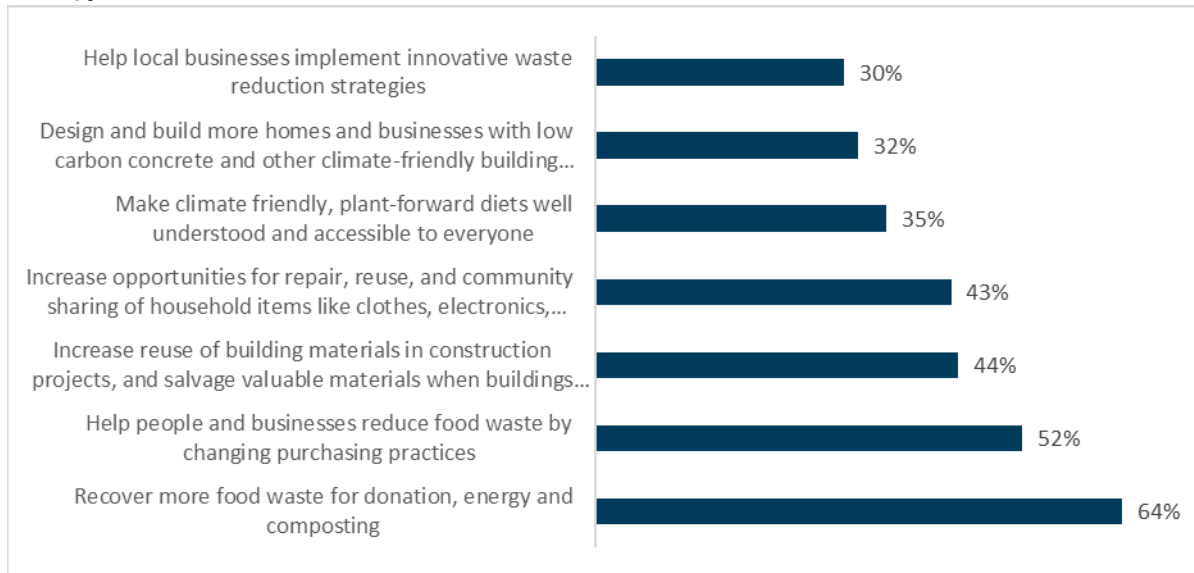
There were seven proposed climate actions to reduce emissions from food, goods and services. The survey asked participants to identify the top actions that would most benefit their communities from the following list. Note: The percentages shown below may not sum to 100%. The percentages are derived from taking the number of times each action is selected as a top three priority dividing it over the total number of participants.

- Make climate-friendly, plant-forward diets well understood and accessible to everyone
- Help people and businesses reduce food waste by changing purchasing practices
- Recover more food waste for donation, energy and composting
- Increase reuse of building materials in construction projects, and salvage valuable materials when buildings are demolished or retrofitted
- Design and build more homes and businesses with low-carbon concrete and other climate-friendly building materials
- Increase opportunities for repair, reuse, and community sharing of household items like clothes, electronics, furniture and appliances
- Help local businesses implement innovative waste reduction strategies

The most frequently selected actions were:

- Recover more food waste for donation, energy and composting (64%)
- Help people and businesses reduce food waste by changing purchasing practices (52%)
- Increase reuse of building materials in construction projects, and salvage valuable materials when buildings are demolished or retrofitted (44%)

“Help local businesses implement innovative waste reduction strategies” received the least support at 30%.



Key themes from open-ended comments

57 total responses were received to the open-text question, “What else would you like us to consider as we develop this plan?”. The following summarizes the responses into key themes.

Environmental preservation and tree canopy protection:

Participants emphasized **preserving mature trees**, prioritizing their protection over new plantings. They called for **fast-growing trees** and building designs that **avoid tree removal**, along with **increased planting in public spaces** and transportation corridors, ensuring ongoing care and maintenance. There were calls to **prevent clear-cutting of protected areas, preserve wetlands, and integrate Indigenous land stewardship practices** into climate planning.

Transportation and mobility:

Feedback strongly supported **expanding public transportation**, including **high-speed and regional rail**, to reduce vehicle dependency, while **ensuring improvements to existing transit (e.g., TriMet) for greater effectiveness**. There was a focus on reducing Vehicle Miles Traveled (VMT) and **opposing freeway expansions** in favor of transit and biking infrastructure.

Equity and environmental justice:

Feedback supported **community-led projects** addressing historical injustices, like the Self Enhancement, Inc. (SEI) initiative. Participants advocated for **prioritizing underserved communities, fostering generational wealth through affordable housing**, and ensuring low-income communities benefit from climate actions, while **expressing concerns about displacement and affordability**.

Renewable energy and building efficiency:

Participants called to **phase out methane gas infrastructure** and transition to electrification within a decade. There was **strong support for renewable energy projects**, particularly for public buildings and low-income housing, alongside an emphasis on **improving energy efficiency in existing buildings through weatherization and passive solar design**.

Health and climate resilience:

Concerns centered on **air quality**, advocating to ban gas-powered leaf blowers, reduce plastic pollution, and address wood burning. Participants highlighted **the health impacts of fossil fuels on vulnerable groups** and called for **balancing climate action with public health improvements** like reducing transportation-related deaths.

Land use and housing policy:

Participants advocated for **higher-density housing** within the urban growth boundary (UGB) and **repealing housing height restrictions**.

Food, goods, and services:

Some open-ended comments advocated for **expanded recycling, composting, and waste reduction, particularly in multifamily housing**.

Community engagement and education:

Feedback emphasized the need for **intergenerational workshops, community learning opportunities, and better public communication** on climate actions. Participants also called for **certification programs for businesses** leading in sustainability.

Urgency and action:

Participants called for **immediate, bold action** over prolonged planning, urging prioritization of **impactful, quickly implementable projects** with ongoing evaluation. They emphasized avoiding funding for large corporations, instead **focusing on small businesses**.

Survey participants

The survey was available in English, Spanish, and a screen-reader-accessible format. Groups that are underrepresented by 4 percent or more in respondent information compared to Census data are indicated in red.

Table 1. Age (81 responses)

Age	Online open house respondents	2023 American Community Survey
18 - 24	7%	10%
25 - 34	18%	19%
35 - 44	28%	20%
45 - 54	21%	16%
55 - 64	11%	15%
65 - 74	8%	12%
75+	7%	8%

For the purpose of comparison, the American Community Survey data shown above was renormalized to exclude people under 18, who were not eligible to participate in the online open house.

Table 2. Languages (95 responses)

Languages	Online open house respondents	2023 American Community Survey
English	83%	82%
Spanish	10%	9.1%
Asian and Pacific Island Languages	2%	4.7%
Vietnamese	1%	-
Chinese	1%	-
Russian	-	-
Arabic	-	-
Other	-	-

Participants were invited to share their primary language if not listed in the options provided. Four participants responded to this, other primary languages include: Hindi, Gujarati, Marathi, Japanese, Portuguese and French.

Table 3. Race and ethnicity (88 responses)

Race/Ethnicity	Online open house respondents	2023 American Community Survey
American Indian or Alaska Native	2%	0.3%
Asian or Asian American	7%	7%
Black or African American	2%	3%
Hispanic or Latino/a/x	16%	14%
Middle Eastern or North African	-	-
Native Hawaiian or Pacific Islander	1%	0.6%
White (Non-Hispanic)	67%	68%
Race(s) or ethnicity not listed here	2%	-
Prefer not to answer	3%	-

Table 4. Household income (81 responses)

Household Income	Online open house respondents	2023 American Community Survey
Less than \$30,000	5%	13.7%
\$30,000 to just under \$50,000	4%	11.3%
\$50,000 to just under \$100,000	32%*	28%
\$50,000 to just under \$70,000	10%	-
\$70,000 to just under \$90,000	12%	-
\$90,000 to just under \$110,000*	10%	-
\$110,000 to just under \$150,000	17%	20%
\$150,000 or more	31%	27.2%
Prefer not to answer	11%	-

*Please note that some regional dataset and survey data set are dissimilar. For the purpose of this comparison, "\$90,000 to just under \$110,000" has been sorted under "\$50,000 to just under \$100,000".

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: January 31, 2025
To: TPAC and interested parties
From: Kim Ellis, AICP, Climate Program Manager
Subject: Update on 2023 Regional Transportation Plan Implementation Activities

PURPOSE

This memo provides an update on implementation of the 2023 Regional Transportation Plan (RTP) and tools and resources being developed to support local and regional planning.

BACKGROUND

The Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council adopted the 2023 RTP in November 2023. A summary of key activities underway to support local and regional implementation of the 2023 RTP follows. A coordinated timeline of these activities is provided in **Attachment 1**.

- **2023 Regional Transportation Plan published online.** The 2023 RTP and executive summary have been published online to support local and regional implementation. Explore online maps of the projects, regional networks, high injury corridors and equity focus areas and download the full plan or individual chapters and appendices at: <https://www.oregonmetro.gov/regional-transportation-plan>
- **USDOT Safe Streets For All Grant implementation.** Metro staff are preparing data and tools and working with local partners to develop safety action plans. Online safety resources have been published to support local planning. Explore the online resources at: <https://storymaps.arcgis.com/stories/5a4c5040c8a7493fb877bc4e529ebdf7>
- **Metro kicked off development of the Comprehensive Climate Action Plan.** Metro is convening public agencies and organizations across the seven-county Portland-Vancouver metropolitan statistical area to develop a Comprehensive Climate Action Plan (CCAP) by the end of 2025. The CCAP will include a comprehensive inventory of greenhouse gas emissions for all sectors and a broad set of strategies to reduce emissions, including transportation-related emissions. Work began in 2023 that led to development of a Priority Climate Action Plan (PCAP). Metro submitted the PCAP to the Environmental Protection Agency in March 2024 to establish eligibility for EPA implementation grants. The planning work is being funded by the [EPA Climate Pollution Reduction Grant \(CPRG\) Program](#) and will be coordinated with DEQ's CPRG work and other climate planning work at Metro and across the region, including the update to the region's Climate Smart Strategy and development of the next Regional Waste Plan Progress Report. More information about the CCAP process can be found at: <https://www.oregonmetro.gov/climategrant>. TPAC will receive an update on the CCAP on Feb. 7. State agencies will share an update on their climate work at the Feb. 12 TPAC workshop.

- **LCDC approved the Portland area progress report implementing Climate Smart Strategy and new statewide transportation planning rules on January 24, 2025.** Metro staff submitted the [first annual report on Climate-Friendly and Equitable Communities \(CFEC\) implementation](#) to DLCD in May 2024. The report summarizes the Portland metropolitan area’s progress implementing the [Climate Smart Strategy](#) and new statewide transportation planning rules adopted in 2022 and 2023. The report shows that the region is not meeting all the performance targets defined in the adopted Climate Smart Strategy and, as required by state rules, identifies recommended actions for future work to be completed in advance of the next update to the Regional Transportation Plan (due by the end of 2028).

LCDC reviewed the report and found the Portland area is making adequate progress and approved the recommended actions as adequate. During their deliberation, the commission expressed a desire to see more near-term progress toward reducing greenhouse gas emissions and vehicle miles traveled per capita and better ways to monitor progress. The commission’s final order has not yet been published.

Attachment 2 contains the actions as approved by LCDC for reference. These actions are also adopted in Chapter 8 of the 2023 RTP.

Metro is required to submit a minor report on Portland area CFEC implementation by May 31, 2025.¹ As part of preparing the report, Metro staff will reach out directly to local government partners to document local actions taken in 2024 to implement CFEC requirements and the Climate Smart Strategy. For more information, please contact Kim Ellis at kim.ellis@oregonmetro.gov.

- Work continued to develop locally preferred alternatives for three major transit projects in the region. On [December 11, 2024](#), Portland City Council voted unanimously to adopt the Montgomery Park Area Plan (MPAP) and the Locally Preferred Alternative (LPA) for the [Portland Streetcar Montgomery Park Extension](#). The [82nd Avenue Transit Project](#) Steering Committee recommended the locally preferred alternative for the project on January 16, 2025. The [Tualatin Valley Highway Transit Project](#) Steering Committee will consider recommending a locally preferred alternative for the project in February. The 82nd Avenue Transit Project and Tualatin Valley Highway Transit Project LPAs will go through local government and Metro endorsement processes in 2025. TPAC will be engaged in the Metro endorsement process for all three LPAs in the coming months, including making a recommendation to JPACT.
- **Technical assistance, data and guidance is available to support local transportation system plan (TSP) updates.** Metro staff have developed guidance and other resources to support local implementation of the 2023 RTP and new transportation planning rules (TPR). These resources will complement other guidance and resources being developed by the Department of Land Conservation and Development (DLCD) and the Oregon Department of Transportation (ODOT) to support implementation of the new TPR rules.

¹ [OAR 660-012-0900](#)

While cities and counties the Portland area do not have deadlines for updating TSPs to address new policies in the 2023 RTP and TPR, several jurisdictions have begun updates. Metro will send a survey to local government TSP leads in February to learn more about the TSP schedules and potential needs for Metro support and guidance. For information about the survey, contact André Lightsey-Walker at andre.lightsey-walker@oregonmetro.gov.

New TSP guidance and other resources can be found at <https://www.oregonmetro.gov/local-transportation-system-plans>, including:

- **Local government liaison contact list** which identifies staff contacts from Metro and other agencies:
<https://www.oregonmetro.gov/sites/default/files/2024/09/05/Local-government-liaisons-list-August-2024.pdf>
- **High Capacity Transit (HCT) transit-supportive checklist**:
<https://www.oregonmetro.gov/sites/default/files/2024/07/31/Transportation-System-Planning-High-Capacity-Transit-toolbox-20240711.pdf>
- **Interim Transportation Demand Management (TDM) and Transportation System Management and Operations (TSMO) System Completion Guidance** in support of implementing the mobility policy in the RTP and new TPR rules:
<https://www.oregonmetro.gov/sites/default/files/2024/10/09/Metro-interim-Transportation-Demand-Management-and-Transportation-System-Management-Operations-system-completeness-guidance-20241008.pdf>
- **Toolbox of TDM and TSMO Strategies** also in support of implementing the mobility policy in the RTP and new TPR rules. The toolbox provides a menu of specific TDM and TSMO strategies that cities and counties can consider in their local planning processes, in support of developing complete TDM and TSMO systems. The tools is available to download at:
<https://www.oregonmetro.gov/sites/default/files/2024/11/12/local-planners-toolbox-Transportation-Demand-Management-and-Transportation-System-Management-Operations-strategies.pdf>
- **Online RTP maps**:
 - **2023 RTP project map viewer**:
<https://experience.arcgis.com/experience/a3272005eba14fd98631fab49c8195a0?org=drcMetro>
 - **2023 RTP policy maps viewer**:
<https://drcmetro.maps.arcgis.com/apps/MapSeries/index.html?appid=5011e6d49fef4965a23ed5ea30f36b51>
- **RTP geospatial data** of projects, policy maps and other information in the RTP is available on request.
- Work continues to advance **implementation of regional mobility policy** in coordination with ODOT and DLCDC, including developing an approach for evaluating household-based VMT per capita to aid cities and counties when updating transportation system plans consistent with OAR 660-012-0160 and when making land use decisions in the Portland area consistent with OAR 660-012-0210. ODOT convened a statewide Oregon Modeling Statewide Collaborative (OMSC) work group

in 2024 to develop a methodology for use in Oregon in support of the state transportation planning rules. Metro staff are now working to apply the methodology and will provide an update at a future meeting. Metro staff anticipate developing interim guidance on implementation of this element of the policy in coordination with the planned update to the Regional Transportation Functional Plan in 2025-26. The interim guidance will support implementing the new mobility policy and state rules during local TSP updates that are currently underway.

- In Fall 2024, Metro kicked off development of a [Regional Transportation Demand Management \(TDM\) Strategy](#) to implement new TDM policies in 2023 RTP and update Metro's Regional Travel Options program strategy to support implementation. This work will also inform other RTP implementation activities and the update to the Climate Smart Strategy, and help address compliance with state CFEC rules. TPAC will be engaged throughout the process.
- In Fall 2024, Metro kicked off the [Community Transit Connector Study](#) to identify transit service gaps and opportunities to improve transit access and convenience for users across the region. This work will also inform other RTP implementation activities and the update to the Climate Smart Strategy, and help address compliance with state CFEC rules. TPAC will be engaged throughout the process.
- In Fall 2024, Metro and the Regional Disaster Preparedness Organization (RDPO) kicked off the [Regional Emergency Transportation Routes \(ETR\) Project \(Phase 2\)](#) to prioritize and tier designated regional ETR routes and research operational guidance for facility owners and operators. This project builds on the Phase 1 project completed in 2021. TPAC will be engaged throughout the process.
- In Fall 2024, Metro initiated background research and analysis in support of the [Cooling Corridors Study](#). Sponsored by Metro's Chief Operating Officer (COO), this project offers the opportunity to develop a people-centered, data informed approach on ways to increase regional resilience to extreme heat in future work, including the Future Vision work and the next RTP update. This work will complement and build on recent heat mapping work led by the public health departments in Clackamas, Multnomah and Washington counties.² TPAC will receive an introduction to the Cooling Corridors study at the Feb. 12 TPAC workshop, and have an opportunity to review findings and recommendations from the study. The study will be completed by Fall 2025.
- **An update to the Regional Transportation Functional Plan (RTFP)** is anticipated to begin in 2025 and continue into 2026. Key outcomes for the RTFP update include:
 - Ensure the functional plan language and provisions are consistent with and adequately reflect new and updated goals, objectives and policies adopted in the RTP.

² 2023 Portland Metro Heat Watch Report: <https://www.washingtoncountyor.gov/public-health/documents/portland-metro-region-heat-mapping-report/download?inline> and 2023 Portland Metro Heat Watch Report Executive Summary: https://multco.us/file/heat_watch_report_summary/download

- Align the functional plan language and requirements with recent statewide rulemaking and policy development to implement the [Climate-Friendly and Equitable Communities Program](#).
- Define how the updated mobility policy will be implemented in local TSPs and local comprehensive plan amendments in coordination with local governments and the statewide CFEC implementation program and [Oregon Highway Plan update](#).
- Update the timeline for local TSPs updates in collaboration with cities, counties and in coordination with DLCD and the ODOT.

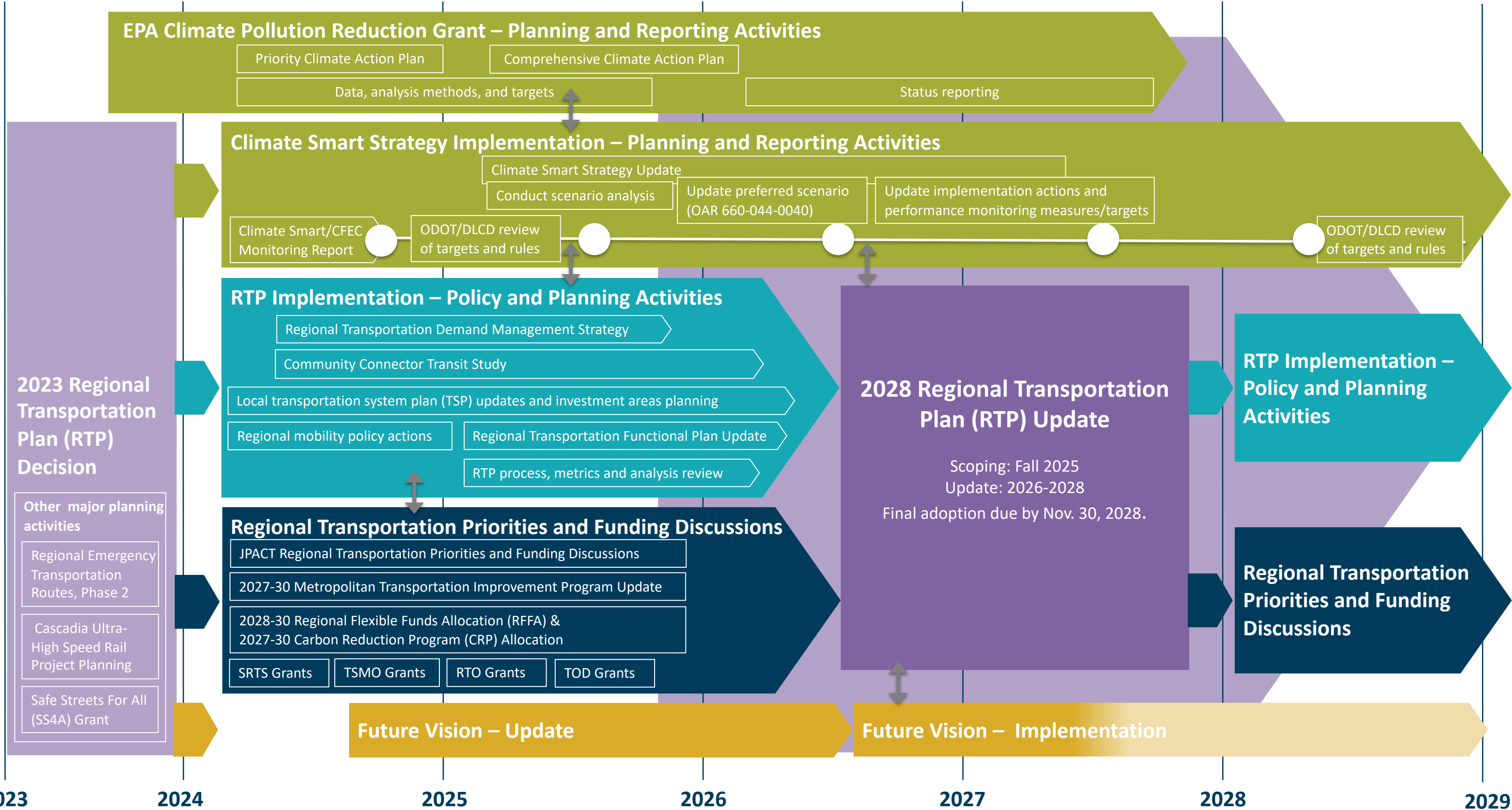
TPAC will have an opportunity to discuss the RTFP update work plan and timeline at a future meeting. TPAC and the Metro Technical Advisory Committee (MTAC) will be engaged throughout the process.

- In 2025, Metro will kick off an **update to the [region's Future Vision](#)**, a guidance document that defines the preferred future for the greater Portland region in 50 years. The work plan and timeline for this work is under development. The Future Vision will touch on a wide range of topics, from land use, transportation and our economy to housing, climate, nature, arts and culture. The updated Future Vision will be shaped by the [Future Vision Commission](#), a group of people from across the region that represent a variety of backgrounds, perspectives, jobs and life experiences. TPAC will have an opportunity to discuss this work at future meetings.
- Scoping is underway for the **Regional Industrial Lands Availability and Intermodal Facilities Access Study**. The study is anticipated to begin in summer 2025 and continue in 2026. TPAC will have an opportunity to discuss this work at future meetings.

Attachments:

1. Coordinated Timeline for RTP Implementation and Climate Action Planning Activities (1/31/25)
2. Future Actions and Recommendations Moving Forward - Excerpt from Exhibit E to the 2023 Major Report Describing Progress Toward Climate Performance Targets (to download the full report, go to: <https://www.oregon.gov/lcd/CL/Documents/MetroReport2023.pdf>)

2023-28 Coordinated timeline of RTP implementation and climate action planning



FUTURE ACTIONS AND RECOMMENDATIONS MOVING FORWARD

The findings in the previous section demonstrate the RTP surpasses the state mandated VMT reduction targets if fully implemented along with state-led pricing actions adopted in the Statewide Transportation Strategy and assumed in the region's targets. However, the findings also show mixed progress on implementation of several key elements of the region's adopted Climate Smart Strategy. As a result, and as required by OAR 660-012-0900(7)(D), Metro staff identified the following future actions and recommendations that will be addressed prior to the next update to the RTP (due by November 30, 2028).

- 1. Metro will begin monitoring and reporting current state and regional trends in transportation-related GHG emissions in coordination with ODOT.** This information will be communicated to JPACT and the Metro Council and as part of the annual minor reports Metro must submit to DLCD on behalf of the region to report on implementation of the region's Climate Smart Strategy. The first minor report will be due in 2025. Current state monitoring efforts are now published online at: <https://www.oregontransportationemissions.com>.
- 2. Metro will continue to improve its climate analysis tools, assessment methods and capabilities in advance of the 2028 RTP update to better estimate GHG emissions impacts of RTP projects and to better inform regional policy and investment decisions that impact climate.** Projects occurring in 2024-25, such as development of a Comprehensive Climate Action Plan through the EPA Climate Pollution Reduction Grant program, allocation of federal Carbon Reduction Program (CRP) grant funding, the Regional Flexible Funds Allocation process, and next Metropolitan Transportation Improvement Program (MTIP) update provide opportunities to test and develop new approaches to estimating GHG impacts of different project types over the next several years.
- 3. Metro recommends state agencies conduct a detailed, comprehensive review of the STS assumptions used to set regional greenhouse gas emissions reduction targets as described in OAR 660-044-0035 (Division 44 - Metropolitan Greenhouse Gas Reduction Targets Rules) and to update the STS and GHG target rules as needed.** The goals of this review should include:
 - o ensuring that state-provided assumptions reflect current trends,
 - o clarifying how state-led pricing assumptions used in setting regional greenhouse gas emissions targets should be accounted for in future regional climate analyses, and

Exhibit E: Major Report Describing Progress Toward Climate Performance Targets

- ensuring that the assumed implementation and GHG impact of state-led policies and assumptions are documented in a manner consistent with how regions are required to document their RTP climate analyses.

This will help improve the analysis in next RTP update and provide clarity on what different state-led pricing actions are assumed in the state targets in OAR 660-044-0020 and how those pricing actions should be accounted for in future analyses.

Metro included assumptions about state-led STS actions (including state-led pricing programs) in the RTP climate analysis because these actions were assumed by the state when it set GHG reduction targets for the region. Metro recommends that the pricing assumptions be reviewed and updated by the state to best reflect how pricing will be implemented. Other assumptions include ambitious state-led pricing programs such as pay-as-you-drive insurance, mileage-based road user fees to replace the gas tax (e.g. VMT fees), a carbon tax, and congestion pricing in the Portland area. While the state does have authority to implement these actions, limited progress has been made to date. The state-adopted climate targets were set at a level that assumed that some combination of these forms of pricing would be implemented in Oregon by 2050. These assumptions should be reviewed and updated as necessary. This information will also help the region identify pathways to meet its targets while accounting for uncertainty in state-led pricing actions.

The most recent STS Monitoring Report, completed in 2023,⁴ reports back on general progress on categories of actions like improving passenger vehicle technology – it does not quantitatively examine whether specific individual assumptions used in the STS are consistent with current trends and policy changes.

This level of detail will improve the transparency and accuracy of the assumptions and targets used in the RTP climate analysis. Metro encourages the State agencies to make this a transparent process and to collect robust public and policymaker feedback on underlying assumptions so that it does not fall to Metro and other partners to communicate the State's assumptions as part their climate analysis and monitoring. The State Agencies' review should also identify corrective actions needed to achieve STS assumptions that are not on track.

4. **Metro recommends ODOT update the Statewide Transportation Strategy, as needed, if the review described above reveals that assumptions are significantly off-track, and subsequently update Division 44 using the updated STS assumptions.** This process would need to be completed by 2026 to inform the climate analysis that will be conducted as part of the next RTP update (due in 2028).

⁴ <https://www.oregontransportationemissions.com/>

Exhibit E: Major Report Describing Progress Toward Climate Performance Targets

5. **Metro will work with state and local partners to conduct a comprehensive review and update to the Climate Smart Strategy to inform the next RTP update.** This work will reflect new information about the potential to implement different GHG reduction measures (e.g., the changing transportation funding landscape and evolving State plans to implement congestion pricing) and new data and tools that will improve methods for estimating the GHG reduction potential from different policies and actions. Metro will also incorporate any required updates emerging from the review of STS assumptions described above. If the State does not address the issues identified about the STS vehicle/fuel and pricing assumptions identified elsewhere in this report, Metro may also explore more realistic assumptions and GHG reduction scenarios representing these assumptions for comparative purposes to inform regional policymaker discussions.
 - This will result in more clarity and an updated Climate Smart Strategy that can guide how the region can best reduce GHG emissions and meet climate targets that are predicated on both the State and region doing their part to reduce GHG emissions.
 - This may include in-depth planning to address some of the areas where the region is falling short on climate implementation (e.g., TDM funding) as well as new GHG reduction strategies identified by agency partners (e.g., promoting electric bikes and scooters and exploring other potential actions to advance transportation electrification that complement federal and state policies and programs).
 - This work will also include a review and recommendations for updates to the adopted Climate Smart Strategy performance monitoring measures and targets, as appropriate.
6. **Metro will update its Climate Smart Strategy implementation monitoring and reporting to reflect the updated strategy and any changes recommended to the Climate Smart Strategy performance monitoring measures and targets.** The next RTP update is due by November 30, 2028. The next major report to DLCD is due the following year, in 2029.
7. **Metro will update the Regional Travel Options (RTO) Strategic Plan and develop a Regional Transportation Demand Management (TDM) strategy.** A goal of this work is to provide clearer direction regarding the role of transportation demand management in helping implement the Climate Smart Strategy – an area in which the region is falling short based on the implementation monitoring results shown in Table 4. As called for in Chapter 8 of the RTP, the new strategy will provide implementation guidance to state agencies, transit providers, local agency and non-profit partners that

Exhibit E: Major Report Describing Progress Toward Climate Performance Targets

administer TDM programs, as well as direction on how the Metro RTO program can support these efforts and implementation through transportation system plans.

- 8. Metro will work with regional partners to identify actions to advance transportation electrification in the greater Portland region that complement existing federal and state policies and programs.**
- 9. Metro will work with cities, counties, community-based organizations and transportation agencies to improve the process of developing and evaluating the project list in advance of the next RTP update.** Called for in Chapter 8 of the RTP, this work will include:
 - Convening a group or multiple groups to review Metro’s existing metrics and tools for evaluating the impacts of transportation decisions on the region’s safety, climate, equity, mobility and economy to ensure metrics and tools reflect community and regional priorities.
 - Conducting a review of processes and best practices used by four to five peer MPOs to identify needs and evaluate and prioritize investments.
 - Working with cities, counties and transportation agencies to share best practices and information on conducting inclusive, equitable engagement and applying safety, climate and equity data and metrics to identify investment priorities in advance of the 2028 RTP call for projects.
 - Developing strategies to improve coordination on submitting projects on state highways and facilities that cross multiple jurisdictional boundaries.
 - Reviewing lessons learned during past RTP project-level evaluations, including those conducted during the 2018 and 2023 RTP updates. The 2018 RTP tested a rigorous qualitative, self-scoring approach to comparing selected RTP projects across ten factors, and Metro encountered several technical challenges in producing consistent information for projects of varying types and sizes. The 2023 RTP tested a qualitative, GIS-based approach that provided consistent information across all projects for each RTP goal area, but did not provide information in enough detail for decision-makers to distinguish between the potential greenhouse gas emissions and VMT impacts of both larger-scale projects and smaller-scale projects. This suggests that a hybrid approach that involves a qualitative evaluation of most RTP projects and a more detailed quantitative evaluation of larger-scale projects could better meet the region’s needs.
- 10. Working in coordination with state and local partner agencies, Metro will increase efforts to prioritize and secure funding for transit service, bicycle and pedestrian infrastructure, and other regional greenhouse gas reduction**

Exhibit E: Major Report Describing Progress Toward Climate Performance Targets

strategies identified in the updated Climate Smart Strategy. Over the past several RTP cycles Metro and its local agency partners have shifted funding from projects that support driving to bicycle, pedestrian and transit projects, and the state has increased funding for transit projects in the region. However, this increase in funding has not kept up with inflation, and is not adequate either to address recent challenges to transit nor to make transit and active transportation as ubiquitous and convenient as driving is throughout the region.

Metro will work with local, regional and state partners to implement these actions and recommendations and submit annual progress reports to DLCDC as required by OAR 660-012-0900(3).