

# Public Transportation Strategy RTAC Update

April 2023

This document presents the agreed-upon Purpose, Goal and Objectives of the Public Transportation Strategy (Strategy), a description of the committee approach, a summary of tasks, the schedule to achieve the Strategy, and the draft Strategy screening criteria questions.

## Purpose, Goal, and Objectives

The Strategy Purpose, Goal and Objectives were established with regional partners by consensus at meetings held on December 22, 2022, and February 1, 2023.<sup>i</sup> The PMG made minor adjustments to the Key Definitions during their first PMG meeting held on March 10, 2023.

### **Purpose**

Establish an equitable Public Transportation Strategy for the Portland Metropolitan and SW Washington area that is developed by regional partners and ODOT. The Strategy will identify near- and long-term public transportation projects and supportive services that are complementary to a congestion pricing system on I-5 and I-205.

### **Goal**

Increase public transportation options other than driving alone on or near tolled highways while advancing a more equitable and climate-friendly transportation system to help meet regional and state policy goals.

### **Objectives**

- Collaborate to increase availability of public transportation options other than driving alone on or near tolled highways, especially for historically and currently excluded and underserved communities.
- Identify public transportation projects and supportive services that will facilitate a shift to higher occupancy vehicles with consideration to local needs.
- Identify potential funding sources and lead agencies.

### **Definitions**

To provide clarity to the Strategy Purpose, Goal, and Objectives, the following definitions were developed:

- **Public transportation projects** include any project type that supports planning, development, and operation of fixed route service. Examples include fixed-route bus, light rail transit, bus rapid transit, and other forms of high-capacity transit.
- **Public transportation supportive services** include any programmatic elements that facilitates a shift to higher occupancy vehicles and/or provides transportation options where fixed route does not exist. Examples of supportive services could include ridesharing, vanpools, deviated fixed route service, local shuttles, park and rides, and mobility hubs.

- **Complementary public transportation projects and supportive services** are those that provide public transportation options for people who would otherwise drive alone on or near priced highways to get to their destination. The Regional Mobility Pricing Project (RMPP) proposes to use congestion pricing to manage travel demand and traffic congestion on I-5 and I-205 in the Portland metropolitan region. During the RMPP NEPA process, if a significant adverse impact is identified resulting from the RMPP, then ODOT will engage partners to identify appropriate mitigations. Mitigation measures for significant impacts that result from the RMPP could include public transportation projects or supportive services identified in the Strategy. More information about project mitigations can be found here: [https://www.environment.fhwa.dot.gov/nepa/trans\\_decisionmaking.aspx](https://www.environment.fhwa.dot.gov/nepa/trans_decisionmaking.aspx)

To provide further clarity for the Strategy effort, elements that will not be under consideration are described below.

- Projects and supportive services that cannot reasonably demonstrate they would be complementary to or have a connection to a congestion pricing system on I-5 and I-205.
- Bike and pedestrian infrastructure projects that are not included in a larger public transit corridor infrastructure project.

## Committee Approach

The committee approach and structure to develop the Strategy was determined through conversations and agreement with regional partners during meetings held on December 22, 2022, and February 1, 2023, and includes a Project Management Group (PMG) and a Workgroup.

### *Project Management Group*

#### **Members**

The members of the PMG were selected through discussion with partner agencies. Agencies and/or organizations will select their own representative. PMG representation includes Clackamas County, City of Portland, C-TRAN, Metro, ODOT, TriMet, Washington County.

#### **Roles and Responsibilities**

The PMG's roles and responsibilities are the following:

- Inform and provide guidance on the overall workplan to develop the Strategy.
- Review and provide input on the agendas and materials for Workgroup meetings.
- Provide oversight on the development and implementation of the engagement plan for community-based organizations and other stakeholders.
- Support the Workgroup to reach consensus.

### *Workgroup*

#### **Members**

The members of the Workgroup were selected through discussion with partner agencies. Workgroup representation includes Canby Area Transit, City of Portland, City of Vancouver, Clackamas County, C-TRAN, Interstate Bridge Replacement, Metro, ODOT, Ride Connection, SMART, SCTD, SW WA RTC, TriMet, Washington County.

## Roles and Responsibilities

The Workgroup's roles and responsibilities are the following:

- Review, provide input, and reach agreement on the screening criteria.
- Apply the screening criteria to develop the initial project list and identify projects and supportive services for the Strategy.
- Develop the initial project list comprised of short-term and long-term projects and supportive services.
- Review, provide input, and reach agreement on the development and implementation of the engagement plan for community-based organizations and other stakeholders.
- Review and provide input on the suite of funding options and financing strategies to be considered generally and by project or service.

## Strategy Tasks

The Strategy will be developed through five major tasks. The first task, establish the Purpose, Goal and Objectives of the Strategy as described above, is complete. The remaining tasks include identifying a comprehensive list of potential funding sources; develop the list of public transportation projects and supportive services; establish an engagement approach for the Strategy, and gain agreement and endorsement of the Strategy. These are described further below.

### ***Funding Options White Paper***

A funding options white paper will be prepared with input from the Workgroup that identifies potential funding sources (federal, state, regional, and local) for public transportation projects in the greater Portland metropolitan region including Southwest Washington. This will help inform regional discussions around the implementation of the Strategy.

### ***Strategy List Development***

Workgroup participants will work together to develop the Strategy project and supportive services list comprised of short-term and long-term public transportation projects and supportive services. The proposed approach to developing the Strategy list includes:

- Collaboratively develop screening criteria to determine the set of public transportation projects and supportive services that best meet the Strategy purpose, goal, and objectives.
- Partners submit initial public transportation projects and supportive services using the screening criteria as a guide.
- Workgroup use screening criteria to review, discuss, and narrow the proposed list of public transportation projects and supportive services to include in the Strategy.
- Projects/supportive services will be organized into two categories:
  - Short-term 5-year investment priorities (2025-2030)
  - Long-term investment priorities (2031+)
- The Workgroup will discuss and identify those that should be prioritized with the implementation of tolling. The prioritization shall take into account the timing of the proposed toll projects.
- Present the Strategy project selection criteria and public transportation project and supportive services list to RTAC and other regional committees to keep them updated on status.

- Seek RTAC endorsement of the Strategy at their October 2023 meeting.
- Bring Strategy to OTC; a future phase of the Strategy that would include a funding plan may require more engagement of the OTC.

### ***Engagement Approach and Implementation***

The Strategy engagement approach will be developed collaboratively with PMG. After the approach is agreed upon, regional partner agencies or public transportation providers with a role in the engagement approach agree to develop and implement the agreed upon engagement plan.

The following guiding assumptions about engagement for this scope of work were developed with PMG on March 27, 2023.

- Most, if not all, identified projects and supportive services will have been vetted through an engagement process prior to Strategy list inclusion.
- For new or modified projects and supportive services, proposing agencies will complete an engagement process, if required. Required engagement does not necessarily have to be completed before proposing the project as part of this Strategy.
- The Regional Tolling Advisory Committee will provide touchpoints of input and Strategy endorsement.
- PMG/Workgroup participants agree to keep their agency's governing bodies engaged during Strategy development and, after endorsement, take action to incorporate projects into adopted plans, as appropriate, within existing processes.
- Identified existing groups with an advisory role on the Regional Mobility Pricing Project and I-205 Toll Project will be provided updates and/or opportunities to provide input to the Strategy.

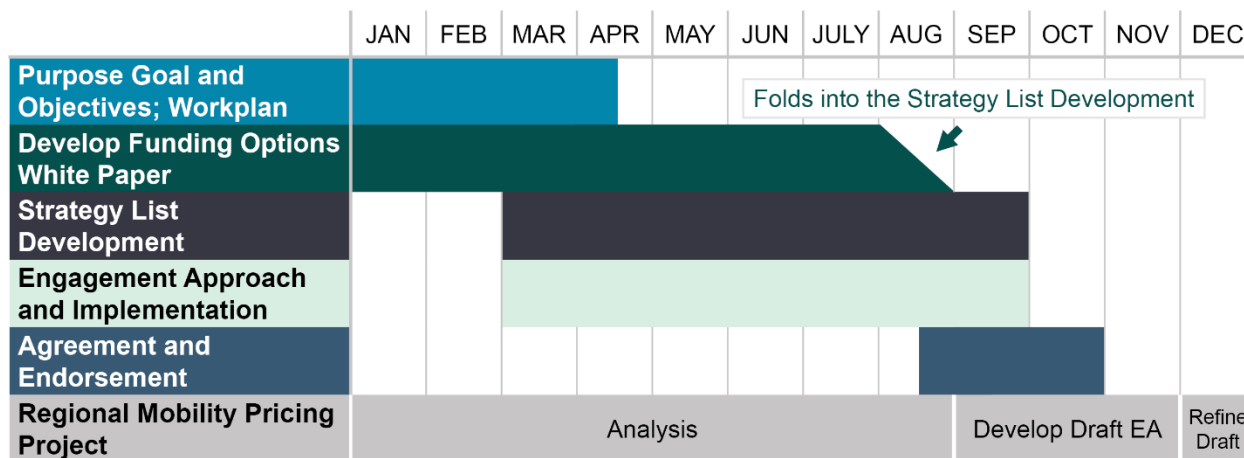
The PMG will revisit this approach after projects/supportive services are submitted for the initial screening.

### ***Agreement and Endorsement***

Workgroup participants will work together to:

- Finalize the Public Transportation Strategy document.
- Update the [2022 Urban Mobility Strategy Map](#) with Partner Projects.
- Regionally collaborate to implement the Strategy.

**Figure 1. Public Transportation Strategy Workplan Schedule**



## Draft Screening Criteria and Strategy List Selection Process

The screening criteria will guide regional partners in determining the set of public transportation projects and supportive services that best meet the Strategy purpose, goal, and objectives.

Provided in Table 1, below, are **draft** screening criteria developed as a conversation starter with the PMG and Workgroup. Table 2, below, reflects current discussions with the PMG for identifying public transportation investments in the short-term 5-year investment priorities and long-term investment priorities beyond 2031. The Workgroup will review and provide initial comments on April 14, 2023.

The PMG identified the following key issues to continue discussing as the **draft** screening criteria and questions are further developed. These key issues will be discussed at the Workgroup and PMG meetings in April and May 2023.

- Establish common understanding for the term “on or near” priced highways:
  - Define it as a “corridor”, vs.
  - Identify common origin/destination pairs for travelers who would normally drive alone ON the priced highway.
- Determine if the Strategy should consider projects/supportive services within defined geographic segments
- Identify preferred analysis tool to assess equity criteria
- Define access to opportunity
- Determine if the screening criteria should be weighted

**Table 1: Screening Criteria**

Evaluation Categories	Screening Questions
<b>Project Type</b>	<p>Project must address at least one of the following to receive a “Pass” score:</p> <ol style="list-style-type: none"> <li>1. Does the project/supportive service support planning, development, and operation of a fixed route service? Examples include fixed-route bus, light-rail transit, bus rapid transit, and other forms of high-capacity transit.</li> <li>2. Does the project/supportive service include programmatic elements that facilitate a shift to higher occupancy vehicles and/or provide transportation options where a fixed route option does not exist? Examples of supportive services could include ridesharing, vanpools, deviated fixed route service, local shuttles, park and rides, and mobility hubs.</li> </ol>
<b>Relationship to congestion pricing</b>	<p>Project must address one of the following to receive a “Pass” score. If the project addresses two or more questions, it will receive a High Pass score.</p> <ol style="list-style-type: none"> <li>1. Does the project/supportive service provide a public transportation option for people who would otherwise drive alone on or near tolled highways to get to their destination?</li> <li>2. Does the project/supportive service address systemwide transit service gaps (coverage, connectivity, frequency, span, reliability) in the public transportation system on or near tolled highways?</li> <li>3. Does the project/supportive service include a connection and/or feed into another transit service that is on or near tolled highways?</li> </ol>
<b>Equity</b>	<p>Project must address one of the following to receive a “Pass” score. If a project addresses two or more questions, it will receive a High Pass score.</p> <ol style="list-style-type: none"> <li>1. Does the project/supportive service serve historically and currently underrepresented and under-served communities?</li> <li>2. Does the project/supportive service address transportation-related disparities and barriers experienced by historically and currently underrepresented and under-served communities?</li> <li>3. Does the project/supportive service provide access to opportunity for historically and currently underrepresented and underserved communities?</li> </ol>

**Table 2: Project and Supportive Service Prioritization Process**

Evaluation Categories	Screening Questions
<p><b>Is the project or service listed on a planned or adopted local, regional, and/or state plan?</b></p>	<p>The following questions are to understand the project status and not exclude the project from being on the Strategy project/service list.</p> <ol style="list-style-type: none"> <li>1. Is the project on the 2018 Regional Transportation Plan (RTP) list?</li> <li>2. Was the project submitted for inclusion on the 2023 RTP update list?</li> <li>3. What other adopted local, regional, and state plans or strategies is the project listed on?</li> <li>4. If the project <b>is not</b> on a planned, or adopted local, regional and/or state plan, please provide additional information on the project development process. Examples include               <ul style="list-style-type: none"> <li>• What plans, policies or strategies is the project anticipated to be listed on in the future?</li> <li>• Is the project a response to a policy, strategy, and/or plan?</li> </ul> </li> </ol>
<p><b>Readiness</b></p>	<p>Please indicate the status of the phase initiated, in process, or completed below.</p> <p><b>Early planning studies</b></p> <ul style="list-style-type: none"> <li>- Initiated</li> <li>- In process</li> <li>- Completed</li> </ul> <p><b>Environmental clearance process (if needed)</b></p> <ul style="list-style-type: none"> <li>- Initiated</li> <li>- In process</li> <li>- Completed</li> </ul> <p><b>Public engagement (additional information requested in the engagement category below)</b></p> <ul style="list-style-type: none"> <li>- Initiated</li> <li>- In process</li> <li>- Completed</li> </ul> <p><b>Design and implementation phase</b></p> <ul style="list-style-type: none"> <li>- Initiated</li> <li>- In process</li> <li>- Completed</li> </ul> <p><b>Funding</b></p> <ul style="list-style-type: none"> <li>- No funding</li> <li>- Some funds programmed</li> <li>- Fully funded</li> </ul>
<p><b>Timeline</b></p>	<p><b>The project/service is needed to be operating in the:</b></p> <ul style="list-style-type: none"> <li>- Short-term (2023 to 2030)</li> <li>- Long-term (2031-2045)</li> </ul>
<p><b>Phasing</b></p>	<p>Are their elements of the project or service that should or could be prioritized or moved ahead immediately or with the start of congestion pricing?</p>
<p><b>Engagement</b></p>	<p>It is ultimately the responsibility of the proposing agency to conduct the public engagement required to vet a particular project/supportive service.</p> <ol style="list-style-type: none"> <li>1. What engagement has been/will be conducted with agency boards, commissions, other stakeholders and or public for the project/supportive service?</li> </ol>

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Participating Regional Partners Agencies
Canby Area Transit
City of Portland
City of Vancouver
City of Wilsonville – SMART
Clackamas County
C-TRAN
Multnomah County
Oregon Department of Transportation
Oregon Metro
Ride Connection
South Clackamas Transportation District
Southwestern Washington Regional Transportation Council
TriMet
Washington County
Washington Department of Transportation

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