PORTLAND 2045

TRANSPORTATION SYSTEM PLAN

Scope of work

March 2025

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This is a public, "living document": the Scope of Work (SOW) may require adjustments throughout the life of the project based on dynamic findings, resources, and needs as the work progresses. The project team will reflect such changes within an updated version of this SOW document, noted by an updated "Draft version" date in the upper right corner of the Contents page. The project team's intentions with updates to the SOW will be to accomplish the purpose and legal compliance required of the work plan within resource constraints.

This version of this SOW (as of January 2025) reflects changes made in response to the SOW Assessment provided by the CFEC Program in collaboration with the ODOT Region 1 Planning office in November 2024. The assessment was designed to support compliance with recent updates to Transportation Planning Rules (TPSs) resulting from the CFEC rulemaking. This scope of work document is subject to iteration as new information comes available, which may include internal funding and project resourcing changes, CFEC rule refinements by DLCD, and Metro's RTFP updates. The cover and contents pages will indicate the draft version by month and by date, respectively, for comparison to previous versions.

Related, please also see the 2045 TSP Public and Agency Engagement Plan, available on the project website: 2045 Transportation System Plan (TSP) | Portland.gov

Questions: Please contact Francesca Jones, PBOT Senior City Planner/ 2045 TSP Project Manager at Francesca.jones@portlandoregon.gov or (503) 865-6214

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Introduction

The transportation system is essential to the functioning of the city and the well-being and prosperity of the community. It connects people and businesses to goods and services, and links them to the region, state, nation, and world. Although transportation is often measured in terms of mobility, it also creates access to opportunity. The way we build our city has an impact on our mobility and, by extension, our access to opportunity. What is access to opportunity? It's being able to get to childcare, reach your healthcare, get to school and higher education, perhaps one's spiritual or religious pursuits, economic opportunity (your job), maybe civic engagement, recreation, and more. Our mobility impacts our opportunities in life in a truly fundamental way. Our city's goals and policies also reflect the role of transportation planning in reducing carbon emissions and improving public health. And there's a role that streets can play in providing great civic and recreational spaces.

With robust and equitable community engagement and technical analysis, the City of Portland's TSP update process will help answer the questions:

- What do we want?
- What do we have now?
- What will we need in the future?
- How will we fund our projects?
- What should we do first?

Purpose

The project will update the City of Portland 2035 Transportation System Plan (TSP). The TSP must identify an integrated network of multi-modal transportation facilities and services adequate to support development of the City's existing and planned land uses over a twenty-year planning horizon. The Project must address transportation facility needs within City limits and the Urban Growth Boundary ("UGB").

Project Objectives

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

Supporting Outcomes

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

- Identify a safe, efficient, well-connected multi-modal transportation network that meets travel needs, based on existing and planned land uses;
- Identify appropriate Transportation Options (TO), Transportation System Management (TSM) and Transportation Demand Management (TDM) techniques;
- Identify how the investments and policies in the TSP support the path to reach regional GHG reduction target;
- Preserve the function and capacity of state transportation facilities;

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- Fill gaps and improve safety on pedestrian and bicycle routes to schools and key destinations;
- Ensure the TSP is consistent with applicable laws and adopted plans, including the Transportation Planning Rule, Oregon Transportation Plan, Oregon Modal Plans, Oregon Facility Plans, and City Plans, policies, and ordinances.

Regulatory compliance

The City of Portland Transportation System Plan (TSP) describes the existing transportation system and the projects, programs, and policies needed to meet a community's transportation needs and aspirations now and 20 years into the future. It serves as the transportation component of the City's 2035 Comprehensive Plan and as the transportation element of the Citywide Systems Plan, which fulfils the State's requirement of a Public Facilities Plan.

TSPs are required by the Transportation Planning Rule (TPR) as documented in Oregon Administrative Rule (OAR) 660-012-0100 for metropolitan areas. These rules provide detailed directions on how to prepare a TSP. A TSP must be locally adopted and acknowledged by the State of Oregon. Portland's TSP also needs to coordinate with Metro's Regional Transportation Plan as well as with the Oregon Transportation Plan (OTP) and its modal and topic plans.

Cities located within a metropolitan area must update their TSPs in conformance with the 2022 updates to the State Transportation Planning Rule (TPR) intended to reduce greenhouse gas emissions (see OAR 660-0012-0100). For all cities this mandate applies to, the State has arranged for the updates to occur sequentially, placing the City of Portland in line to begin a major TSP update in FY 2025. The City of Portland's Comprehensive Plan, with a horizon year of 2035, is not under state mandated update requirements and is not planned to have a major update soon. Transportation serves land use and requires growth management assumptions suitable for approximately a 20-year outlook. For this purpose, Metro's 2045 Regional Growth Management assumptions fulfill the adequate planning criteria.

History of updates

Portland's first TSP was adopted in 2002, with minor updates in 2007 and 2011, which updated master street plans and responded to the Portland-Milwaukie Light Rail Land Use Final Order. A major update is when the horizon year must be pushed out to keep up with a 20-year future outlook. The last time this was accomplished, it required recalibration based on updated growth management assumptions, updating goals and policies, refreshing criteria for prioritizing projects, re-running project evaluation, and updating the financial plan. This was accomplished in three stages between 2016 and 2018 as part of the update to the Comprehensive Plan, which was under the state-mandated Periodic Review process. Since then, a minor update went into effect in March 2020, primarily updating pedestrian classifications as recommended through PedPDX, the City's pedestrian master plan.

Portland will be undertaking a major TSP update for which preparations are under way for a funded scope of work to begin in 2025 for a planning horizon year of 2045.

New requirements

The Department of Land Conservation and Development (DLCD) updated Oregon Administration Rules (OAR) Chapter 660, Division 12, also known as the Transportation Planning Rule (TPR), in 2022. The rulemaking that updated the TPR is known as the Climate Friendly and Equitable Communities (CFEC) rulemaking. The purpose of the CFEC rulemaking was to better align the state's transportation planning

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with its long-term climate pollution goal. The rulemaking primarily focuses on Oregon's eight most populated areas, requiring changes in transportation planning to ensure Oregonians have more transportation options to reduce single-occupancy vehicle reliance.

The added requirements in metropolitan areas include:

1. Conducting multimodal inventories of the transportation system.
2. Prioritizing walking, biking, and transit investments to access destinations.
3. Planning transportation demand management programs and services.
4. Identifying investments to support greater development in transit corridors and downtowns.
5. Planning for and managing parking to meet demonstrated demand.
6. Identifying investments and planning for needed electric vehicle charging infrastructure.
7. Conducting equity analyses to understand impacts of the transportation system and identifying strategies to minimize impacts on underserved populations.
8. Selecting and using system performance measures that further community livability goals.
9. Regularly monitoring and reporting progress related to increasing equitable outcomes for underserved populations and decreasing climate pollution.

Strategic Plan integration

The 2019-2024 PBOT Strategic Plan guides PBOT's work around three core goals that are all closely aligned to help implement the TSP. The TSP needs to have all our PBOT functions in mind, even as its role is to serve land use to accommodate the expected population and job growth, which directly aligns with one of the three core goals in particular: Moving People and Goods, Providing transportation options for a growing city. In alignment with federal, state, regional, and local policies and regulations, the policies, projects, and programs in the TSP are already informed by Vision Zero, with a lens for dismantling structural racism and achieving transportation justice, while emphasizing necessary carbon emission reduction from the transportation sector -all of which are emphasized in the PBOT Strategic Plan. The 2045 TSP will attempt to work at every level to fundamentally integrate the Safe System Approach throughout our policies and priorities, while also working at every level to fundamentally address our dire asset management needs and critically missed maintenance considerations, as available data can support. In doing so, the TSP will more robustly serve all the goals of the bureau.

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Figure 1: PBOT's three core goals are Safety (Make Portland streets safe for everyone), Moving People and Goods (Provide transportation options for a growing city), and Asset Management (Deliver smart investments to maintain our transportation system).

Future Strategic Plans should then be much easier to develop after we have the 2045 TSP because they will be able to more directly serve as the near-term implementation strategy for our 3-core goal fully-integrated 20-year plan. Another way to put it is that a TSP that more fully integrates our Safe System Approach along with Asset Management and Maintenance, at all levels of our policies and projects and their prioritization, should be more implementable.

Planning phases and schedule

The 2045 TSP update will be accomplished in three primary phases: the Groundwork Phase, Development Phase, and Refinement Phase. The phases are designed so that data gathered in one phase informs the work of the subsequent stages to iteratively build a sound and supported plan. Defining the transition between the Groundwork and Development Phase is a Planning Commission/ City Council Committee affirmation of the vision, goals, evaluation criteria, performance measures, performance standards, existing and future conditions, revenue scenarios, and thresholds for the constrained/ unconstrained major projects lists. This crucial moment will allow the Development Phase work to continue, developing and evaluating solutions and developing a constrained project list, without continuing to move the target, so to speak. The final fourth phase supports post-plan adoption implementation to share the TSP updates impactfully and ensures their ongoing useability during subsequent operationalization of the plan.

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Groundwork Phase

Approx: January – December 2025

Goal: Assembling information about our transportation system and community feedback about system vision and goals to support and guide the collaboration we'll need to develop priorities for Portland's future.

Tasks:

- 1A: Public and Agency Engagement Plan
- 1B: Engagement Implementation through Phase I Engagement
- 2: Vision and Goals
- 3: Transportation options planning
- 4: Existing Conditions
- 5: Future Conditions
- 8: Groundwork phase of chapter updates

Development Phase

Approx: January – late 2026

Goal: Collaborating with technical experts, agency partners, and community to develop our 20-year priorities to meet agreed upon vision, goals, and evaluation and performance criteria.

Tasks:

- 1B: Engagement Implementation through Phase II Engagement
- 6: Developing and evaluating solutions
- 7: Preparing the funding program
- 8: Chapter updates

Refinement Phase

Approx: 2026 – late 2027

Goal: Engaging Portlanders to iterate improvements to their 2045 TSP.

Tasks:

- 1B: Engagement Implementation through Phase III Engagement
- 9: Legislative iteration + adoption

Implementation Phase

Timeframe: Post Plan Adoption

Goal: Making sure Portlanders and City staff alike have easy access to the content of the new TSP and know how it impacts them.

Task 10: Post-adoption implementation includes finalizing the document, updating the interactive TSP, conducting internal trainings, outreach to Development Review and other implementing staff, sharing public announcements, and learning from our process.

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Tasks of the planning process

Task 1A: Public and Agency Engagement Plan

A successful TSP is as unique as the community it describes: its policy framework, planning direction, and selected projects and programs reflect a community's goals and priorities to meet local multimodal transportation needs. Successful TSPs are developed in coordination with city, county, regional, and state agency partners, including transit providers serving the city. It is also important to involve organizations that support walking and bicycling, and other similar organizations. Successful TSPs also have extensive participation from a wide range of community members at varying levels of engagement.

Portland's TSP update will require a "Plan for the Plan" – one that describes the demographic and geographic audiences of Portland and how those who could potentially be impacted by decisions about the city's transportation system will be engaged in the decision-making process. The Public and Agency Engagement Plan will include a range and diversity of engagement opportunities, especially in support of garnering meaningful participation from marginalized communities and those who have been typically under-engaged and/or underserved. While this is aligned with our standard practice and core values as a city and bureau, the state requirements in this area have been substantially upgraded, so we will need to ensure our compliance with the letter as well as the spirit of those updates.

1.1 Draft initial Public and Agency Engagement Plan

Portland's TSP must prioritize community-led engagement and decision-making, with special emphasis placed on racial minorities, low-income people, and other underserved populations and feature a public involvement program that centers the voices of underserved populations at all levels of decision-making. This process should include an equity analysis, regular reporting on progress towards this goal, and multilingual and tailored outreach activities. It also includes gathering, collecting, and valuing quantitative and qualitative information (including lived experience) from the community on how the proposed change benefits or burdens underserved populations.

1.1.1 Demographic research and relevant geographic summary information

Identify areas with concentrations of underserved populations as provided in OAR 660-012-0125, identified using best available data with consistency among bureau and city practices. More details as outlined in "Community Profile" below:

Community Profile

a. Summary of current population locations and characteristics;
b. Summary of historic and projected population growth patterns;
c. Identification of geographic areas with disproportionate concentrations of underserved and transportation-disadvantaged populations;

Identification of existing activity centers and key destinations as defined in OAR 660-012-0360 and the types of trips associated with those locations.

1.1.1.1 Major equity analysis

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A major equity analysis is required as provided in OAR 660-012-0135 and is a method for Portland to determine whether its TSP improves outcomes for underserved populations. The analysis must include an inventory of how past transportation and land use decisions have harmed underserved populations (content of History of Racist Transportation Planning), identifying geographic areas with concentrations of underserved people, development of performance measures for key community outcomes, and analysis of proposed changes against these performance measures.

More details as outlined in "Equity Analysis" below:

Equity Analysis

As required by OAR-660-012-0135(4)(d) (Equity Analysis). Analyze the proposed changes for impacts and alignment with desired key community outcomes and key performance measures under OAR 660-012-0905 (Land Use and Transportation Performance Measures).

Draft one Title VI Equitable Outcomes Report that has several iterations/rounds of updates and includes content noted in 1.3B-1.5B as well as:

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

1.1.2 Branding strategy, webpage, contact

Font and standardized document templates for reports, fact sheets, and PowerPoints. Establish a central website and shared project email address.

1.1.3 Log

Establish public involvement tracking log of activities and feedback as well as a log of public comments, questions, and concerns received throughout the Project ("Comment Log"). City shall also include in the Comment Log public comments received on all Deliverables and how they were addressed.

1.2 Community interviews

Inform refinements to plan and incorporate how community-based organizations and other key communities of interest wish to participate. Identify specific areas of interest/ concern.

1.3 Gain refinement advice

Present the draft public and agency coordination plan to Comp Plan CIC for feedback; a required engagement step for this legislative process. Also consult with PBOT's

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Transportation Justice Steering Committee and/or public involvement and equity practitioners.

1.4 Establish Technical Advisory Committee (TAC)

Technical Advisory Committees focus on the technical analysis methodologies and results to maintain consistency between and within jurisdictions as well as maintain compliance with state and regional plans and regulations. Technical Advisory Committees members are typically identified and appointed by the city/county and include local agency staff such as planning directors, public works directors, traffic engineers, transit agency leaders, and other technical staff such as transportation analysts or modelers. Members might include representatives from ODOT, the county, adjacent cities, the Metropolitan Planning Organization (where applicable), transportation service providers, transportation options providers, emergency services providers, local public health agencies, utilities, schools, and liaisons from the planning commission or council/commission/court.

1.4.1 Roles, responsibilities, meetings SOW

1.5 Phase 1 Community Advisory Committee (CAC)

This nontechnical committee will focus on policies and outcomes of the technical analyses and provide valuable insight into community priorities. Nontechnical committee members are typically identified and appointed by the city/county and include members of the public such as: residents, property owners, business owners, representatives from underserved populations, advocacy groups, civic institutions, community centers, and senior centers. As with Technical Advisory Committees, it can also be helpful to include a liaison from the planning commission or council/commission/court.

Phase 1 includes a series of four every-other month meetings leading up to the moment of City Council Committee affirmation of the 2045 TSP vision, goals, eval criteria, performance measures and standards, existing and future conditions, revenue scenarios, and thresholds for constrained/ unconstrained projects lists.

1.5.1 Roles, responsibilities, meetings SOW, bylaws

1.5.2 Recruitment/ selection process

1.6 Phase 2 CAC

Phase 2 includes a series of three quarterly meetings including an immersive workshop to embrace the Development Phase work of developing and evaluating solutions and developing a financially constrained project list in preparation of a public review draft and Refinement Phase tasks.

1.6.1 Recruit/ replace open seats

If there is attrition of CAC members over the duration of work up to this point, it is possible for staff to consider replacing those vacant seats using Civic Life-approved procedures.

1.6.2 Training/ catch-up with new members

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If new CAC members are brought on to support the work in Phase 2, staff will take the time to ensure they are fully caught-up and prepared to contribute in their roles.

1.7 City Council/ Committee check-in

Midway through the 2045 TSP update process, staff will aim to bring a TAC/ CAC-supported vision, goals, eval criteria, performance measures and standards, existing and future conditions, revenue scenarios, and thresholds for constrained/ unconstrained projects lists forward for City Council Committee affirmation. This step marks the distinction between Phase 1 and Phase 2 of the work plan. The affirmation will allow the Development Phase to continue without continuing to "move the target".

Task 1B: Engagement Implementation

Engagement implementation includes efforts supporting public education about Portland's history of racist transportation planning, operating the Community Advisory Committee (CAC), and actions to take within each of the first three phases of the planning process.

1.1B History of Racism in Portland's Transportation System

The major equity analysis now required of TSPs, per Task 1.1.1.1A, must include an inventory of how past transportation and land use decisions have harmed underserved populations. PBOT currently has a 150-page draft History of Racism in Portland's Transportation System, which can be refined to serve this purpose while also inspiring equity and transportation justice-informed participation in the 2045 TSP.

1.1.1B Community + external SME review stipends

Community and external historian subject matter experts expect from modern best practice to be compensated for their time reviewing and contributing to historical papers. Broader expertise and perspectives provide PBOT with the opportunity to build trust in/ among impacted communities. The budget assumes ten $500 stipends for community and external subject matter expertise for review and contributions to the history of Portland's racist transportation planning and a collaboratively evaluated executive summary.

1.1.2B Video project

Storytelling through video is a meaningful medium to reach a broad audience and make a bigger impact. Community review participants will be invited to share personal photos and be interviewed about their own experiences and/ or knowledge of Portland's racist transportation history. These stories may be shared individually and as woven into an overall narrative video. The video will aim to inspire equity and transportation justice-informed participation in the 2045 TSP.

1.2B CAC attendance + support

There are an estimated 7 CAC meetings to be hosted throughout the planning process. TAC meetings, which will be held on alternating every-other month schedules with the CAC, are designed, in part, to inform preparation for CAC meetings. Staff will need to arrange meeting

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dates, times, locations, hybrid options, and other administrative tasks as well as prepare meeting processes, agendas, materials, activities, and presentations, take meeting notes, and publish materials to the website and in Interested Parties emails for adequate CAC member preparation, public notice, and public records availability and transparency, supporting informed engagement in the plan.

1.3B Phase I engagement

Phase I engagement includes assembling information about our transportation system and perspectives that shape our vision and goals to support and guide the collaboration we'll need to develop priorities for Portland's future. This work includes developing a summary report for the Phase I engagement including the elements within "Title VI and Equitable Outcomes Report" below:

Title VI and Equitable Outcomes Report

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

1.3.1B Online engagement

1.3.2B Equity-centered focus groups/ workshops

1.3.3B Language translation

1.3.4B Engagement incentives

1.3.5B Culturally relevant consultant support

1.3.6B Social media, radio advertising

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1.3.7B Youth outreach

1.4B Phase II engagement

Phase II engagement includes collaborating with technical experts, agency partners, and community to develop and evaluate solutions that meet the agreed upon vision, goals, and evaluation and performance criteria. This work includes developing a summary report for the Phase II engagement including the elements within "Title VI and Equitable Outcomes Report" below:

Title VI and Equitable Outcomes Report

Summary of all community engagement activities conducted as part of the Phase II engagement including committee meetings, public meetings and open houses, small group meetings or briefings, partner databases or email lists, comment log summaries covering key issues, and project webpage analytics;

a. Summary of how members of underserved populations were engaged as part of the project in Phase II in the development of community outcomes or performance measures;
b. Analysis of qualitative and quantitative information collected as part of the Project in Phase II, including lived experience, from the community on how the proposed change benefits or burdens underserved populations;
c. Summary of key transportation improvements needed to achieve an equitable transportation system and summary of unresolved issues;
d. Review of transportation performance measures, including those required in OAR 660-012-0905, for progress toward key community outcomes;
e. Summary of how preferred transportation solutions identified as part of the Project in Phase II work toward key community outcomes;
f. Summary of strategies implemented over the course of Phase II of the Project and in its identified solutions to create greater equity or minimize negative consequences;
g. Summary of how the Project considered current or historic transportation investments within the planning area that have impacted historically underserved populations within Phase II; and
h. Analysis of how the changes and transportation solutions identified in Phase II of the Project may impact underserved populations and may align with desired key community outcomes and performance measures under OAR 660-012-0905.

1.4.1B Online engagement

1.4.2B Neighborhood, focus group, workshop engagement

1.5B Phase III engagement

Phase III will engage Portlanders to iterate improvements to their 2045 TSP. This work includes developing a summary report for the Phase III engagement including the elements within "Title VI and Equitable Outcomes Report" below:

Title VI and Equitable Outcomes Report

Summary of all community engagement activities conducted as part of the Phase III engagement including committee meetings, public meetings and open houses, small group meetings or

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briefings, partner databases or email lists, comment log summaries covering key issues, and project webpage analytics;

a. Summary of how members of underserved populations were engaged as part of the project in Phase III in the development of community outcomes or performance measures;
b. Analysis of qualitative and quantitative information collected as part of the Project in Phase III, including lived experience, from the community on how the proposed change benefits or burdens underserved populations;
c. Summary of key transportation improvements needed to achieve an equitable transportation system and summary of unresolved issues;
d. Review of transportation performance measures, including those required in OAR 660-012-0905, for progress toward key community outcomes;
e. Summary of how preferred transportation solutions identified as part of the Project in Phase III work toward key community outcomes;
f. Summary of strategies implemented over the course of Phase III of the Project and in its identified solutions to create greater equity or minimize negative consequences;
g. Summary of how the Project considered current or historic transportation investments within the planning area that have impacted historically underserved populations within Phase III; and
h. Analysis of how the changes and transportation solutions identified in Phase III of the Project may impact underserved populations and may align with desired key community outcomes and performance measures under OAR 660-012-0905.

1.5.1B Online engagement

1.5.2B Neighborhood, focus group, workshop engagement

1.5.3B Printing + distributing review copies

1.5.4B Final Title VI and Equitable Outcomes Report

A combined narrative from Phases I-III.

Task 2: Vision and Goals

How a jurisdiction defines and addresses transportation system needs through planning should reflect community priorities. These priorities are typically reflected in transportation goals, which in turn, are reflected in a unifying vision for the transportation system. Goals provide direction for where a community would like to go. They provide a framework for shaping transportation policies and are the basis for the formulation of performance measures and targets. Using goals as a framework helps define gaps and deficiencies as well as evaluation criteria to determine which transportation projects, programs, pilot projects, and refinement studies best meet community needs.

The Draft TSP vision, goals, and evaluation criteria will be used later in, among other areas, setting policy, selecting preferred alternatives, project prioritization and decision-making. The goals and evaluation criteria must be structured in a way that informs relevant, strategic, actionable policies in support of Statewide Planning Goal 12, “to provide and encourage a safe, convenient, and economical transportation system.”

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Goals should:

- Articulate community transportation priorities
- Define how the transportation system should ideally function
- Form the basis for developing criteria to evaluate and select preferred infrastructure improvements
- Be the basis for comprehensive plan transportation policy statements
- Encompass "community outcomes" per equity analysis

Portland's 2045 TSP will need to consider the following in the new or updated TSP planning vision and goals:

- Portland's existing 2035 TSP and Comprehensive Plan
- The State's 2022 updates to the Transportation Planning Rule
- Metro's 2023 Regional Transportation Plan
- Transportation and land use plans adopted by Portland City Council since the last TSP update in 2020
- New transportation-related policy objectives, modeling, management, and design techniques and approaches that were not prevalent or known during the last TSP planning process. These policies could reflect current trends and/or current best practices within one or more modes
- PBOT's Strategic Plan
- Portland's June 2023 Transportation Decarbonization Strategies (Resolution No. 37620)
- City's July 2022 Climate Emergency Workplan (Resolution No. 37585)

2.1 Draft initial project goals and vision statement, informed by analysis of above sources (pair with Task 3.1 Plans + policy review)

Jurisdiction staff formulate and articulate project vision and goals at the very start of a TSP project. The goals should reflect the character and vision of the community and be consistent with other comprehensive plan policies as well as the TPR and regional, state, and federal plans and policies.

2.2 Evaluation and prioritization criteria

Although often related through the overall TSP vision, evaluation criteria, performance measures, and performance standards/targets are used differently throughout the development and implementation of the TSP. Evaluation criteria are used to compare transportation system alternatives and to prioritize projects that are included in a TSP. They can be qualitative and/or quantitative and should align with the vision and goals identified through the TSP development process.

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

i. Meeting greenhouse gas reduction targets provided in OAR 660-044-0020 or OAR 660-044-0025; (B) Supporting compact, pedestrian-friendly patterns of development in urban areas, particularly in climate-friendly areas; (C) Reducing single-occupant vehicle

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travel as a share of overall travel; and (D) Meeting performance targets set as provided in OAR 660-012-0910.

ii. Support, if within an MPO, the region's preferred scenario/STS path for meeting the state-set GHG reduction targets (OAR-660-044).
iii. Improving equitable outcomes for underserved populations identified in OAR 660-012-0125.
iv. Improving safety, particularly reducing or eliminating fatalities and serious injuries.
v. Improving access for people with disabilities.
vi. Improving access to key destinations as outlined in OAR 660-012-0360.
vii. Completing the multimodal transportation network
viii. Supporting the local, regional, and state economies; and
ix. Other factors determined in the community.

2.3 Performance tracking

Performance measures are used to evaluate the performance of the transportation system over time. "Performance tracking" is the establishment of baseline measures. PBOT will coordinate with Metro regarding consideration of performance measures and targets established in the Metro Climate Smart Strategy. While cities and counties within Metro do not need to adopt the regional performance measures or targets in their local TSP, the TSP should be designed to achieve the targets. The TSP relies on those targets in a number of other Rules, including: 0145 (Transportation Options Planning), 0155 (Prioritization Framework), 0160 (Reducing Vehicle Miles Traveled), 0170 (Unconstrained Project List), 0180 (Financially-Constrained Project List), 0215 (Transportation Performance Standards), and 0820 (Street and Highway Projects).

2.4 Performance standards

Performance targets are set for each performance measure, for each required reporting year. Performance standards/targets are used during the TSP development process to identify gaps and deficiencies in the transportation system. The TSP development process can modify adopted performance standards/targets.

After the TSP is adopted, the performance standards/targets can be used as standards to evaluate plan and land use amendments, although not all performance standards/targets will apply to all situations. Performance standards will serve as an evaluation framework to track and report on progress. See OAR 660-012-0215 Transportation Performance Standards.

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

At least 1 performance standard must be adopted that supports increasing transportation options and avoiding principal reliance on the automobile. The transportation performance

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standards must evaluate at least 2 of the following objectives for the transportation system, for any or all modes of transportation:

- Reducing climate pollution
- Equity
- Safety
- Network connectivity
- Accessibility
- Efficiency
- Reliability
- Mobility

2.5 Refine vision and goals

Those who participate in this process—in particular, advisory committee members—further refine vision and goals as one of the initial tasks of the planning process. OAR 660-012-0135 requires a city or county in a metropolitan area to engage with members of underserved populations, as identified in OAR 660-012-0125, to develop key community outcomes as part of the development of vision and goals.

Task 3: Transportation Options Planning

Portland's TSP must now include a "transportation options" element that discourages the use of single-occupancy vehicles, as provided in OAR 660-012-0145. This element must include education and other transportation demand management programs, a trip reduction strategy for large employers, and coordination with transportation options providers.

3.1 Existing conditions inventory

The existing conditions will include documentation of current programming within the City/ bureau as well as externally.

3.1.1 Internal programming audit

Articulate City/ PBOT programs supporting transportation demand management.

3.1.2 External programming audit

Cities and counties shall coordinate with transportation options providers, public transportation service providers, state agencies, and other cities and counties to identify existing transportation options and transportation demand management programs, services, and projects. These shall include, but are not limited to:

(a) Education, encouragement, and other transportation demand management programs and services that focus on forms of transportation other than single occupancy vehicles;

(b) Transportation demand management programs and policies that discourage the use of single-occupancy vehicles; and

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(c) Transportation options needs of underserved populations.

3.3 Establish future demand management needs

Cities and counties shall coordinate with transportation options providers, public transportation service providers, and other cities and counties to identify future transportation demand management needs. These shall include, but are not limited to:

(a) Commute trip reduction consultation and promotion of programs such as the provision of transit passes and parking cash-out;

(b) Physical improvements such as carpool parking spaces and park and ride locations; and

(c) Regional solutions for intercity travel.

3.4 Trip reduction strategy

Articulate the City's trip reduction strategy for large employers.

Task 4: Existing Conditions

A thorough review and assessment of the existing transportation system is typically done early in the TSP planning process and includes a review of plans and policies, system facilities, and needs.

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

System inventories will be used to establish a baseline for comparison with future needs. The inventories must be based on geospatial data and augmented with visual and descriptive data, as available.

4.1 Plans and policy review (related to Task 2.1 Draft initial vision and goals)

A critical early step in the development or update of a TSP is to conduct a review of all state, regional, and local planning documents relevant to the planning area. This review will need to explain how relevant content might influence the outcomes of the planning process and where the jurisdiction may need to modify existing policy or ordinances based on the recommendations of the new or updated TSP. Jurisdictions should also briefly explain the role of each plan reviewed and the date it was adopted or last revised. This review will give context on how each plan is related to transportation system planning and how its content compares to the unique project goals of the transportation system planning process.

4.2 Existing conditions (bicycle, pedestrian, roadway, transit, truck freight, other solutions)

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The inventory provides a current snapshot of the system and serves as the basis for identifying future transportation improvements. OAR 660-012-0150 identifies the requirements for cities and counties within metropolitan areas.

This task includes accomplishing the mode-specific components of Rules 0500 (Pedestrian System Planning), 0600 (Bicycle System Planning), 0700 (Public Transportation System Planning) and 0800 (Street and Highway System Planning), including: inventory requirements, gaps, prioritization factors, and safety analysis. Solutions analysis should be informed by OAR 660-022-0155 (Prioritization Framework).

4.3 Existing needs determination (bicycle, pedestrian, roadway, transit, truck freight, other solutions)

Once the transportation system inventory is completed, the next step in the planning process is to analyze the existing inventory and determine needs. The analysis provides a snapshot of the existing transportation system to determine where the system is currently deficient or is insufficient to serve future needs.

Deficiencies are defined as the difference between the current transportation system and adopted standards or targets and may reflect performance measures and evaluation criteria developed in Step 2: Vision and Goals. Deficiencies are capacity or design constraints that limit but do not prohibit the ability to travel by a given mode. Gaps are defined as missing links in the transportation system for any mode. Gaps either prohibit travel by a particular mode or make it functionally unsafe. Together, gaps and deficiencies are defined as needs.

See OAR 660-012-0500 through OAR 660-012-0800 for additional rules defining needs/ deficiencies that must be documented. Example from Pedestrian Rules OAR 660-0120500: Cities and counties shall identify gaps and deficiencies in the pedestrian system by comparing the complete pedestrian system plan with the pedestrian system inventory developed under OAR 660-012-0505. Cities or counties must include any part of the complete pedestrian system not presently built to the standard in the complete pedestrian system plan as a gap or deficiency.

4.4 Funding Review

It is critical to understand the financial limitations of the study area early in the planning process before the development and assessment of transportation projects. The funding review provides a snapshot of existing revenue and expenditures as well as a preliminary estimate of future funding available to implement projects included in the TSP. The preliminary financial review should take place before assessing future transportation system needs and developing solutions to address those needs. The funding review can then be the foundation for a jurisdiction's Capital Improvement Plan.

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

- The identification of all funding sources that the city or county expects to use over the planning period to operate, maintain, or construct the transportation system. These sources include, but are not limited to:
    - Local, regional, state, and federal funding sources; and
    - Sources expected from any transportation facility or service operator within the planning area, such as transit providers.
- For each funding source identified, the following will be documented:
    - The expected funding over the remainder of the planning period;
    - The purpose of the source of funding and any key limitations on the use of the funding; and
    - Reasons that the funding source is expected to be available during the planning period. These reasons may include, but are not limited to, that the funding is provided by:
        - Transportation facility pricing revenues, including parking revenues;
        - Tax or bond revenues;
        - Fees, charges, or other local revenues;
        - Grants given using a formula or other regular disbursement;
        - Regional funds from a Metropolitan Planning Organization; or
        - A source that previously provided funds to the city or county and can reasonably expected to provide more in the future.

  The city or county shall use the list of funding sources to determine the amount of funding expected to be available to develop transportation projects over the planning period. Funding to maintain and operate the transportation system or used for purposes other than development of transportation projects, shall be excluded. The transportation system plan shall clearly describe the amounts that are included and excluded.

The funding review will follow rules 0170 (Unconstrained Project List) and 0180 (Financially-Constrained Project List) and required process. Integration of other agency projects will occur at the point of consideration under initial application of prioritization criteria, per goals, as developed.

Task 5: Future Conditions

Analyze multimodal deficiencies in the transportation infrastructure. Combine information from the transportation inventory needs analysis through the lens of OAR 660-012-0215 with information about potential future transportation improvements.

5.1 Performance standards selection

Identify at least two metrics as designated in OAR 660-012-0215 to assess transportation conditions.

5.2 Deficiencies identification

Using the results of the existing conditions element, determine the location of existing transportation system deficiencies as they relate to the two metrics selected in the previous step.

5.3 Improvements identification

Determine which deficiencies defined in the previous step will be addressed by projects proposed to be included in the 2045 Transportation System Plan and which deficiencies are not addressed by any of these projects. Denote for each potential project the deficiencies it addresses and whether any other projects would address that deficiency in its absence.

Task 6: Developing and evaluating solutions

The product of this analysis is a technical memorandum that evaluates the solutions developed to address the transportation system needs and identifies the preferred list of solutions for inclusion in the TSP. Included should be a written description of the needs to be addressed; solutions, evaluation process, potential impacts, and cost estimates for the proposed improvements (projects); maps depicting the locations of projects; and a table comparing the solutions against the evaluation criteria. Solutions with obvious environmental flaws should be rejected or revised to eliminate or minimize the environmental concerns.

The TSP should include a statement that describes the purpose and need for each planned project to ensure that future project development is consistent with the original intent. Solutions should also include opportunities to improve the efficiency of the existing transportation system through strategies such as Transportation System Management and Operations, land use, and access management. Finally, the proposed solutions should align with current and likely future funding sources to ensure that they are feasible for implementation within the planning horizon.

Solutions analysis will be informed by OAR 660-022-0155 (Prioritization Framework).

6.1 Developing solutions (bicycle, pedestrian, roadway, transit, truck freight, other solutions)

The following components are to be evaluated as part of the system of solutions:

- Transportation System Management measures
- Transportation Demand Management measures
- Improvements to existing facilities or services
- New facilities and services, including different modes or combinations of modes that could reasonably meet identified transportation needs
- Local governments in Metropolitan Planning Organization areas with populations larger than one million shall evaluate alternative land use designations, densities, and design standards to meet local and regional transportation needs

6.2 Evaluating proposed solutions (bicycle, pedestrian, roadway, transit, truck freight, other solutions)

Evaluation of the solutions should begin with a baseline condition that illustrates the impact of not changing the current transportation system beyond constructing improvements for which funding is already committed. The “no build” baseline condition is the condition against which the proposed solutions are compared and an important tool for meaningful transportation decision-making.

660-012-0155
Prioritization Framework

(1) Cities, counties, Metro, and state agencies shall use the framework in this rule for decision making regarding prioritization of transportation facilities and services. Cities, counties, Metro, and state agencies shall consider the following:

(a) Prioritization factors as provided in section (3);

(b) Classification of facilities or segments as provided in section (4);

(c) The planned land use context as provided in section (5); and

(d) Expected primary users as provided in section (6).

(2) Cities, counties, Metro, and state agencies may use local values determined through engagement as provided in OAR 660-012-0120 to weight various prioritized factors when making prioritization decisions as provided in this division.

(3) Cities, counties, Metro, and state agencies shall prioritize transportation facilities and services based on the following factors:

(a) Meeting greenhouse gas reduction targets, including:

(A) Reducing per-capita vehicle miles traveled to meet greenhouse gas reduction targets provided in OAR 660-044-0020 or OAR 660-044-0025;

(B) Supporting compact, pedestrian-friendly patterns of development in urban areas, particularly in climate-friendly areas;

(C) Reducing single-occupant vehicle travel as a share of overall travel; and

(D) Meeting performance targets set as provided in OAR 660-012-0910.

(b) Improving equitable outcomes for underserved populations identified in OAR 660-012-0125;

(c) Improving safety, particularly reducing or eliminating fatalities and serious injuries;

(d) Improving access for people with disabilities;

(e) Improving access to destinations, particularly key destinations identified as provided in OAR 660-012-0360;

(f) Completing the multimodal transportation network, including filling gaps and making connections;

(g) Supporting the economies of the community, region, and state; and

(h) Other factors determined in the community.

(4) Cities, counties, Metro, and state agencies shall consider the functional classification of planned or existing transportation facilities or segments when making decisions about appropriate transportation facilities and services. Cities, counties, Metro, and state agencies may establish mode-specific functional classifications for each mode on any facility or segment that they own and operate.

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(5) Cities, counties, Metro, and state agencies shall consider the planned land use context around an existing or planned transportation facility or segment when making decisions about appropriate transportation facilities and services.

(a) Within climate-friendly areas, cities, counties, Metro, and state agencies shall prioritize pedestrian, bicycle, and public transportation facilities and services. Cities, counties, Metro, and state agencies shall ensure facilities are planned for these modes to experience safe, low stress, and comfortable travel for people of all ages and abilities within climate-friendly areas with minimal interference from motor vehicle traffic.

(b) In areas with concentrations of underserved populations, cities, counties, Metro, and state agencies shall prioritize transportation projects addressing historic and current marginalization. Proposed transportation projects in these areas must work to rectify previous harms and prevent future harms from occurring. These areas may have suffered from disinvestment or harmful investments, including transportation system investments. Such harms include but are not limited to displacement, increased exposure to pollutants, destruction and division of neighborhoods, heat islands, and unsafe conditions for pedestrians, cyclists, transit users, and others.

(6) Cities, counties, Metro, and state agencies shall consider the expected primary users of an existing or planned transportation facility or segment when making decisions about appropriate transportation facilities and services. In particular:

(a) In areas near schools or other locations with expected concentrations of children, or areas with expected concentrations of older people or people with disabilities, cities, counties, Metro, and state agencies must prioritize safe, protected, and continuous pedestrian and bicycle networks connecting to key destinations, including transit stops.

(b) In industrial areas, along routes accessing key freight terminals, and other areas where accommodations for freight are needed, cities, counties, Metro, and state agencies must consider the needs of freight users. Pedestrian, bicycle, and public transportation system connections must be provided in industrial areas at a level that provides safe access for workers.

6.3 Selecting and prioritizing (bicycle, pedestrian, roadway, transit, truck freight, other solutions)

The preferred list of solutions forms the essence of the TSP. The TSP will identify needs, modes, functions, and general locations of planned improvements. Prioritization of projects relative to the financial constraint developed through Task 6 will be done through application of performance standards allowed under OAR -0210 and the requirements of the updated regional Mobility policy. Actual alignments will be determined through the project development or permit approval process or subsequent facility planning to respond to topographical or environmental constraints or to meet urban design goals.

As feasible, Portland should combine overlapping single-mode projects into multimodal projects. The unconstrained project list must be prioritized, either project-by-project or in tiers. This ranking must be based on vehicle miles travelled impact, burden on underserved populations, and progress toward other adopted performance measures.

This task implements application of Rule 0155 (Prioritization Framework) and modal list prioritization required in Rule 0170 (Unconstrained Project List). While useful to ensure future projects will align with performance standards in TSP development, application of Rule 0215 (Transportation Performance Standards) performance standards is not required at the TSP level.

Task 7: Prepare the funding program

The transportation funding program identifies which projects/programs developed in the TSP process will be funded based on existing and anticipated revenue sources and the projected costs of proposed projects and programs. Funding projections as provided in OAR 660-012-0115. Portland must include funding projections in its TSP. These projections need to include a list of funding sources and the amount of funding available. The list of sources also needs to include the reason the funding is expected to be available, such as pricing revenues, parking revenues, tax revenues, fees, grants, etc. The list must exclude funding used for purposes other than development of transportation projects (such as funds set aside for operations and maintenance).

The funding review will follow rules 0170 (Unconstrained Project List) and 0180 (Financially-Constrained Project List) and required process. Integration of other agency projects will occur at the point of consideration under initial application of prioritization criteria, per goals, as developed.

Results of the project prioritization process for the financially constrained project list will indicate whether Task 11 will be contingently necessary or not. Specifically, if projects required for Enhanced Project Review per OAR 660-012-0830 pass the criteria for prioritization for the initial draft financially constrained project list, then Task 11 will be required.

660-012-0170
Unconstrained Project List

(1) Cities and counties shall create a combined project list by combining:

(a) The pedestrian project list developed as provided in OAR 660-012-0520;

(b) The bicycle project list developed as provided in OAR 660-012-0620;

(c) The public transportation project list developed as provided in OAR 660-012-0720; and

(d) The streets and highways project list developed as provided in OAR 660-012-0820.

(2) Cities and counties shall, to the extent practicable, combine proposed projects from multiple single-mode lists into a single multimodal project on the combined project list.

(3) Cities and counties shall develop an unconstrained project list by prioritizing the combined project list, including multimodal projects. Cities and counties need not include every project in the combined project list on the unconstrained project list. There is no limit to the number of projects that may be included on the unconstrained project list.

(4) Cities and counties shall develop a method of prioritizing projects on the unconstrained project list. Projects on the unconstrained project list may be ranked individually or in tiers. Unconstrained project lists ranked in tiers shall have enough tiers to clearly be able to determine the relative ranking of projects when making decisions. Cities and counties shall describe the method used to prioritize the

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unconstrained project list in the transportation system plan. Cities and counties must emphasize the following requirements when developing a method of prioritizing projects on the unconstrained project list:

(a) The project will help reduce vehicle miles traveled;

(b) The project burdens underserved populations less than and benefit as much as the city or county population as a whole; and

(c) The project will help achieve the performance targets set as provided in OAR 660-012-0910.

(5) Cities and counties shall develop planning-level cost estimates for the top ranked projects on the prioritized unconstrained project list as provided in section (4). The city or county shall make estimates for as many projects as the city or county reasonably believes could be funded in the planning period. The city or county need not make cost estimates for every project on the unconstrained project list.

660-012-0180
Financially-Constrained Project List

(1) Cities and counties shall include a financially-constrained project list in a transportation system plan. Cities and counties shall use the prioritized unconstrained project list developed as provided in OAR 660-012-0170 and the amount of funding available developed as provided in OAR 660-012-0115 to produce the financially-constrained project list.

(2) Cities, counties, Metro, and the state may only develop, fund, and construct projects on the financially-constrained project list.

(a) Cities and counties may only submit projects on the financially-constrained project list in their transportation system plan to the financially-constrained list of a federally-required regional transportation plan.

(b) Cities and counties may develop, fund, or construct a project on the unconstrained project list if:

(A) The project is required as a condition of land development;

(B) A property owner is providing financial or material contributions to the project; and

(C) The project would not require review as provided in OAR 660-012-0830.

(3) Cities and counties shall create a financially-constrained project list using the top available projects on the prioritized unconstrained project list and the planning-level cost estimates developed as provided in OAR 660-012-0170. The sum of the planning-level cost estimates for projects placed on the financially-constrained project list shall not exceed 125 percent of the funding available as identified in OAR 660-012-0115. Cities and counties shall select projects such that the resulting financially-constrained list would:

(a) Reduce per capita vehicle miles traveled, as provided in OAR 660-012-0160;

(b) Burden underserved populations less than and benefit underserved populations as much or more as the city or county population as a whole; and

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(c) Make significant progress towards meeting the performance targets set for each performance measure as provided in OAR 660-012-0910 or OAR 660-044-0110.

(4) If the list of projects cannot meet each test in section (3), the city or county must adjust the project list to find the highest-ranking set of projects that can meet the criteria in section (3). This is the financially-constrained project list.

(5) Cities or counties making a major or minor amendment to the transportation system plan as provided in OAR 660-012-0105 which includes an update to any project list, shall update the financially-constrained project list as provided in this rule.

(6) Cities and counties shall prioritize the implementation of projects from the financially-constrained project list for their ability to reduce climate pollution and improve equitable outcomes using the criteria provided in section (3) of this rule.

7.1 Identifying potential funding sources

This assessment involves identification of current and historical transportation revenue sources, current and historical transportation expenditures, and a projection of 20-year funding and expenditure forecasts.

7.2 Develop revenue scenarios

7.2.1 Review scenarios with Capital Investment Committee

7.2.2 Set financial scenario for TSP: thresholds for constrained/ unconstrained

7.3 Development of a financially constrained project list

In recognition that the planning-level cost estimates from the preferred list of transportation projects/programs will likely exceed the projected 20-year funding forecast, a revised project list shall be developed that more closely considers projected financial limitations.

Criteria for prioritization of modal lists follows Rules 0170 (Unconstrained Project List) and 0180 (Financially-Constrained Project List). The unconstrained project list will be tiered. Integration of other agency projects will occur at the point of consideration under initial application of prioritization criteria, per goals, as developed.

The constrained project list must not exceed 125% of reasonably likely funding per OAR 660-012-0115 (Funding Projections).

7.3.1 Standardize and update project cost estimates

Underestimating costs creates problems down the line. All potential projects for consideration of inclusion in the TSP will need to undergo standard determined cost escalation factors to meet future planning level cost projections.

7.3.1.1 Lower SE Rising and West Portland Town Center Plan inputs

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Accomplish planning level estimates for new and rescoped West Portland Town Center transportation project recommendations as well as tier 2-3 projects from Lower SE Rising plan.

7.3.2 Enhanced Review of Projects triggering OAR 660-012-0830

After review of Rule 0830 requirements in consultation with DLCD, ODOT Region 1, and the Port of Portland, there are approximately five projects that may increase capacity and therefore trigger enhanced review procedures per Rule 0830, if any of them end up on the initial Financially Constrained project list after applying required rules and procedures for project prioritization.

Projects that qualify for enhanced review (exceptions and exemptions apply):

- Include a new or extended multi-lane road
- Include a new or expanded interchange
- Increase the number of general-purpose travel lanes, or
- Add an auxiliary lane of one-half mile or more.

Task 8: Chapter updates

In addition to determining existing conditions, examining present policy context, and processing needs and financial constraints, attention will need to be given to refresh the policies, programs, classifications, and implementation chapters of the TSP.

8.1 TSP Policies chapter review inreach + findings memo

Review past TSPs to determine the TSP update that introduced each policy. Analyze the OARs and RTFP to determine any applicable requirements for policies.

Identify PBOT staff who use or have used the policies and staff who have played a role in crafting the policies in the past. Ask current or former policy users how they use or used the policies and whether there are any methods/processes they use that rely on the policies. Ask policy creators why each policy was created and any downsides of changing or removing it.

This task includes reviewing and updating sub policies also found in the following additional sections of the TSP:

A. Pattern Area policies
B. Community Involvement policies

This process will result in a brief memo discussing history and use of TSP-specific policies. This memo will be used to inform the TAC and CAC in considerations of existing policy effectiveness. Potential policy revisions will be considered through this history and use context as well as the vision, goals, performance measures and standards.

8.2 Programs update

The 2035 TSP identifies ten Programs that each have their own priority lists and nuanced prioritization criteria, developed in planning processes for program implementation (including from modal plans). The implementation of these programs over time may inform consideration

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of title and description refinements, and/or program consolidation to best reflect how program funds are combined most effectively in practice. Potential program revisions will be considered additionally through the context of the TSP vision, goals, prioritization criteria, performance measures and standards, and financial plan.

This task will result in a memo for TAC and CAC consideration of refinements to PBOT programs identified in the TSP.

8.3 Classifications chapter update

PBOT shall evaluate and update its existing TSP classifications, maps, and descriptions. The update should include recommendations from Council-adopted plans.

8.3.1 Compile recommended classification changes from recently completed plans
Document plans updated since TSP classifications last update *(exists already).* Compile and map changes from list of plans (mapping support needed), documenting change origin and reason for each classification change. Document and propose reconciliation for any conflicts between classification changes.

Report findings of classification "clean up" update to CAC/TAC. **Key question/conversation:** "Here are our recommended updates to the TSP classifications. Here's where those updates are coming from and why they exist. Here are a few where there are conflicts and we have recommendations for their resolution. How do you think we should resolve these conflicts?"

8.3.2 Classifications audit
Form internal working group of classification users and potential users to ask and answer following questions:

- What is the purpose of classifications?
- Are classifications having the desired effect?
    - What is the desired effect? Can we assess this?
- How could classifications be more effective?

8.3.3 Classification changes research + proposal
Research best practices in response to deficiencies identified in classifications audit to enhanced the effectiveness of and our ability to assess classifications. Document the overarching purpose in amending classifications as well as the classifications to be amended and eliminated.

- Engage with the City of Gresham regarding Pleasant Valley and Kelly Creek Trail east and west

8.3.3.1 Street Design Classifications
Street Design Classifications will likely need special attention. All the other classification families have a modal plan that informs their classifications. This is something of an opportunity to create more consistency in the understanding and use of these classifications as well as do a bit of auto modal planning.

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- Consider integration of low car street/ low car district language and approaches related to requirement of OAR 660-012-0330

8.3.3.2 Emergency response classifications
Coordinate with Portland Fire and Rescue to update the classifications and reaffirm Emergency Response classification implications.

8.4 Implementation chapter update
PBOT shall update the TSP Implementation Chapter to provide better direction about planning studies and projects that are needed during the 20-year planning horizon. Analysis should consider where and when PBOT has developed Area Plans, Master Street Plans, and Streetscape Plans, and geographic, modal and equity gaps that may exist in planned and future planned work.

8.4.1 Chapter 4 Master Street Plans update
Compile list of Master Street Plans updated since last TSP update. Map list of plans for inclusion in TSP.

8.4.2 Chapter 5 Modal Plans update
Compile list of Modal Plans updated since last TSP update. Draft a short description of listed plans for inclusion in the TSP.

8.4.3 Chapter 6 Implementation Strategies update

Review listed plans and studies and determine: which have been completed and should be removed; which are "stale" and understand whether or not they should be removed.

8.4.3.1 Chapter 6 relationship to Planning Division workplan
Assemble an internal working group to explore the relationship of the Implementation Strategies chapter and Planning Division's work plan and if there are any opportunities being missed or any risks to business as usual. Make recommendation for changing Chapter 6 accordingly.

8.5 Additional outreach and engagement

Additional outreach and engagement will be necessary for accomplishing all tasks within the Programs Update.

Task 9: Legislative iteration + adoption

Preparation of the plan for adoption requires iteration for feedback and refinement. In addition to engagement by advisory bodies to the plan, as well as specific community engagement activities to inform development of discreet elements and considerations along the way, full drafts of the plan will be used to solicit refinement.

9.1 Initial staff/ TAC draft

Informed by previous engagement, staff shall prepare an initial draft for review by the project team in consultation with subject matter experts, for a review and comment period by the TAC.

9.2 CAC draft

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Informed by and edited to reflect TAC feedback, the CAC draft shall be made available to CAC members for review and comment (and for general access by the public for public comments accepted during CAC meetings and/or by email to the project team during the duration of CAC review).

9.3 Internal draft (CAC + TAC)

Staff will seek subject matter expert and TAC review of edits proposed to be made resulting from CAC feedback and public comments.

9.4 Discussion draft for full public review + engagement

A full public draft will be made available to the public for review and comment.

9.4.1 Virtual, hosted, and attended community engagement activities

Creative and determined efforts will be made to secure meaningful engagement and public feedback on the draft, especially efforts to reach marginalized and underserved communities, per the public involvement plan. Geographic and demographic engagement is to be tracked and approaches modified mid-stream, as appropriate to elevate underrepresented geographies and demographics.

9.4.2 Public involvement report

Document and report what was heard, demographics, and changes made/ staff responses to comments provided.

9.5 Proposed draft to Planning Commission

A revised version of the plan with changes resulting from public involvement will be published for a Planning Commission public hearing.

9.5.1 Legislative hearing notices 35 days in advance

9.5.1.1 Local newspaper, email, mailing list, Metro + DLCD

9.5.2 Planning Commission public hearing

9.6 Recommended draft

Updated version reflecting Planning Commission's amendments, if any, submitted with council docs.

9.6.1 City Council public hearing

9.7 Notifications and certification

9.7.1 Public, per DLCD rules

9.7.2 Metro, per DLCD rules

9.7.3 DLCD submittal/ certification

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Task 10: Post adoption implementation

10.1 Printed & PDF versions finalized

10.2 Interactive TSP updated

10.3 Internal Trainings

10.4 Development Review + public announcements

10.5 Process Evaluation & Lessons learned

Task 11 (Contingent Task): Enhanced Project Review

This task is contingent upon outcomes of the project prioritization process in Task 8. Results of the project prioritization process for the financially constrained project list will indicate whether Task 11 will be contingently necessary or not. Specifically, if projects required for Enhanced Project Review per OAR 660-012-0830 pass criteria of prioritization for the initial draft financially constrained project list, then Task 11 will be required and initiate a proposed project authorization process.

If results of Task 8 include any of five specific 0830-requiring projects on the draft initial financially constrained project list upon application of the project prioritization criteria within the reasonably available funding scenario, Enhanced Project Review (hereby "0830 project") procedures will be required for each of the specific 0830 projects that made the draft list.

This section details specific actions required of each of the enhanced review-triggering projects. These actions will begin as soon as Council Committee affirmation of the vision, goals, evaluation criteria, performance measures and standards, revenue scenarios, thresholds for constrained/ unconstrained is accomplished and a draft initial financially constrained project list is available for TAC/ CAC and then Phase 2 public engagement. Phase 2 public engagement will additionally add engagement requirements for 0830 projects.

11.1 Project Management and Agency Coordination

This contingent SOW assumes the requirements of 0830 analysis will need to be accomplished within an approximately 6-month window to limit impacts to the overall project timeline. Whether for just one or for all five 0830-triggering projects, daily Project Management Team (PMT) and/or partner agency collaboration meetings will be required to keep tasks on track with maximal coordination and efficiency to communicate and coordinate decisions about the 0830 analysis and findings.

City shall conduct Agency Coordination meetings to introduce the process, define the facility impact area, review community engagement tasks, conduct and review the alternatives analysis, advise on preferred alternative, and advise on authorization.

11.2 Community Engagement & Equity Analysis

Phase 2 public engagement will be augmented to conduct an engagement-focused equity analysis of 0830 projects as provided in OAR 660-012-0135, taking particular care when reviewing the facility impact areas in places with concentrations of underserved populations.

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The city must consider the special impact of new facilities in the context of historic patterns of discrimination, disinvestment, and harmful investments. The augmented public involvement strategy must provide opportunities for meaningful public participation in decision-making over the course of the proposed project authorization process for each 0830-relevant project on the initial draft financially constrained project list. The public involvement strategy will include regular reports to the affected governing bodies, planning commissions, and the public on the progress of the authorization process.

New engagement work may include:

- Expansion of engagement beyond typical planning area to include the full 0830 'facility impact area' for each 0830 project proposed
- Additional content for email updates, social media posts, and marketing materials
- Focused community engagement events including presentation materials and digital content
- Expanded demographic and equity analysis to encompass underserved populations in the facility impact area.

11.3 Facility Impact Area Definition

City will establish a facility impact area as provided in OAR 660-012-0830(3) in coordination with jurisdictions within a two-mile radius of the proposed project and considering affected jurisdictions, identified gaps and deficiencies, and underserved populations. The facility impact area will include, *at minimum*, areas within one mile of the proposed project, and all areas where implementation of the proposed project is expected to change levels or patterns of traffic or otherwise change the transportation system or land use development patterns. Additionally, City will coordinate with transportation facility owners and operators within or serving the two-mile radius and those which may provide alternative solutions.

To establish the facility impact area, City will also consider:

1. Places with concentrations of underserved populations and the context of historic patterns of discrimination, disinvestment, and harmful investments. City will summarize underserved populations, as defined in OAR 660-012-0125 per 660-012-0830(5)(b), within the facility impact area.

2. Applicable transportation system plans within the designated facility impact area and document:
    a. Identified gaps and deficiencies in pedestrian and bicycle facilities within the facility impact area;
    b. identified gaps and deficiencies in public transportation facilities and services within the facility impact area; and
    c. existing and needed transportation demand management services within the facility impact area.

11.4 Plans and Policy Review

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Additional Plans and Policy Review will need to highlight key issues, policies, regulations, and standards that will impact the proposed project or alternative solutions to the project.

Other plans in the facility impact area, highlighting:

- Identified gaps and deficiencies in pedestrian and bicycle facilities within the facility impact area;
- identified gaps and deficiencies in public transportation facilities and services within the facility impact area; and
- existing and needed transportation demand management services within the facility impact area.

- ODOT documentation related to system pricing, congestion pricing, and tolling
- Metro's Regional Mobility Policy
- TSPs in the facility impact area

11.5 Methodology and Assumptions Technical Memorandum Update

Update TSP technical methodologies task to document the chosen methodologies, assumptions, and parameters to be used for the Rule 0830 alternatives analysis. This should include a methodology to determine induced and latent demand in accordance with APM section 6.12.2, APM Appendix 10A and in coordination with the ODOT Transportation Planning and Analysis Unit.

11.6 Alternatives Review Report

City will develop alternatives, or enhanced investment scenarios, that could substantially meet the need for the proposed project without implementation of the project, and document the analysis in an Alternatives Review Report as provided in 660-012-0830(5). To the extent possible, scenarios will be developed utilizing analysis, plans and data that are existing or developed over the course of the TSP project. The alternatives review process must include, and Alternatives Review Report must describe:

1. Review of Needs:
   a. Summary of expected impacts of the Projects on underserved populations;
   b. Summary of the estimated vehicle miles traveled (VMT) per capita with and without implementation of the proposed project in 20 years, using the Metro model for VMT estimates;
   c. Identified gaps and deficiencies in pedestrian and bicycle facilities within the facility impact area;
   d. Identified gaps and deficiencies in public transportation facilities and services within the facility impact area; and
   e. Existing and needed transportation demand management services within the facility impact area.

2. Induced Demand Analysis. To meet the requirements of the induced demand analysis in OAR 660-012- 0830(5)(c), City will analyze potential induced demand of the proposed facility over the first 20 years of service, using best available science;

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3. Reasonable Alternatives. In coordination with partner agencies, City will develop reasonable and feasible alternative(s) to the proposed project facility per OAR 660-012- 0830(5) in the four modal categories: bicycle/pedestrian, transit, transportation options, and system pricing. City may also consider alternatives not required in rule that may contribute to VMT per capita reduction, such as ramp metering.

4. Qualitative Review of Reasonable Alternatives. City will complete a qualitative review of modal projects in order to select the best performing and most feasible alternative(s) in each of the modal categories and will combine them into one or more Alternative Project Scenario for additional quantitative analysis.

5. Quantitative Review of Alternative Project Scenario: Alternative project scenario(s) will undergo a more detailed quantitative analysis, such as with a travel demand model run. Method of analysis for the proposed project should be the same as the analysis method for the Alternative Project Scenario.

6. Summary Enhanced Investment Scenario Review Report describing:
    a. The facility impact area, affected jurisdictions, transit service providers and transportation options providers
    b. Evaluation and summary of expected impact of the proposed facility on the underserved populations. These impacts must include, but are not limited to, additional household costs and changes in the ability to access jobs and services without the use of a motor vehicle
    c. Summary of the estimated additional motor vehicle travel per capita that is expected to be induced by implementation of the proposed facility over the first 20 years of service
    d. Summary of gaps and deficiencies
    e. Summary of qualitative analysis completed for Alternatives Review including a description of the effectiveness of the identified scenario(s) in meeting the need for the proposed project
    f. A summary of the quantitative analysis completed for the Alternative Project Scenario(s)

11.7 Induced Demand

Induced demand analysis should:

a. Incorporate the use of SWIM to determine total induced demand as outlined in ODOT Analysis Procedure Manual Chapter 6. Induced demand is defined as the VMT difference between the future No-Build and Build scenarios in SWIM.
b. Use scenarios that are 20 years from the opening date of the proposed project. This 20-year induced demand requirement may represent a different horizon year than the travel demand model horizon year used for operational analysis. If the 20-year period from the opening year of the project extends past the last available model year, then induced demand should be summarized for the last available model year available from SWIM. For example, a project's opening year is expected to be 2040. The RTP travel demand extends out to the year 2045 and the SWIM model extends out to the year 2050. For

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purposes of induced demand, data from the year 2050 from the SWIM model should be used, and NOT extrapolated to 2060.

c. Identify the geographic extent to which "per capita" induced demand is to be measured. Geography should be large enough to capture the locations where/if induced demand is generated, and this area is likely much larger than the facility impact area.

11.8 Authorization Report

If the City decides to include the Project in the unconstrained or constrained TSP project list, and not move forward with Alternative Project Scenario(s), City shall develop Authorization Report as defined in OAR 660-012-0830(7) for Project.

The Authorization Report must include:

a. Record of the initiation of the authorization process by the governing body;
b. A summary of the public involvement strategy, activities, and how each part of the public involvement strategy was met;
c. The Alternatives Review Report
d. A summary of additional estimated long-term costs of maintaining proposed facility including expected funding and a summary of entities responsible for maintenance and operations of the proposed project.

11.9 VMT per Capita Analysis

If the City decides to include the proposed project in the constrained TSP project list, City shall complete a VMT per capita analysis demonstrating that the financially constrained project list – as a whole and including the project - is not projected to increase VMT per capita over the base year.

City will calculate the No-Build Horizon Year household-based light vehicle VMT per capita consistent with the definition in OAR 660-012-0005(64) and in OAR 660-012-0160 and using the same modeling assumptions for the No-Build Horizon Year and financially constrained investment scenario. City will iterate the project list until analysis demonstrates that the financially constrained project list does not increase VMT per capita over the base year.

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