

I-5 and I-205 Toll Projects

Public Involvement and Communications Plan



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PURPOSE

This plan will inform and guide the project teams during the environmental review for two road pricing (toll) projects in the Portland metro area. It describes goals, objectives, metrics of success, audiences and tools to guide the notification, education and engagement activities that will be used before key decision points during the National Environmental Policy Act (NEPA) process that leads to decisions by the Oregon Department of Transportation, Oregon Transportation Commission (OTC) and Federal Highway Administration (FHWA).

This plan is intended to be a high-level overview. More detailed plans will be written before each stage of the technical analysis to ensure transparent delivery of information and public engagement that supports decision-making. The communications strategy is consistent with the Oregon Department of Transportation’s communication guiding principles.

OVERVIEW

Oregon House Bill 2017 – “Keep Oregon Moving” – directed the OTC to develop a proposal for implementing value pricing (tolling) on I-5 and I-205 in the Portland metro area to reduce congestion and create revenue for bottleneck improvements. The Portland Metro Area Value Pricing Feasibility Analysis concluded in late 2018 with an application to the FHWA to proceed with further analysis and implement road pricing. FHWA issued a response in early 2019 with a description of the steps necessary to proceed. The application describes OTC direction, the study areas on I-5 and I-205 and serves as a guide for the current work.

During the feasibility analysis, ODOT, as directed by OTC, engaged regional stakeholders, agency partners, and the public to explore the options available for congestion pricing and determine how and where variable rate tolling could help improve and manage congestion on I-5 and I-205 during peak travel times. Best practices and lessons learned from previous community input will be used as a foundation or starting point for the alternative’s refinement and environmental planning phase. See a 2019 Memorandum¹ to ODOT that describes outcomes from the feasibility analysis.

¹ EnviroIssues, “Portland Area Congestion Pricing Existing Research and Current Context for Communications Planning,” memorandum to Oregon Department of Transportation; Aug. 11, 2019.

Scope of the Projects

The feasibility analysis phase identified pricing options on I-5 and I-205 to help address Portland metro area congestion. We are now refining these options and analyzing alternatives in the environmental review phase for the I-5 and I-205 projects.

Addressing challenges and limitations to make tolling work for us in the Portland metro area is central to this work. Key concerns around community mobility and equity are priorities for the environmental process. These include:

- The need to avoid negatively affecting low-income communities
- The need for improved transit and other transportation choices
- The need to reduce negative effects of traffic diversion to local streets

These key concerns were identified during the feasibility analysis will remain a focus throughout the environmental review. They will be referred to as equity and mobility strategies for messaging of the projects. (Note: Depending on an eventual NEPA process, these strategies may be described differently in an environmental document.)

Description of the Projects

ODOT is considering options to manage congestion and raise revenue to improve mobility on I-5 through central Portland and on I-205 near the Abernethy Bridge by adding a variable rate toll to use the facilities. Tolls will be paired with:

- Tools that create a system to work for all income levels
- Other transportation options; including transit where feasible
- Strategies to reduce negative effects to neighborhoods from changed traffic patterns, i.e. diversion.

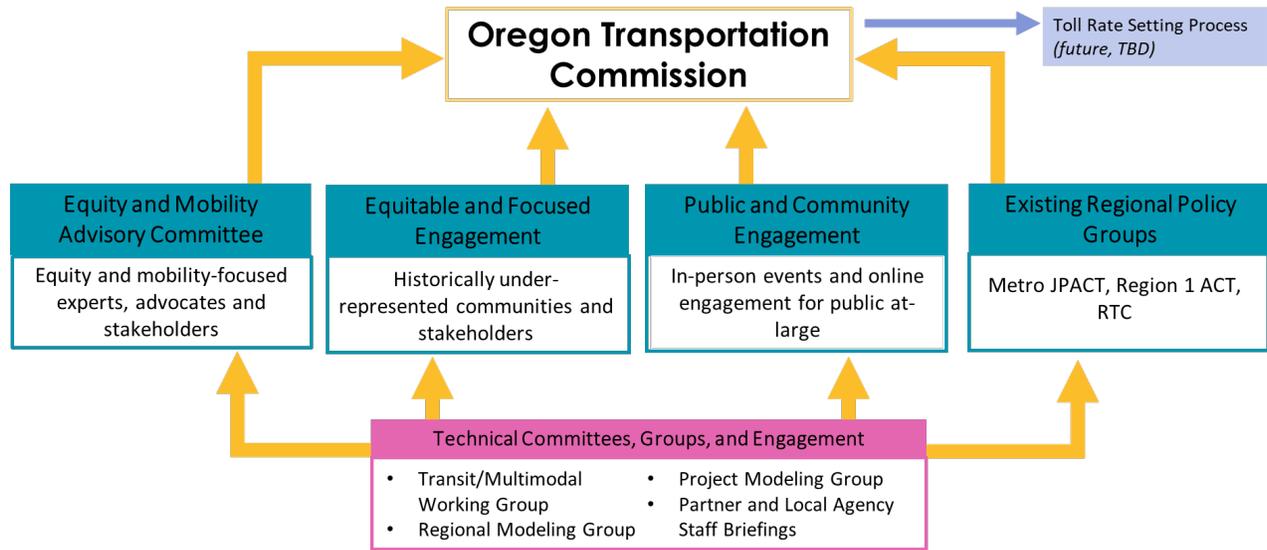
. The OTC and ODOT have not yet decided on specific transportation improvement projects to be financed by net toll revenue.

The I-205 Toll Project is currently in the environmental review and public input phase to identify toll end-points and equity and mobility strategies. The environmental review and public input process for the I-5 Toll Project will begin later.

Note: Tolling is not expected to be implemented in the Portland metro area before 2023.

ADVISORY AND ENGAGEMENT STRUCTURE

OTC is the decision maker for the I-5 and I-205 Toll Projects, toll policies and toll rates. OTC will consider input from the public, the Toll Projects' Equity and Mobility Advisory Committee, regional policy committees and technical analysis before making decisions.



I-5 and I-205 Toll Projects Schedule

	2019	2020	2021	2022	2023	2024	2025	2026
I-205 Tolling Project		Tolling Environmental Review (NEPA)						
I-205 Widening	Widening Project Design & Bid			Four-year Construction Period*				
I-5 Tolling Project		I-5 Alternatives Refinement		Environmental Review (NEPA)				
Equity		Equity Framework		Equity engagement				

*Dependent on construction funding.

RELATED PLANNING PROCESSES

At the same time the tolling analysis proceeds for I-5 and I-205, several other transportation projects will be ongoing and could affect public discussions about tolling.

1. **I-5 Rose Quarter Improvement Project:** This HB 2017 project is located fully within the I-5 corridor being studied. Stakeholders for both projects are often the same.
2. **I-205 Improvements:** This HB 2017 project is currently funded through design, but not construction.
3. **SW Corridor Light Rail extension:** The proposed southwest corridor light rail extension parallels I-5 in the area proposed for tolling. The proposed 12-mile light rail extension connects downtown Portland to Tualatin.
4. **Potential future I-5 Interstate Bridge:** Planning to replace the I-5 Bridge over the Columbia River has re-started.
5. **Regional initiatives:** Both the City of Portland and Metro have planning processes ongoing related to road pricing policy.

STAKEHOLDER ASSESSMENT

Demographics overview

A review of the demographic data is intended to enhance the understanding of the diversity and broad engagement needs of the populations living in and traveling through the study area. Table 1 summarizes key demographic indicators for a 20-mile radius around the City of Portland. More detailed demographic analysis is presented in Chapter A.

Ethnicity and language needs – The region’s population is predominately White, at 78 percent of the population. The I-205 corridor has a higher proportion of non-White residents and higher percentage of non-native English speakers than the rest of the region and the I-5 corridor. Approximately 13 percent of the population identifies as Hispanic or with Latin American roots and 9 percent of the population identify as Asian in the I-205 corridor.

Spanish is the most common language spoken at home besides English throughout the region. Other spoken languages include Chinese, Vietnamese, Russian, Korean, Arabic, Japanese and Tagalog. The proportion of linguistically isolated households is slightly higher along the entirety of the I-205 corridor than the I-5 corridor and the rest of the state/region.

I-5 near central Portland has a slightly higher proportion of non-White residents than the rest of the region. Additionally, there is a higher population of Black/African Americans along the I-5 corridor (6 percent) than in the region in general (5 percent). Many people from this demographic community travel from elsewhere in the region to cultural and historic destinations in the Historic Albina area.

Income – In the 20-mile radius around the city of Portland, nearly half of households earned \$50,000 per year or less and 14 percent are living in poverty. Median incomes are lower in East

Portland, parts of north Portland, and along the I-205 corridor. Higher median incomes are concentrated south and east of I-205 (Happy Valley and parts of West Linn).

Table 1: Demographics overview (20-mile radius from the city of Portland, unless otherwise stated)²

Age		Housing Types		Race/Ethnicity	
Under 20	24%	Single-family homes	60%	White	78%
Age 20 - 29	14%	Apartments	33%	Hispanic/Latino	11%
Age 30 - 44	25%	Other	7%	Other/2 or more races	8%
Age 45 - 64	26%			Asian	7%
Age 65 +	11%			African American	5%
				American Indian or Alaskan Native	1%
				Native Hawaiian or other Pacific Islander	1%
		Disability Status			
		11% with any disability			
				Languages Spoken At home	
Foreign-Born Population		Country of Origin		English only	81%
15% born outside the U.S.		Mexico	22%	Spanish	8%
		Vietnam	8%	Vietnamese	1%
Limited English Population		China	5%	Chinese	1%
8%		Ukraine	4%	Russian	1%
		India	4%		
		Unemployment Rate (Portland Metro Area)¹		Education Level (Portland)	
Annual Household Income		4.4%		Did not graduate high school	9%
Less than \$25,000	23%			Graduated college	46%
\$25,000-\$49,999	23%				
\$50,000-\$99,999	30%	Poverty Rate			
\$100,000 plus	24%	14%			

Audiences and stakeholders

Primary audiences for engagement are those who are directly affected by the Toll Projects. They include:

- Influencers and community groups for historically underrepresented and underserved communities
- Local elected officials and leaders in the Portland metro area, including Southwest Washington
- Commuters through corridors where tolls are being considered
- Communities along corridors where tolls are being considered
- Freight operators and small businesses operating through and near potential tolled corridors

Additional important stakeholders include: Tribes, regulatory agencies, partner agencies, environmental organizations and advocates, active transportation users and advocates.

² Census and American Community Survey data compiled using PolicyMap and Community/Attributes, 2011-2015

Equitable engagement considerations and approach

To achieve equitable outcomes, ODOT plans to engage communities, which are historically and currently underrepresented and underserved in the decision process. For the I-5 and I-205 Toll Projects, affected groups include people who are low-income, youth, older adults, Black, Indigenous, multi-racial, and people of color, people who may speak a language other than English, and people with disabilities, who may face challenges accessing employment and other services.

There are benefits to tolling with improved travel reliability and improvements in the transportation system. However, tolling may impact these populations more due to the potential for proportionally higher transportation costs, more limited transportation options in lower cost housing areas, limited schedule flexibility and additional traffic rerouting through their neighborhoods by drivers attempting to avoid tolls.

The projects will consider best practices for equitable engagement, the Equity Framework, input from the Equity and Mobility Advisory Committee, input received from environmental justice communities during the feasibility analysis phase and stakeholder interviews to develop the equitable engagement strategy.

PUBLIC ENGAGEMENT SCOPE

Key decisions and input opportunities

Public engagement will inform key decisions and activities for the environmental review phase for tolling in both the I-5 and I-205 corridors.

Key Decisions	Primary Engagement Methods
Equitable engagement strategies	Stakeholder interviews Community Based Organization interviews Equity and Mobility Advisory Committee
Equity framework	Equity and Mobility Advisory Committee
Evaluation criteria and performance measures for analysis	Equity and Mobility Advisory Committee Technical working groups Partner agencies
NEPA analysis: <ul style="list-style-type: none"> Statement of purpose and need, goal and objectives Range of alternatives 	Regional policy committees Technical working groups Open houses Online open houses/webinars Online survey
Preferred alternatives <ul style="list-style-type: none"> Alternatives refinement to include community mobility and equity strategies 	Equity and Mobility Advisory Committee Technical working groups Regional policy committees

Key Decisions	Primary Engagement Methods
<ul style="list-style-type: none"> Preferred alternative for I-5 and I-205 Toll Projects 	Open houses Online open houses/webinars Online survey Equity discussion groups (in-person or online) Community workshops

Guiding principles

The following will guide implementation of all public engagement and communications for this phase:

- Racial and social equity:** Conduct engagement activities with equity at the forefront. Equitable engagement (e.g. process equity to intentionally involve historically underserved and underrepresented communities) is the first thing we consider when designing an engagement process.
- Be available:** Be available and responsive to stakeholders to ensure they have timely information they need to provide informed input.
- Focus on the congestion problem:** Education about congestion problems facing the region and the tools to address it must be a part of all communications with the public.
- Build on past work:** Build on public input provided during the feasibility analysis and communicate how it informs our current work.
- Inclusive and transparent:** The process for developing recommendations must be inclusive and transparent to stakeholders
- HB 2017:** Fulfill requirements of HB 2017 from the state legislature.
- ODOT standards:** Apply ODOT’s adopted communication standards to these projects.

These guiding principles intend to achieve and support ODOT’s communications guidance, which calls for being data driven, having goals focused on outcomes and using an ODOT voice.

PUBLIC INVOLVEMENT GOALS, OBJECTIVES AND SUCCESS METRICS:

By striving to achieve the goals and objectives listed below, ODOT will work to achieve process equity, as defined in the Equity Framework, and enhance public trust in the agency’s stewardship of the highway system and the decision process. For each of the two projects, the following goals, objectives and metrics of success will apply.

Goal 1: Broad community awareness and shared understanding of project need and ways to participate.

A well-executed education and engagement program that includes a coordinated media and

government relations strategy will serve to increase public knowledge about how tolling works, the regional congestion problem and ODOT's plans to address it.

Objective: Regularly provide current information related to tolling, the congestion problem, and analysis or engagement opportunities.

Objective: People understand the varied ways they can provide their concern, ideas and feedback about the project at key milestones.

Objective: People understand how tolling can reduce congestion and fund transportation projects.

Metrics of success:

- Project reach increases by 10% per year across channels (example growth in email distribution list, and website visits).
- Traditional and factual media coverage occurs at every key milestone.
- Comments and questions are received from the public about the project at key milestones.
- More than 20% of comments or questions received demonstrate knowledge of the project and the need for the project by the time the preferred alternative is selected.

Goal 2: Historically and currently underserved and underrepresented communities' concerns are consistently understood and considered during project decision-making. Design of pricing projects that strive to work for all income levels and demographic groups depends on the early and ongoing engagement and feedback by these communities on options under consideration.

Objective: Underserved and underrepresented communities who may be affected are able to share their input in culturally-preferred ways throughout project decision making.

Objective: Underserved and underrepresented communities share ideas throughout the project on how to equitably implement tolls and conduct the engagement process.

Objective: Underserved and underrepresented communities learn about the project and how it could affect them before decisions are made.

Objective: Decision makers receive and consider input from underrepresented and underserved communities.

Metrics of success:

- Participant demographics are proportionate or higher to the demographics of the project area.
- Greater than 75% of participants express satisfaction with their opportunity to be heard in face to face events, meetings or interactive webinars. (Note: In person meetings will be substituted with webinars when necessary due to Covid-19 physical distancing requirements.)
- Greater than 75% of participants expressed satisfaction with the quality and accessibility of information presented.
- The number of comments received from historically underserved and underrepresented communities is proportional to the population.
- Comments received from underrepresented and underserved communities indicate a knowledge about the problem, proposed project and ways to equitable engage.
- At least three ethnic media outlets that receive information publish factual articles about the project before each environmental review milestone.
- Regular conversations with community liaisons indicate underrepresented and underserved communities acknowledge and understand how their input was used for decision-making.

Goal 3: Public input helps to shape project decisions. Public input about the I-5 and I-205 tolling alternatives and equity and mobility strategies collected through in-person and online tools will help ODOT and Oregon Transportation Commission make informed choices.

Objective: People understand where we are in the decision-making process and how they can influence it.

Objective: Affected communities share input on tolling alternatives and community mobility strategies via in person and online tools and tactics.

Objective: People understand how public input influenced decisions and the rationale for decisions.

Objective: Project team asks community about quality of engagement to inform future phases of project decision making.

Objective: Decision makers receive and consider input from the public and stakeholders.

Metrics of success:

- Community members and stakeholders provide comments before decisions are made at a consistent rate over the life of the projects.
- Greater than 75% of participants expressed satisfaction with the quality and accessibility of information presented as measured by evaluation survey administered after public comment period.
- Greater than 75% of participants expressed satisfaction with their opportunity to be heard in the public input process as measured by evaluation survey administered after public comment period.
- Project staff report back on how public input was considered and how/if used.

Goal 4: Regional agency partners and stakeholders collaborate with project staff in the development of the projects to create robust and supported project alternatives. Multiple jurisdictions oversee the comprehensive transportation system in the Portland metro area. A well-functioning system relies on effective coordination between entities that manage local roads, regional roads and highways, transit services, land use planning and transportation funding. An effective toll system will require travelers to have choices to use the toll road or other options that may be provided by another transportation authority.

Objective: Create opportunities to collaborate with regional agency partners throughout project development to incorporate community values and concerns.

Metrics of success:

- Regular attendance and active engagement from partner agencies and stakeholders at and between technical working group meetings.
- Agency partner staff review, discuss and share input before moving ahead to next step in environmental review process.
- Regional partners provide opportunities for project briefings to facilitate dialog and partner input before key decision milestones.
- Project staff regularly report back on how partner input was considered and how/if used.

PRIMARY COMMUNICATIONS AND ENGAGEMENT TOOLS

Communications and engagement tools are divided into three categories in the table below:

- **Tools to share information:** Project staff deliver information to audience groups; one-way communication
- **Tools to collect and compile input:** Project staff deliver new information about project choices and ask for input from audience groups

- **Tools to bring people together:** Project staff host or engage in activities where there is multi-way communication and relationship building to promote engagement and advance project development.

At various points in the project, different tools will be used to align with the needs and desires of the audience and project staff. Elected officials may have a role in maintaining the transportation system and require a deeper level of understanding and engagement. A resident of who rarely drives on I-5 or I-205 may be satisfied with reading information and completing a survey, but not participating in public meetings or committees.

More detailed plans will be written before each stage of the technical analysis to identify the which tools will be used to ensure transparent delivery of information and public engagement that supports decision-making.

Primary outreach and communications tools by group, stakeholder or community.

Includes tools to bring people together, tools to collect and compile input and tools to share information

Group, Stakeholder or Community	Advisory committees	Community workshops/events	Equity discussion groups	Briefings & presentations	Open houses	Project email/VM	Online surveys	Stakeholder interviews	Printed materials (incl translation)	Website tools (i.e. videos)	Social media	Newsletters text for community orgs	Fairs, festivals, tabling	News release/e-news	Webinar
I-5 and I-205 drivers, commuters	X				X	X	X			X	X		X	X	X
Underserved and underrepresented communities (EJ, LEP, disabled, low income)	X	X	X	X			X	X	X			X	X	X	
Freight stakeholders	X			X						X	X			X	
Businesses, business orgs stakeholders	X			X			X		X	X	X			X	
Bicyclists and pedestrians	X	X		X	X		X			X	X		X		
Neighborhood coalitions		X		X	X		X			X		X			

Group, Stakeholder or Community	Advisory committees	Community workshops/events	Equity discussion groups	Briefings & presentations	Open houses	Project email/VM	Online surveys	Stakeholder interviews	Printed materials (incl translation)	Website tools (i.e. videos)	Social media	Newsletters text for community orgs	Fairs, festivals, tabling	News release/e-news	Webinar
Residents near project areas		X			X		X			X	X		X	X	
Transportation focused stakeholder groups	X			X						X	X			X	
SW Wash residents	X				X		X			X	X	X			X
School districts				X					X	X				X	
Environmental stakeholder organizations	X						X			X		X		X	
Transit users	X	X	X		X		X			X	X			X	
Tribal governments				X					X						
OR state legislators				X					X	X				X	
OR/WA federal delegation									X	X				X	
City/County elected (OR/WA)	X			X					X	X				X	
Media										X	X			X	
Regulatory, FHWA				X					X					X	
Rural, ag (outside project area)				X						X				X	

PUBLIC ENGAGEMENT SCHEDULE

See attached.

MESSAGING

Effective communications strategies are goal- and solution-focused. An agency should identify the main problems that its program is intended to solve and create a set of key messages framed

around these goals. These goals should be identified and communicated early and remain consistent over time.

MESSAGING FRAMEWORK	
Problem statement	We have a traffic congestion problem. And we need to fix it.
Mission and Vision <i>Drawn from HB 2017</i>	To preserve and modernize Oregon's transportation system and invest in the things Oregonians value: a vibrant economy with good jobs, choices in transportation, a healthy environment and safe communities.
Values	<ul style="list-style-type: none"> • Equitable • Transparent • Accountable and responsive • Shared mobility benefits
Audience <i>Who do we need to reach and hear from during this phase?</i>	<ul style="list-style-type: none"> • Influencers and community groups for historically underrepresented and underserved communities • Local elected officials and leaders in the Portland metro area, including Southwest Washington • Commuters through corridors where tolls are being considered • Communities along corridors where tolls are being considered • Freight operators and small businesses operating through and near potential tolled corridors
Voice	<ul style="list-style-type: none"> • Factual • Competent, knowledgeable • Relatable, friendly
What will be different as a result of our messaging?	<ul style="list-style-type: none"> • People understand the purpose behind tolling • People understand where we are in the decision-making process and how they can influence it • Community members share ideas on how to be equitable in implementing tolls

Key themes to convey

1. Tolls are one of many tools to fix our transportation challenges.
 - We have a congestion problem across our state and region, and it is costing us \$2 million each day as people and freight spend time in Portland area traffic.
 - Congestion in the Portland metro region requires a multifaceted set of solutions and tools.
 - The I-5 and I-205 Toll Projects have two purposes: generate revenue and manage congestion.

2. People who pay tolls will see direct benefits from their investment.
 - Other cities across the nation are using tolls to help manage congestion on their roadways for more reliable trips
 - It's all electric! No stopping at toll booths to pay.
 - Reduced greenhouse gas emissions, improved air quality and better fuel consumption results when traffic moves more freely and there is less stop and-go traffic.

3. Equity is central to how we plan this work.
 - When planning for tolls, we must account for the transportation needs of those historically underrepresented and underserved by the transportation system and they must share in the benefits of improved mobility.
 - We will intentionally seek out voices and communities that we have left out, supporting active roles from the beginning to help shape programs that lead to equitable outcomes.

4. We want to hear from all perspectives.
 - During our outreach in 2018, community members told us their priorities, and we are incorporating them as we move forward.

COMMUNICATIONS RISKS

Several communications risks have been identified by ODOT team, the consultant team and road pricing literature. These risks should be attended to during the next phase of analysis.

Risks	Strategies
Given ODOT's current work on multiple large transportation projects (e.g. Rose Quarter, I-205) residents and the media could confuse the Toll Projects with others.	Frame messaging to separate ODOT's different projects in the minds of the public while keeping communications consistent enough across different project teams, so communities understand that these projects are meant to work together to create a more reliable transportation system.
Political and stakeholder acceptance for tolling varies – some like it as a potential revenue source for capital projects, others like it as a demand management strategy. Research shows that pricing projects have a greater likelihood of success if decision makers are advocates.	Actively reach out to regional leaders so interests and viewpoints are well understood and provide them with information they can easily distribute to constituents.
Community members are sensitive to the risks presented by introducing new costs, but do not have good information about the cost of doing nothing.	Describe benefits of variable rate tolling in all outreach and available online.
Underserved communities will react to these projects in the context of an inequitable history of transportation decisions in the Portland metro area.	Actively engage historically underserved and underrepresented communities before decisions are made so that they may inform the outcome.
Keeping community engagement and communications focus too narrow. These projects affect the entire region and state with very diverse audiences.	Widen geographic reach to surrounding cities and liberally use translated materials. Develop communications/messages to address diverse audiences (i.e. Bike, rural, disabled, business, freight communities)
Potential for conflicting messages with other large projects in the region.	Regular coordination with other project owners to help communities envision future transportation with

Risks	Strategies
	all projects implemented. Requires strategic communication at a high level.
Specific concerns about diversion from adjacent neighborhoods, neighborhood associations and the bike community. Concerns will be in reference to conflicts and traffic on specific streets and intersections.	Create specific engagement plans to reach adjacent communities when mobility strategies are considered. Plan should include in-person events to receive input, presentations, digital information sharing and timely responses to questions.
Concerns about privacy, trust and confidence in implementation and government accountability, are likely to come up.	Address concerns through an open and honest process using clear communications. Prioritize project accountability, provide project timeline and process, encourage public to participate and engage. FAQs posted can help staff consistently answer questions and be posted on the website.
Low income communities feeling they are getting the brunt of the burden. People with lower incomes may devote a greater percentage of income to transportation and have less flexibility to alter schedules. ³	Actively engage and consult with these communities to gain their input on the engagement approach and before decisions are made and ensure they are educated about potential benefits. Include representatives from these communities on advisory committees. Close the feedback loop and make sure under-represented and under-served communities know how their feedback was used.
Metro’s 2020 ballot measure and pricing study and City of Portland’s Pricing Options for Equitable Mobility task force can take attention and time away from ODOT’s tolling engagement. The risk is two-fold: 1) Many of the region’s transportation leaders are dedicating their time to the local and regional effort and may lack additional capacity to actively engage with ODOT’s process. 2) Confusion could exist among community members about the differences between the efforts and why pricing would be considered for infrastructure improvements in addition to a tax or fee increase.	Clear communication about how this process and goals are separate and distinct from Metro’s and the City’s are needed. When forming a future advisory committee, ODOT project team will need to coordinate to prevent overlapping meetings. In addition, ODOT will need to design an advisory committee process that accommodates limited staff time.
Lack of technical information to respond to public questions and concerns. Members of the public are hungry for more specifics and certainty related to tolling proposals.	Communications will need to focus clearly on what we do know, when we will know more information and that ODOT shares some of the same concerns voiced by the public.

³ Oregon Department of Transportation (2018), “Portland Metro Area Value Pricing Feasibility Analysis: Title VI/Environmental Justice Engagement Summary Report.”