

# Public Transportation Strategy

## Memorandum

<b>Date</b>	October 10, 2023; Revised November 2, 2023
<b>To</b>	Public Transportation Strategy (PTS) Project Management Group and Workgroup
<b>From</b>	ODOT Toll Program PTS Staff
<b>Subject</b>	PTS Overview and Next Steps

## Overview

As ODOT moves towards implementation of the Oregon Toll Program, regional partners and the public have expressed desire for more public transportation investment to complement toll projects. To meet this need, ODOT engaged bi-state regional public transportation providers within the Portland metropolitan and southwest Washington area. Over the course of the last year regional partners convened to collaboratively identify near- and long-term public transportation projects and supportive services that are complementary to a congestion pricing<sup>1</sup> system on I-5 and I-205, and increase the availability of public transportation, especially for historically and currently excluded and underserved communities. This process, and resulting list, is referred to as the Public Transportation Strategy, or PTS.

Many of the PTS projects and supportive services would increase transit mobility through system improvements, and are identified in local and regional planning documents, such as Metro's Regional Transportation Plan and public transportation provider's Transit Development Plans. Many of the public transportation projects address system gaps and deficiencies that exist with or without tolling. Once tolling is implemented, these deficiencies may be more visible or pronounced. Increasing regional investment in the public transportation system to address many of the existing gaps will advance equitable public transportation and enhance the effectiveness of the congestion pricing system. In mid-2023 a separate but parallel effort titled the Nexus Project List began which identifies pedestrian, bicycle, and other roadway projects that have a clear nexus to toll-related impacts.

This memorandum provides an overview of the process regional public transportation providers conducted to collaboratively prepare the PTS project and supportive services list (PTS List) and its current presentation and organization. It also describes the next steps for future engagement and refinement. This entire process was collaborative and co-led with the public transportation providers and this memorandum compiles findings and reflects their input.

The PTS List is based on information, data and analysis that currently available. However, through conversation with public transportation providers in Clackamas, Multnomah, and Washington counties, partners have identified a list of additional data, analysis, and information such as I-205 Toll Project and RMPP environmental analysis, including diversion, safety and congestion findings to help refine or prioritize the PTS List. When the information, data, and analysis is available, regional partners requested a second phase to consider new information and adjust the PTS List. During the next phase, other public transportation projects or supportive services may be identified and added to the PTS List, while others

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<sup>1</sup> All toll projects currently planned will have scheduled toll rates that change based on congestion at certain hours and the terms "congestion pricing", "toll(ed)(ing)", and "pricing" are used interchangeably within this memorandum.

may no longer be relevant to providing options to those who would otherwise drive alone on the tolled the tolled highways.

Additionally, as part of the PTS process, a Funding Options Whitepaper was developed to document the potential federal, state, regional and local funding sources currently available to implement the PTS List. Regional public transportation partners reviewed and provided input on the initial documentation of funding sources in spring 2023. As a result, information on U.S. Code 23, Section 129 and the Value Pricing Pilot Program was added that identifies the ability and/or restrictions of the use revenue generated through toll projects for public transportation investments. Additionally, information was added to address members' request for known information about the Oregon Constitutional restriction of transportation funds, including increased specificity about the use of toll revenue as specified in the 2023 OHP Goal 6 Amendment. The Funding Options Whitepaper is provided in **Attachment A: Funding Options Whitepaper**.

## PTS Purpose, Goal, and Objectives

The PTS purpose, goal, and objectives and workplan were established with bi-state regional partners by consensus at meetings held in the winter of 2022/2023. The PTS committee's approach and structure includes a Project Management Group (PMG) and a Workgroup. The Committees were supported by a neutral facilitator and consultant team staff to develop work products and meeting materials. The committee structure and more information on its purpose, the agency partners represented, and its charge and workplan are detailed in **Attachment B: PTS Purpose, Goal, Objectives, Definitions, and Committee Approach**.

The PTS Workgroup's confirmed purpose, goal, and objectives, as well as key definitions, are as follows:

- **Purpose:** Establish an equitable PTS for the Portland metropolitan and southwest Washington area that is developed by regional partners and ODOT. The PTS 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 PTS 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.

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- **Public transportation supportive services** include any programmatic elements that facilitate 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 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 Regional Mobility Pricing Project's NEPA process, if a significant adverse effect is identified, then ODOT will engage partners to identify appropriate mitigations. Mitigation measures for significant adverse effects that result from the RMPP could include public transportation projects or supportive services identified in the PTS. More information about project mitigation can be found at [https://www.environment.fhwa.dot.gov/nepa/trans\\_decisionmaking.aspx](https://www.environment.fhwa.dot.gov/nepa/trans_decisionmaking.aspx).

## PTS Screening Criteria and Call for Projects

The bi-state Portland metropolitan and southwest Washington area PMG and Workgroup identified screening criteria that were used to identify public transportation projects and supportive services to be included on the PTS List. The process was iterative, and PMG and Workgroup members informed, refined and finalized the screening criteria. This included discussions on but not limited to defining screening criteria categories that met the PTS purpose, goal and objectives, establishing a common understanding of the term for “on or near” priced highways, adding a funding and engagement subcategory, and defining access to opportunity.

The screening criteria are categorized into two categories: Equity, and Relationship to Congestion Pricing. The equity category's screening criteria were developed using the Equity and Mobility Advisory Committee's [\*Shaping an Equitable Toll Program: Recommendations to the OTC as a guide. These Recommendations\*](#) were adopted by the Oregon Transportation Commission in July 2022. The screening criteria and categories were presented to Regional Toll Advisory Committee for input at its April 24 and July 24, 2023, meetings, and to the Equity and Mobility Advisory Committee at its August 7, 2023, meeting. More information on screening criteria and categories is available in **Attachment C: PTS Screening Criteria**.

Members of the PMG and Workgroup reviewed the intake form and provided feedback on the assessment tools approach, including assessment category scoring methodologies. The intake form was derived from the screening criteria and assessment approach. The PTS PMG and Workgroup agreed to move forward with the assessment categories in the assessment approach with the understanding that they were based on readily available information for the Portland metropolitan and southwest Washington area at the time of the assessment tool development.

More information on the PTS “call for projects” process, including the assessment tools provided to partners, is available in **Attachment D: PTS Intake Form, Instructions, and Guidance**.

The PTS “call for projects” began on May 31, 2023, and closed on June 30, 2023. Projects and supportive services were collected via an intake form developed based on the screening criteria. One key challenge was identifying assessment tools that were common to and readily available for both the Portland metropolitan and southwest Washington area.

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Fifty-eight projects and supportive services were received from public transportation service providers, including from Clackamas County, C-TRAN, Multnomah County, Portland Bureau of Transportation, Ride Connection, South Metro Area Regional Transit, and TriMet. Through analysis and vetting, 10 of the submittals were determined to either be duplicative to another submittal or a better fit for the Nexus List project identification process.

Presently, 48 public transportation projects and supportive services are included on the PTS List, as shown on Figure 1. Each project or supportive service on the PTS List is important and will further support the region's multimodal transportation network when congestion pricing is operational.

## Assessment Organization and Presentation

Members of the PMG and Workgroup developed a process to assess each project and supportive service's ability to meet the PTS purpose, goal, and objectives through screening criteria using available existing data sources and information. The assessment process was iterative, and the PMG and Workgroup contributed to the assessment process either by providing additional information when requested or by supporting and guiding refinement of the assessment approach to better reflect the intended criteria being assessed.

Specifically, the PMG and Workgroup informed the screening assessment process by informing the final travel demand assessment approach; adding an assessment criteria for access to job centers; expanding the access to opportunity definition to include social resources such as medical centers, parks, grocery stores and schools; defining geographic areas; and, identifying more specific project and supportive service types. Another change based on their input was the elimination of the Readiness category from consideration at this time. They determined the information collected was not in a state to adequately inform the PTS List organization (more information is provided in the next section). The assessment process and partner feedback are documented in **Attachment E: PTS Assessment Process**.

The PMG and Workgroup established an agreed-upon organization and presentation of the assessed PTS List. The agreed-upon assessment organization is shown on Figure 2, which depicts how the public transportation projects and supportive services perform against screening criteria within the Equity and Relationship to Congestion Pricing categories. The PTS List is presented as either High, Medium, or Low to convey the project or supportive service's perceived and *anticipated* ability to provide equitable benefits to people who are historically and currently underrepresented, and how projects and supportive services would address *anticipated* impacts from toll implementation. The word *anticipated* is used for two reasons: 1) transportation modeling for each toll project has not been completed or assessed for impacts, and 2) the PTS assessment was based on preliminary data and additional analysis will be needed to determine if the projects do provide equitable benefits to people who are historically and currently underrepresented. To reduce the potential mis-informed interpretation that the PTS List is prioritized, partners requested that the two maps, Figure 1 and Figure 2, be provided together. Further, to deemphasize the order of the projects and services, the partners organized the PTS List by the expanded project or supportive service type on both maps. Additional information on the organized PTS List is provided in **Attachment F: PTS Assessment Workbook**.

## Going Forward: PTS List

ODOT and the Federal Highway Administration are currently conducting an environmental assessment to identify potential benefits and impacts of both the I-205 Toll Project and the Regional Mobility Pricing Project. The results of the environmental analysis, including information on potential effects on diversion, safety and congestion, will be available for consideration and discussion in 2024.

The PMG and Workgroup worked with ODOT to identify new information, data, and specific analyses that will better inform prioritization in the future. At that time, regional partners may also decide to revise, refine, iterate, and identify additional projects to be included on the PTS List. The specifics of these next steps will be discussed with partners when new information is available. It is likely that the PTS List and Nexus project list will follow the same or a similar process.

As identified in the section above, partners determined that information collected as part of this effort for the Readiness Category<sup>2</sup> was not provided in a manner that helped to inform the discussion at this time. Data was incomplete, not standardized across all submittals, and many partners noted that there are additional considerations to determine an investment's "readiness" that were not collected. These other readiness considerations included potential federal and state funding opportunities, potential grant opportunities, and eligibility to use toll revenue as a potential funding source—all these elements could influence implementation timelines. Analysis of the cost-benefit of each investment was also identified as a useful analysis to better understand which public transportation project or supportive services would provide the most benefit for the anticipated cost. Partners concluded that any future analysis should also consider capital and operation costs, ridership and safety.

Multiple funding sources and partnerships will be required to implement the projects and supportive services on the PTS List. As part of the PTS process, a Funding Options Whitepaper was developed to document the potential federal, state, regional, and local funding sources. The Funding Options Whitepaper is a snapshot in time (summer 2023) that documents potential public transportation funding sources.

The Oregon Constitution Article IX Section 3a restricts the use of any tax or excise levied on the ownership, operation or use of motor vehicles. It has been determined that toll revenue is subject to this restriction. However, after consultation with the Oregon Department of Justice, ODOT concluded that the agency could most likely use toll revenue to fund the following types of public transportation, bicycle, and pedestrian programs using resources constitutionally dedicated to highway purposes below (please see **Attachment A: Funding Options Whitepaper** for more information).

- Congestion management options such as dedicated lanes for transit or carpooling, shared lanes for mixed auto/light rail and bus traffic, and queue-jumping lanes.
- Transit facilities within public highway rights-of-way such as transit stops and transit stations.
- Park and ride locations in or adjacent to the right of way that serve buses.
- Transit signal priority.
- Highway pull outs to accommodate buses.

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<sup>2</sup> Data collected as part of the Readiness Category included capital and operations costs, implementation timing, engagement, and project development phases.

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- Bicycle and pedestrian facilities within the highway, road, or street right-of-way.

In January 2023, the Oregon Transportation Commission (OTC) adopted an amendment to the Oregon Highway Plan’s (OHP), Goal 6: Tolling and Congestion Pricing.<sup>3</sup> Policy 6.L: *Follow a hierarchy of revenue allocation for road pricing projects, states:*

*When construction projects are bonded, certain financial obligations must be met before discretionary spending may occur. Net revenues after such obligations should be targeted to meet statewide goals and meet all federal requirements, and those identified in Oregon’s constitution, and elsewhere as appropriate.*

The Policy recognizes that multimodal transportation investments should be consistent with the State’s constitution and the policies outlined in Goal 6, Policy 6.L. At the time a project or supportive service is proposed for implementation, project owners in partnership with ODOT, can begin to determine how the project or supportive service will be funded and if using net toll revenue is applicable. The table that follows presents the three-tiered hierarchy of revenue allocation for road pricing projects as adopted into the OHP.

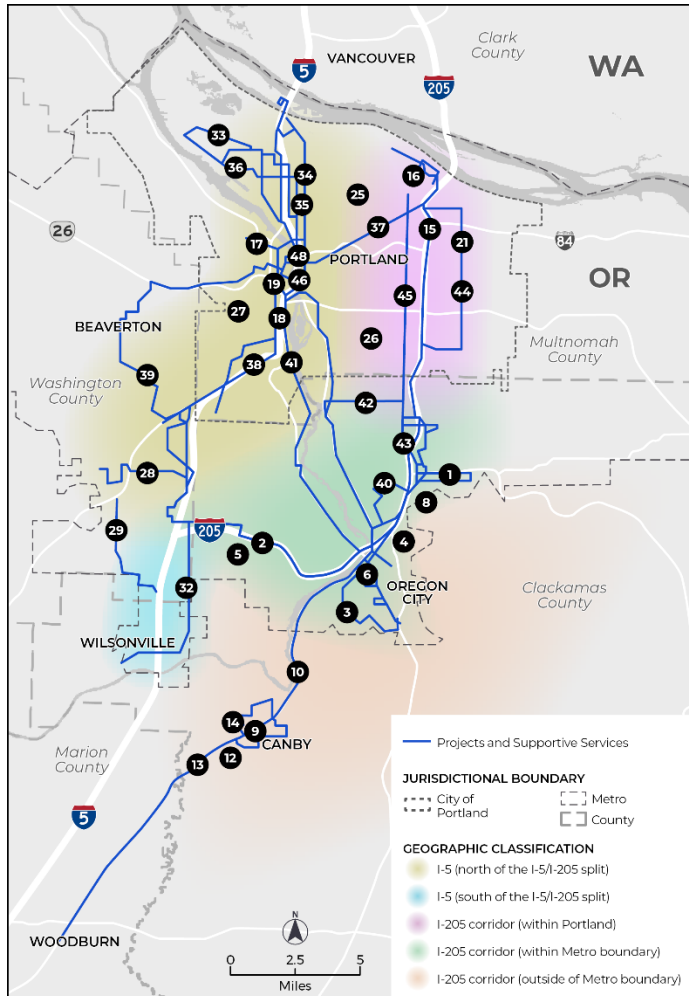
	Objective		
	Tolling (revenue focused)	Congestion Pricing (congestion focused)	Combination (tolling and congestion pricing)
First	Cover the cost of the tolling system, operations, maintenance and administration, as consistent with bond indenture requirements	Cover the cost of the tolling system, operations, maintenance and administration	Cover the cost of the tolling system, operations, maintenance and administration, as consistent with bond indenture requirements
Second	Reach the desired share of revenue needed to pay for the project including long-term operations, preservation, and maintenance of the physical infrastructure	Manage congestion through multimodal investments in biking, walking, public transportation and roadway infrastructure within the traffic and multimodal corridors	Reach the desired share of revenue needed to pay for the project with a focus on capital and multimodal investments that support congestion reduction, while also addressing long-term operations, preservation and maintenance of the physical infrastructure
Third	Meet any additional system performance metrics defined for the corridor	Meet any additional system performance metrics defined for corridors, a series of corridors or by segments	Meet any additional system performance metrics defined for corridor

<sup>3</sup> [https://www.oregon.gov/odot/Planning/Documents/OHP\\_Goal\\_6\\_Policy.pdf](https://www.oregon.gov/odot/Planning/Documents/OHP_Goal_6_Policy.pdf)



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Figure 1. Public Transportation Strategy Project and Supportive Services List by Project Type



HIGH CAPACITY TRANSIT

- 17 Portland Streetcar, Montgomery Park Transit Extension
- 18 Portland Streetcar, SW Moody Extension
- 19 Portland Streetcar Frequency Improvements
- 35 MLK FX
- 38 SW Corridor
- 45 82nd Ave. FX
- 46 MAX Tunnel
- 47 MAX frequency improvements\*
- 48 Steel Bridge Approach/ Transit Bottleneck

FIXED ROUTE BUS

- 9 Canby: Transit Center Expansion / Upgrade
- 10 Canby: Increase Frequent Service on 99E
- 13 Canby: Expanded Woodburn Service
- 14 Canby: Loop Service
- 15 C-TRAN, I-205 Bus on Shoulder
- 20 Enhanced Transit/Better Bus Portland Central City Portals Transit Enhancements, Phase 2\*
- 21 Enhanced Transit/Better Bus Line 73 and 122nd Avenue Corridor Safety and Access to Transit Improvements
- 32 Wilsonville to Clackamas Town Center Fixed Route Service
- 33 TriMet Line 4 Frequency, Bus Capacity and Transit Priority Improvements
- 34 TriMet Line 6 Frequency, Bus Capacity and Transit Priority Improvements
- 36 TriMet Line 44 Frequency and Transit Priority Improvements
- 37 TriMet Line 12 Frequency, Bus Capacity and Transit Priority Improvements
- 39 TriMet Line 76 Frequency and Capital Improvements
- 40 TriMet Line 145 Frequency and Capital Improvements
- 41 TriMet Line 35 Transit Priority and Frequency Improvements
- 42 TriMet Line 33 Transit Priority and Frequency Improvements
- 43 TriMet Line 79 Frequency and Transit Priority Improvements
- 44 TriMet Line 73 Frequency and Transit Priority Improvements

FIXED ROUTE SHUTTLE/DEVIATED FIXED ROUTE SHUTTLE

- 1 Industrial Area Shuttle
- 2 Tualatin / Stafford / Oregon City Shuttle (East Tualatin)
- 3 CCC Xpress Shuttle Expansion
- 4 Clackamas County Shuttle Expansion
- 16 ACCESS Shuttle service expansion and bus stop improvements
- 28 King City Shuttle
- 29 Basalt Creek Shuttle

DEMAND RESPONSIVE SHUTTLE

- 25 North and Northeast Portland Shuttle for Older Adults and People with Disabilities
- 26 Southeast and East Portland Shuttle for Older Adults and People with Disabilities
- 27 Southwest Portland Shuttle for Older Adults and People with Disabilities

PARK-AND-RIDE/MOBILITY HUB

- 5 Park and Ride Stafford Road
- 6 Oregon City Park and Ride
- 8 Mobility Hub to support Happy Valley to Oregon City Service and Clackamas Industrial Area Shuttle. CC TDP ST-4
- 12 Canby: Park and Ride
- 22 Mobility Hubs: Gateway TC + Parkrose TC
- 23 Mobility Hubs: I-5 and I-205 tolled corridors\*

TDM PROGRAM

- 7 Implementation of Transportation Demand Management strategies being developed in Clackamas County Travel Option Plan\*
- 24 Transportation Demand Management (TDM) programs in the I-5 and I-205 tolled corridors\*

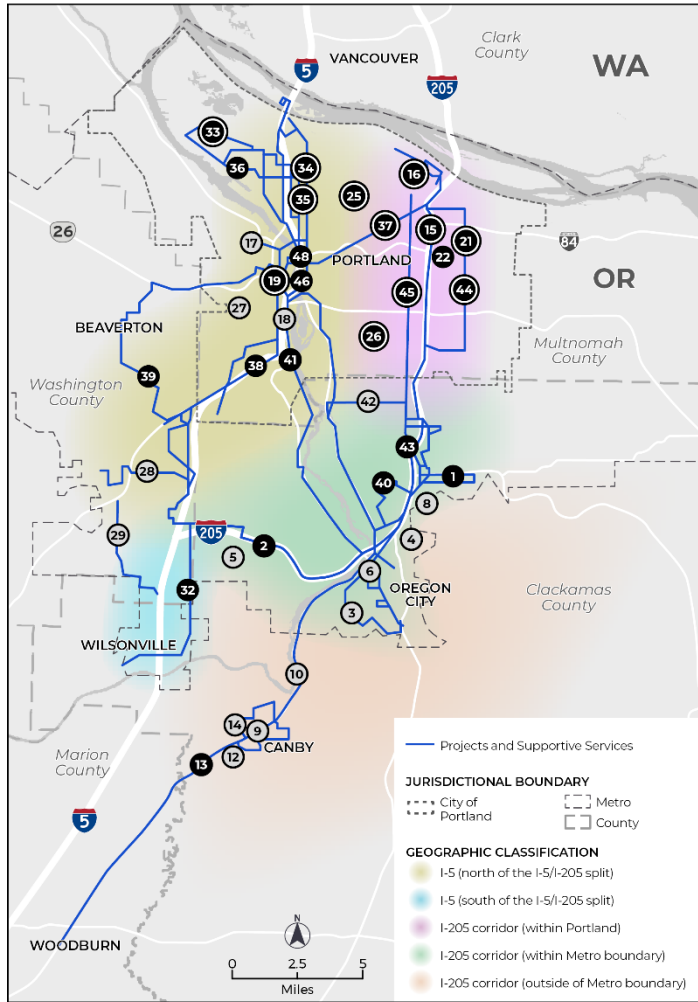
BUS PURCHASE

- 11 Canby: Additional Vehicles\*
- 30 Battery-electric buses for Washington County Shuttles\*
- 31 Accessible Vehicle Purchase\*

\* Project not shown on the map

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Figure 2. Early Assessment List Organization – Relationship to Congestion Pricing Projects and Equity Concerns



**HIGH**

**HIGH CAPACITY TRANSIT**

- 19 Portland Streetcar Frequency Improvements
- 35 MLK FX
- 45 82nd Ave. FX

**FIXED ROUTE BUS**

- 15 C-TRAN, I-205 Bus on Shoulder
- 20 Enhanced Transit/Better Bus Portland Central City Portals Transit Enhancements, Phase 2\*
- 21 Enhanced Transit/Better Bus Line 73 and 122nd Avenue Corridor Safety and Access to Transit Improvements
- 33 TriMet Line 4 Frequency, Bus Capacity and Transit Priority Improvements
- 34 TriMet Line 6 Frequency, Bus Capacity and Transit Priority Improvements
- 37 TriMet Line 12 Frequency, Bus Capacity and Transit Priority Improvements
- 44 TriMet Line 73 Frequency and Transit Priority Improvements

**FIXED ROUTE SHUTTLE/ DEVIATED FIXED ROUTE SHUTTLE**

- 16 ACCESS Shuttle service expansion and bus stop improvements

**DEMAND RESPONSIVE SHUTTLE**

- 25 North and Northeast Portland Shuttle for Older Adults and People with Disabilities
- 26 Southeast and East Portland Shuttle for Older Adults and People with Disabilities

**MEDIUM**

**HIGH CAPACITY TRANSIT**

- 38 SW Corridor
- 46 MAX Tunnel
- 47 MAX frequency improvements\*
- 48 Steel Bridge Approach/ Transit Bottleneck

**FIXED ROUTE BUS**

- 13 Canby: Expanded Woodburn Service
- 32 Wilsonville to Clackamas Town Center Fixed Route Service
- 36 TriMet Line 44 Frequency and Transit Priority Improvements
- 39 TriMet Line 76 Frequency and Capital Improvements
- 40 TriMet Line 145 Frequency and Capital Improvements
- 41 TriMet Line 35 Transit Priority and Frequency Improvements
- 43 TriMet Line 79 Frequency and Transit Priority Improvements

**FIXED ROUTE SHUTTLE/ DEVIATED FIXED ROUTE SHUTTLE**

- 1 Industrial Area Shuttle
- 2 Tualatin / Stafford / Oregon City Shuttle (East Tualatin)

**PARK-AND-RIDE/MOBILITY HUB**

- 22 Mobility Hubs: Gateway TC + Parkrose TC
- 23 Mobility Hubs: I-5 and I-205 tolled corridors\*

**TDM PROGRAM**

- 7 Implementation of Transportation Demand Management strategies being developed in Clackamas County Travel Option Plan\*
- 24 Transportation Demand Management (TDM) programs in the I-5 and I-205 tolled corridors\*

**BUS PURCHASE**

- 30 Battery-electric buses for Washington County Shuttles\*
- 31 Accessible Vehicle Purchase\*

**LOW**

**HIGH CAPACITY TRANSIT**

- 17 Portland Streetcar, Montgomery Par Transit Extension
- 18 Portland Streetcar, SW Moody Extension

**FIXED ROUTE BUS**

- 9 Canby: Transit Center Expansion / Upgrade
- 10 Canby: Increase Frequent Service on 99E
- 14 Canby: Loop Service
- 42 TriMet Line 33 Transit Priority and Frequency Improvements

**FIXED ROUTE SHUTTLE/ DEVIATED FIXED ROUTE SHUTTLE**

- 3 CCC Xpress Shuttle Expansion
- 4 Clackamas County Shuttle Expansion
- 28 King City Shuttle
- 29 Basalt Creek Shuttle

**DEMAND RESPONSIVE SHUTTLE**

- 27 Southwest Portland Shuttle for Older Adults and People with Disabilities

**PARK-AND-RIDE/MOBILITY HUB**

- 5 Park and Ride Stafford Road
- 6 Oregon City Park and Ride
- 8 Mobility Hub to support Happy Valle to Oregon City Service and Clackam: Industrial Area Shuttle. CC TDP ST-4
- 12 Canby: Park and Ride

**BUS PURCHASE**

- 11 Canby: Additional Vehicles\*

\*Project not shown on the map



## **Attachments**

Attachment A: PTS Funding Options Whitepaper

Attachment B: PTS Purpose, Goal, Objectives, and Committee Approach

Attachment C: PTS Screening Criteria

Attachment D: PTS Intake Form, Instructions, and Guidance Assessment

Attachment E: PTS Assessment Process

Attachment F: PTS Assessment Workbook

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**Attachment A: PTS Funding Options Whitepaper**

## Attachment A

<b>Date</b>	October 10, 2023; Revised November 2, 2023
<b>To</b>	Public Transportation Strategy Project Management Group and Workgroup
<b>From</b>	ODOT Project Team
<b>Subject</b>	<b>Public Transportation Strategy Funding Options Whitepaper</b>

## Introduction

This Funding Options Whitepaper documents the potential federal, state, regional, and local funding sources as of summer 2023 that could help fund implementation of the Public Transportation Strategy (Strategy) list of near- and long-term public transportation projects and supportive services complementary to a congestion pricing system on I-5 and I-205. It also provides a high-level overview of the legal and policy considerations that will support and inform funding decision-making for the PTS List, specifically around toll revenue eligibility and the use of funds collected for investment in different types of public transportation.

The PTS Project Management Group and Workgroup members reviewed and provided input on the initial documentation of funding sources in spring 2023. As a result, information on U.S. Code 23, Section 129 and the Value Pricing Pilot Program was added that identifies the ability and/or restrictions of the use revenue generated through toll projects for public transportation investments. Additionally, information was added to address members' request for known information about the Oregon Constitutional restriction of transportation funds, including increased specificity about the use of toll revenue for investment in different types of public transportation.

Transit projects, as with all transportation projects, often require multiple funding sources. It should be noted that while this memorandum documents funding opportunities, securing funding for the PTS List will be challenging due to several barriers, including the following.

- **Oregon constitutional restriction:** Oregon Constitution Article IX, Section 3a has been interpreted by the Oregon Supreme Court such that revenues collected from the ownership, operation or use of motor vehicles must be spent on roadway projects in Oregon. This poses a challenge to using toll revenues to funding public transportation projects and supportive services. To propose a revision to the Oregon Constitution, regional partners must undergo the initiative and referendum processes which includes gathering and submitting the required number of signatures and placing the initiative on a ballot for voters to adopt or reject.<sup>1</sup>

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<sup>1</sup> For more information, please visit <https://sos.oregon.gov/elections/Pages/statelaw.aspx>.

- **Limited funding sources for operations and maintenance costs:** Funding for public transit projects often comes from specific sources such as federal grants, dedicated taxes or bonds, or public-private partnerships. These sources are often earmarked for capital investments and are often not flexible or available for ongoing operations and maintenance costs, or supportive programs or services.
- **Federal Toll Program Authorization and Revenue Restrictions:** ODOT is pursuing tolling through two federal authorization programs Title 23, U.S. Code Section 129 – General Tolling (Section 129) and the Value Pricing Pilot Program (VPPP). The Oregon Constitution (Article IX, Section 3a) restricts funding for public transportation projects. Although Section 129 and VPPP allow for toll revenue (under specific guidelines), to fund public transportation projects and supportive services in other states, this flexibility is not an option in Oregon.
- **Some Plans Will Require Updates to Prioritize Projects:** Some of the projects and supportive services identified on the PTS List are not identified and/or prioritized in local or regional plans or the fiscally constrained regional transportation plan. In these cases, project owners will need to update plans and budgets before seeking funds to implement the projects and supportive services.

## Federal Public Transportation Funding

This section provides a high-level overview of the legal and policy considerations that will support and inform funding decision-making for public transportation projects and supportive services in the greater Portland metropolitan area, including Southwest Washington. The following subsections detail the constitutional language and enacting legislation that play a key role in defining how funds may be allocated and help set the funding parameters for consideration if a funding plan is developed for the Strategy in the future.

### Federal Policy Context

Federal funds for public transportation are authorized and appropriated by Congress, primarily through the U.S. Department of Transportation (USDOT). The Federal Transit Administration (FTA) and the Federal Highway Administration (FHWA) provide funding allocations to the states and reimburse for eligible expenses, including state administration of the FTA programs. Large urban transit providers also receive some funds directly from the FTA. Many federal sources require local/state matching funds that vary from 10 percent to 50 percent, and higher, depending on the program. FTA does not allow fare revenue to be used for local match for the project on which it is earned. Fare revenues are normally applied to gross operating costs to reduce the net operating costs of the transit system.

Under U.S. Code 23, Section 142., the U.S. Secretary of Transportation may approve projects on any Federal-aid highway for the construction of exclusive or preferential high occupancy vehicle lanes, highway traffic control devices, bus passenger loading areas and facilities (including shelters), eligible pedestrian and bicycle improvements, and fringe and transportation corridor parking facilities, electric vehicle charging stations or natural gas vehicle refueling stations, to serve high occupancy vehicle and

public mass transportation passengers, in order to encourage the development, improvement, and use of public mass transportation systems operating buses on Federal-aid highways. In addition, this Section also provides direction on the use of Surface Transportation Block Grants and Congestion Management and Air Quality (CMAQ) formula funds. It also provides approval criteria for establishing bus corridors on Federal-aid highways.

Under the Bipartisan Infrastructure Bill passed in 2021, some of the federal programs listed below experienced increases in funding and changes to eligibility and purpose. For more information, see this document: [FTA Program Fact Sheets under the Bipartisan Infrastructure Law](#).

Table 1 below summarizes the major sources of federal public transportation funding in Oregon and lists program/source, method of distribution, and a description of the fund purpose. Funding for public transit projects often comes from specific sources such as federal grants, dedicated taxes or bonds, or public-private partnerships. It is important to note these sources are often earmarked for capital investments and are often not flexible or available for ongoing operations and maintenance costs, or supportive programs or services.

These funds include:

- FTA formula and discretionary allocations to direct recipients.
- FTA formula allocations passed through ODOT.
- FHWA funds passed through ODOT.

Table 1 also includes toll credits. These credits are not a traditional funding mechanism. FHWA allows states to earn toll credits when toll revenues are used to build highways, bridges or tunnels. The toll credits can then be used in lieu of a cash match on Federal grants for eligible highway or transit projects with the approval of the granting agency. (Note that the FTA refers to toll credits as “Transportation Development Credits”.) It is important to note that toll credits are not cash and they do not increase the amount of funds available for a project. Rather, toll credits used as match for a federal grant allow an agency to use the non-federal funds that would have matched that grant for other purposes. See the [FHWA Toll Credit FAQ website](#) for more information about the application of toll credits for project funding.

## **Federal Toll Program Authorization and Revenue Restrictions**

ODOT is pursuing two toll projects in the Portland Metro area through two federal authorization programs:

- Title 23 U.S. Code Section 129 – General Tolling<sup>2</sup> (Section 129): Section 129 provides Oregon the authority to implement the I-205 Toll Project because the tolls will be implemented conjunction with improvements to the highway.
- Value Pricing Pilot Program<sup>3</sup> (VPPP): VPPP provides Oregon the option to seek authority to implement the Regional Mobility Pricing Project.

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<sup>2</sup> <https://www.govinfo.gov/content/pkg/USCODE-2017-title23/html/USCODE-2017-title23-chap1-sec129.htm>

<sup>3</sup> [https://ops.fhwa.dot.gov/congestionpricing/value\\_pricing/](https://ops.fhwa.dot.gov/congestionpricing/value_pricing/)



### **Section 129**

Section 129 provides authority for tolling Federal-aid highways in conjunction with new construction or other improvements to those highways, which includes new highway (lanes), reconstruction or replacement of bridges and tunnels, and associated structures and approaches. Section 129 has limitations on revenue use, which in general is dedicated to debt service for projects the toll is funding, improvement and proper operation and maintenance of the tolled facility, payments to private partnership agreements, annual audits, and record keeping. If the public authority certifies annually that the tolled facility is adequately maintained and fulfills all other requirements, revenue may be used for other purposes, including public transportation capital projects. **However, the Oregon Supreme Court's interpretation of the Oregon Constitution Article IX, Section 3a, is such that that revenues collected from the ownership, operation or use of motor vehicles must be spent on roadway projects in Oregon; this interpretation limits how toll revenues can be used for public transportation projects and/or operations in Oregon.** More information about the Oregon constitutional restriction is provided in Section 3.

### **Value Pricing Pilot Program**

The Value Pricing Pilot Program (VPPP) established by the U.S. Congress applies to fifteen states including Oregon and provides comprehensive tolling authority under select conditions. The primary conditions include project scopes where the primary objective is congestion reduction, and the tolled facility uses some form of variable pricing and electronic toll collection (ETC). The Regional Mobility Pricing Project meets the VPPP conditions by proposing variable rate and all electronic tolls on I-5 and I-205 for the primary purpose of congestion management. The Value Pricing Pilot Program has similar regulatory direction to Section 129 regarding limitations of revenue use, which is first dedicated to debt service for the toll project, improvement and proper operation and maintenance of the tolled facility, payments to private partnership agreements, annual audits, and record keeping. VPPP allows excess revenue is eligible for both public transportation capital projects and operations. One example of Value Pricing Pilot Program excess revenue used for public transportation operations include the Inland Breeze Transit service in San Diego, which is partially funded by the San Diego I-15 Express Lanes. **However, the Oregon Supreme Court's interpretation of the Oregon Constitution Article IX, Section 3a, is such that that revenues collected from the ownership, operation or use of motor vehicles must be spent on roadway projects in Oregon; this interpretation limits how toll revenues can be used for public transportation projects and/or transit operations in Oregon.** More information about the Oregon constitutional restriction is provided in Section 3.

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Table 1. Potential Federal Funding Sources for Public Transportation Funding in Oregon

Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FTA Section 5309</b> Capital Investment Grants (CIG) New Starts	Design and construction of new-fixed guideways or extensions to fixed guideways (projects that operate on a separate right-of way exclusively for public transportation, or that include a rail or a catenary system that have a total estimated capital cost of \$400M or more or that are seeking \$150M or more in CIG program funds.  <u>Eligible project types:</u> Capital. Heavy rail, light rail, commuter rail, streetcars, trolleybus, fixed guideway bus rapid transit, gondolas, and ferries. Note, corridor-based bus rapid transit projects are not eligible without a separated right-of-way dedicated for public transportation along the majority of the route.	Discretionary grant to urban areas	n/a	While funds are awarded annually, the process is multiyear	40% state/local match	\$4.6B for both New Starts and Small Starts in FFY 2023 authorized. Appropriations have been lower (\$2.6B for NS in FY23).
<b>FTA Section 5309</b> Capital Investment Grants (CIG) Small Starts	Design and construction of new fixed guideway projects, extensions to existing fixed guideway systems, or corridor-based bus rapid transit projects operating in mixed traffic that represent a substantial investment in the corridor and emulate the features of rail. Small Starts projects must have a total capital cost of less than \$400 million and must be seeking less than \$150 million in CIG program funds.  <u>Eligible project types:</u> Capital. Heavy rail, light rail, commuter rail, streetcars, trolleybus, bus rapid transit, and ferries.	Discretionary grant to urban areas	n/a	While funds are awarded annually, the process is multiyear	20% state/local match	\$4.6B for both New Starts and Small Starts in FFY 2023 authorized. Appropriations have been lower (\$530M for SS in FY23).

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FTA Section 5312</b> Public Transportation Innovation	Funding for innovative public transportation research and development.  <u>Eligible uses:</u> Research, development, demonstration and deployment projects and evaluation of technology of national significance to public transportation.	Discretionary	n/a	Annual	20% state/local match	\$38M in FFY 2023
<b>FTA ICAM</b> Innovative Coordinated Access and Mobility Grant Program	Funding supports innovative capital projects for the transportation disadvantaged population that improve the coordination of transportation and non-emergency medical transportation services.  <u>Eligible uses:</u> Capital projects.	Discretionary	n/a	Annual	At least 20% state/local match.	\$5M
<b>FTA Section 5304</b> Statewide Transportation Planning Grant Program	Provides funding and procedural requirements for multimodal transportation planning in non-metropolitan areas and states. Planning needs to cooperative, continuous and comprehensive, resulting in long-range plans and short-range programs reflecting transportation investment priorities.  <u>Eligible uses:</u> Transportation planning activities related to management, planning, operations, capital requirements and economic feasibility; evaluation of previously financed projects; peer reviews and exchanges of technical data, information, assistance, and related activities in support of planning and environmental analyses.	Formula to urban areas, states	Discretionary	Annual	20% state/local match	\$1M for FFY 2021 to 2023

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<p><b>FTA Section 5307</b></p> <p>Urbanized Area Section Formula Funds</p>	<p>Federal resources made available to urbanized areas<sup>4</sup> and to governors for transportation planning, transit capital and operating assistance in urbanized areas.</p> <p><u>Eligible uses:</u> Planning, engineering, design, and evaluation of transit projects and other technical transportation-related studies; capital investments in bus and bus-related activities such as replacement, overhaul and rebuilding of buses, crime prevention and security equipment and construction of maintenance and passenger facilities.</p> <p>Associated transit improvements and certain expenses associated with mobility management programs are eligible.</p>	<p>Flexible</p> <p>For urbanized areas with 200,000 population and over, funds are apportioned, and flow directed to the designed recipient</p>	<p>Discretionary; funds are programmed.</p> <p>For urbanized areas under 200,000 in population, funds are apportioned to the governor of each state</p>	<p>Annual to direct recipients through USDOT, biannual through ODOT</p>	<p>Typical match is 80% FTA, 20% state and local. Match can come from other, federal, non- DOT funds<sup>5</sup></p>	<p>\$48M to Oregon Metro in FFY 2022</p>
<p><b>FTA Section 5310</b></p> <p>Enhanced Mobility of Seniors &amp; Individuals with Disabilities</p>	<p>Funding for the purpose of providing funds for meeting the transportation needs of older adults and people with disabilities when the transportation service provided is unavailable, insufficient, or inappropriate to meeting these needs.</p> <p><u>Eligible uses<sup>6</sup>:</u> Capital, purchases service, and preventative maintenance projects for transportation providers.</p>	<p>Formula to urban areas and states</p>	<p>Formula and discretionary to STIF Qualified Entities</p>	<p>Funds are awarded every two years</p>	<p>20% for capital projects to 50% for operating expenses</p>	<p>\$24M in FFY 2021 to 2023 biennium</p>

<sup>4</sup> An urbanized area is an incorporated area with a population of 50,000 or more that is designated by the U.S Department of Commerce, Bureau of the Census.

<sup>5</sup> Local match is required: The federal share is not to exceed 80 percent of the net project cost for capital expenditures. The federal share may be 90 percent for the cost of vehicle-related equipment attributable to compliance with the Americans with Disabilities Act and the Clean Air Act. The federal share may not exceed 50 percent of the net project cost of operating assistance.

<sup>6</sup> Under MAP-21, the program was modified to include projects eligible under the former Section 5317 New Freedom program, described as capital and operating expenses for new public transportation services and alternatives beyond those required by the ADA, designed to assist individuals with disabilities and seniors.

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FTA Section 5311</b> Formula Grants for Rural Areas	Provides capital, planning and operating assistance to states to support public transportation in rural areas with populations less than 50,000, where many residents often rely on public transit to reach their destinations.  <u>Eligible uses:</u> Planning, capital, operating, job access and reverse commute projects, and the acquisition of public transportation services.	Formula to states	Formula to rural providers	Biennial	Match varies dependent on project type: 10.27% for administration, capital, mobility management, planning and preventative maintenance; 43.92% for operations	\$797M in FY 2023
<b>FTA Section 5339b</b> Bus and Bus Facilities Program	Assists in the financing of buses and bus facilities capital projects, including replacing, rehabilitating, purchasing or leasing buses or related equipment, and rehabilitating, purchasing, constructing or leasing bus-related facilities.  <u>Eligible uses:</u> Capital projects.	Discretionary grant for urban areas, state	Discretionary rural and small urban via state	Annual	For Vehicles, 20% state/local match (15% for ADA or Clean Air Act related vehicles). For Bus-related Equipment and Facilities, 20% state/local match (10% for CAA related facilities).	\$470M in FY 2023
<b>FTA Section 5339c</b> Low or No Emission Program	Provides funding to state and local governmental authorities for the purchase or lease of zero-emission and low-emission transit buses. This also includes acquisition, construction, and leasing of required supporting facilities.  <u>Eligible uses:</u> Capital projects	Discretionary grant for urban areas, state	Discretionary grant for urban areas, state	Annual	For Vehicles, 15% state/local match For Bus-related Equipment and Facilities, 10% state/local match	\$1.2B in FY 2023



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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FHWA CMAQ</b> Congestion Mitigation and Air Quality Improvement Program – 23 USC 149	Flexible funding source to state and metropolitan planning organizations (MPOs) governments for public transportation projects and programs to meet requirements of the Clean Air Act.  <u>Eligible uses:</u> CMAQ projects must meet the following criteria. <ul style="list-style-type: none"> <li>• Transportation projects</li> <li>• Must generate a net emissions reduction for applicable pollutants.</li> <li>• Must be in or benefit a non-attainment or maintenance area.</li> <li>• Conform to the requirements of the Clean Air Act</li> <li>• New transit service<sup>7</sup></li> </ul> CMAQ projects must also be consistent with a long-range transportation plan and included in the MTIP(MPOs) or STIP (rural recipients).	Formula to states	Suballocated to MPOs and rural recipients	Annual	20% state/local, but projects on the interstate can meet 10%	\$21.5M to Oregon in FY 2023.  Individual projects generally receive <\$10M.

<sup>7</sup> To tap new markets for transit, CMAQ funds may be used to support startup of new transit services, such as new express bus routes or shuttle services linking major activity centers. Although not a permanent source of funding for these services, the CMAQ dollars can support innovation and help determine the viability of new transit services.

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FHWA CRP</b> Carbon Reduction Program	Provides funds for projects that reduce greenhouse gas emissions from transportation. States, in coordination with MPOs, develop a Carbon Reduction Strategy <sup>8</sup> that supports reduction in transportation emissions.  <u>Eligible uses:</u> May include public transit and active transportation, streetlight and traffic control device energy efficiency; tolling, pricing and transportation demand management that shift travel to cleaner modes, freight and port projects, alternative fuels; and congestion management technologies.	Formula to states	Allocated in accordance with Carbon Reduction Strategy	Annual through 2026	10.27% state/local match	\$82M for OR in FY 202.
<b>FHWA STBG</b> Surface Transportation Program Block Grants (STBG)	Provides flexible funding to states and MPOs using a highway-based funding formula. A portion of the funds have been allocated to the Transportation Options Program and the Innovative Program.  <u>Eligible uses:</u> It is a flexible funding source for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals.	Formula to local governments and MPOs	Application to ODOT by local jurisdictions	Annual	Generally, 10.27% state/local match but varies by project type	\$181M for Oregon in FY 2023; \$35M of this is suballocated for Portland Metro

<sup>8</sup> Oregon's Statewide Transportation Strategy (STS), which was created in coordination with MPOs, other state agencies, local jurisdictions and a broad array of stakeholders, will serve as the base of the Carbon Reduction Strategy. It identifies Vehicles, Fuels, Pricing, Transportation Options, System Improvements and Land Use strategies to reduce greenhouse gas emissions from transportation.

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>FHWA Transportation Alternatives<sup>9</sup></b> Transportation Alternatives Set-Aside Program (TA Set-Aside; formerly known as the Transportation Alternatives Program, or TAP <sup>10</sup> )	The BIL (Bipartisan Infrastructure Law) continues the Transportation Alternatives set-aside from the Surface Transportation Block Grant (STBG) program.  <u>Eligible uses:</u> The program provides funding for all projects and activities that were previously eligible under TAP, encompassing a variety of smaller-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to storm water and habitat connectivity.	Formula to state	59% Suballocated to local governments based on population	Annual	Generally, 20% state/local match but varies by project type	\$1.411B in 2024 (sum of estimated individual State Transportation Alternatives apportionments)
<b>FHWA Toll Credits</b> Transportation Development Credits	FHWA allows states to earn toll credits when toll revenues are used to build highways, bridges or tunnels. The toll credits can then be used in lieu of a cash match on Federal grants for eligible highway or transit projects with the approval of the granting agency.  <u>Eligible uses:</u> Capital, operations, and maintenance projects.	n/a	n/a	n/a	Toll credits can be used as match for a federal grant allow an agency to use the non-federal funds that would have matched.	n/a

<sup>9</sup>The Fixing America's Surface Transportation Act ("FAST Act") eliminates the MAP-21 Transportation Alternatives Program (TAP) and replaces it with a set-aside of Surface Transportation Block Grant (STBG) program funding for transportation alternatives (TA).

<sup>10</sup> In 2023, TAP funds are directed to Oregon Community Paths.

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Program	Description	Allocation Method		Funding Cycle	Local/State match requirement	Annual Funding Available
		USDOT	ODOT			
<b>US DOT RAISE</b> Rebuilding American Infrastructure with Sustainability and Equity (RAISE)	Helps communities build transportation projects that have significant local or regional impact.  <u>Eligible uses:</u> Surface transportation capital projects that included but are not limited to, highway, bridges, public transportation projects, passenger and freight rail projects and activities related to planning, preparation, or design.	Discretionary	n/a	Annual	20% state/local match	\$2.3B for FY 2023
<b>USDOT SS4A Safe Streets and Roads for All Grant Program</b>	Supports the development of a comprehensive safety action plan (Action Plan) that identifies the most significant roadway safety concerns in a community and the implementation of projects and strategies to address roadway safety issues. Action Plans are the foundation of the SS4A grant program. There are two grants under the SS4A program – Planning and Demonstration Grant and the Implementation Grant.  <u>Eligible uses – Planning and Demonstration Grant:</u> Updating an existing Action Plan, supplemental planning, and demonstration activities.  <u>Eligible uses – Implementation Grant:</u> Activities carrying out projects and strategies identified in an Action Plan.	Discretionary	n/a	Annual	20% state/local match	\$1.17B for FY 2023
<b>USDOT SMART</b> Strengthening Mobility and Revolutionizing Transportation Grants Program	Provides grants to eligible public sector agencies to conduct demonstration projects focused on advanced smart community technologies and systems in order to improve transportation efficiency and safety.  <u>Eligible uses:</u> Capital projects.	Discretionary	n/a	Annual	none	\$100M for FY 2023

## State Public Transportation Funding

State public transportation funding in Oregon is currently limited to a few major sources. These sources have been shaped by the Oregon Constitution and increased in recent years by the passage of House Bill 2017 (2017) and House Bill 3055 (2021).

### Oregon Constitution

Article IX, Section 3a of the Oregon Constitution was enacted as a result of a ballot measure to amend the Oregon Constitution in the 1980 primary election.<sup>11</sup> This constitutional amendment specifies that revenues collected from the ownership, operation or use of motor vehicles must be spent on roadway projects in Oregon.<sup>12</sup> This applies to road taxes—including fuels tax, driver and motor vehicle fees (including vehicle title and registration fees), and the weight-mile tax on heavy trucks—and toll revenue.

The Oregon Supreme Court has interpreted this constitutional requirement to mean that these funds “must be limited exclusively to expenditures on highways, roads, streets and roadside rest areas themselves and for other projects or purposes within or adjacent to a highway, road, street or roadside rest area right-of-way that primarily and directly facilitate motorized vehicle travel.”<sup>13</sup> All funds subject to the highway restriction can be used only in Oregon.

After consultation with Oregon Department of Justice, ODOT has concluded that it most likely can fund the following transit and bicycle/pedestrian programs using resources constitutionally dedicated to highway purposes.

- Congestion management options such as dedicated lanes for transit or carpooling, shared lanes for mixed auto/light rail traffic, and queue-jumping lanes.
- Transit facilities within public highway rights-of-way such as transit stops and transit stations.
- Park and ride locations in or adjacent to the right of way that serve buses.
- Transit signal priority.
- Highway pull outs to accommodate buses.

Bicycle and pedestrian facilities within the highway, road, or street right-of-way. Some of the allowable uses listed above are included as components of PTS projects and supportive services. The PTS WG and PMG recommend initiating further discussions and further evaluations to identify and recommend project elements that are not bound by constitutional restrictions. This will help inform future decisions regarding revenue allocation.

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<sup>11</sup> Ballotpedia. "Oregon Limitations on Uses of Gasoline and Highway User Taxes, Measure 1 (May 1980)." [https://ballotpedia.org/Oregon\\_Limitations\\_on\\_Uses\\_of\\_Gasoline\\_and\\_Highway\\_User\\_Taxes,\\_Measure\\_1\\_\(May\\_1980\)](https://ballotpedia.org/Oregon_Limitations_on_Uses_of_Gasoline_and_Highway_User_Taxes,_Measure_1_(May_1980)). Accessed March 20, 2023.

<sup>12</sup> Oregon State Constitution. Article IX. Section 3a. [https://www.oregonlegislature.gov/bills\\_laws/lawsstatutes/1999sjr0011.html](https://www.oregonlegislature.gov/bills_laws/lawsstatutes/1999sjr0011.html). Accessed March 16, 2023.

<sup>13</sup> Rogers v. Lane County, 307 Or 534, 771 P2d 254 (1989). <https://law.justia.com/cases/oregon/supreme-court/1989/307-or-534.html>. Accessed March 30, 2023.



## House Bill 2017 and Senate Bill 1601: The STIF

House Bill (HB) 2017 (ORS 184.617 to 184.742), enacted by the Oregon legislature in 2017 made significant, multi-modal investments in transportation to better manage congestion and improve mobility throughout the state.<sup>14</sup> HB 2017 directed the OTC to seek approval from the FHWA by December 2018, to implement value pricing on the I-5 and I-205 corridors, from the state line to their intersection in Oregon. Per the legislation, value pricing would be used to reduce traffic congestion in the Portland metropolitan region through the creation of a Congestion Relief Fund to implement and administer a traffic congestion relief program. HB 2017 also established the Statewide Transportation Improvement Fund (STIF) to provide a dedicated source of funding for improving, maintaining, and expanding public transportation for all users. STIF provides public transportation funding to support access to jobs, improve mobility, relieve congestion, and reduce greenhouse gas emission in Oregon on a biennial basis. Originally, the STIF program was funded by one-tenth of 1 percent state payroll tax. It is currently also funded by ID card fees, non-highway gas tax, and cigarette tax revenues, per Oregon Revised Statute. The total funding amount is estimated annually. STIF revenues are allocated across the following programs:

- 90% to STIF Formula
- 5% to STIF Discretionary
- 4% to STIF Intercommunity Discretionary
- 1% to Technical Resource Center

Subsequent to HB 2017, in 2020 Senate Bill (SB) 1601 called for the consolidation of STIF with the Special Transportation Fund, intended to improve services for seniors and individuals with disabilities (ORS 184.751). Additionally, SB 1601 clarified that STIF funds can be used to maintain existing public transportation services and to fund light rail operations and maintenance but cannot be used for light rail capital expenses.

## House Bill 3055

House Bill (HB) 3055 was an omnibus transportation bill passed in 2021. It built upon the work of HB 2017 and gave direction for the creation of a Toll Program Fund in coordination with the congestion management program HB 2017 directed the OTC to implement. All toll revenue would be deposited in the Toll Program Fund, and all toll revenue would be subject to the restrictions on highway funds included in the Oregon Constitution. “To the extent necessary and permitted by state and federal law and Article IX, section 3a of the Oregon Constitution,” these funds should manage congestion and improve safety, both on the tollway but also on adjacent, connected, or parallel highways to the tollway, reduce impacts of diversion as a result of tolling and minimize and mitigate impacts to historically and currently underrepresented and disadvantaged communities. Funds can be used for a variety of purposes under 383.009, including but not limited to:

- Developing toll projects
- Acquiring land for toll projects
- Financing construction, renovation, operation, improvement, maintenance or repair of toll projects

<sup>14</sup> Oregon Department of Transportation (ODOT). “HB 2017 Funding.” <https://www.oregon.gov/odot/pages/hb2017.aspx>. Accessed March 17, 2023.

- Paying debt service on bonds for toll projects
- Addressing the impacts of toll projects

Specific to mitigation, under 383.009(2)(j), ODOT can use Toll Program funds “To make improvements or fund efforts on the tollway and on adjacent, connected or parallel highways to the tollway to reduce traffic congestion as a result of a tollway project, improve safety as a result of a tollway project and reduce impacts of diversion as a result of a tollway project.” This requires that any expenditure of toll revenues on roads other than the toll facility have a nexus to the actual tollway project; it does not allow for general revenue sharing divorced from the specific impacts of the toll project. The language in (j) was added to the statute by the Legislature in 2021 through passage of HB 3055.

## 2023 Oregon Highway Plan Update

In January 2023, the Oregon Transportation Commission further clarified tolling policy by updating Goal 6 in the Oregon Highway Plan. The update included defining various terms that are used for road pricing such as tolling, congestion pricing (scheduled variable rate tolling) and combination to clarify how a tolling project could encompass various aspects such as planned capital investment, traffic diversion or mode shift in transportation due to changes in road pricing.

Additionally, this update specified that diversion is part of any road pricing project and shall be considered as vehicles move from priced to unpriced facilities within “corridors.” The update further redefined the corridor concept as the “immediate area of impact adjacent to the priced facility, generally within 1 mile or as defined through the project-specific analysis as being impacted by the project” OR a “broader geographic area because of lack of adjacent/parallel facilities, such as around bridges and/or major geographic barriers (rivers, mountains, ravines, etc.)” The update also specified that revenue expenditure on transit and multimodal transportation options should be a focus on congestion pricing projects that do not have specific freeway infrastructure included. The Department of Transportation can use revenue expenditure to support transit and multimodal transportation options through direct congestion pricing revenue allocation, when compliant with the Oregon Constitution, or through partnerships.

Table 2 below summarizes the major sources of state public transportation funding in Oregon and lists program/source, project and eligibility requirements, and a description of the fund’s purpose.

**Table 2. Current Major Sources of State Funding for Public Transportation Funding in Oregon**

Program	Description	Allocation Method	Annual Funding Available
<b>Oregon Toll Program Revenue</b>	Revenue from the Oregon Toll Program may be allocated to projects when compliant with the Oregon Constitution and the direction given through the legislation and policy updates listed in the previous section.  <u>Eligible uses:</u> capital projects, toll facility infrastructure operations and maintenance costs.	TBD	TBD

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Program	Description	Allocation Method	Annual Funding Available
<p><b>Statewide Transportation Improvement Fund (STIF)</b></p> <p><b>Formula Funds</b></p>	<p>STIF may be used for public transportation purposes that support the effective planning, deployment, operation, and administration of public transportation programs. 90% of funds are distributed via formula to transit providers throughout the state.</p> <p>The STIF Formula fund is based on payroll tax revenue generated in the recipient’s geographic area; a small portion of the funds comes from a population-based formula and is solely intended for elderly and disabled services. In the Portland Metropolitan area, TriMet is the Qualified Entity that receives and passes through STIF Formula funds to public transportation providers. TriMet and providers agreed to allocate funding based on the payroll tax revenue generated in the recipients’ area.</p> <p><u>Eligible uses:</u> operations &amp; maintenance, planning, equipment, and vehicle purchase</p>	<p>Formula to transit providers throughout state</p>	<p>\$134M/year for FY 2023 to 2025</p> <p>\$242,694,755 total for STIF for FY 2023 to 2025</p> <p>\$24.3M total for STIF Formula for FY 2023 to 2025</p>
<p><b>Statewide Transportation Improvement Fund (STIF)<sup>15</sup></b></p> <p><b>Discretionary Funds and Statewide Transit Network Program</b></p>	<p>The STIF Discretionary fund is to provide a flexible funding source to improve public transportation in Oregon. It is a competitive statewide fund and eligible projects must serve destinations or stops in Oregon. STIF Discretionary is not a source of ongoing operations funding, however, funds may be awarded for pilot service operations if the applicant demonstrates they have a financial plan to sustain operations after the pilot period.</p> <p>Within STIF Discretionary, there is a STIF Intercommunity Discretionary fund for improving connections between communities and other key destinations for a connected Statewide Transit Network.</p> <p>Supports a wide variety of project types to improve public transportation but cannot be used to fund ongoing operations. The Intercommunity Discretionary fund supports maintaining, expanding, and improving public transportation services between two or more communities.</p> <p><u>Eligible uses:</u> Capital projects, planning.</p>	<p>Discretionary grant through ODOT</p>	<p>\$24.3M total for FY 2023 to 2025:</p> <p>\$13.5M/year for STIF Discretionary Fund for FY 2023 to 2025</p> <p>\$10.8M/year for STIF intercommunity Fund for FY 2023 to 2025</p>

<sup>15</sup> RTC, C-TRAN and SW Washington partners could be eligible for STIF funds for projects in Oregon.

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Program	Description	Allocation Method	Annual Funding Available
<b>Innovative Mobility Program (IMP)</b>	<p>The Innovative Mobility Program (IMP) is a new initiative at ODOT that aims to improve historically underserved communities' access to public and active transportation. Program goals also include reducing the number of trips Oregonians make by car and reducing greenhouse gas emissions. The program awards grants to non-profit organizations, government agencies, transit districts and other groups that help people get around.</p> <p><u>Eligible uses:</u> supportive services</p>	Discretionary grant through ODOT	<p>\$10M total from STBG</p> <p>\$10M total from the state Transportation Operating Fund</p>
<b>Transportation Growth Management (TGM) Program Planning Grants</b>	<p>TGM Planning Grants help local jurisdictions plan for streets and land to lead to more livable, sustainable, and economically vital communities. This planning increases opportunities for transit, walking and bicycling.</p> <p><u>Eligible uses:</u> planning</p>	Discretionary through DLCD	\$2M in FY 2022
<b>Oregon Transportation Infrastructure Bank Loan (OTIB)</b>	<p>A statewide revolving loan fund designed to promote innovative financing solutions for transportation needs. Projects include transit capital such as buses, equipment, and maintenance or passenger facilities.</p> <p><u>Eligible uses:</u> capital projects</p>	Project selection by OTIB staff	The OTIB currently offers direct loans for eligible projects. Loans may be funded from available OTIB resources or through the sale of revenue bonds.
<b>Oregon Lottery Fund</b>	<p>Lottery bonds are authorized in specified amounts to specific projects or programs by legislative action.</p> <p><u>Eligible uses:</u> capital projects.</p>	Legislative action	Varies, dependent on legislative action.
<b>Connect Oregon</b>	<p>Legislatively allocated competitive grant program for alternative modes, modes that are not eligible for highway fund, of transportation, including transit capital projects.</p>	Discretionary through the OTC	<i>Connect Oregon VI</i> is currently under review.
<b>Transit Districts</b>	<p>HB 2017 (ORS 184.617 to 184.742), established a dedicated source of funding for expanding public transportation service in OR that benefits a high percentage of low-income households. It includes a 0.1% employee payroll tax to fund public transportation.</p> <p>In or near the Metro region, these include the Tri-County Metropolitan Transportation District (TriMet), South Metro Area Regional Transit (SMART), operated by the City of Wilsonville and Canby Area Transit, operated by the City of Canby.</p>	Transit districts locally administer the 0.1% employee payroll tax State Transportation Improvement Fund (STIF) as authorized by HB 2017.	<b>Varies</b>

Program	Description	Allocation Method	Annual Funding Available
<b>New miscellaneous other taxes and fees (e.g., HB 2017)</b>	Some miscellaneous taxes/fees could contribute to transit projects with petition/lobby for allocation to project or legislative action to create/increase new funding source.  <u>Eligible uses:</u> TBD	Legislative action	\$427M (FY 2021-2023) from cigarette tax, local match on construction projects, Parks & Rec. fee collection, bike tax, vehicle dealer privilege tax, use tax, payroll transit tax, and others.

## Regional and Local Transportation Funding

There are three primary sources of local funding for public transportation in Oregon: payroll taxes, property taxes, and earned revenues such as those from fares and advertising. Some local governments may, at their discretion, also use such revenues such as local general funds, transportation impact fees, system development charges, special assessments, and transportation utility fees. All forms of local funds, except passenger fares, are used to meet local match requirements and leverage federal funding. Table 3 provides an overview of STIF and other regional and local public transportation funding sources.

**Table 3. Potential Regional, and Locally Administered Funding Sources for Public Transportation in Oregon**

Program	Description	Annual Funding Available
<b>Regional Flexible Funds</b>	Regional flexible funds come from two federal transportation funding sources: the Surface Transportation Block Grant and Congestion Mitigation/Air Quality programs. These programs allow discretion on how the monies are spent – hence the term “flexible.” This flexibility allows for greater focus on local priorities and innovative solutions to transportation challenges. Based on the RTP, these projects must align with four regional goals: equity, safety, climate, congestion.	Funds are allocated through Metro. <ul style="list-style-type: none"> <li>• Transit &amp; Project Development Bond Repayment Commitment: \$65.28M.</li> <li>• Region-wide Program Investments, Planning: \$35.8M.</li> <li>• Capital Investments: \$41.2M.</li> <li>• Transit &amp; Project Development Bond Repayment Commitment: \$65.28M.</li> <li>• Region-wide Program Investments, Planning: \$35.8M.</li> <li>• Capital Investments: \$41.2M.<sup>16</sup></li> </ul>
<b>County Transportation Development Taxes (TDTs)</b>  <b>Washington County</b>	These funds are typically reserved for transportation improvements proximate to development paying tax, which will require coordination to align with public transportation planning.	\$19.2M in FY 2021.
<b>Local Improvement District (LID)</b>	LIDs may fund improvements that “provide local and special benefit to properties.”	Dependent upon district/agency analysis.

<sup>16</sup> Investments were previously identified and adopted through the 2025 – 2027 RFFA Program Directions (Resolution 21-5194)

*Public Transportation Strategy*

Funding Options Whitepaper

Program	Description	Annual Funding Available
<b>Tax Increment Financing (TIF)</b>	TIF can be used for projects located within an urban renewal area that are included in the urban renewal plan. TIF has been used for streetcar and light rail projects, the Interstate Corridor Urban Renewal Area, TIF funds are allocated to other program. In recent years, it is less common for TIF funds to be allocated to transportation and transit capital projects.	Dependent upon district/agency analysis.
<b>Hotel, Motel, and Short-term Rental Taxes, Transient Lodging Tax (TLT)</b>	Funds are not currently used for transportation purposes in in OR and would have to originate with the Cities. A case study where TLT funds were used to fund a transportation project is the City of Inglewood, CA, Measure H.	Inactive.
<b>Transportation System Development Charges (TSDC)</b>	TSDCs are levied on new developments throughout the city and can be used toward capital expenditures associated with projects included on TSDC program's project list – an approved list of projects eligible for funding.	Inactive.
<b>City of Portland<sup>17</sup></b>	<p>A case study is the City of Portland.</p> <p>In the City of Portland, developers pay one-time Transportation system Chargers (TSDCs) on all types of new construction in Portland – residential, commercial or industrial. Each type of land use (single family residential, hospital, etc.) pays a different TSDC rate based on the number of “person trips” they generate during evening commute hours. Each type of land use (single family residential, hospital, etc.) pays a different TSDC rate based on the number of “person trips” they generate during evening commute hours.</p> <p>TSDCs can only be used to fund specific projects from the TSDC project list. This list is updated every 10 years with input from the public. On average, TSDCs cover about 30% of project costs, with the remainder coming from state and federal grants, the gas tax, or other sources.</p>	
<b>Transportation Utility Fees</b>	Transportation Utility Fees are assessed on the utility bills of water/sewer customers, and the revenue is designated for city transportation infrastructure projects. These fees are based on the police powers of cities and used as specified in implementing ordinance. Within the Metro region, Hillsboro, Lake Oswego, Milwaukie, North Plains, Tigard, Tualatin, West Linn and Wilsonville use TUFs. No TUFs currently use revenues to fund transit service.	Inactive, requires changes to local implementing ordinances.

<sup>17</sup> For more information, please visit <https://www.portland.gov/transportation/permitting/tsdc#toc-about-tsdc>

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## **Attachment B: PTS Purpose, Goal, Objectives, and Committee Approach**

# Public Transportation Strategy Purpose, Goal, Objectives, and Committee Structure

September 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.

Purpose, Goal, Objectives, and Committee Structure

- **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*

- 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.

Purpose, Goal, Objectives, and Committee Structure

The PMG's roles and are 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, Multnomah County, ODOT, Ride Connection, SMART, SCTD, SW WA RTC, TriMet, Washington County.

### ***Responsibilities***

The Workgroup's roles and are 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.

i

<b>Participating Regional Partners Agencies</b>
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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## **Attachment C: PTS Screening Criteria**

# Memorandum

<b>Date</b>	May 9, 2022
<b>To</b>	Public Transportation Strategy Workgroup
<b>From</b>	Public Transportation Strategy Project Team
<b>Subject</b>	Public Transportation Strategy Screening Criteria

## Screening Criteria

The screening criteria will guide regional partners in determining the set of public transportation projects and supportive services appropriate for various sections of the Toll Program that best meet the Strategy’s purpose, goal, objectives, and definitions.

**Table 1: Screening Criteria**

Evaluation Category	Screening Questions
<b>Project Type</b>	Project must address at least one of the following to receive a “Pass” score: <ol style="list-style-type: none"> <li>Does the project or supportive service support planning, development, or 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> </ol>
<b>Relationship to congestion pricing</b>	Project or supportive service must address the following to receive a “Pass” score. A weighting approach is in development for this screening criteria. <ol style="list-style-type: none"> <li>Does the project or supportive service expand availability of public transportation options for people who would otherwise drive alone on or near tolled highways to get to their destination?</li> </ol>
<b>Equity</b>	Project and supportive services must address one of the following to receive a “Pass” score. A weighting approach is in development for this screening criteria. <ol style="list-style-type: none"> <li>Does the project or supportive service serve historically excluded and underserved communities?</li> <li>Does the project or supportive service address transportation-related disparities and barriers experience by historically excluded and underserved communities?</li> <li>Does the project or supportive service provide access to opportunity for historically excluded and underserved communities?</li> </ol>



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**Attachment D: PTS Intake Form, Instructions,  
and Guidance Assessment**

# Public Transportation Strategy Strategy Project and Supportive Service Intake Form

## Introduction

The Urban Mobility Office (UMO) invites you to submit a project or supportive service for the Public Transportation Strategy (Strategy) to develop the initial project and supportive services list. The purpose of the Strategy is to 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. For reference, the Strategy’s purpose, goals, and objectives are available in Attachment A.

**Project and supportive services intake forms must be received by June 16, 2023, at 11:59 p.m. PT.**

The following are key dates for the Strategy’s project list submittal process.

Date	Project Submittal and Input Process
<b>May 31 – June 16</b>	Transit agencies will coordinate with project team and submit initial projects and supportive services. A webinar with tutorial will be provided within the first week of call for projects and supportive services lists.
<b>June 16 – June 21</b>	Project team will compile the initial list and share with PMG.
<b>June 28</b>	<b>PMG Meeting #4</b> Review initial list and reach a shared agreement on the process to identify short- and long-term projects with the Workgroup. Determine whether there are relevant RMPP modeling results.
<b>July 11</b>	<b>Workgroup Meeting # 3</b> Review and provide input on the initial Strategy list.
<b>July 24</b>	<b>RTAC Update and Input</b> Review and provide input on the initial list.

## Section 1: General information

**Project or Supportive Service Name:**

**Project or Supportive Service Description** (1000 characters or less):

**Service Provider/Owner** (sponsoring agency that will be ultimately responsible to manage the delivery of, implement and/or operate proposed project or service):

**Location** (city, county):

**Project Partner(s):**

**Project Map:** Please provide a graphic representation (e.g., project map) and a GIS shapefile with your application. One geodatabase with all shapefiles can be included to meet this requirement (preferred).

### Eligibility

To be eligible for the Public Transportation Strategy project list, project or supportive service must address one of the following. Please select the applicable box and include project type:

- Does the **public transportation project** support planning, development, or operation of a fixed route service? Examples include fixed-route bus, light-rail transit, bus rapid transit, and other forms of high-capacity transit.

In response to feedback received after the definitions were accepted by partners, public transportation projects may also include bus-on-shoulder and transit priority treatments to improve reliability, speed, and efficiency, such as Business Access and Transit (BAT) lanes, queue bypasses, and signal queue jumps.

Project type:

- Does the **supportive service** include programmatic elements that facilitate a shift to higher occupancy vehicles and/or provide transportation options. Examples of supportive services could include ridesharing, vanpools, deviated fixed route service, local shuttles, park and rides, and mobility hubs.

Supportive service type:

If you have questions about whether the project or supportive service is eligible, please reach out to Greg Mallon: [gregory.mallon@wsp.com](mailto:gregory.mallon@wsp.com).

## Section 2: Proposed public transportation project or supportive service information

The purpose of this section is to gather information and assess readiness and timing for implementation, not to eliminate public transportation projects or supportive services.

### Timeline

The project or supportive service is proposed to be operating in the

- Short-term (2025 – 2030) If known, specify year:
- Long-term (2031+) If known, specific year:

### Phasing

Are their elements of the project or supportive service that should or could be prioritized or moved ahead immediately or with the start of congestion pricing?

- No phasing options
- Phasing may be possible but not identified at this time
- Yes, phasing is possible (please provide detail, 1000 characters or less):

### Engagement

It is the responsibility of the implementing agency to conduct the public engagement required to vet a particular project or supportive service. What engagement has been/will be conducted with agency boards, commissions, other interested parties and or public for the project/supportive service? (2500 characters or less):

### Readiness

Please indicate the status of the phase initiated, in process, or completed below.

#### Early planning studies

- Initiated  Not Applicable
- In process
- Completed

#### Environmental clearance process (if needed)

- Initiated  Not Applicable
- In process
- Completed

#### Public engagement (additional information requested in the engagement category below)

- Initiated  Not Applicable
- In process
- Completed

#### Design and implementation phase

- Initiated  Not Applicable
- In process
- Completed



## Section 3: Screening assessment

The screening criteria will guide regional partners in determining the set of public transportation projects and supportive services appropriate for various sections of the Toll Program that best meet the Strategy's purpose, goal, objectives, and definitions.

Projects or supportive services must address the following to be included in the Strategy. Tools to support partners in assessing projects are provided.

### Relationship to congestion pricing

Please use the Transportation Analysis Zone (TAZ) District Map, 2027 RMPP No-Action Demand Table to provide responses to the following questions. Guidance on how to use these tools is available in Attachment A.

Using the tools, please assess and determine:

1. Does the project or supportive service provide a public transportation option for people who would otherwise drive alone on or near tolled highways to get to their destination?  
 Yes  
 No
2. Please list the TAZ districts that are served by the proposed project or supportive service. (ex: Districts 17, 18, and 23) (2500 character limit)
3. It is anticipated that roadways near highways proposed for tolling that experience traffic congestion today will continue to experience traffic congestion in the future, which may be affected when tolling is operational. Does the proposed public transportation project or supportive service address a concern on an existing congested roadway near a highway proposed for tolling?  
 Yes, these roadways:  
 No
4. Please describe how the proposed project or supportive service is complementary to congestion pricing (2500 character limit):

#### Assessment tools

- TAZ District Map
- 2027 RMPP No-Action Demand Table

If you are experiencing issues with the TAZ District demand table or have questions, please contact Greg Mallon at (503-417-1362) or [Gregory.mallon@wsp.com](mailto:Gregory.mallon@wsp.com).

## Equity

For the purposes of the Public Transportation Strategy, historically excluded and underserved communities are defined as populations that are currently or have historically been disproportionately affected by local transportation projects. As discussed in [Oregon Toll Program's Equity Framework](#), equity communities include low-income populations, minority populations, older adults, children, people with disabilities, persons with low English proficiency, and households with no vehicle access.

Please use the Equity assessment tools to provide responses to the following questions. Guidance on how to use the Equity assessment tools will be provided in Attachment A.

1. Please call out districts that are served by the proposed project or supportive service. (ex: Districts 17, 18, 24)
  
2. Which (low-wage) job centers does it connect to? (2500 characters or less)
  
3. Please describe how the proposed project or supportive service addresses one or more of the following questions (5000 characters or less):
  - How does the project or supportive service serve historically excluded and underserved communities?
  - How does the project or supportive service address transportation-related disparities and barriers experience by historically and underserved communities?
  - How does the project or supportive service provide access to opportunity for historically excluded and underserved communities?

### Equity Assessment tools

- [Metro Social Vulnerability Explorer](#)
- Equity TAZ District Map
- Equity Focus Areas 2027 RMPP No-Action Demand Table
- Low Wage Jobs Map
- Social Resources Map

If you are experiencing issues with the Equity TAZ District demand table or have questions, please contact Greg Mallon at (503 417-1362) or [Gregory.mallon@wsp.com](mailto:Gregory.mallon@wsp.com).

# Public Transportation Strategy Application Instructions and Guidance

## General Information

This document is a step-by-step guide for completing and submitting the Public Transportation Strategy (Strategy) intake form. Please note a separate form must be completed per project or supportive service.

**Projects and supportive services intake forms must be received by June 16, 2023, at 11:59 p.m. PT.** The following are key dates for the Strategy’s project list submittal process.

Date	Project Submittal and Input Process
<b>May 31 – June 16</b>	Transit agencies will coordinate with project team and submit initial projects and supportive services.
<b>June 2 at 1:00 p.m.</b>	The project team will host a recorded webinar to walk partners through the intake form, tool and answer questions. Invitations to the webinar will be sent on Thursday, June 1.
<b>June 16 – June 21</b>	Project team will compile the initial list and share with PMG.
<b>June 28</b>	<b>PMG Meeting #4</b> Review initial list and reach a shared agreement on the process to identify short-and long-term projects with the Workgroup. Determine whether there are relevant RMPP modeling results.
<b>July 11</b>	<b>Workgroup Meeting # 3</b> Review and provide input on the initial Strategy list.
<b>July 24</b>	<b>RTAC Update and Input</b> Review and provide input on the initial list.

The Strategy Intake Form is an editable PDF that uses a combination of check boxes, yes or no questions, and questions with descriptions. All questions on the form must be answered unless specified as optional. If you have clarifying questions as you work through the form, please contact Gregory Mallon at [Gregory.mallon@wsp.com](mailto:Gregory.mallon@wsp.com). To the extent possible, all form questions should be answered or responded to.

Please provide a graphic representation (e.g., project map) and a GIS shapefile with your application. One geodatabase with all shapefiles can be included to meet this requirement (preferred). If you have any questions or concerns about this requirement, please contact Gregory Mallon via email at [gregory.mallon@wsp.com](mailto:gregory.mallon@wsp.com) or via phone at (503) 417-1362.

The application and supporting materials will be available online on the Public Transportation Strategy Google Drive at [PTS – Intake Process](#). To submit a project or supportive service, please upload the application form and supporting materials to the transit agency’s designated folder. The links to individual



application folders will be emailed directly to each transit agency. For questions or issues accessing or uploading application materials please email Gregory Mallon via email at [gregory.mallon@wsp.com](mailto:gregory.mallon@wsp.com) or via phone at (503) 417-1362.

### **PTS Intake Form Organization**

The PTS intake form has the following sections:

- Section 1: General Information
- Section 2: Proposed public transportation project or supportive service information
- Section 3: Screening assessment

## **Section 1: General information and eligibility**

All projects and supportive services submitted need to address the Strategy's Purpose, Goals, and Objectives. The 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.

For reference, these are listed below.

### **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.

In response to feedback received after the definitions were accepted by partners, public transportation projects may also include bus-on-shoulder and transit priority treatments to improve reliability, speed, and efficiency, such as Business Access and Transit (BAT) lanes, queue bypasses, and signal queue jumps.

- **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.

## Section 2: Proposed public transportation project or supportive information

The purpose of Section 2 is to gather information and assess readiness and timing for implementation. This section **will not** eliminate public transportation projects or supportive services. All questions on the form must be answered unless specified as optional. If you have clarifying questions as you work through the form, please contact Gregory Mallon.

## Section 3: Screening assessment

### Relationship to congestion pricing

This section includes a high-level description of the assessment tools and a step-by-step process on how to use the assessment tools to answer the screening questions related to the relationship to congestion pricing category.

#### Assessment tools

- **Transportation Analysis Zone (TAZ) District Map** identifies how data is aggregated to each TAZ (geography of trip tables). This map can also be used to locate your project.
- **2027 RMPP No-Action Demand Table** shows Origin / Destination (O/D) information for each of the TAZ districts in the year 2027 for trips that use any portion of I-5 from Boone Bridge to the Interstate Bridge and I-205 from I-5 to the Glenn Jackson Bridge.

#### Steps to answer the relationship to congestion pricing screening questions:

- **Step 1:** Use the **TAZ District Map** to identify the area where the proposed project or supportive service is located and/or serves (for example, a mobility hub may provide access to bus routes that serve districts beyond the district the mobility hub is in).
- **Step 2:** Use the **2027 RMPP No-Action TAZ District Demand Table** to locate the TAZ district(s) identified in the previous step. Note that each TAZ District is both an origin (rows) and destination (columns). Trip counts are displayed in the in the body of the table.

Navigate to the trip counts for each respective TAZ district, If the trip table shows a number greater than zero, mark **Relationship to Congestion Pricing, Question # 1** as “Yes”. A number greater than zero means the project or supportive service will be considered to provide an option other than driving alone on or near the proposed tolled highway.

- **Step 3:** Once you have identified the TAZ district(s) the proposed project or supportive service is located within or serves, list the TAZ district(s) in the response section of **Question #2**.
- **Step 4:** If the proposed project or supportive service is located on an existing congested roadway near a highway proposed for tolling, mark **Question #3** “Yes” and name the roadways in the space provided.
- **Step 5:** Provide a written justification using the information provided to respond to Question #4.

### Equity

This section includes a high-level description of the assessment tools and a step-by-step process on how to use the assessments to answer the screening questions related to the equity category.

#### Equity assessment tools

- **[Metro Social Vulnerability Explorer](#)** - Shows equity populations throughout the region with expansive equity metrics that you can use to identify where equity populations are currently located.

- **Equity TAZ District Map** - Shows Equity Focus Area TAZ included in the Equity TAZ District Demand Tables used to measure movements of equity populations in the region.
- **Equity Focus Areas 2027 RMPP No-Action Demand Table** - Shows Origin / Destination (O/D) information for each Equity Focus Area TAZ aggregated to districts in the year 2027 for trips that originate from Equity Focus Area TAZs.
- **Low-Wage Jobs Map** – Heat map showing clustering of low-wage jobs. Map analysis used a Kernel Dot Density analysis to show natural clusters of low-wage job hot spots. Also included is an All-Wage Jobs Map.
- **Social Resources Map** – Shows social resources for community connection.

**Steps to answer the equity screening questions:**

- **Step 1:** Use the **Equity TAZ District Map** to identify the area where the proposed project or supportive service is located and/or serves (for example, a mobility hub may provide access to bus routes that serve districts beyond the district the mobility hub is in).
- **Step 2:** Use the **Equity Focus Area 2027 RMPP No-Action TAZ District Demand Table** to locate the TAZ district(s) identified in the previous step. Note that each TAZ district is both an origin (rows) and destination (columns). Trip counts are displayed in the in the body of the table for trips originating from Equity Focus Areas within each of the TAZ districts.

Once you have identified the TAZ district(s) the proposed project or supportive service is located within or serves, list the TAZ district(s) in the response section of **Equity Question #1** if the equity trip table shows a number greater than zero.

- **Step 3:** Using the **Low-Wage Jobs Map** which shows clustering of low-wage job centers and your local knowledge, describe if and to which low-wage job centers the projector supportive service connects to in the form for **Question #2**.
- **Step 4:** Use a combination of your agency’s existing equity work and the provided materials to answer **Question #3**. Materials to assist you include the [Metro Social Vulnerability Explorer](#), Equity TAZ District Map, Low-Wage and All-Wage Jobs Maps, and Social Resources Map.

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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

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## **Attachment E: PTS Assessment Process**

# Public Transportation Strategy Assessment Process, Categories, and Methods

<b>Date</b>	Revised August 4, 2023; Revised August 23, 2023
<b>To</b>	Public Transportation Strategy Workgroup
<b>From</b>	Public Transportation Strategy Project Team
<b>Subject</b>	Public Transportation Strategy Draft Assessment Process, Categories, and Methods –

## Assessment Process

The second phase of the process to establish the Public Transportation Strategy list is to identify projects and supportive services that should be prioritized with the implementation of tolling in 2026. Projects and supportive services will be evaluated in three categories: (1) Relationship to Congestion Pricing (2) Equity and (3) Readiness. Proposed projects and supportive services will receive an assessment of low (1), medium (2), or high (3) for each category to indicate how well it meets the intent of each.

## Assessment Categories

The tables that follow provide descriptions of the quantitative and qualitative inputs that inform how the proposed projects and supportive services will be assessed.

**Table 1. Relationship to Congestion Pricing Category**

Category & Intake Form Source	Rating Descriptions
<b>Travel Demand</b> Section 3, <i>Relationship:</i> Questions 1 and 2	<p><b>Methodology:</b>            An average of two methodological approaches will determine the Travel Demand assessment score for projects and supportive services.</p> <ul style="list-style-type: none"> <li>• <b>Approach A:</b> will consider the TAZ district with the highest demand served by the project or supportive service.</li> <li>• <b>Approach B:</b> will consider the average demand of all TAZ districts served by the project or supportive service.</li> </ul> <p>The average of the individual scores of Approach A and Approach B will be the Travel Demand assessment score. (e.g., Approach A = 2; Approach B = 3; Travel Demand Assessment Score = 2.5).</p> <p><i>*More information in the Travel Demand Rating – Methods section below.</i></p> <ul style="list-style-type: none"> <li>- <b>(1) Low:</b> Project or supportive service provides connection to under 1 standard deviation above the average demand for TAZ districts respective of travel movements and approach.</li> <li>- <b>(2) Medium:</b> Project or supportive service provides connection to TAZ districts where demand is 1 standard deviation above average respective of travel movements and approach.</li> <li>- <b>(3) High:</b> Project or supportive service provides connection to TAZ districts where demand is 2 or more standard deviations above average respective of travel movements and approach.</li> </ul>

Assessment Process

Category & Intake Form Source	Rating Descriptions
<b>Congestion</b> Section 3, Relationship: Question 3	– <b>(1) Low:</b> Project or supportive service does not address a concern on an existing congested roadway near a highway proposed for tolling.
	– <b>(3) High:</b> Project or supportive service addresses a concern on an existing congested roadway near a highway proposed for tolling.
<b>Access</b> Independent assessment and sponsor coordination required.	– <b>(1) Low:</b> Project or supportive service does not address a systemwide transit service gap.
	– <b>(2) Medium:</b> Project or supportive service addresses a systemwide transit service gap focusing on frequency, span, and reliability. Increases to service would fall into this category either by shorter headways, increased hours of operation, or roadway treatments that provide transit less variability in arrival/departure times.
	– <b>(3) High:</b> Project or supportive service addresses a systemwide transit service gap focusing on coverage and connectivity. New transit lines or supportive services would fall into this category where there is a lack of transit currently. Extensions to existing public transportation services would also fall into this category if there were not an existing service that already serves the area where the extension is proposed.

Table 2. Equity Category

Category & Intake Form Source	Rating Descriptions
<b>Equity Travel Demand</b> Section 3, Relationship: Questions 1 and 2	<b>Methodology:</b> An average of two methodological approaches will determine the Equity Travel Demand assessment score for projects and supportive services. <ul style="list-style-type: none"> <li>• <b>Approach A:</b> will consider the EFA TAZ district with the highest demand served by the project or supportive service.</li> <li>• <b>Approach B:</b> will consider the average demand of all EFA TAZ districts served by the project or supportive service.</li> </ul> The average individual scores of Approach A and Approach B will be the Equity Travel Demand assessment score. (e.g., Approach A = 2; Approach B = 3; Equity Travel Demand Assessment Score = 2.5). *More information in the Travel Demand Rating – Methods section below.
	– <b>(1) Low:</b> Project or supportive service provides connection to under 1 standard deviation above the average demand for EFA TAZ origin districts respective of travel movements and approach.
	– <b>(2) Medium:</b> Project or supportive service provides connection from demand of EFA TAZ origin districts where demand is 1 standard deviation above average respective of travel movements and approach.
	– <b>(3) High:</b> Project or supportive service provides connection to EFA TAZ District origins where demand is 2 or more standard deviations above average respective of travel movements and approach.



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Category & Intake Form Source	Rating Descriptions							
<p><b>Access to Job Centers</b> Section 3, Equity: Question 2</p>	<p><b>Methodology:</b> An average of two methodological approaches will determine the Access to Job Centers assessment score for projects and supportive services.</p> <ul style="list-style-type: none"> <li>• <b>Approach A:</b> will consider whether the project or supportive service increases access to low-wage job centers for historically and underserved communities.</li> <li>• <b>Approach B:</b> will consider whether the project or supportive service increases access to job centers (all wages).</li> </ul> <p>The average individual scores of Approach A and Approach B will be the Access to Job Centers assessment score. (e.g., Approach A = 2; Approach B = 3; Access to Job Centers Score = 2.5).</p> <table border="1" data-bbox="467 653 1425 1024"> <thead> <tr> <th data-bbox="467 653 948 688">Access to low-wage job centers</th> <th data-bbox="948 653 1425 688">Access to job centers (all wages)</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 688 948 863">                     – <b>(1) Low:</b> Project or supportive service does not increase access to low-wage job centers for historically excluded and underserved communities.                 </td> <td data-bbox="948 688 1425 863">                     – <b>(1) Low:</b> Project or supportive service does not increase access to job centers for historically excluded and underserved communities.                 </td> </tr> <tr> <td data-bbox="467 863 948 1024">                     – <b>(3) High:</b> Project or supportive service increases access to low-wage job centers for historically excluded and underserved communities.                 </td> <td data-bbox="948 863 1425 1024">                     – <b>(3) High:</b> Project or supportive service increases access to job centers for historically excluded and underserved communities.                 </td> </tr> </tbody> </table>		Access to low-wage job centers	Access to job centers (all wages)	– <b>(1) Low:</b> Project or supportive service does not increase access to low-wage job centers for historically excluded and underserved communities.	– <b>(1) Low:</b> Project or supportive service does not increase access to job centers for historically excluded and underserved communities.	– <b>(3) High:</b> Project or supportive service increases access to low-wage job centers for historically excluded and underserved communities.	– <b>(3) High:</b> Project or supportive service increases access to job centers for historically excluded and underserved communities.
Access to low-wage job centers	Access to job centers (all wages)							
– <b>(1) Low:</b> Project or supportive service does not increase access to low-wage job centers for historically excluded and underserved communities.	– <b>(1) Low:</b> Project or supportive service does not increase access to job centers for historically excluded and underserved communities.							
– <b>(3) High:</b> Project or supportive service increases access to low-wage job centers for historically excluded and underserved communities.	– <b>(3) High:</b> Project or supportive service increases access to job centers for historically excluded and underserved communities.							
<p><b>Access to opportunity</b> Section 3, Equity: Question 3</p>	<ul style="list-style-type: none"> <li>– <b>(1) Low:</b> Project or supportive service does not connect to social resources. It does not identify specific social services/resources that benefit historically and currently excluded or underserved communities.</li> <li>– <b>(3) High:</b> Project or supportive services connects to social resources:                         <ul style="list-style-type: none"> <li>• Submitters could answer this several ways to be considered high. Generally, submitters could:                                 <ul style="list-style-type: none"> <li>○ Describe benefits of the project or supportive service to improve access to social services/resources from specific EFA TAZ districts that are served.</li> <li>○ Describe benefits of the project or supportive service to improve access to social services/resources especially to those that are historically and currently excluded and underserved communities (typical: Title IX, aging or other disadvantaged populations not captured in the EFA TAZ (Metro Social Vulnerability Index, or other agency equity indices).</li> </ul> </li> <li>• Submissions identify specific social services/resources that benefit historically and currently excluded or underserved communities.</li> </ul> </li> </ul>							

**Table 3: Readiness Category**

Category & Intake Form Source	Rating Descriptions
<b>Timeline to implement</b> <i>Section 2, Timeline</i>	- <b>(1) Low:</b> Long-term (2031+)
	- <b>(3) High:</b> Short-term (2025 – 2030)
<b>Project phase</b> <i>Section 2, Readiness</i> <i>Questions: Planning, Environmental Clearance, &amp; Design/Implementation</i>	- <b>(1) Low:</b> Project or supportive has not initiated planning studies
	- <b>(2) Medium:</b> Project or supportive service has initiated early planning studies, environmental clearances, and early design as needed.
	- <b>(3) High:</b> Project or supportive service has completed early planning studies and environmental clearances as needed.
<b>Engagement</b> <i>Section 2, Readiness</i> <i>Question: Engagement</i>	- <b>(1) Low:</b> None or limited engagement initiated, if required.
	- <b>(2) Medium:</b> Some engagement completed, if required.
	- <b>(3) High:</b> Most engagement completed if required. There is strong public and political support.
<b>Funding</b> <i>Section 2, Funding</i>	- <b>(1) Low:</b> No funding identified.
	- <b>(2) Medium:</b> Partial funding identified.
	- <b>(3) High:</b> Partial funding programmed or fully funded.

## Travel Demand Rating – Methods

Projects and supportive services will be considered to serve the TAZ districts for which they are identified or fall within. The assessment will use a hybrid approach to consider the level of travel demand a project/supportive service serves. Approach 1 will consider the highest demand TAZ district and will be sorted into (1) low, (2) medium, and (3) high based upon the standard deviation buckets identified rating descriptions. Approach 2 will average the demand of the identified TAZ districts a project or supportive service falls within. Appropriate demand table cells will be averaged for each of the TAZ districts’ origin and destination cells. The average of the demand will be sorted into the standard deviation buckets as appropriate. The hybrid approach will take the average of both methodological approaches as the Travel Demand and Equity Travel Demand assessment. This hybrid approach recognizes and balances particular project/supportive service serving a very high demand TAZ district with ones that serve multiple very high demand TAZ districts.

Park and rides will be quantified slightly differently than transit lines. Proposed park and rides will be assessed based on the district it is identified within, the team may consider adjacent districts based on location information provided. Existing transit lines that serve the site will be used to determine feasible destinations. The assessment will use the hybrid approach listed above for Travel Demand and Equity Travel Demand rating.

## List organization

As presented above, there is no weighting or prioritization proposed for the categories. This will be a topic of conversation with the PMG.

## Workgroup Meeting #3 Feedback

On July 11, 2023, the PTS Workgroup reviewed the draft assessment approach and provided the comments summarized in Table 4.

**Table 4: Workgroup comments and responses**

	Comment(s)	Response
1	<p><b>Assessing the I-205 separate from the I-5.</b></p> <p>This process should be assessing I-205 separate from the I-5. These are two separate travel patterns and relate to the Travel Demand piece. It's critical to think about the corridors separately.</p>	<p>No changes to the assessment approach.</p>
2	<p><b>Travel Demand</b></p> <p>If you have multiple TAZ zones that you are serving, should you be taking the average throughout the corridor or based the assessment on the highest one?</p>	<p>Methodology for the Travel Demand category was revised as listed below.</p> <p><u>Travel Demand Rating Methodology</u> An average will be calculated for the two methodological approaches.</p> <ul style="list-style-type: none"> <li>• Approach A: will consider the TAZ district with the highest demand served by the project or supportive service.</li> <li>• Approach B: will consider the average demand of all TAZ districts served by the project or supportive service.</li> </ul> <p>This approach considers both the highest demand a project/supportive serves and considers the average of all TAZ districts served.</p>
3	<p><b>Request for additional RMPP information</b></p> <p>It would be helpful to know the location of gantries and where tolls are going to be collected. There might be some places that are going to be impacted before other places.</p> <p>Other information gathered during the RMPP EA process, such as transit ridership and demand, would be useful to have on hand.</p>	<p>RMPP EA information will be provided as it is available. PTS will continue to move forward as planned.</p>

Assessment Process

	Comment(s)	Response
4	<p><b>Transit systemwide gaps vs. frequency</b></p> <p>Should new coverage receive a higher score than frequency and reliability?</p>	<p>No changes to the assessment approach.</p> <p>The purpose of the PTS is to provide options to those who would otherwise drive on the tolled facility, thus a project or supportive service that addresses a systemwide transit gap would assess higher than frequency and reliability improvements on an existing transit corridor.</p>
5	<p><b>Low wage jobs vs. high-wage job centers</b></p> <p>Is there a question to capture for all - wage job centers. It is important to highlight and the needs to low-wage centers but doesn't support the support access to high wage centers.</p>	<p>The project team added an assessment within the equity criteria for access to job centers for historically and currently excluded and underserved communities.</p>
6	<p><b>Metro Equity Areas</b></p> <p>Concerned about using Metro Equity Areas because Oregon City area does not have any Metro Equity Areas and will be directly impacted by tolling.</p>	<p>No changes to the assessment approach.</p>
7	<p><b>Project Cost and Funding</b></p> <p>Should cost of projects get considered beyond the existing categories?</p> <p>It makes sense to leverage funding by scoring projects with partial funding higher, but it may be useful to pursue projects without identified funding sources due to other factors. Including funding availability and timing of projects in the assessment score could deprioritize projects that are in the early stages of planning but could have the greatest impact.</p>	<p>No changes to the assessment approach. Project cost will be discussed at a future stage.</p>
8	<p>With the deadline for RTAC extended and RMPP analysis still forthcoming, why is the deadline for the PTS process still October? Could and should it be extended?</p>	<p>The PTS process will continue to move forward as planned.</p>

Assessment Process

	Comment(s)	Response
9	In identifying a list of transit projects critical to the success of the toll program, how would toll program revenue be allocated to PTS projects and how would the resulting list be incorporated into revenue decisions?	Conversations on what project or supportive services will be funded with tolling credits and revenue will be discussed at a future stage.
10	<b>Low-wage job centers:</b> How is low-wage job center being defined? Can you please include access to living wage jobs as defined by Metro’s 3 wage levels in the RTP? Also, could you leverage Metro’s work on having defined Job and Community Places in the RTP for access analysis, even if you don’t want to run the model you could use those layers in a GIS overlay assessment.	The project team added an assessment within the equity criteria for access to job centers for historically and currently excluded and underserved communities. The low-wage job centers map provided for the equity assessment category used data from the U.S Census Bureau and the LEHD Origin – Destination Employment Statistics 2020. Low wage is defined as earnings less than \$1250 per month.  Submitters could have used the Job and Community Places in the RTP as a tool to respond to the Access to Opportunity question in the Equity Assessment Category.
11	<b>Access to opportunity:</b> Can you be more specific about how you will conduct this qualitative assessment or what it will entail?	Initial assessment will be completed based on responses in the Equity Category. Project team may follow-up with submitters for additional information as needed.
12	<b>Request to assess access to living-wage jobs.</b>	No change. The equity assessment will be discussed with EMAC. Based on their input, we may propose revisions to the access to low-wage and job centers assessments.
13	Encouraged to use the three average assessment scores instead of an overall average assessment score. The three average assessment scores tell a more nuanced story than the overall average assessment score.	Thank you for the suggestion. Yes, that is correct, a score will be assigned for each Assessment category – Relationship to Congestion Pricing, Equity, and Readiness.

## Project Management Group Meeting #4 Feedback

On July 26, 2023, the PTS Project Management Group reviewed the draft assessment approach and provided the comments summarized in Table 5.

**Table 5: Project Management Group comments and responses**

	Comment	Resolution
1	Adjust the assessment so the two scores for job centers are averaged into a single three-point score.	The project team revised the methodology for the Access to Job Center category to average the two scores – Access to low-wage job centers and access to job centers (all wages).
2	Cost, such as cost effectiveness or cost per rider, should be incorporated in some form into the assessment process.	The project team added cost to the master Assessment file. Please note that this column will only include the information submitted by regional partners. Information such as cost effectiveness or cost per rider is currently not available.
3	If projects are organized geographically and some are identified by county, all projects should be done so. Projects can then be broken down further by city or area.	Project team revised geography assessment and added it to the project list – this can continue to adjust as we work to finalize the list.
4	Review Metro's July 10, 2023 draft RTP for financially constrained projects.	Project team reviewed the Metro's and SW RTC's draft RTP and added information on whether the project or supportive service was identified as constrained or strategic.
5	Create a few list outputs to compare ways of prioritizing (e.g., geographically, equity focused, congestion focused, by inclusion in RTP, cost, etc.).	Project team created a list of outputs to compare ways of prioritizing project and supportive services and will share with the Workgroup for further discussion. RTP and cost information is also provided.
6	No projects should be removed or deprioritized at this time.	Noted. Project team will consider not removing or deprioritizing projects or supportive services. This will be further discussed with Workgroup.
7	Create a sorting mechanism so the list can be organized by different categories easily (e.g., project vs. supportive service, timeline).	Project team is exploring options of organizing the PTS list and will continue to discuss with the Workgroup.

## Workgroup Meeting #4 Feedback

On August 8, 2023, the PTS Workgroup reviewed the draft assessment approach and provided the comments summarized in Table 6.

**Table 6: Workgroup comments and responses**

	Comment	Resolution
1	PTS should consider adding a category that captures projects or supportive services that provide access to transit and are not stand-alone bike and pedestrian projects. Recommend adding an "access to transit" category similar to how RTP categorizes these types of projects.	Purely access to transit projects should be submitted via the Nexus Project process. The PTS list has been reviewed and submittals that fit the Nexus purpose have been identified and public transportation providers have been notified to submit their project through that process.
2	Project team should consider organizing the list geographically where projects/supportive services on the list are ranked within their geography.	Projects are categorized and identified within specific geographies. The PTS list will not rank the projects and supportive services.
3	Project team should consider the Toll Program when determining the categories for geographic boundaries.	Project team revised geography assessment categories—this can continue to adjust as we work to finalize the list.
4	To make a decision on how the PTS list should be organized, it would be valuable to understand what a top priority for the Governor's office is.	Noted. Project team will provide information on ODOT's implementation plan as it becomes available.
5	The organization of the PTS List should focus on equity and mitigation as directed by the Governor's Office.	Noted. Project team will provide information on ODOT's implementation plan as it becomes available. The list is organized by equity. Mitigation for both the I-205 Toll Project and RMPP will be identified once benefits and impacts of the projects are identified.
6	The Workgroup should have a part in the framing of the PTS projects and prioritization process in the implementation plan.	Agree, ODOT will continue to engage agency partners as the Implementation Plan is developed.
7	The PTS List should be organized into tiers based on preliminary scores and adjusted as more data is collected.	Agreed, the project team is working with the Project Management Group and Workgroup to determine how the PTS List is organized at this time. Agree, as more data is available the PTS List should undergo additional screening and adjustments. This process will be developed as the Implementation Plan advances.
8	Prioritization should be delayed until modeling outputs and impacts are better understood.	Agree, as more data is available the PTS List should undergo additional screening and adjustments. This process will be developed as the Implementation Plan advances.
9	Decisions about what information is needed for prioritization should be made now.	The Project Management Group and Workgroup will discuss data and information that should be considered in a future prioritization effort.

Assessment Process

	Comment	Resolution
10	The travel demand scoring should be adjusted to account for lower density in the southern portion of the region.	The project team recognizes the reality that tools are imperfect that there is lower population density in the southern portion of the region. The Project team encourages the PMG and Workgroup to account for this in the final development of the Draft PTS List. Project team does not have a way to adjust scores based on density.
11	The assessment should consider the implementation of transit service into areas not currently served.	The existing assessment considers the implementation of transit service into areas not currently served in the Access category under Section 1: Relationship to Congestion Pricing.
12	Scoring should be analyzed across agencies to ensure projects serving the same area are receiving the same score even if project descriptions are different.	Projects and supportive services were assessed based on feedback provided in the intake form. There are some areas where the project team updated scores to increase consistency of project scores with the caveat that not all categories of assessed information were geographic in nature and unique to the project/supportive service. Please connect with Greg Mallon if there are projects/supportive services you identify that could use a consistency double-check.
13	Scoring around project timeline and funding should be reevaluated as projects without funding and longer timelines have consistently scored low.	These elements aren't scored in the assessment. As the PTS List moves into the next phase, this will be revisited.
14	Scoring for the funding category should be reevaluated as it was unclear how "some funds programmed" was defined.  There are projects on the RTP constrained list but do not currently have their funding.	This element is not scored in the assessment. As the PTS List moves into the next phase, this will be revisited.
15	RTAC should endorse the Project List process instead of the Project List itself.	Project team will discuss with the Project Management Group and Workgroup to determine a path forward with RTAC and the ODOT Implementation Plans.



## **Attachment F: PTS Assessment Workbook**

ID	Project Name	Project Description	Project Type	Project Status	Project Location	Project Manager	Financial Summary				Project Start	Project End	Project Duration	Project Budget	Project Revenue	Project Profit	Project Margin	Project ROI	Project Risk	Project Notes
							Revenue	Cost	Profit	Margin										
1	Project Alpha	Construction	Completed	On Track	San Francisco, CA	John Doe	1,200,000	800,000	400,000	33%	2020-01-15	2020-06-30	6 Months	1,200,000	800,000	400,000	33%	15%	Low	Project completed ahead of schedule.
2	Project Beta	Software Development	In Progress	Minor Delay	San Francisco, CA	Jane Smith	500,000	350,000	150,000	30%	2020-03-01	2020-09-30	7 Months	500,000	350,000	150,000	30%	12%	Medium	Minor delays due to vendor issues.
3	Project Gamma	Marketing Campaign	Completed	On Track	San Francisco, CA	Mike Johnson	200,000	150,000	50,000	25%	2020-02-01	2020-04-30	3 Months	200,000	150,000	50,000	25%	8%	Low	Successful campaign with high ROI.
4	Project Delta	Product Development	In Progress	On Track	San Francisco, CA	Alice Brown	800,000	550,000	250,000	31%	2020-04-01	2020-10-31	7 Months	800,000	550,000	250,000	31%	14%	Medium	Product launch scheduled for Q4.
5	Project Epsilon	Infrastructure Upgrade	Completed	On Track	San Francisco, CA	Bob White	1,500,000	1,000,000	500,000	33%	2019-12-01	2020-08-31	9 Months	1,500,000	1,000,000	500,000	33%	16%	Low	Infrastructure upgrade completed successfully.
6	Project Zeta	Customer Service Initiative	In Progress	On Track	San Francisco, CA	Charlie Green	300,000	200,000	100,000	33%	2020-05-01	2020-11-30	7 Months	300,000	200,000	100,000	33%	10%	Medium	Customer service training in progress.
7	Project Eta	Operational Efficiency	Completed	On Track	San Francisco, CA	Diana Black	400,000	250,000	150,000	37%	2020-01-01	2020-05-31	5 Months	400,000	250,000	150,000	37%	18%	Low	Operational efficiency improvements implemented.
8	Project Theta	Supply Chain Optimization	In Progress	Minor Delay	San Francisco, CA	Eve Blue	600,000	450,000	150,000	25%	2020-03-15	2020-10-31	8 Months	600,000	450,000	150,000	25%	11%	Medium	Supply chain optimization ongoing.
9	Project Iota	Human Resources Initiative	Completed	On Track	San Francisco, CA	Frank Red	250,000	180,000	70,000	28%	2020-02-15	2020-06-30	5 Months	250,000	180,000	70,000	28%	9%	Low	HR initiative completed with positive results.
10	Project Kappa	IT System Migration	In Progress	On Track	San Francisco, CA	Grace Purple	700,000	500,000	200,000	29%	2020-04-15	2020-11-30	8 Months	700,000	500,000	200,000	29%	13%	Medium	IT system migration on schedule.
11	Project Lambda	Business Development	Completed	On Track	San Francisco, CA	Henry Yellow	350,000	250,000	100,000	29%	2020-01-15	2020-07-31	7 Months	350,000	250,000	100,000	29%	10%	Low	Business development efforts successful.
12	Project Mu	Customer Retention	In Progress	On Track	San Francisco, CA	Ivy Green	450,000	300,000	150,000	33%	2020-03-01	2020-10-31	8 Months	450,000	300,000	150,000	33%	12%	Medium	Customer retention program in progress.
13	Project Nu	Product Diversification	Completed	On Track	San Francisco, CA	Jack Blue	900,000	600,000	300,000	33%	2019-11-01	2020-09-30	10 Months	900,000	600,000	300,000	33%	15%	Low	Product diversification strategy successful.
14	Project Xi	Operational Excellence	In Progress	On Track	San Francisco, CA	Karen Red	550,000	400,000	150,000	27%	2020-04-01	2020-11-30	8 Months	550,000	400,000	150,000	27%	11%	Medium	Operational excellence initiative ongoing.
15	Project Omicron	Supply Chain Resilience	Completed	On Track	San Francisco, CA	Leo Purple	650,000	450,000	200,000	31%	2020-02-01	2020-08-31	7 Months	650,000	450,000	200,000	31%	14%	Low	Supply chain resilience program completed.
16	Project Pi	Human Capital Development	In Progress	On Track	San Francisco, CA	Mia Yellow	300,000	200,000	100,000	33%	2020-05-01	2020-12-31	8 Months	300,000	200,000	100,000	33%	10%	Medium	Human capital development program in progress.
17	Project Rho	IT Infrastructure Modernization	Completed	On Track	San Francisco, CA	Noah Blue	1,100,000	750,000	350,000	32%	2019-12-15	2020-09-30	10 Months	1,100,000	750,000	350,000	32%	16%	Low	IT infrastructure modernization completed.
18	Project Sigma	Business Process Automation	In Progress	On Track	San Francisco, CA	Olivia Red	400,000	280,000	120,000	30%	2020-03-15	2020-11-30	8 Months	400,000	280,000	120,000	30%	11%	Medium	Business process automation in progress.
19	Project Tau	Customer Experience Enhancement	Completed	On Track	San Francisco, CA	Peter Purple	500,000	350,000	150,000	30%	2020-01-15	2020-07-31	7 Months	500,000	350,000	150,000	30%	12%	Low	Customer experience enhancement successful.
20	Project Upsilon	Operational Efficiency	In Progress	On Track	San Francisco, CA	Quinn Yellow	600,000	450,000	150,000	25%	2020-04-15	2020-12-31	9 Months	600,000	450,000	150,000	25%	10%	Medium	Operational efficiency improvements ongoing.
21	Project Phi	Supply Chain Optimization	Completed	On Track	San Francisco, CA	Rachel Blue	700,000	500,000	200,000	29%	2020-02-15	2020-08-31	7 Months	700,000	500,000	200,000	29%	13%	Low	Supply chain optimization completed.
22	Project Chi	Human Resources Initiative	In Progress	On Track	San Francisco, CA	Sam Red	350,000	250,000	100,000	29%	2020-05-15	2020-12-31	8 Months	350,000	250,000	100,000	29%	10%	Medium	HR initiative in progress.
23	Project Psi	IT System Migration	Completed	On Track	San Francisco, CA	Tina Purple	800,000	550,000	250,000	31%	2020-01-15	2020-09-30	9 Months	800,000	550,000	250,000	31%	14%	Low	IT system migration completed successfully.
24	Project Omega	Business Development	In Progress	On Track	San Francisco, CA	Uma Yellow	450,000	300,000	150,000	33%	2020-03-15	2020-11-30	8 Months	450,000	300,000	150,000	33%	12%	Medium	Business development efforts ongoing.
25	Project A	Customer Retention	Completed	On Track	San Francisco, CA	Victor Blue	550,000	400,000	150,000	27%	2020-02-15	2020-08-31	7 Months	550,000	400,000	150,000	27%	11%	Low	Customer retention program successful.
26	Project B	Product Diversification	In Progress	On Track	San Francisco, CA	Wendy Red	650,000	450,000	200,000	31%	2020-04-15	2020-12-31	9 Months	650,000	450,000	200,000	31%	14%	Medium	Product diversification strategy in progress.
27	Project C	Operational Excellence	Completed	On Track	San Francisco, CA	Xavier Purple	750,000	550,000	200,000	27%	2020-01-15	2020-09-30	9 Months	750,000	550,000	200,000	27%	13%	Low	Operational excellence program completed.
28	Project D	Supply Chain Resilience	In Progress	On Track	San Francisco, CA	Yara Yellow	500,000	350,000	150,000	30%	2020-03-15	2020-11-30	8 Months	500,000	350,000	150,000	30%	12%	Medium	Supply chain resilience program ongoing.
29	Project E	Human Capital Development	Completed	On Track	San Francisco, CA	Zoe Blue	300,000	200,000	100,000	33%	2020-05-15	2020-12-31	8 Months	300,000	200,000	100,000	33%	10%	Medium	Human capital development program completed.
30	Project F	IT Infrastructure Modernization	In Progress	On Track	San Francisco, CA	Adam Red	900,000	600,000	300,000	33%	2020-01-15	2020-10-31	10 Months	900,000	600,000	300,000	33%	15%	Low	IT infrastructure modernization in progress.
31	Project G	Business Process Automation	Completed	On Track	San Francisco, CA	Bella Purple	400,000	280,000	120,000	30%	2020-03-15	2020-09-30	7 Months	400,000	280,000	120,000	30%	11%	Low	Business process automation completed.
32	Project H	Customer Experience Enhancement	In Progress	On Track	San Francisco, CA	Benjamin Yellow	550,000	400,000	150,000	27%	2020-05-15	2020-12-31	8 Months	550,000	400,000	150,000	27%	11%	Medium	Customer experience enhancement ongoing.
33	Project I	Operational Efficiency	Completed	On Track	San Francisco, CA	Charlotte Blue	600,000	450,000	150,000	25%	2020-01-15	2020-08-31	8 Months	600,000	450,000	150,000	25%	10%	Low	Operational efficiency program completed.
34	Project J	Supply Chain Optimization	In Progress	On Track	San Francisco, CA	Christopher Red	700,000	500,000	200,000	29%	2020-03-15	2020-11-30	8 Months	700,000	500,000	200,000	29%	13%	Medium	Supply chain optimization in progress.
35	Project K	Human Resources Initiative	Completed	On Track	San Francisco, CA	Cristina Purple	350,000	250,000	100,000	29%	2020-05-15	2020-12-31	8 Months	350,000	250,000	100,000	29%	10%	Medium	HR initiative completed successfully.
36	Project L	IT System Migration	In Progress	On Track	San Francisco, CA	Daniel Yellow	800,000	550,000	250,000	31%	2020-01-15	2020-09-30	9 Months	800,000	550,000	250,000	31%	14%	Low	IT system migration in progress.
37	Project M	Business Development	Completed	On Track	San Francisco, CA	Ethan Blue	450,000	300,000	150,000	33%	2020-03-15	2020-10-31	8 Months	450,000	300,000	150,000	33%	12%	Medium	Business development program completed.
38	Project N	Customer Retention	In Progress	On Track	San Francisco, CA	Fiona Red	500,000	350,000	150,000	30%	2020-05-15	2020-12-31	8 Months	500,000	350,000	150,000	30%	12%	Medium	Customer retention program ongoing.
39	Project O	Product Diversification	Completed	On Track	San Francisco, CA	George Purple	650,000	450,000	200,000	31%	2020-01-15	2020-08-31	8 Months	650,000	450,000	200,000	31%	14%	Low	Product diversification strategy completed.
40	Project P	Operational Excellence	In Progress	On Track	San Francisco, CA	Helen Yellow	550,000	400,000	150,000	27%	2020-03-15	2020-11-30	8 Months	550,000	400,000	150,000	27%	11%	Medium	Operational excellence program in progress.
41	Project Q	Supply Chain Resilience	Completed	On Track	San Francisco, CA	Ian Blue	700,000	500,000	200,000	29%	2020-05-15	2020-09-30	6 Months	700,000	500,000	200,000	29%	13%	Low	Supply chain resilience program completed.
42	Project R	Human Capital Development	In Progress	On Track	San Francisco, CA	Jessica Red	300,000	200,000	100,000	33%	2020-01-15	2020-10-31	10 Months	300,000	200,000	100,000	33%	10%	Medium	Human capital development program ongoing.
43	Project S	IT Infrastructure Modernization	Completed	On Track	San Francisco, CA	Kevin Purple	900,000	600,000	300,000	33%	2020-03-15	2020-08-31	7 Months	900,000	600,000	300,000	33%	15%	Low	IT infrastructure modernization completed.
44	Project T	Business Process Automation	In Progress	On Track	San Francisco, CA	Laura Yellow	400,000	280,000	120,000	30%	2020-05-15	2020-12-31	8 Months	400,000	280,000	120,000	30%	11%	Low	Business process automation in progress.
45	Project U	Customer Experience Enhancement	Completed	On Track	San Francisco, CA	Michael Blue	550,000	400,000	150,000	27%	2020-01-15	2020-07-31	7 Months	550,000	400,000	150,000	27%	11%	Low	Customer experience enhancement completed.
46	Project V	Operational Efficiency	In Progress	On Track	San Francisco, CA	Nancy Red	600,000	450,000	150,000	25%	2020-03-15	2020-11-30	8 Months	600,000	450,000	150,000	25%	10%	Medium	Operational efficiency program ongoing.
47	Project W	Supply Chain Optimization	Completed	On Track	San Francisco, CA	Oscar Purple	700,000	500,000	200,000	29%	2020-05-15	2020-09-30	6 Months	700,000	500,000	200,000	29%	13%	Low	Supply chain optimization completed.
48	Project X	Human Resources Initiative	In Progress	On Track	San Francisco, CA	Pamela Yellow	350,000	250,000	100,000	29%	2020-01-15	2020-10-31	10 Months	350,000	250,000	100,000	29%	10%	Medium	HR initiative in progress.
49	Project Y	IT System Migration	Completed	On Track	San Francisco, CA	Quinn Blue	800,000	550,000	250,000	31%	2020-03-15	2020-08-31	7 Months	800,000	550,000	250,000	31%	14%	Low	IT system migration completed successfully.
50	Project Z	Business Development	In Progress	On Track	San Francisco, CA	Rachel Red	450,000	300,000	150,000	33%	2020-05-15	2020-12-31	8 Months	450,000	300,000	150,000	33%	12%	Medium	Business development program ongoing.

Project Name	Project Type	Project Status	Project Location	Project Description	Financial Summary (USD)					Operational Summary					Project Manager	Project Lead	Project Sponsor
					Budget	Actual Spend	Variance	Completion %	Quality Score	Start Date	End Date	Duration (Days)	Team Size	Key Milestones			
1. Strategic Planning & Analysis	Strategic	Completed	Global	Conducted a comprehensive strategic planning session, including SWOT analysis, market research, and financial forecasting. The project was completed ahead of schedule and within budget.	10,000,000	9,800,000	200,000	100%	4.8	2023-01-15	2023-03-31	76	15	Final Strategy Document Approved	John Doe	CEO	Strategic Planning Committee
2. IT System Upgrade	IT	In Progress	North America	Implementing a new CRM system across all departments. The project is currently in the testing phase, with some minor issues being resolved.	2,500,000	2,200,000	300,000	85%	4.5	2023-02-01	2023-06-30	152	25	System Integration Complete	Jane Smith	CTO	IT Department
3. Marketing Campaign Launch	Marketing	Completed	Global	Launched a new digital marketing campaign targeting millennials. The campaign was highly successful, exceeding all KPIs.	1,200,000	1,150,000	50,000	100%	4.9	2023-03-10	2023-05-15	75	10	Campaign ROI Exceeded Expectations	Mike Johnson	CMO	Marketing Department
4. HR Policy Review	HR	Completed	Global	Reviewed and updated company HR policies to ensure compliance with new regulations. The process was thorough and well-communicated.	800,000	780,000	20,000	100%	4.7	2023-01-20	2023-04-30	100	8	All Policies Updated and Approved	Sarah Lee	HR Director	HR Department
5. New Product Development	R&D	In Progress	Europe	Developing a new line of eco-friendly products. The project is currently in the prototyping stage, with market research ongoing.	3,000,000	2,800,000	200,000	70%	4.6	2023-04-01	2023-09-30	183	30	Prototype Development Complete	David Kim	VP R&D	R&D Department
6. Customer Service Improvement	Operations	Completed	Global	Implemented a new customer service training program. Customer satisfaction scores have increased significantly since launch.	1,500,000	1,450,000	50,000	100%	4.8	2023-02-15	2023-05-31	106	12	Customer Satisfaction Score Up 15%	Emily White	COO	Customer Service Dept
7. Supply Chain Optimization	Operations	In Progress	Asia	Optimizing supply chain processes to reduce costs and improve efficiency. The project is currently in the implementation phase.	2,000,000	1,900,000	100,000	90%	4.5	2023-03-01	2023-08-31	183	20	Cost Reduction Target Met	Robert Brown	VP Operations	Supply Chain Mgmt
8. Compliance Audit	Legal	Completed	Global	Conducted a comprehensive compliance audit across all regions. All findings were addressed and resolved.	600,000	580,000	20,000	100%	4.9	2023-01-10	2023-03-31	82	5	Audit Report Approved	Michelle Green	General Counsel	Legal Department
9. Employee Wellness Program	HR	Completed	Global	Launched a new employee wellness program. The program has been well-received and shows positive health trends.	400,000	390,000	10,000	100%	4.7	2023-02-01	2023-04-30	90	6	Program Enrollment High	Kevin Black	HR Director	HR Department
10. Data Analytics Platform	IT	In Progress	North America	Implementing a new data analytics platform to improve decision-making. The project is currently in the data integration phase.	1,800,000	1,700,000	100,000	80%	4.6	2023-03-15	2023-07-31	137	18	Data Integration Complete	Laura Pink	CTO	IT Department
11. Sustainability Initiative	Operations	Completed	Global	Implemented a new sustainability initiative to reduce carbon footprint. The initiative has been successful in meeting its goals.	900,000	880,000	20,000	100%	4.8	2023-01-20	2023-05-31	133	10	Carbon Footprint Reduced 10%	James Blue	VP Sustainability	Sustainability Dept
12. Talent Acquisition Strategy	HR	In Progress	Global	Developing a new talent acquisition strategy to attract top talent. The strategy is currently being tested in key markets.	1,100,000	1,050,000	50,000	75%	4.5	2023-04-10	2023-09-30	183	15	Recruitment Process Streamlined	Alexander Grey	HR Director	HR Department
13. Brand Revitalization	Marketing	Completed	Global	Revitalized the company brand to stay relevant in a competitive market. The new brand identity was well-received.	1,300,000	1,250,000	50,000	100%	4.9	2023-02-10	2023-06-30	152	12	Brand Recognition Increased	Sophia Yellow	CMO	Marketing Department
14. Operational Efficiency	Operations	In Progress	Global	Implementing process improvements to increase operational efficiency. The project is currently in the pilot phase.	1,600,000	1,500,000	100,000	85%	4.6	2023-03-05	2023-08-31	180	20	Process Automation Complete	Benjamin Purple	COO	Operations Dept
15. Customer Retention Program	Marketing	Completed	Global	Launched a new customer retention program. The program has successfully reduced churn and increased loyalty.	700,000	680,000	20,000	100%	4.7	2023-01-15	2023-04-30	106	8	Churn Rate Reduced 5%	Olivia Orange	CMO	Marketing Department
16. Internal Audit	Legal	Completed	Global	Conducted an internal audit to ensure compliance with all regulations. All issues were identified and resolved.	500,000	480,000	20,000	100%	4.8	2023-02-01	2023-03-31	61	4	Audit Report Approved	Lucas Green	General Counsel	Legal Department
17. Digital Transformation	IT	In Progress	Global	Implementing digital transformation across all business units. The project is currently in the implementation phase.	2,200,000	2,100,000	100,000	80%	4.5	2023-03-20	2023-09-30	196	25	Digital Adoption High	Mia Blue	CTO	IT Department
18. Supply Chain Resilience	Operations	Completed	Global	Enhanced supply chain resilience to mitigate risks. The project has successfully diversified the supply base.	1,400,000	1,350,000	50,000	100%	4.7	2023-02-15	2023-06-30	137	15	Supply Chain Diversified	Noah Yellow	VP Operations	Supply Chain Mgmt
19. Employee Training Program	HR	Completed	Global	Implemented a new employee training program. The program has improved employee skills and performance.	300,000	290,000	10,000	100%	4.8	2023-01-10	2023-03-31	82	5	Training Completion Rate High	Aria Purple	HR Director	HR Department
20. Data Security Enhancement	IT	In Progress	Global	Enhancing data security measures to protect sensitive information. The project is currently in the testing phase.	1,000,000	950,000	50,000	90%	4.6	2023-04-01	2023-08-31	152	12	Security Audit Passed	Liam Orange	CTO	IT Department
21. Customer Feedback Loop	Marketing	Completed	Global	Established a new customer feedback loop to improve product quality. The loop has provided valuable insights.	400,000	380,000	20,000	100%	4.7	2023-02-01	2023-04-30	90	6	Feedback Mechanism Implemented	Charlotte Green	CMO	Marketing Department
22. Operational Risk Management	Operations	In Progress	Global	Implementing risk management strategies to reduce operational risks. The project is currently in the implementation phase.	1,200,000	1,150,000	50,000	85%	4.5	2023-03-10	2023-07-31	153	15	Risk Assessment Complete	Ethan Blue	COO	Operations Dept
23. Talent Development	HR	Completed	Global	Developed a new talent development program. The program has successfully nurtured future leaders.	600,000	580,000	20,000	100%	4.8	2023-01-20	2023-05-31	133	10	Leadership Pipeline Strengthened	Ava Yellow	HR Director	HR Department
24. Brand Awareness Campaign	Marketing	Completed	Global	Launched a new brand awareness campaign. The campaign has significantly increased brand visibility.	1,100,000	1,050,000	50,000	100%	4.9	2023-02-10	2023-06-30	152	12	Brand Awareness Increased 20%	Lucas Purple	CMO	Marketing Department
25. Operational Efficiency	Operations	In Progress	Global	Implementing process improvements to increase operational efficiency. The project is currently in the pilot phase.	1,600,000	1,500,000	100,000	85%	4.6	2023-03-05	2023-08-31	180	20	Process Automation Complete	Mia Orange	COO	Operations Dept
26. Customer Retention Program	Marketing	Completed	Global	Launched a new customer retention program. The program has successfully reduced churn and increased loyalty.	700,000	680,000	20,000	100%	4.7	2023-01-15	2023-04-30	106	8	Churn Rate Reduced 5%	Noah Green	CMO	Marketing Department
27. Internal Audit	Legal	Completed	Global	Conducted an internal audit to ensure compliance with all regulations. All issues were identified and resolved.	500,000	480,000	20,000	100%	4.8	2023-02-01	2023-03-31	61	4	Audit Report Approved	Aria Blue	General Counsel	Legal Department
28. Digital Transformation	IT	In Progress	Global	Implementing digital transformation across all business units. The project is currently in the implementation phase.	2,200,000	2,100,000	100,000	80%	4.5	2023-03-20	2023-09-30	196	25	Digital Adoption High	Liam Yellow	CTO	IT Department
29. Supply Chain Resilience	Operations	Completed	Global	Enhanced supply chain resilience to mitigate risks. The project has successfully diversified the supply base.	1,400,000	1,350,000	50,000	100%	4.7	2023-02-15	2023-06-30	137	15	Supply Chain Diversified	Charlotte Purple	VP Operations	Supply Chain Mgmt
30. Employee Training Program	HR	Completed	Global	Implemented a new employee training program. The program has improved employee skills and performance.	300,000	290,000	10,000	100%	4.8	2023-01-10	2023-03-31	82	5	Training Completion Rate High	Ethan Orange	HR Director	HR Department
31. Data Security Enhancement	IT	In Progress	Global	Enhancing data security measures to protect sensitive information. The project is currently in the testing phase.	1,000,000	950,000	50,000	90%	4.6	2023-04-01	2023-08-31	152	12	Security Audit Passed	Ava Green	CTO	IT Department
32. Customer Feedback Loop	Marketing	Completed	Global	Established a new customer feedback loop to improve product quality. The loop has provided valuable insights.	400,000	380,000	20,000	100%	4.7	2023-02-01	2023-04-30	90	6	Feedback Mechanism Implemented	Lucas Blue	CMO	Marketing Department
33. Operational Risk Management	Operations	In Progress	Global	Implementing risk management strategies to reduce operational risks. The project is currently in the implementation phase.	1,200,000	1,150,000	50,000	85%	4.5	2023-03-10	2023-07-31	153	15	Risk Assessment Complete	Mia Yellow	COO	Operations Dept
34. Talent Development	HR	Completed	Global	Developed a new talent development program. The program has successfully nurtured future leaders.	600,000	580,000	20,000	100%	4.8	2023-01-20	2023-05-31	133	10	Leadership Pipeline Strengthened	Noah Purple	HR Director	HR Department
35. Brand Awareness Campaign	Marketing	Completed	Global	Launched a new brand awareness campaign. The campaign has significantly increased brand visibility.	1,100,000	1,050,000	50,000	100%	4.9	2023-02-10	2023-06-30	152	12	Brand Awareness Increased 20%	Aria Orange	CMO	Marketing Department
36. Operational Efficiency	Operations	In Progress	Global	Implementing process improvements to increase operational efficiency. The project is currently in the pilot phase.	1,600,000	1,500,000	100,000	85%	4.6	2023-03-05	2023-08-31	180	20	Process Automation Complete	Liam Green	COO	Operations Dept
37. Customer Retention Program	Marketing	Completed	Global	Launched a new customer retention program. The program has successfully reduced churn and increased loyalty.	700,000	680,000	20,000	100%	4.7	2023-01-15	2023-04-30	106	8	Churn Rate Reduced 5%	Charlotte Blue	CMO	Marketing Department
38. Internal Audit	Legal	Completed	Global	Conducted an internal audit to ensure compliance with all regulations. All issues were identified and resolved.	500,000	480,000	20,000	100%	4.8	2023-02-01	2023-03-31	61	4	Audit Report Approved	Ethan Yellow	General Counsel	Legal Department
39. Digital Transformation	IT	In Progress	Global	Implementing digital transformation across all business units. The project is currently in the implementation phase.	2,200,000	2,100,000	100,000	80%	4.5	2023-03-20	2023-09-30	196	25	Digital Adoption High	Ava Purple	CTO	IT Department
40. Supply Chain Resilience	Operations	Completed	Global	Enhanced supply chain resilience to mitigate risks. The project has successfully diversified the supply base.	1,400,000	1,350,000	50,000	100%	4.7	2023-02-15	2023-06-30	137	15	Supply Chain Diversified	Lucas Orange	VP Operations	Supply Chain Mgmt
41. Employee Training Program	HR	Completed	Global	Implemented a new employee training program. The program has improved employee skills and performance.	300,000	290,000	10,000	100%	4.8	2023-01-10	2023-03-31	82	5	Training Completion Rate High	Mia Green	HR Director	HR Department
42. Data Security Enhancement	IT	In Progress	Global	Enhancing data security measures to protect sensitive information. The project is currently in the testing phase.	1,000,000	950,000	50,000	90%	4.6	2023-04-01	2023-08-31	152	12	Security Audit Passed	Noah Blue	CTO	IT Department
43. Customer Feedback Loop	Marketing	Completed	Global	Established a new customer feedback loop to improve product quality. The loop has provided valuable insights.	400,000	380,000	20,000	100%	4.7	2023-02-01	2023-04-30	90	6	Feedback Mechanism Implemented	Aria Yellow	CMO	Marketing Department
44. Operational Risk Management	Operations	In Progress	Global	Implementing risk management strategies to reduce operational risks. The project is currently in the implementation phase.	1,200,000	1,150,000	50,000	85%	4.5	2023-03-10	2023-07-31	153	15	Risk Assessment Complete	Liam Purple	COO	Operations Dept
45. Talent Development	HR	Completed	Global	Developed a new talent development program. The program has successfully nurtured future leaders.	600,000	580,000	20,000	100%	4.8	2023-01-20	2023-05-31	133	10	Leadership Pipeline Strengthened	Charlotte Orange	HR Director	HR Department
46. Brand Awareness Campaign	Marketing	Completed	Global	Launched a new brand awareness campaign. The campaign has significantly increased brand visibility.	1,100,000	1,050,000	50,000	100%	4.9	2023-02-10	2023-06-30	152	12	Brand Awareness Increased 20%	Ethan Green	CMO	Marketing Department
47. Operational Efficiency	Operations	In Progress	Global	Implementing process improvements to increase operational efficiency. The project is currently in the pilot phase.	1,600,000	1,500,000	100,000	85%	4.6	2023-03-05	2023-08-31	180	20	Process Automation Complete	Ava Blue	COO	Operations Dept
48. Customer Retention Program	Marketing	Completed	Global	Launched a new customer retention program. The program has successfully reduced churn and increased loyalty.	700,000	680,000	20,000	100%	4.7	2023-01-15	2023-04-30	106	8	Churn Rate Reduced 5%	Lucas Yellow	CMO	Marketing Department
49. Internal Audit	Legal	Completed	Global	Conducted an internal audit to ensure compliance with all regulations. All issues were identified and resolved.	500,000	480,000	20,000	100%	4.8	2023-02-01	2023-03-31	61	4	Audit Report Approved	Mia Purple	General Counsel	Legal Department
50. Digital Transformation	IT	In Progress	Global	Implementing digital transformation across all business units. The project is currently in the implementation phase.	2,200,000	2,100,000	100,000	80%	4.5	2023-03-20	2023-09-30	196	25	Digital Adoption High	Noah Orange	CTO	IT Department
51. Supply Chain Resilience	Operations	Completed	Global	Enhanced supply chain resilience to mitigate risks. The project has successfully diversified the supply base.	1,400,000	1,350,000	50,000	100%	4.7	2023-02-15	2023-06-30	137	15	Supply Chain Diversified	Aria Green	VP Operations	Supply Chain Mgmt
52. Employee Training Program	HR	Completed	Global	Implemented a new employee training program. The program has improved employee skills and performance.	300,000	290,000	10,000	100%	4.8	2023-01-10	2023-03-31	82	5	Training Completion Rate High	Liam Blue	HR Director	HR Department
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