



# TRI-COUNTY PUBLIC TRANSPORTATION IMPROVEMENT PLAN



FY2024-FY2025 STATEWIDE  
TRANSPORTATION IMPROVEMENT  
FUND PLAN AND PROJECT BREAKOUT

*Investing the Keep Oregon Moving Act  
with Recommended Services and Facilities to Better  
Serve Low-Income Communities within the Tri-County  
Region*

DECEMBER 2022

# TRI-COUNTY PUBLIC TRANSPORTATION IMPROVEMENT PLAN



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## 1. Executive Summary

The Oregon Legislature enacted House Bill 2017 (HB 2017), the Keep Oregon Moving act, in mid-2017. Keep Oregon Moving includes a new employee payroll tax that equates to less than \$1 per week for the average Oregon worker, and is dedicated to funding the expansion of public transportation services. The payroll tax became effective on July 1, 2018 and is administered through the Statewide Transportation Improvement Fund, or STIF. Ninety percent (90%) of the STIF funds will be disbursed by formula to Qualified Entities (QE) based on the amount of payroll tax generated in their area.

The Oregon Legislature designated TriMet as the Qualified Entity (QE) for the tri-county region for the purpose of administering the STIF planning process, and receiving and distributing STIF funds for Clackamas, Multnomah and Washington counties. As the QE, TriMet is responsible for submitting the Tri-County Public Transportation Improvement Plan (PTIP) for approval by the Oregon Transportation Commission.

Originally adopted in 2018, this document serves as the region's 2022 Public Transportation Improvement Plan (PTIP) update and is the culmination of extensive efforts put forth by the HB 2017 Transit Advisory Committee (Committee). The Committee was formed specifically to advise and assist in the plan's development.

Notable highlights of the PTIP development process and findings are summarized here.

### Engaging the Community

The 2018 PTIP reflects extensive public engagement with transit riders and plan stakeholders at the local, grass-roots level throughout the region. Outcomes of public engagement efforts were used to establish transit improvement priorities and possible funding allocations. The public input formed the basis for further refinement of the plan by local committees representing interests outside of the TriMet district in Clackamas, Multnomah and Washington counties, and by the HB 2017 Transit Advisory Committee for interests inside the TriMet boundary. The 2020 and 2022 PTIP updates conducted additional public engagement to affirm transit improvement priorities and funding allocation.

Public input and the technical findings and recommendations contained in the PTIP reflect a broad consensus of the Committee with respect to transit service and program improvements within the TriMet service district. The Committee also embraced the individual plan recommendations from cities and transit districts that serve communities outside the TriMet service district, but within the tri-county area. The committee appointed a Regional Coordination Subcommittee to recommend specific improvements to enhance transit connections between service districts. Their recommendation was approved by the HB 2017 Transit Advisory Committee and included in the 2018 PTIP and are carried over in the 2022 PTIP update.

## Charting the Allocation of HB 2017 Funds

Beginning in 2018, the PTIP<sup>1</sup> establishes a roadmap for the roll-out of future services and programs to improve service in low-income communities. It also provides for planned revenue and service improvements and programs within the next 2 years (FY 2024 - FY 2025). The plan includes a method to sub-allocate STIF Formula Fund moneys to the region's transit service providers, and carefully considers targets of expected HB 2017 revenue within each of the region's individual service areas and counties.

Within the next 2 years the PTIP targets significant investment within specific areas of the tri-county region:

- **TriMet Service District** – nearly \$180 million in on-going investments, including more than \$7 million annually in the Regional Coordination Program; and more than \$14 million annually in the Low Income Fare Program. Also included is 54 million in one-time only capital funding.
- **Clackamas County** - almost \$10 million in investments outside of the TriMet service district, through the cities of Canby (CAT), Sandy (SAM) and Wilsonville (SMART), the South Clackamas Transportation District (Molalla) County and the remainder of rural Clackamas County.
- **Multnomah County** - almost .27 million in investments outside the TriMet service district.
- **Washington County** - almost \$1.3 million in investments outside of the TriMet service district.

## Defining Low-Income Communities for Plan Investments

A key objective of HB 2017 is to improve transit services in Oregon's low-income communities. The PTIP takes special effort to define what constitutes the low-income communities that will benefit from HB 2017 investments. The TriMet Transit Equity Advisory Committee helped develop the region's Diversity and Transit Equity Index (Index). The Index was approved by the HB 2017 Transit Advisory Committee and applied in the plan to guide improvement plans and programs that benefit low-income communities.

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<sup>1</sup> The 2018 PTIP established the first 2 ½ years of programming service improvements in low income communities. The 2022 PTIP extends those plans through the FY 2024 - FY 2025 biennium.

## Assessing Need and Identifying Proposed Service and Capital Improvements

Reflecting legislative priorities identified in the Keep Oregon Moving act, the PTIP addresses the transportation needs of people residing and traveling within the region, especially those residents in low-income communities. Key project and program provisions of the PTIP include:

- Increasing the frequency and adding new or expanded bus service in low-income communities
- Implementing expanded reduced fare programs for low-income households
- Procuring low or no-emission electric buses
- Improving the frequency and reliability of service connections between communities inside and outside of the TriMet service district
- Fostering coordination between transit service providers to reduce fragmentation
- Expanding TriMet's Access Transit Program for students in Grades 9 through 12
- Providing transportation services to seniors and people with disabilities with both STIF funding and Special Transportation Funds.



## Organization of the PTIP

The PTIP is organized into the following 10 chapters:

1	<b>Executive Summary</b>	<ul style="list-style-type: none"> <li>Introduces the part of the Keep Oregon Moving act, the Statewide Transportation Improvement Fund (STIF), the rules outlined by the state guiding use of STIF funds, and the requirements of local STIF plans.</li> </ul>
2	<b>Introduction</b>	<ul style="list-style-type: none"> <li>Introduces the HB 2017 Transit Advisory Committee and its Guiding Statement for the purpose of advising development and update of the PTIP.</li> <li>Summarizes the projected STIF funding within the tri-county region and defines methods used by TriMet to allocate STIF funds to the region's sub-recipients.</li> </ul>
3	<b>Existing Public Transportation Services</b>	<ul style="list-style-type: none"> <li>Describes and maps the regional and local transit service providers that operate fixed-route and paratransit services within the tri-county region.</li> <li>Describes TriMet's current transportation funding and its reduced fare program for low-income riders.</li> <li>Describes community-based and long-distance transit service providers with service linking the region to other parts of Oregon.</li> </ul>
4	<b>Demographic Analysis</b>	<ul style="list-style-type: none"> <li>Describes the definition of poverty consistent with STIF Rules, and the region's effort in developing and mapping the Diversity and Transit Equity Index. The Index is used to support focused planning for improved services and facilities within the region's low-income communities.</li> </ul>
5	<b>TriMet District</b>	<ul style="list-style-type: none"> <li>Summarizes the public transportation needs assessment within the TriMet service district, historic factors affecting local ridership, and strategies to address changing demographics which include an expansion of the region's fare reduction program for low-income residents. Outlines the PTIP public outreach program.</li> <li>Summarizes the proposed funding levels in the PTIP for both on-going and one-time investments in service expansion, low income fares, school transportation, electric bus program, and other capital facility improvements.</li> <li>Outlines proposed service and capital improvements to be funded by STIF.</li> </ul>
6	<b>Clackamas County</b>	<ul style="list-style-type: none"> <li>Outlines projected PTIP funding totals for each county and for local service providers within Clackamas County. Summarizes each county's needs-assessment and public participation process.</li> <li>Outlines proposed STIF-funded service and capital improvements for each county.</li> </ul>
7	<b>Multnomah County</b>	
8	<b>Washington County</b>	
9	<b>Regional Coordination Program and Plan</b>	<ul style="list-style-type: none"> <li>Defines the role of the Regional Coordination Program (RCP), the RCP Committee and the RCP Project Selection process.</li> <li>Summarizes selected projects recommended by the RCP Committee to the HB 2017 Transit Advisory Committee.</li> </ul>
10	<b>Conclusion</b>	

## 2. Introduction

### 2.1 STIF Legislation

In mid-2017, the Oregon Legislature enacted House Bill 2017 (HB 2017), the Keep Oregon Moving act. Keep Oregon Moving established a significant increase - \$0.10 (per gallon) - in the state gasoline tax and created three new taxes to fund public transportation, bicycle and pedestrian infrastructure, and other modes of travel.

- A 0.5% vehicle dealer privilege tax on new car sales will fund rebates to encourage sales of electric vehicles. This tax went into effect January 1, 2018.
- A \$15 tax on the sale of new bicycles (that cost at least \$200) will support Connect Oregon to fund off-road bicycle and pedestrian paths that serve commuters. This tax went into effect January 1, 2018.
- A **0.1% employee payroll tax** (\$1 for every \$1000 in payroll) will **improve public transportation service** in both rural and urban communities. This equates to less than \$1 per week for the average Oregon worker. This tax went into effect July 1, 2018.

The employee payroll tax provides a dedicated source of funding for expanding public transportation service in Oregon. This funding source, called the Statewide Transportation Improvement Fund (STIF), will be separated into *formula* and *discretionary* funds. Ninety percent (90%) of the STIF will be disbursed by *formula* to Qualified Entities (see below) based on the amount of transit payroll tax generated in their area. Although allocated by formula, the plan for using these funds must be approved by the Oregon Transportation Commission (OTC). Up to 9% of the STIF funds are *discretionary*, and will be disbursed to local public transportation providers through a competitive state-wide grant funding processes. The final 1% of funds goes to the State's Technical Resource Center.

### 2.2 STIF Rules Regarding the Plan

As directed by the legislature, the Oregon Department of Transportation (ODOT) prepared the STIF Rules<sup>2</sup> in 2018 to guide the allocation, receipt and reporting of STIF funds by local agencies. The STIF Rules have been approved by OTC.

#### STIF Plan Approval

HB 2017 designates TriMet as the *Qualified Entity* (QE) for the purpose of administering the STIF planning process and receiving and distributing STIF funds for the Clackamas, Multnomah and Washington County region. As the QE, TriMet is responsible for submitting the Tri-County Public Transportation Improvement Plan (PTIP) for approval by the OTC. Once approved, TriMet will enter into an agreement with ODOT to receive STIF Formula Funds on behalf of the region, and will be responsible for distributing STIF Formula Fund moneys to the three counties noted above, as well as other public transportation service providers.

The Tri-County Public Transportation Improvement Plan (PTIP) will be submitted to the OTC for their approval for STIF Formula Funds for the three-county region.

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<sup>2</sup> Statewide Transportation Improvement Fund Rules, Oregon Department of Transportation, approved by the Oregon Transportation Commission, June 22, 2018.

## Purpose of STIF Formula Funds

STIF moneys are to be used to support effective planning, deployment, operation and administration of STIF-funded public transportation programs and projects, including:

1. Creation of new systems, facilities and services with origins, destinations or stops in Oregon.
2. Maintenance or continuation of systems and services.
3. Planning for, and development of a Local Plan or future STIF Plan to improve Public Transportation Service.

The Rules also state that STIF moneys are not to be used for new light rail capital expenses, but may be used for light rail operation expenses.

Following passage of Senate Bill 1601 (Statewide Transportation Improvement Fund) in 2020, the STIF rules have been modified relating to programs that maintain existing transit services. SB1601 recognizes the financial impact that COVID-19 has had on transit providers in Oregon, and now allows for the use of STIF Formula Funds to maintain existing services as of July 7, 2020. ODOT has prescribed definition of these newly defined eligible programs as “service preservation” to avoid any potential confusion with preventive maintenance.

## STIF Plan Requirements

The Tri-County PTIP meets the requirements outlined by the STIF Rules.

### **OTC - APPROVED STIF RULES**

#### **A STIF Plan will:**

- ✓ Cover at least a Biennium, up to two Biennia w/ Commission approval
- ✓ Address needs of people residing in or travelling into/out of QE’s area of responsibility
- ✓ Consider Public Transportation Services for the area outside the QE’s district boundaries (TriMet) but within the remainder of the counties
- ✓ May be included in a QE’s Local Plan or as a stand-alone plan (the PTIP)
- ✓ Contain explanation of how the Plan defines, identifies and serves communities with a high percentage of Low-Income Households
- ✓ Include a description of the QE’s method to sub-allocate STIF Formula Funds to Public Transportation Service Providers (and other potential sub-recipients) and the process to develop the method

The STIF Rules require that each STIF plan include an explanation of how the plan defines, identifies and serves communities with high percentage of low-income households. Chapter 4 summarizes the PTIP definition of poverty, and how the PTIP identifies and maps communities with a high percentage of low-income households. Chapters 5-9 describe how the plan improves services to these areas.

The HB 2017 Transit Advisory Committee (Committee) was appointed in 2017 (see section 2.3 below) consistent with STIF Rules. The Committee’s purpose is to advise and assist the QE (TriMet) in fulfilling the requirements of the STIF Rules and prioritize projects that will be funded by STIF moneys. The STIF

Rules require the Committee to consider the following criteria when reviewing STIF Formula Fund projects:

### **STIF FORMULA FUND PROJECT EVALUATION CRITERIA**

- ✓ Whether the Project would:
  - (A) Increase the frequency of bus service in communities with a high percentage of Low-Income Households.
  - (B) Expand bus routes and bus services to reach communities with a high percentage of Low-Income Households.
  - (C) Implement programs to reduce fares for public transportation in communities with a high percentage of Low-Income Households.
  - (D) Procure buses that are powered by natural gas, electricity or other low or no-emission propulsion for use in areas with populations of 200,000 or more.
  - (E) Improve the frequency and reliability of service connections between communities inside and outside of the Qualified Entity's service area.
  - (F) Foster coordination between Public Transportation Service Providers to reduce fragmentation in the provision of transportation services.
  - (G) Provide student transit services for students in grades 9 through 12.
  - (H) Maintain and expand the existing system
  - (I) Implementation of programs that enhance services for older adults and people with disabilities.
  
- ✓ The extent to which the Project goals meet public transportation needs and are a responsible use of public funds.
  
- ✓ Other factors to be determined by the HB2017 Advisory Committee.

### 2.3 HB 2017 Transit Advisory Committee

In late 2017, the HB 2017 Transit Advisory Committee was appointed by the TriMet board of directors<sup>3</sup> with the specific purpose of advising, assisting and reviewing the PTIP. The Committee adopted its own Guiding Statement and actively advised on how to spend STIF revenue for purposes consistent with STIF rules.

#### **The Committee's Guiding Statement:**

HB 2017 provides much-needed investment in transit service. For the first time, employees in Oregon will be taxed to pay for transit, and low-income workers will contribute proportionately more of their incomes as a result. Annual per capita income in the Portland metropolitan areas is below the U.S. average and a lack of affordable housing has pushed low-income residents to areas with lower transit services. It is therefore critical that investment of this funding serve the needs of low-income people to have affordable, reliable, convenient transit service that connects them to jobs and services. A modern, well-funded transportation system that is planned, built, and operated with equity as a guiding principle will benefit everyone through reduced air toxics, carbon output, and congestion, and shape our region for generations to come. Therefore, the committee will advise TriMet on a public transportation improvement plan to spend HB 2017 funds for the following purposes:

**Programs to reduce transit fares** for communities with a high percentage of low-income households

**Procurement of buses** powered by natural gas or electricity

**Capital projects** required for the creation, expansion and improvement of transit services, including projects intended to improve speed and reliability, with consideration for communities with a high percentage of low-income households and responsible contracting and workforce utilization

**Expansion of existing/creation of new transit services** (including last mile services) in communities outside the TriMet service district, but inside in Clackamas, Multnomah, and Washington counties

**Regional coordination**/reduction of fragmentation between TriMet and communities outside the TriMet service district, but inside Clackamas, Multnomah, and Washington counties

**Attachment A** lists the members of the HB 2017 Transit Advisory Committee.

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<sup>3</sup> The HB 2017 Transit Advisory Committee was established and the initial members appointed by TriMet board resolution on October 25, 2017, prior to the publication and adoption of ODOT's final STIF rules in June 2018. The board took the action of establishing the committee prior to the final rule to allow the implementation of a low income fare program to coincide with the effective date of the new payroll tax on July 1, 2018. Because of the long lead time needed to plan, budget and hire staff for service expansions, TriMet also asked the committee to approve the allocation of STIF funds to allow HB 2017-funded service expansions slated for September 2018 and March 2019. Based on feedback from the initial appointees and other community stakeholders, the TriMet board expanded the membership of the committee on December 13, 2017.

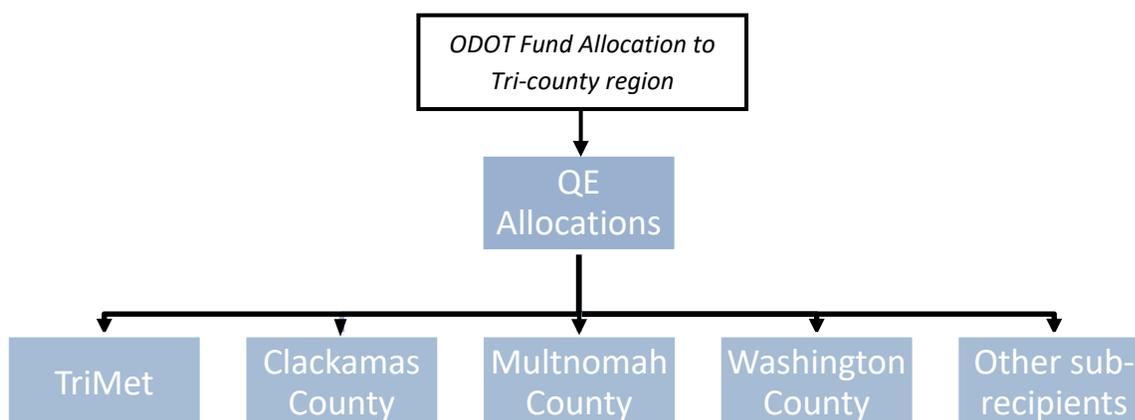
In 2018, the advisory committee met monthly over the course of a year to provide guidance on how the STIF funds should be spent. In doing so, the committee:

- Reviewed and approved a standard for determining the concentration of people earning a low-income (note, ODOT determined that low-income was defined as 200% of the federal poverty level, but left it to the QE advisory committees to define a high concentration of low-income earners).
- Reviewed the results of the public outreach process.
- Reviewed and approved the transit improvement programs to be funded and at what levels.
- Appointed a subcommittee to allocate funding for the Regional Coordination program.
- Reviewed the results of the draft plan outreach.
- Approved the final plan.

In 2022, the TriMet board approved membership renewal and new membership to the HB 2017 Transit Advisory Committee. The Committee assisted TriMet in guiding the update to the PTIP, including review and approval of the revised Transit Equity map, STIF outreach plan and FY 2024 - FY 2025 Draft STIF budget.

## 2.4 Projected STIF Funding

STIF payroll tax receipts will continue to be collected by the state and distributed to Qualified Entities (QE) to fund public transportation capital improvements and operations within their geographic areas. TriMet, acting as the legislatively designated QE for the Tri-county region, is tasked with distributing STIF payroll tax receipts to the counties or other public transportation service providers (sub-recipients) within the three-county region. In the fifth full year of implementation (FY2024), the state and TriMet estimate that HB2017 revenue will be distributed to the region as follows:



2.4.1 HB 2017 Fund Allocation

HB 2017 requires TriMet, acting as the QE for the region, to recommend an appropriate process of allocating funds among the sub-recipients in the region. STIF Rules state:

To the extent possible, using the best available data, the sub-allocation method used by Qualified Entities must be proportionate to the amount of employee payroll tax revenue generated within the geographic territory of each Public Transportation Service Provider.

To meet this requirement in the 2022 PTIP, TriMet used ODOT’s Formula Fund Allocation Estimates to determine the allocation of funds between TriMet and the areas of Washington, Clackamas and Multnomah counties outside of the TriMet district. STIF funding allocation to sub-recipients under the 2022 PTIP for the FY 2024 - FY 2025 biennium is based on revenue history of STIF funding since the inception of HB 2017. Table 1 summarizes the HB 2017 funding allocation to those areas outside of the TriMet district.

Table 1: HB 2017 Revenue Estimates for Tri-County Region Sub-Recipients: FY2024 – FY2025

	<b>FY 2024 - FY 2025</b>
City of Canby	\$646,578
City of Sandy	\$646,578
South Clackamas Transportation District	\$463,843
City of Wilsonville**	\$2,672,086
Clackamas County	\$1,048,933
Multnomah County	\$129,867
Washington County	\$730,698
<b>Total</b>	<b>\$6,313,519</b>

\*\* Service area in parts of Clackamas and Washington counties

Data Sources:

- (1) Oregon Employment Division, April 2022 – Sub-County Allocation (2020).
- (2) Oregon Department of Transportation, September 2022 – STIF Formula Fund Allocation Estimates by County (FY2024-FY2025).

Chapter 5 further describes how the Committee helped establish the HB 2017 funding allocation of public transit operation and capital investments made possible by new HB 2017 funds.

2.5 Consolidating Statewide Public Transportation Funding Programs

Senate Bill 1601, passed in the July 2020, acts to consolidate the Special Transportation Fund (STF) and STIF public transportation funding programs. The purpose of the fund consolidation is to increase

efficiency and funding reliability for public transportation providers throughout Oregon. The STF was created in 1985 by the Oregon Legislature to provide transportation services needed to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible.

Historically, the three-county STF area receives approximately \$8.5 million in STF formula, funds each biennium (every two years). STF funds have played an important role in the expansion of community-based services for seniors and persons with disabilities the last 10-12 years as well as in the preservation of fixed route and complementary paratransit services.

STF formula funds have covered approximately 6% of transit agencies costs of door-to-door services for seniors and people with disabilities. The STF formula program supports approximately 50% of the City of Sandy's paratransit costs; 25% of Wilsonville's; 31% of Canby's; and 5% of TriMet's paratransit costs.

### 3. Existing Public Transportation Services

One of the goals enumerated in HB 2017 is to reduce the fragmentation of public transit services. This section summarizes the existing transit services within the three-county region, including recent or ongoing planning efforts to identify gaps or fragmentation between various services. Existing transit services are illustrated in **Figure 1** and summarized below by type and provider: regional transit, last mile shuttle, and community-based transit.

#### 3.1 Regional and Local Transit Service Providers

Several agencies provide either fixed-route transit and/or paratransit service within the three-county area, including:

- Tri-County Metropolitan Transportation District (TriMet)
- South Metro Area Regional Transit (SMART)
- City of Portland
- Canby Area Transit (CAT)
- Clackamas County – Mount Hood Express
- Sandy Area Metro (SAM)
- South Clackamas Transit District (SCTD)
- ODOT – Columbia Gorge Express
- C-Tran
- Columbia County Rider

The following summary reflects the fixed-route and paratransit services provided by regional and local transit services providers prior to the impacts of Covid 19 in early 2020.

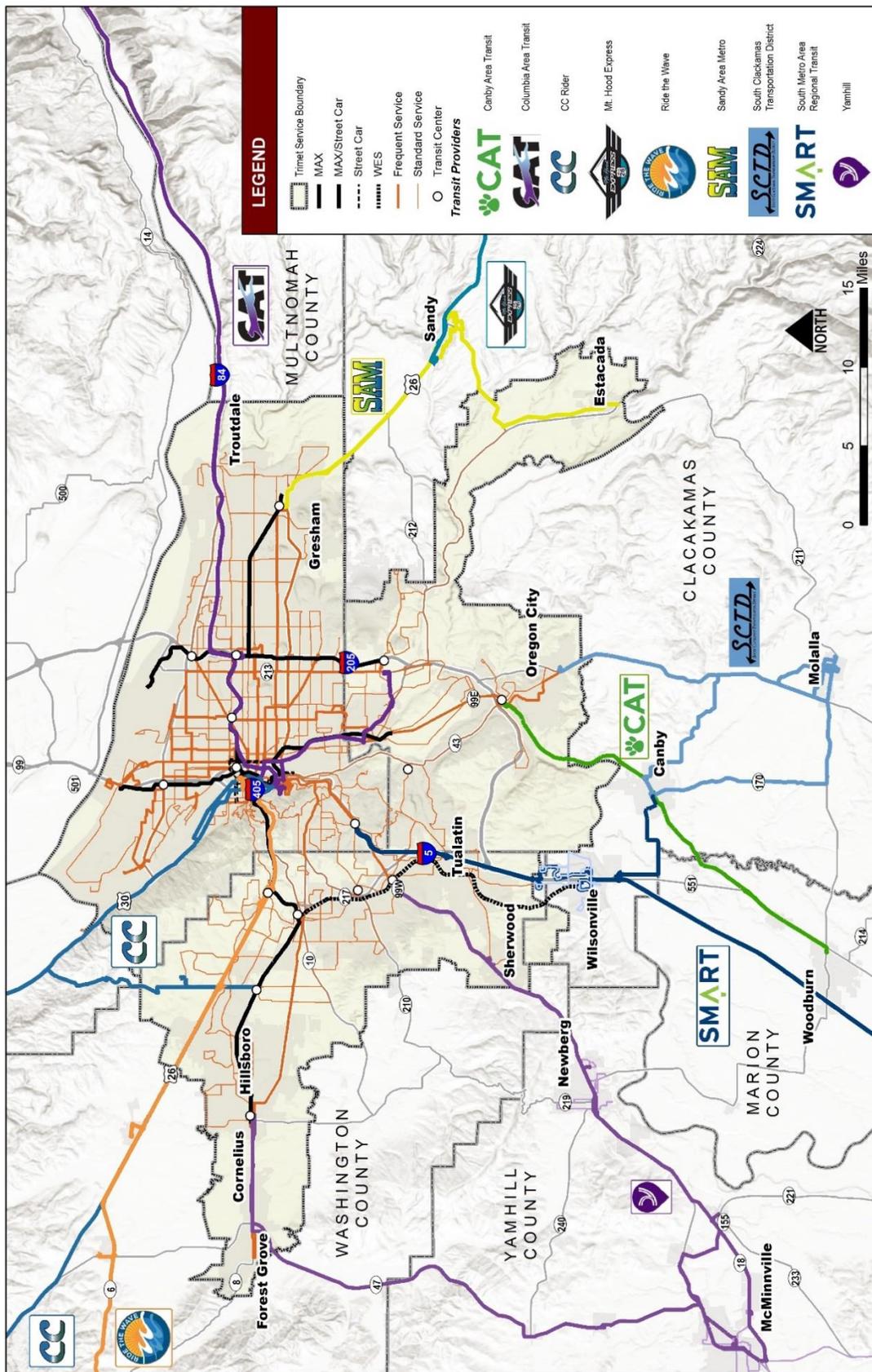
##### 3.1.1 *TriMet*

###### Fixed Route and Paratransit Services

As of September 2022, TriMet will operate a fixed-route network consisting of 82 bus lines, a 60-mile, 97-station MAX light rail system and a 14.7-mile commuter rail service. Since 2017, all fixed-route buses have low floors, allowing people to conveniently board the bus without climbing stairs or using a lift. All MAX trains have at least one low-floor car and all WES commuter rail trains have level boarding with accessible platforms.

TriMet's LIFT paratransit service is a shared-ride public transportation service for people who are unable to use regular buses or trains due to a disability, or a disabling health condition. A fleet of 278 Lift buses and vans serve the LIFT program. Rides are facilitated by reservation, with subscription service available.

Figure 1: Tri-County Region Public Transportation Service Providers



## Current Public Transportation Funding

Major funding of TriMet's operations, capital improvements and administration come from three primary sources:

1. **Employer and Self-Employed Payroll Tax** – TriMet is in the seventh year of a 10-year expansion plan funded by an incremental increase to the base employer payroll tax. In early 2017, the base employer payroll tax increased to 0.7437 percent of the wages paid by employers and the net-earnings from self-employment for services performed within the TriMet service district. See **Figure 2** Revenue from the base payroll tax was slightly more than \$156 million in 2017.

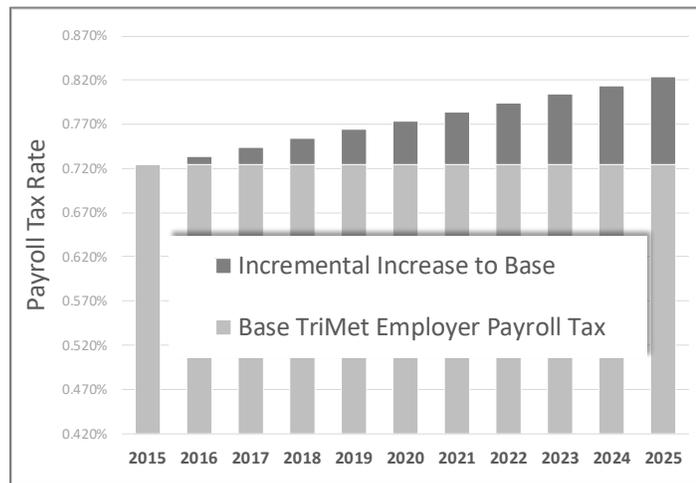


Figure 2: Employer and Self-Employed Payroll Tax  
TriMet Service District

2. **Farebox** – Fares paid by TriMet riders totaled almost \$39 million in 2021 and accounted for approximately 5% of all revenue. This is a reduction of \$54 million from FY20 and \$65 million from 2019. These reductions are related to the decrease in ridership resulting from the COVID-19 pandemic. Passenger revenues began to grow again in FY22 as ridership increased.
3. **Federal/State/Local Grants** – Though they may vary, federal, state, and local grants provide important funding resources for capital improvements and supporting operations. As an example, a \$5.5 million federal grant will enable TriMet to expand the Beaverton Transit Center to accommodate more buses in preparation for future service growth in Washington County. In 2021, total grant revenue received by TriMet was about \$117 million, not including federal CARES Act and CRRSAA funds.

### Impact of the HB 2017 Employee Payroll Tax

On July 1, 2018, HB 2017 went into effect, implementing the statewide employee payroll tax. The new employee payroll tax rate is equivalent to \$1 for every \$1,000 in employee payroll, and is estimated to provide over \$60 million annually within the TriMet service district in FY24-25. HB 2017 revenue will be used to improve or expand transit service within the TriMet service district (see Chapter 5).

### Reduced Fare Program for Low-Income Riders

TriMet currently offers reduced fares for two important rider groups:

- **Honored Citizens** - Low-income riders, Medicare beneficiaries, or riders with a mental or physical disability. Honored Citizen riders pay half the price of an Adult 2½-Hour Ticket, and less than one-third the price of an Adult 1-Month Pass.
- **Youth** - Riders age 7–17, and students in high school or those pursuing a GED also pay half the price of an Adult 2½-hour ticket. Proof of eligibility required for those who are ages 15-17, and high school/GED. Children 6 and under ride free with a paying passenger.

Rides are free for all reduced fare riders after spending \$2.50 per day, or \$28 per month.

Chapter 5 summarizes the TriMet’s reduced fare program for Low-Income riders in the three-county region. See **Attachment B**, TriMet’s Low-Income Fare Program.

### 3.1.2 South Metro Area Regional Transit (SMART)

SMART, operated by the City of Wilsonville, maintains a fleet of over 35 vehicles and has 9 fixed routes, including one late night service, operating routes within Wilsonville and to the Barbur Transit Center, Salem and Canby. A transfer to TriMet WES Commuter Rail is possible at SMART Central at the Wilsonville Station. SMART operates on weekdays - generally from 5 a.m. to 9 p.m., on Saturday from 8:30 a.m. to 5:30 p.m., and on select holidays.

SMART also operates Dial-a-Ride, which provides door-to-door service within Wilsonville, and medical transport services to Portland and other nearby cities for seniors, and for people with disabilities.

**SMART continues implementing its 2017 Transit Master Plan (TMP).** The TMP is essentially cost-neutral and provides improved intercity transit services and expansion of local service hours through route improvements as follows:

Route 2x	Switch service from Barbur TC to Tigard TC and add stop at Tualatin Park & Ride	Increases connections to TriMet system
Route 3	Separate Canby and Charbonneau service Pilot Charbonneau Shuttle service	Increases connections to CAT Funding from Dial-a-Ride resources
Route 4	Streamline route service and expand evening service	Expands evening service
Route 4	Expand Saturday service	Adds two extra service hours on Saturdays
Villebois/ Route 7	Route reconfiguration	Mileage and hours remain the same
Dial-a-Ride	ADA Required Paratransit	Service enhancement to meet ADA guidelines

SMART applied STIF funding in FY 2022 – FY 2023 as part of local match to fund electric buses (2) and electric charging units and three (3) CNG cutaways placed into service in 2021, and provide express service between Tualatin Park and Ride and Wilsonville Transit Center. STIF funds were also used by SMART to operate weekday, bus-on-shoulder service between Wilsonville Transit center and Clackamas Town Center.

### 3.1.3 Canby Area Transit (CAT)

Canby Area Transit (CAT) provides fixed route bus service via Route 99, from the Canby Transit Center with 20 daily trips north to Oregon City (north), and 8 daily trips south through Aurora and Hubbard, to Woodburn. Route 99 provides local transit circulation within the city along the Highway 99E corridor.

With advanced registration or eligibility approval, CAT Dial-A-Ride program also provides:

- **Complementary Paratransit Service** (for eligible seniors and persons with disabilities) within ¾ mile of the local Canby Fixed-Route service and extends to all locations within the Canby Urban Growth Boundary.
- **Premium Dial-A-Ride Service** for customers who are eligible for complementary paratransit services. This service transports individuals to and from destinations within the Oregon City limits. It is limited to medical, education, employment, legal services and social service appointments.
- **General Public Dial-A-Ride Service** for morning and afternoon shopping shuttle service, and local demand responsive rides to the general public. This service is open to anyone traveling in Canby and is provided on a space-available basis (first-come first-serve).

Canby's 2017 Transit Master Plan identifies several improvements to its system, subject to new funding capacity:

- Route 99 service enhancements (pulse or timed connections) and staffing improvements
- Increasing Route 99 service frequency (additional 7 services hours with increased morning runs, and later evening runs)
- Added structure to Premium Paratransit services
- Added weekend service to Route 99
- New weekday local circulator route (10 hours per weekday)
- Weekend local circulator route service (not expected to be funded with increased STIF funding)

CAT applied STIF funding to purchase two (2) low-floor buses to provide future local circulator service in Canby, and continue Saturday service on Route 99 and complimentary demand response and paratransit services.

### 3.1.4 Mt. Hood Express

Clackamas County administers the Mt. Hood Express with two separate routes:

- The Express, a public bus service linking communities along Highway 26, running from the city of Sandy east to Government Camp and Timberline, and
- Villages Shuttle, a deviated fixed route service between Sandy and Rhododendron.

The Express offers 7 daily round trips, with one additional, Winter Late Run trip (December 01-March 31). The Village Shuttle operates 4 daily round trips.

STIF funding was used in FY 2022 – FY 2023 to purchase two (2) new two buses with additional trailers, ski boxes and technology to replace an aging fleet.

### 3.1.5 Sandy Area Metro (SAM)

Sandy Area Metro (SAM) provides service within the City of Sandy via a fixed route in the commercial corridor and a dial-a-ride service which is available to the general public up to and within a 3-mile radius of the city. SAM also operates 2 commuter routes and an Elderly and Disabled program that provides out of town non-emergency medical rides to Medicaid-ineligible, frail, elderly and disabled persons.

The SAM Gresham route operates along Highway 26 to the Gresham Transit Center with connections to the greater Metro area via TriMet system. SAM Gresham makes 30 weekday trips to the Gresham Transit Center, 17 Saturday trips and 8 trips Sundays and most holidays.

The SAM Estacada route travels south along Highway 211 via Sandy, Eagle Creek and Estacada where SAM connects with TriMet bus service (Route 30). SAM Estacada provides 5 daily trips to Eagle Creek and Estacada, Monday through Saturday.

SAM adopted its Transit Master Plan (TMP) update in 2020. The TMP describes potential future service and capital investment option depending on available funding.

STIF funding was used in FY 2022– FY 2023 to expand service on SAM Gresham, SAM Estacada and SAM Shopper routes.

### 3.1.6 South Clackamas Transit District (SCTD)

South Clackamas Transportation District (SCTD) operates 3 routes within and from the Molalla area:

- The Molalla City bus is a fare-less, deviated route which makes 10 weekday trips throughout Molalla and connections to 2 SCTD commuter routes. Seven of the City bus trips connect with Clackamas Community College (CCC) commuter route.
- The CCC commuter route terminates at the Clackamas Community College campus. The CCC bus makes 22 weekday and 9 Saturday trips to the campus where it connects with the TriMet bus system.
- Canby commuter route provides connection to both the Canby (CAT) and Wilsonville (SMART) bus services. The Canby commuter route makes 8 weekday trips, no service on Saturdays.

STIF funding was used in FY 2022– FY 2023 continue service added in 2021 to Clackamas Community College and Canby, and Saturday service in Molalla.

### 3.1.7 ACCESS Shuttle (Multnomah County)

In July 2022, Multnomah County launched a new community/job-connector shuttle that provides a needed last-mile connection to industrial jobs in the area south of PDX airport, providing transfer opportunities from TriMet and C-TRAN service. This area was identified in TriMet's North/Central Service Enhancement Plan as a location that would benefit from a community/job connector shuttle. ACCESS (Alderwood-Cornfoot-Columbia Employment Shuttle Service) runs Monday through Friday, mornings and afternoons, between the Cully neighborhood and Parkrose/Sumner Transit Center.

Regional Coordination Program funding was used in FY 2022– FY 2023 to initiate new ACCESS shuttle service.

The shuttle serves both employment and community destinations, including Hacienda CDC, Las Adelitas (an affordable housing development opening Fall 2022), NAYA (the Native American Youth and Family Center), Boeing, UPS, FedEx, DHL, AirTrans Way, the US Postal Service, and numerous other employers along the Alderwood-Cornfoot industrial corridor and 102nd Ave.

The ACCESS route created 16 new shared transit stops, which provide connections to and from light rail (the MAX Red Line at Parkrose Transit Center), three Frequent Service lines (12, 72, 73), and at least five additional bus lines (21, 71, 87, and C-TRAN Line 65). In addition to these shared stops, ACCESS has created 12 new standalone stops that serve new locations on or near the Alderwood-Cornfoot Rd corridor, stretching from 47th Ave (NE 47th Ave at Whitaker Ponds) to NE Alderwood Rd at Mt. St. Helens Ave).

### *3.1.8 Columbia Gorge Express (ODOT)*

ODOT operates daily bus service on the Columbia Gorge Express. Metro area passengers connect to the Express Bus at Gateway Transit Center, with links to Multnomah Falls and Rooster Rock State Park. The shuttle is free from Rooster Rock State Park (there is a park day-use permit fee) and \$5 from the Gateway Transit Center. Weekday service is coordinated with Columbia Area Transit, which provides limited service (3 trips per day) between Gateway Transit Center, Rooster Rock, Multnomah Falls, Cascade Locks and Hood River.

### *3.1.9 City of Portland*

#### Portland Streetcar

Portland Streetcar service operates two lines: the NS Line and the bidirectional Loop lines “A” (running clockwise) and “B” (running counter-clockwise). The 3.9-mile NS Line links Northwest Portland with the South Waterfront via Downtown and the Pearl District. The “A” and “B” loop lines link Downtown Portland with the Oregon Museum of Science and Industry, the Central Eastside Industrial District, the Lloyd District and Pearl District. The City of Portland developed a City-wide Streetcar System Concept Plan in 2009 which identifies corridors for consideration for future expansions of the streetcar system.

#### Portland Aerial Tram

The Portland Aerial Tram is part of Portland's public transportation system and operates in coordination with TriMet and Portland Streetcar. The tram operates “load-n-go.” The lower tram terminal is at the intersection of SW Moody & Gibbs. The upper terminal is located on Marquam Hill at Oregon Health and Sciences University.

### *3.1.10 Clark County Public Transit Benefit Area Authority (C-TRAN)*

C-TRAN offers regional connecting bus service between: (a) downtown Vancouver, Delta Park and Vanport MAX station, and, (b) Fisher’s Landing Transit Center and the Parkrose/Sumner MAX station. From these locations, riders can transfer to other C-TRAN routes, MAX, or TriMet bus routes for continued travel to destinations including Rose Quarter, Lloyd District, Swan Island, and downtown Portland. Service is provided on weekdays, Saturdays and Sundays.

C-TRAN offers Clark County residents Express bus service to Lloyd District, the downtown Portland Transit Mall, and the OHSU campus on Marquam Hill. Express service is available only during weekday peak commute times from all major park and ride and transit center locations in Clark County, except on the Route 105 I-5 Express which provides service throughout the day, Monday through Friday.

### *3.1.11 Yamhill County Transit*

Yamhill County Transit Area (YCTA) provides local public transit service in Yamhill County and connections to the TriMet system. Local service is provided in McMinnville and Newberg on weekdays only. In addition to local services, Yamhill County Transit provides several routes connecting communities in the area to TriMet services in the Portland metropolitan area.

Route 33 (McMinnville - Hillsboro): Connects McMinnville to Carlton, Yamhill, Gaston, Forest Grove and to the MAX light rail (Blue Line) in Hillsboro with two morning, a midday, and two afternoon round trips on weekdays.

Route 44 (McMinnville – 99W): Connects McMinnville to Lafayette, Dundee, Newberg, Sherwood, and Tigard. Route 44 operates ten weekday round trips, which includes an express route (Route 45x), and four Saturday round trips (Route 46s).

### *3.1.12 Columbia County Rider*

Columbia County Rider (CCR) provides public transit services in Columbia County and connections to TriMet. CCR has one bus line that connects riders to TriMet routes. Line 1 operates between downtown Portland and the St. Helens Transit Center with 7 roundtrips on weekdays. Community-Based and Long-Distance Transit Service Providers

There are several community-based transit providers within the region:

- Tillamook WAVE
- Central Oregon Breeze
- Northwest POINT
- Washington County Community Bus

#### *3.2.1 Tillamook WAVE*

Tillamook County Transportation District (TCTD) provides a twice-daily service from Tillamook to Portland's Union Station downtown where passengers may connect with Amtrak. Prior to downtown Portland, the service stops at Banks, North Plains, NW 185<sup>th</sup> Ave and the Sunset Transit Center to connect with TriMet's MAX light rail system, which provides connections to Portland International Airport as well as all destinations in TriMet's bus, light rail, and commuter rail system. Bus service runs from 8:00 a.m. to 6:00 p.m. All vehicles are accessible and can accommodate wheelchairs.

#### *3.2.2 Central Oregon Breeze*

Central Oregon Breeze provides one roundtrip bus service between Bend, Redmond and Madras, and Sandy, Gresham, the Portland Airport and downtown Portland, now limited to Sunday, Monday, Tuesday and Thursday.

### 3.2.3 Northwest POINT

Northwest POINT (Public Oregon Intercity Transit) is one of three inter-city shuttle bus routes in Oregon operated by the private sector OC&W Coachways, with supplemental funding from ODOT. This particular route provides twice-daily round trips between Portland Union Station, Cannon Beach, and Astoria.

### 3.2.4 Washington County WestLink

Washington County's WestLink is a deviated fixed-route transit service that connects Forest Grove, North Plains, Banks and Hillsboro (Transit Center). WestLink currently provides two weekday round trips (operated by Ride Connection). WestLink serves as a lifeline support for people reliant on transit in the rural communities of Banks and North Plains to access jobs, support services, and daily necessities in the cities of Forest Grove and Hillsboro.

## 3.3 Ride Connection

Ride Connection is a private non-profit organization, located in Portland, Oregon, that coordinates transportation operations, mobility management activities provided by community-based organizations and groups, and provides direct service when a partner cannot be found. Ride Connection provides demand-responsive and a fixed-route transit service in rural Washington County. Ride Connection is funded through an agreement with TriMet, and with grants from federal, state, foundation, corporate and individual entities. The majority of Ride Connection customers are seniors or persons with disabilities. In recent years, Ride Connection services have also expanded to include more community-connector shuttle services and fare assistance for low-income individuals.

Demand response service is provided in all areas of Washington County that are west of 185th Avenue in Hillsboro and outside the TriMet service district. All rural unincorporated communities including Buxton, Gales Creek, Scholls and Timber are included in addition to the cities of Gaston, Banks and North Plains. Pick up or drop off, for trips that begin or end outside of the TriMet service district, can occur at locations inside the TriMet service district in Forest Grove, Cornelius and Hillsboro.

## 4. Demographic Analysis

### 4.1 STIF Definition of Poverty

STIF Plans must contain an explanation of how the Plan defines and identifies “communities with a high percentage of Low-Income Households.” Furthermore, these definitions are to be incorporated in the HB 2017 Transit Advisory Committee bylaws, so the members can consider these criteria in decision making.

In communities with high percentages of low-income populations, the STIF Plan

must demonstrate, and specify, the anticipated benefits and discrete measurable outcomes associated with each Project, including:

- An increase in frequency of bus service (schedules) in low-income population areas
- Expansion of bus routes and bus services
- Implementation of programs to reduce fares for public transportation

Findings of benefit to low-income populations and measurable outcomes associated with individual STIF projects are reported separately for the TriMet Service District (Chapter 5) and individual counties (Chapters 6-8).

### 4.2 Demographic Indicators of Low-Income Communities

The TriMet Transit Equity Advisory Committee developed the Diversity and Transit Equity Index (Index) to aid in planning transit service investments. The Index scoring regimen includes measures of Low Income Populations summarized by individual Census block groups. Ten factors are normalized, scored and integrated into the Diversity and Transit Equity Index to describe and identify locations of high concentrations of Low-Income Populations for the three-county region, including:

People of Color	Low Income Households*
Limited English Proficiency	Senior Population
Youth Population (age 21 and younger)	People with Disabilities (age 65 and older)
Households with Poor Vehicle Access	Access to Low and Medium Wage Jobs
Access to Affordable Housing	Access to Essential Services (Grocery Stores, Schools, Healthcare)

\* Persons Reporting Income Below 200% of Federal Poverty Level

#### THE TRI-COUNTY PUBLIC TRANSPORTATION IMPROVEMENT PLAN IMPLEMENTS THE STIF RULES BY DEFINING POVERTY AS:

... A household with a total income that does not exceed 200% of the (Federal) poverty guidelines\*

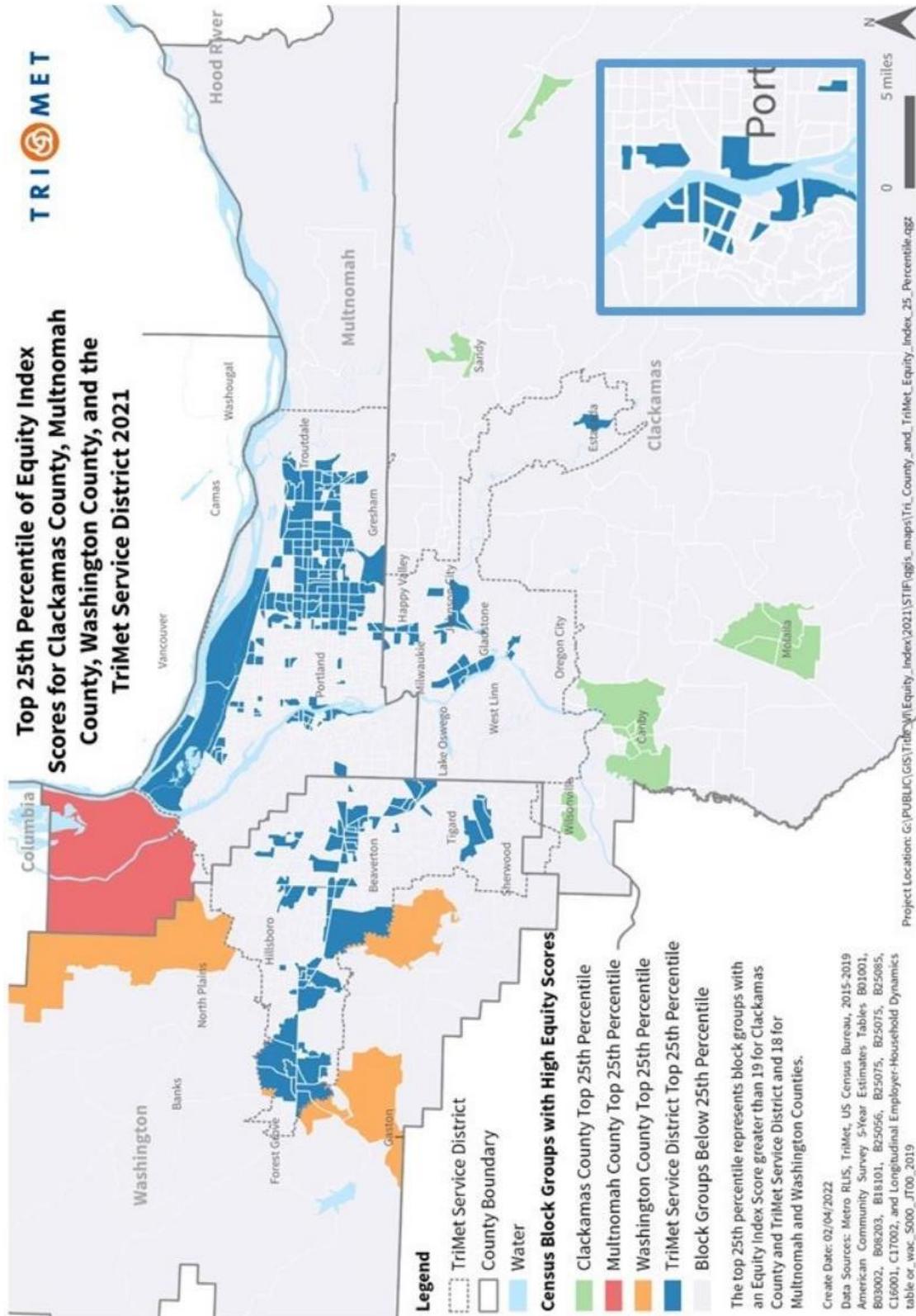
\*as updated periodically in the Federal Register by the U.S. Department of Health and Human Services under the authority of 42 U.S.C. 9902(2) for the 48 Contiguous States and the District of Columbia.

For each of the region’s Census block groups, the composite Index values are divided into quartiles. **Figure 3** maps the Diversity and Transit Equity Index (top percentile - 25%) by Census block group. The Transit Equity Advisory Committee determined these areas to be served by the Public Transportation Improvement Plan and Regional Coordination Program.

The original Diversity and Transit Equity Index and map was reviewed and approved in May, 2018. The scoring and map was updated and approved by the

by the HB 2017 Transit Advisory Committee in August, 2022. See **Attachment C** for a full description and data source of each Index factor.

Figure 3: Diversity and Transit Equity Index



## 5 TriMet District

### 5.1 Needs Assessment

The region has completed extensive public outreach and assessments to determine necessary public transportation systems improvements and expansion. This section summarizes three components:

- TriMet’s examination of the multiple factors affecting bus ridership, and the strategies TriMet has deployed to address changing demographics and economic conditions.
- Planning and programming efforts completed in the region that help outline candidate public transportation improvements to be considered for STIF funding and included in the PTIP.
- TriMet’s public outreach efforts to engage the community to help identify and affirm support for necessary service improvements in the TriMet Service District (District).

#### 5.1.1 Factors Affecting TriMet Ridership

In late 2017, TriMet completed its examination of local and national economic trends and other factors affecting its light rail and bus

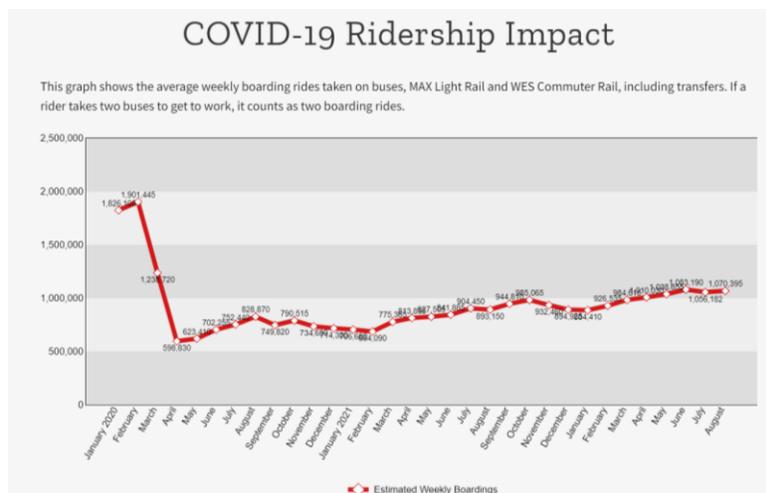
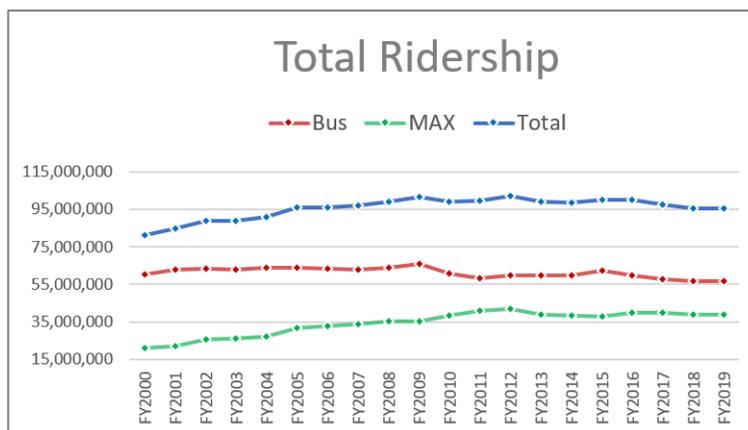
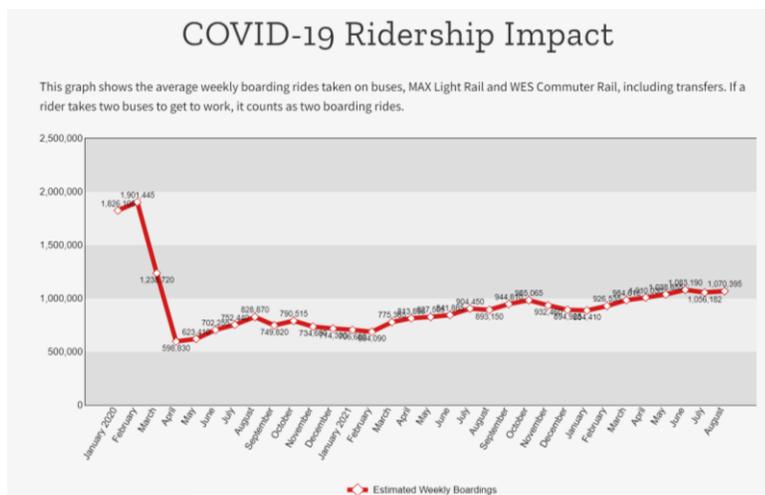


Figure 4: TriMet Bus and MAX Ridership History



systems ridership. As shown in

Figure 4, while MAX ridership showed a steady increase since 2001, bus ridership plateaued, and, decreased over time. Since 2008, ridership loss has been particularly noticeable in weekend and off-peak bus trips.

Between 2014 and 2019, a number of factors are thought to affect a small decline in bus ridership:

- Reduced TriMet operating hours following the 2008 recession (that have now been restored to 2005 levels)
- Elimination of Fareless Square (2010), particularly affecting off-peak bus ridership
- Increased overall traffic congestion (affecting on-time bus performance)
- Growing popularity of bicycle use, bike share, Lyft/Uber and car share

COVID-19 has certainly had a dramatic impact on both bus and MAX ridership since March of 2020. Weekly ridership initially dropped by 70% in response to the Governor's stay at home order. For much of 2020 and 2021, weekly ridership hovered between 50-60%. Customers have begun to return to TriMet with the rollout of vaccinations and booster shots, and the lifting of mask mandate. Ridership is now down by approximately 40%, with continued growth occurring every month. Ridership has mostly returned during the weekday midday hours and on weekends. Weekday peak ridership still lags behind as remote work policies allow employees to work from home, making commute trips a smaller portion of overall ridership.

Key findings continue to indicate a geographical shift of lower income residents within the region. Historically, central eastside Portland neighborhoods were home to lower and middle-income residents who often required access to the TriMet bus and MAX systems for work and other travel needs. Trends indicate these residents are moving to more affordable housing in the far east and outlier city neighborhoods within the region, or even to the satellite cities outside the Portland metro area, and likely taking transit less often. It is also likely that newer residents in the central eastside are not taking transit as frequently and for as many purposes (See Figures 5 & 6).

Additionally, the pandemic and safety concerns have fueled a spike in attrition among bus and MAX operators and the current labor shortage has made it difficult for TriMet to replace them. TriMet is now

operating approximately 22% less bus service because there are not enough operators to operate the system at pre-pandemic levels. This lower level of service has likely slowed TriMet’s ridership recovery.

TriMet is currently conducting a comprehensive service analysis in response to the changes to the transit market resulting from the pandemic and economic displacement. Called Forward Together, the analysis will make recommendations about how to reallocate existing service and implement new service with revenue growth coming from the Statewide Transportation Improvement Program. Phase 1 of Forward Together will be completed in 2022 and the first changes may occur as early as Sept. of 2023. More information on Forward Together can be found in Chapter 5.3.2.

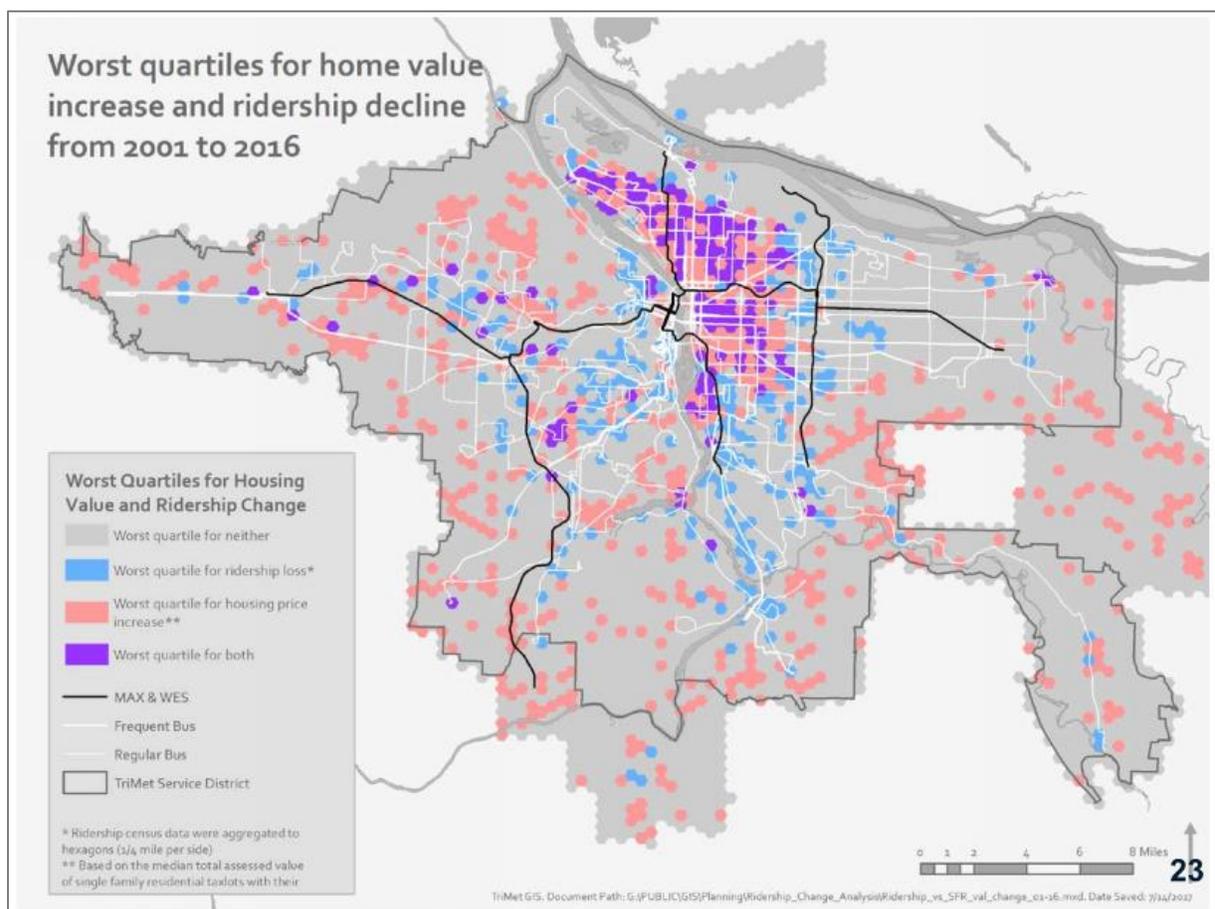


Figure 5: Comparing Home Value Increases and Transit Ridership Loss Within the TriMet Service District

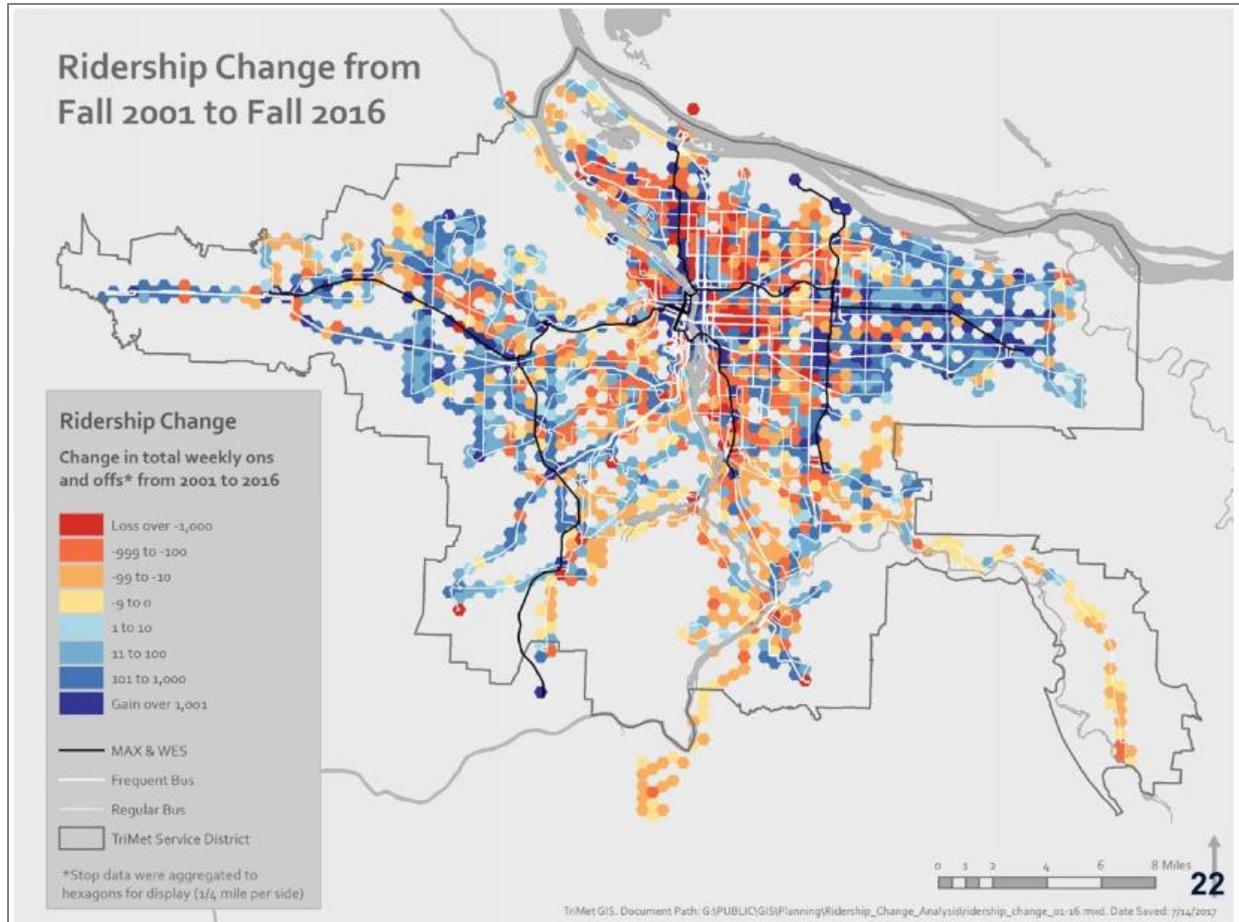


Figure 6: Change in TriMet Ridership- 2001 to 2016

**Figure 5** superimposes the highest levels of home value increases in the region, with transit ridership losses. The two factors overlap in the inner southeast, northeast and north Portland neighborhoods.

A comprehensive charting of transit ridership change within the TriMet district, from 2001 to 2016, is illustrated in **Figure 6**. As shown, increased transit ridership is foremost found along MAX corridors and in far east Portland, Gresham, Beaverton and Hillsboro. Other cities also indicate growing transit use, including Oregon City, Canby, Wilsonville and Sherwood.

The coverage and frequency of public transportation in these areas is far less than the inner southeast, northeast and north Portland areas.

## TriMet Strategies to Address Changing Demographics

TriMet is actively implementing a number of strategies to address these emerging trends by:

- Eliminating service to low ridership, high income areas and adding service to high ridership, low-income areas (see Forward Together in Chapter 5)
- Improving bus travel speeds and on-time performance (Better Bus program and coordination with City of Portland)
- Increasing affordability and integrating services, such as the Hop program with reduced fares for eligible youth and seniors
- Conducting customer research and implementing marketing programs and incentives

Forward Together improvements to be funded by reallocation of existing service and STIF and included in the PTIP (see Chapters 5-9) will significantly advance and implement these strategies.

### 5.1.2 Public Transportation Needs Assessments

TriMet has completed important studies with its regional planning partners and the greater community to help identify future public transportation needs within the service district. This section summarizes these key studies, including TriMet's Fare Reduction Program, Service Area Enhancement Plans and Portland's Enhanced Transit Corridor Plan.

#### Implementing the Region's Fare Reduction Program for Low-Income Residents

In 2017, Metro Councilor Sam Chase and TriMet's General Manager convened a regional Low-Income Fare Taskforce (Taskforce) to explore the feasibility of a local program through a regional collaborative effort. The Taskforce included 22 members from across the tri-county area. Members included local elected officials, community-based organizations, business associations and stakeholders from secondary and post-secondary education institutions. The Taskforce was informed by the Transit Equity Advisory Committee (TEAC), who helped draft the region's vision and initiative to establish a regional Low-Income Fare program, and championed the need for important policy research and passage of HB 2017. TriMet's Diversity and Transit Equity team used a variety of community outreach efforts (see above) to gather feedback, understanding and input for the development of the Low-Income Fare Reduction program and inform the Taskforce.

#### LOW-INCOME FARE PROGRAM IMPLEMENTATION

TriMet implemented Ordinance 347 and expanded its fare reduction program to include low-income residents.

- + Oregon residents earning less than double the federal poverty level qualify, who are ages 18-64 years old and not already using the Honored Citizen fares.
- + Riders are automatically eligible for reduced fares if they are already enrolled in the Oregon Health Plan/Medicaid or other federal or state assistance programs.
- + Riders must apply and verify their age and income to receive personalized Hop cards.
- + Reduced fare rates are 50% off single rides or day passes, or 72% off a monthly pass.

The Taskforce met over the course of five months, identifying the need for a regional Low-Income Fare Program equivalent to the Honored Citizen and Youth fare structures. The Taskforce's findings included

a funding strategy to prioritize a portion of new transit funds under HB 2017 to fund the Low-Income Fare Reduction program. The Taskforce's recommendations were adopted by TriMet in December 2017 under Ordinance 347. The Fare Reduction Program enlisted 2,000 customers in 2018. By 2020, the Fare Reduction Program enlistment has grown to 32,500 customers.

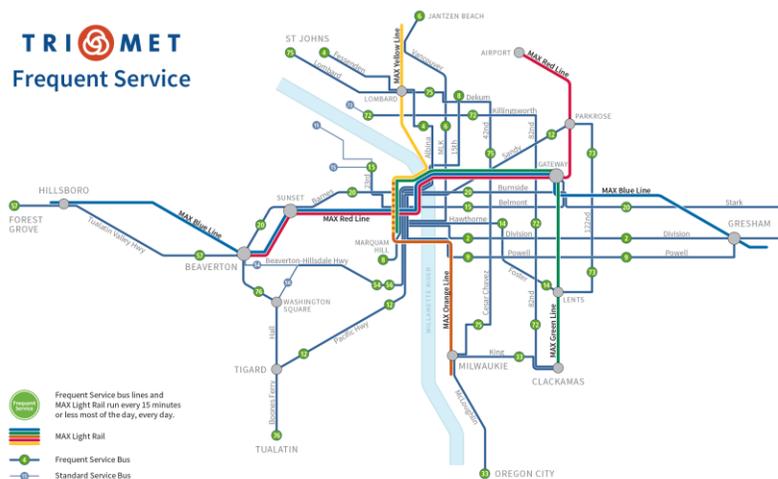
Current programmatic options considered for implementation in 2023 and 2024

- Fare subsidy
- Summer Pass program for low-income students (new, an extension of High School pass)
- Transit Access Grants (new) for seniors, people with disabilities and low-income veterans' passes (free, FCFS) to community-based organizations
  - Both are pilot projects now, utilizing previous unspent program dollars – becomes official)
- Administration & marketing (TriMet needs to hire new staffing to administer program)
- Program Reserve (in case more applicants register in the program than anticipated)

Portland's Enhanced Transit Corridors Plan and Rose Lane Project

The Enhanced Transit Corridors Plan (ETC) reflects the City of Portland's commitment to develop and fund street design improvements that increase the capacity, reliability and speed of transit. The ETC Plan was developed in 2017 and recently adopted by Council in June, 2018. The ETC Program has now been renamed the Better Bus Program.

Key ETC recommendations:



**Establish an Enhanced Transit performance monitoring program** – that establishes transit peak delay thresholds to trigger actionable transit performance improvements.

- **Refocus transit on serving longer trips** – by strategically moving bus stops further apart in key corridors and using street design and traffic signal priority treatments to increase bus speeds and schedule reliability.
- **Regularly commit city funds to plan and implement Enhanced Transit** – with a recommended annual city budget of \$500,000 to help fund ETC projects.
- **Include Enhanced Transit projects** in the RTP for federal and regional funding.
- **Consider impacts to transit speed and reliability in every project** – initiates city policy to consider transit speed and reliability improvements as part of any plan or project along a Frequent Service street.

In 2020, the City adopted the Rose Lane Project to implement key features of the ETC. Rose Lanes are corridors where transit priority treatments are used to get buses and streetcars out of traffic. Maps the City's Rose Lane vision, identifying city street transit routes that are:

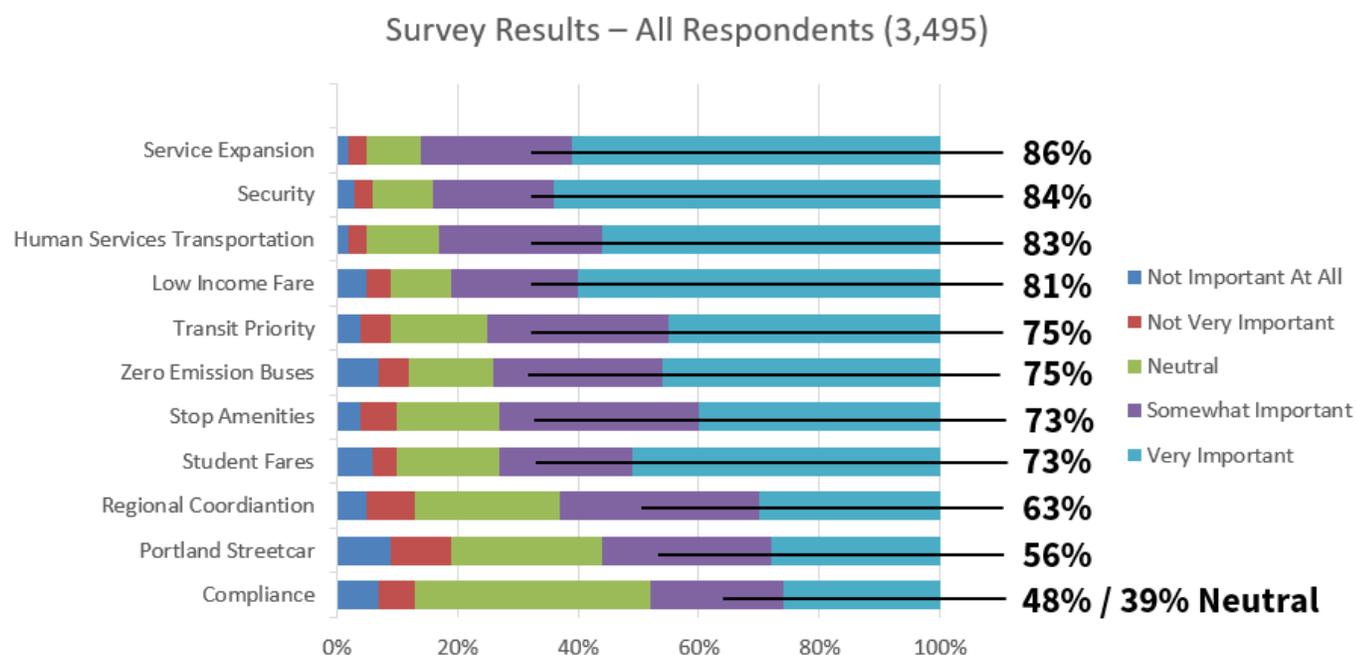
- **Faster.** Bus and streetcar routes with transit priority to improve transit speed, reliability and capacity, including segments of uncongested lanes primarily for transit and other treatments from the City's Enhanced Transit Toolbox. This may include red pavement markings in transit priority lanes.
- **Frequent.** A network of Frequent Service lines that come every 15 minutes all-day, more often at peak hours. Some lines may become 12 minutes all-day or better with future service increases.
- **Full.** Lanes that are exclusively or primarily for transit serve multiple bus/streetcar lines that come often and carry high ridership to maximize benefit.



### 5.1.3 Public Outreach

In August and September of 2022, TriMet staff asked the public to provide their feedback on the priorities being proposed for TriMet’s portion of the FY2024- FY2025 PTIP biennium. Public outreach was conducted online by an online survey translated into five languages – Spanish, Russian, Chinese, Korean, and Vietnamese. Staff also presented the plan to TriMet’s Equity Advisory Committee and Committee on Accessible Transportation. The outreach effort garnered 3,495 comments, of which 156 were in a language other than English. The survey asked respondents to rate how important each project in the plan was to them. **Figure 8** illustrates the response received by respondents.

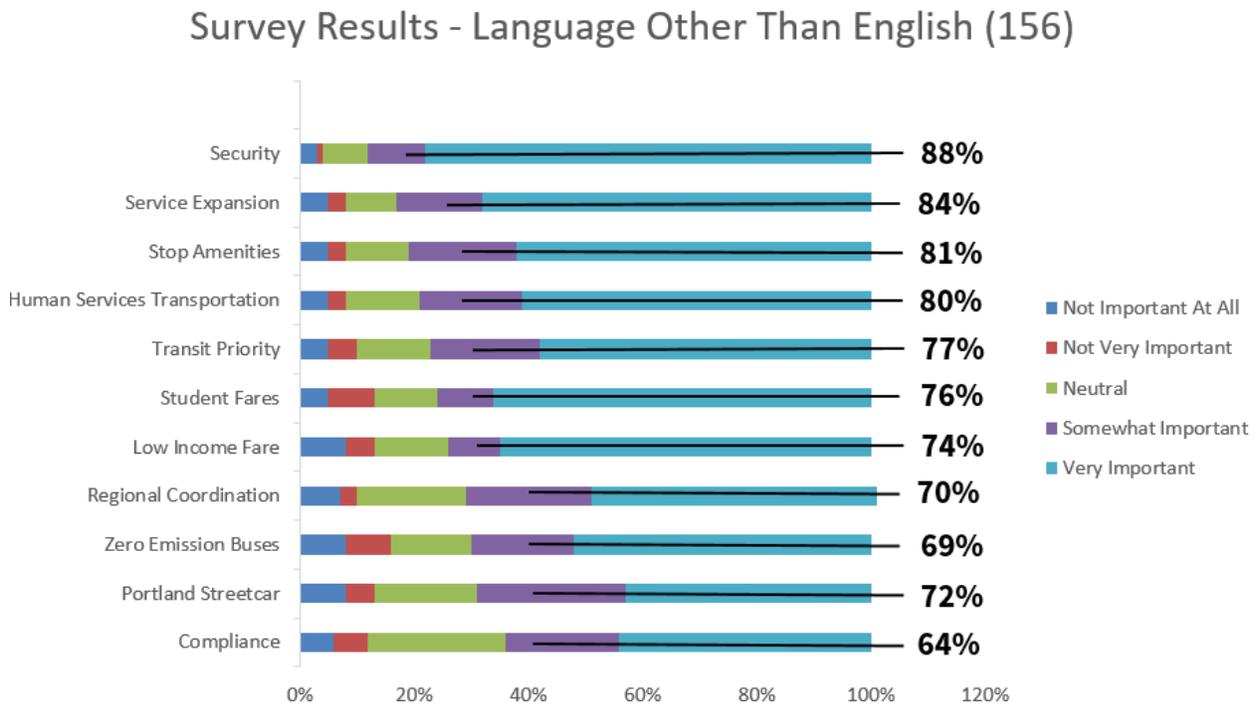
Figure 8: Year 2022 Public Outreach Response to Proposed TriMet PTIP Projects - All Respondents



As shown in the bar graph, more than 50% of respondents rated 10 out of 11 as being either very important or somewhat important, with several receiving over 80% support. The only project to receive a rating below 50% was the Compliance project. However, if you include the neutral rating, the project scored well above 50%.

**Figure 9** shows the results of the 156 responses received in a language other than English. These respondents rated the projects even higher, with no fewer than 64% rating all project very important or somewhat important.

Figure 9: Year 2022 Public Outreach Response to Proposed TriMet PTIP Projects - Non English Speaking Respondents



TriMet staff used the above public feedback in developing possible final funding allocations for consideration by the HB 2017 Transit Advisory Committee in 2022. Each of the public transportation service providers outside the TriMet district conducted outreach to their communities separately from the TriMet outreach.

## 5.2 Proposed Funding Level

During the summer and fall of 2022, the HB 2017 Advisory Committee considered and recommended allocating ongoing funding towards eleven programs. As shown the funding allocation includes important investments to continue expanding services in low-income communities:

### Ongoing Funding

- TriMet Fixed Route Service Increase improvements throughout the district (\$42.4 million, 23.0%)
- Low Income Fare (\$29.6 million, 16.2%)
- Student Fares – expanded student Transit Access Grant Program (\$1.8 million, .98%),
- Community based demand response Senior and Disabled Transportation (\$4 million, 2.2%)
- Zero-Emission Bus Program (\$56.7 million, 31%)
- Non-TriMet Regional Coordination Program (\$18 million, or 9.8%) in support of existing and new shuttle bus service to low income communities within the district and between other service providers in the region and an upgrade to TriMet’s online trip planner to include the shuttles and other transit services outside the TriMet district.
- Better Bus (\$8.3 million, 4.5%)
- Stop Amenities/Digital Displays (\$2.8 million, 1.5%)
- Portland Streetcar (\$6.0 million, 3.2%)
- Security (\$12.9 million, 7%)
- Compliance Administration (\$0.4 million, 0.2%)

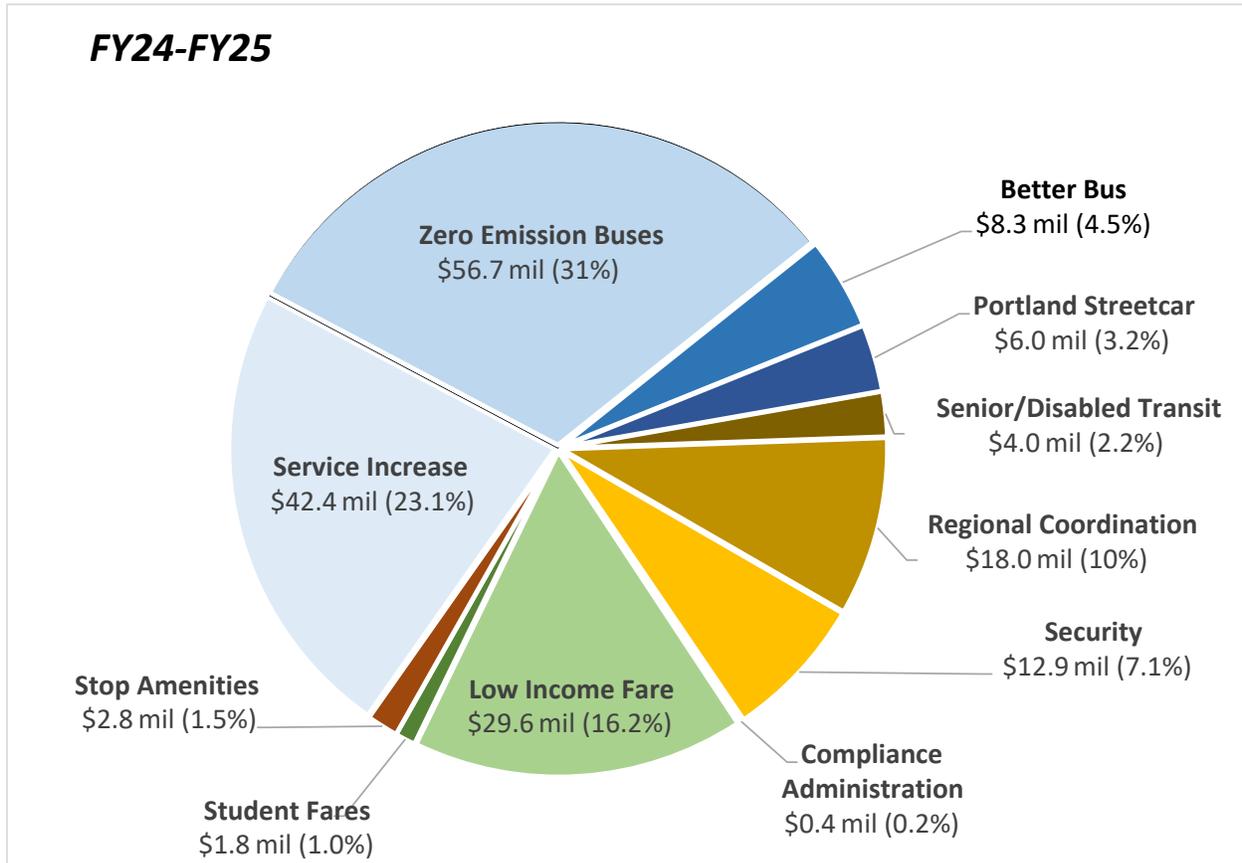
These programs will help to ensure that transit service and amenities are expanded and improved throughout the region.

Project	Description	Type				Priority Criteria				Expenditures		Notes
		Administrative	Planning	Capital Purchase	Service Expansion	Increase Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Services Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Population	
1	Low Income Fare Project Administration. This task will fund staff and staff time allocations for program support within TriMet.	x				x	x	x	x	\$ 1,236,000		
	Low Income Fare Planning & Marketing. Planning and creation for the low income fare enrollment service contracts, Outreach contracts, advertising, marketing, printing and materials.	x	x			x	x	x	x	\$ 1,036,000		
	Low Income Fare Preventative Maintenance. Low-income fare vehicle maintenance and upkeep.	x	x			x	x	x	x	\$ 6,000		
	Low Income Fare Operations. Providing fare to riders at a subsidized cost and HOP card purchase expenses.	x	x			x	x	x	x	\$ 23,466,275		
	Low Income Fare Program Reserve. Contingency due to uncertainty in ridership forecast and utilization of fare discounts, unforeseen needs. Funds for potential increase in transit needs within targeted communities may require fare relief program.	x	x			x	x	x	x	\$ 3,861,641		
	Service Expansion. This program maintains service expansions from FY19, FY20, & FY22 & increases funding for future expansions. Costs include ability of TriMet's Labor & HR Division to recruit and retain workforce and operations costs.	x	x	x		x	x	x	x	\$ 32,513,700		
	Service Expansion. This task will fund labor support and staff time allocations for planning work within TriMet.	x	x	x		x	x	x	x	\$ 308,000		
	Service Expansion. This task will fund labor support and staff time allocations for STIF program coordination and management.	x	x	x		x	x	x	x	\$ 308,000		
	Human Services TriMet LIFT - Operations. Demand Response services for seniors and people with disabilities.	x	x			x	x	x		\$ 1,000,000		
	Transit Access - Student Fare Program Project Administration. This task will fund staff time allocations for program support within TriMet.	x	x			x	x	x	x	\$ 27,600		
	Transit Access - Student Fare Program Planning & Marketing. Planning and development of Transit Access fare enrollment service marketing and outreach.	x	x			x	x	x	x	\$ 18,400		
	Transit Access - Student Fare Program Operations. Providing fare to student riders at a subsidized cost and HOP card purchase expenses.	x	x			x	x	x	x	\$ 1,794,000		
	Bus Stop Amenities Cleaning & Maintenance for Bus Shelters - Cleaning Costs. Maintains cleaning, maintenance and upkeep services to stops and shelters to improve rider experience.	x	x			x		x		\$ 150,000		
	Bus Stop Amenities Cleaning & Maintenance for Bus Shelters - Staff. This task will fund labor support and staff time allocations for Cleaning and Maintenance of Bus Shelters.	x	x			x		x		\$ 360,000		
	STIF Compliance & Administration which includes OE compliance and monitoring.	x	x							\$ 430,000		
	Safety and Security Division Project Management. This task will fund labor support and staff time allocations for Safety and Security project management.	x	x			x		x		\$ 510,000		
Security Information Technology. This task will fund labor support and staff time allocations for Information Technology related to Safety and Security programs.	x	x			x		x		\$ 305,000			
Security Investigative Analysis. This task will fund labor support and staff time allocations for Investigative Analysis.	x	x			x		x		\$ 470,000			
Security Safety Response Team - This task will fund labor support and staff time allocations for safety response and supervision	x	x			x		x		\$ 10,200,000			
2	Capital											
	Service Expansion Transit Centers and Layovers Construction. Materials and construction for transit layovers and transit center.			x		x		x		\$ 4,891,646		
	Staff time for design, engineering, & project management of transit centers and layovers expansion.	x	x			x		x		\$ 240,000		
	Transit Center/Layover Consulting Work. This task will fund Consultant Services on Transit Center and Layover Design.	x	x			x		x		\$ 500,000		
	Operator Workforce Management Systems Upgrade. Funding to upgrade software for operator management processes, software licenses, labor support and staff time allocations planning and consultant services.			x		x	x	x		\$ 2,666,589		
	Zero Emission Buses Purchase 24 Long Range Battery Electric Buses			x		x	x	x	x	\$ 18,596,886		1
	Zero Emission Buses Columbia Bus Base Project Development. Engineering and design for new bus base to house zero emission buses.		x	x						\$ 10,000,000		1
	Zero Emission Buses Overhead Charging Engineering & Design.	x	x			x	x			\$ 3,000,000		1
	Zero Emission Buses Charging Infrastructure - Funding for utility power upgrade at Powell substation.			x		x	x			\$ 3,000,000		1
	Zero Emission Buses Powell Charging Expansion - Fund new charging infrastructure.			x			x			\$ 2,200,000		1
	Zero Emission Buses Merlo Charging Island #2 engineering and design			x			x			\$ 2,000,000		
	Human Services technology for accessibility enhancements.			x		x	x	x		\$ 78,906		
	Better Bus Transit Priority Improvements - Planning, Design & Construction.		x			x				\$ 7,500,000		
	Better Bus Staff Time. This task will fund staff time allocations for program support within TriMet.	x				x	x	x	x	\$ 500,000		
	Better Bus-Transit Center and Layovers Expansion Shared. This task will fund labor support and staff time allocations support both Better Bus and Transit Centers and Layovers Expansion.	x				x	x	x	x	\$ 345,041		
	Bus Shelter Expansion - Materials & Construction. Materials and construction of new shelter improvements.			x		x	x	x	x	\$ 450,000		
	Bus Stop Amenities Bus Shelter Expansion - New Bus Shelter Design - Planning, Design, engineering and prototype costs.			x		x				\$ 50,000		
	Bus Stop Amenities Staff. This task will fund labor support and staff time allocations for bus stops planning.	x				x				\$ 308,000		
	Bus Stop Amenities Bus Shelter Expansion - Site Design. Design and engineering for site identification and improvement for shelter expansion.		x			x				\$ 105,000		
	Bus Stop Amenities Damaged Shelter Program - Materials & Construction. Replace bus shelter, benches, and stop signs damaged from vandalism and vehicle crashes.			x		x				\$ 200,000		
	Bus Stop Amenities ADA Bus Stop Improvements - Materials & Construction. Materials and construction of bus stop improvements to comply with Americans with Disabilities Act.			x		x				\$ 180,000		
	Bus Stop Amenities ADA Bus Stop Improvements - Site Design and Engineering. Design to upgrade bus stops to comply with Americans with Disabilities Act.		x			x				\$ 50,000		
	Bus Stop Amenities Bus Shelter Replacement Program. Purchase and replacement of bus shelters.			x		x				\$ 300,000		
Bus Stop Amenities Digital Displays - Procure, install and maintain digital displays which provide real time arrival information and other rider alerts.			x		x	x	x		\$ 687,203			
Security. Security Cameras and Video Data Storage - New & Replacements. Procurement & installation of security cameras on transit system and video data storage.			x		x				\$ 1,200,000			
TriMet Trip Planner Upgrade. Update regional trip planner and call taker application.	x	x	x		x	x	x	x	\$ 1,895,510			
Security Information Technology. This task will fund labor support and staff time allocations for Information Technology related to Safety and Security programs	x				x				\$ 305,000			
Program Reserve. Contingency funds for potential increase in transit capital program.					x				\$ 1,290,708			
Zero Emission Buses. This task will fund labor support and staff time allocations for Zero Emissions Bus and facilities system master planning.	x	x							\$ 345,041			
3	Electric Vehicle Program Reserve			x						\$ 17,603,114		1
<b>TriMet Total</b>										<b>\$ 168,647,669</b>	<b>\$0</b>	
[2]	Funds rolled over from FY2021-FY2023 STIF Formula Funds.											

Project	Description	Type				Priority Criteria					Expenditures			Notes		
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Human Services	STIF Population	STF Carry Over				
<b>Ride Connection</b>																
1	Human Services Transportation Plan	Ride Connection Network Replacement Vehicles - to purchase 5 vehicles			x		x	x	x				\$ 586,877			
		Ride Connection - Preventative Maintenance		x			x	x	x					\$ 77,509		
		Mobility Management - Ride Connection's Mobility Management program has provided travel training and related mobility support in the tri-county area since 2004. All services are easily accessed and allow the participants to receive the support needed to move freely within their community. Program services include: Travel Options Counseling, Mobility for Health, RideWise Travel Training, Ride Ambassador Program, Riders' Clubs, One-to-one Travel Training, Call taking, scheduling and dispatching of rides.		x		x		x	x	x					\$ 182,494	
		Network Support - Provides centralized call-center services and scheduling; driver, partner, staff training and development; contract compliance, risk management and safety; accessible fleet procurement; management of a 120+ vehicle fleet; technical support; joint marketing of regional transportation services; advocacy for individuals with transportation needs and community-based partners; fund development; volunteer recruitment; data management and reporting; and service planning including coordination of existing services, monitoring of performance and creation and implementation of services.	x	x		x		x	x	x					\$ 99,171	
		Ride Connection - Technology Capital & Infrastructure - Funding for the needed internal staff to manage these services and projects. Supports infrastructure that benefits operations including network partners throughout Clackamas, Multnomah and Washington Counties. Network enhancements will provide more reliable wireless network throughout systems.	x		x			x	x	x					\$ 229,504	
		Network Coordination - Provides centralized call-center services and scheduling; driver, partner, staff training and development; contract compliance, risk management and safety; accessible fleet procurement; management of a 120+ vehicle fleet; technical support; joint marketing of regional transportation services; advocacy for individuals with transportation needs and community-based partners; fund development; volunteer recruitment; data management and reporting; and service planning including coordination of existing services, monitoring of performance and creation and implementation of services.	x	x		x		x	x	x						
		Washington County Title XIX Match					x	x	x					\$ 1,987,360	\$1,428,233	
		Direct Service & Funding Cut Restoration					x	x	x					\$ 408,000		
		5310 Match - This project provides the required 10.27% matching funds for 5310 funding for capital purchases and preventative maintenance.					x	x	x					\$ 3,405,586	\$ 404,010	
		Asian Health & Services Center - Asian Communities Transportation Project					x	x	x					\$ 113,179		
		Exceed Enterprises - Supporting People with Diverse Abilities Project					x	x	x					\$ 195,920		
		Impact NW - Transportation Services for Seniors and People with Disabilities					x	x	x					\$ 637,887	\$76,599	
		MFS - STF Formula					x	x	x					\$ 255,638	\$ 24,651	
		MFS - N/NE Portland Service Restoration					x	x	x					\$ 393,126	\$ 31,435	
		Neighborhood House - Senior & Disabled Transportation Service					x	x	x					\$ 150,471		
Centro Cultural - Transportation Access for Senior & Disabled Latinos					x	x	x					\$ 323,222				
2	Vehicle Program Reserve			x									\$1,549,038	1		
<b>Ride Connection Total</b>											<b>\$ 2,400,682</b>	<b>\$6,208,689</b>	<b>\$1,549,038</b>			
[1] Funds rolled over from FY2021-FY2023 funds.																

Project	Description	Type				Priority Criteria					Expenditures			Notes	
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STF			
<b>Portland Streetcar</b>															
1	Portland Streetcar Service Preservation	STIF revenues will be used to support ongoing operations of Portland Streetcar - the funding will cover approximately 20% of the annual operating budget or ~14,000 revenue hours of service during each fiscal year of the plan. The City will need an ongoing STIF allocation to meet the service preservation objectives of this project, pursuant to needed approvals.	x	x			x	x	x	x			\$ 6,000,000		
		<b>Portland Streetcar Total</b>											\$ 6,000,000	\$0	
[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.															

Figure 10: HB 2017 Funding Allocation, FY 2024 – FY 2025



### 5.3 Proposed Service and Capital Improvements

#### 5.3.1 Ongoing Transit Service Expansion and Improvements

A large share of funding will be used to continue service expansion from prior years and to increase and improve transit service in the region (see **Attachment D** for a complete, line by line list of service increases already implemented with STIF funding.).

#### **Assessing the Transit Market for Future Service Improvements**

Though TriMet increased service levels on eighteen bus lines in FY19 & FY20, the COVID-19 pandemic facilitated a steep drop in ridership and a halt to significant service improvements. Changes to the transit market resulting from the pandemic, such as greater work from home rates, lower peak commuter ridership, and increased demand to areas with essential workers have persisted into FY23. Consequently, TriMet is conducting a comprehensive service analysis called Forward Together, which will assess how the market for transit service has changed and reallocate service to new and growing ridership opportunities.

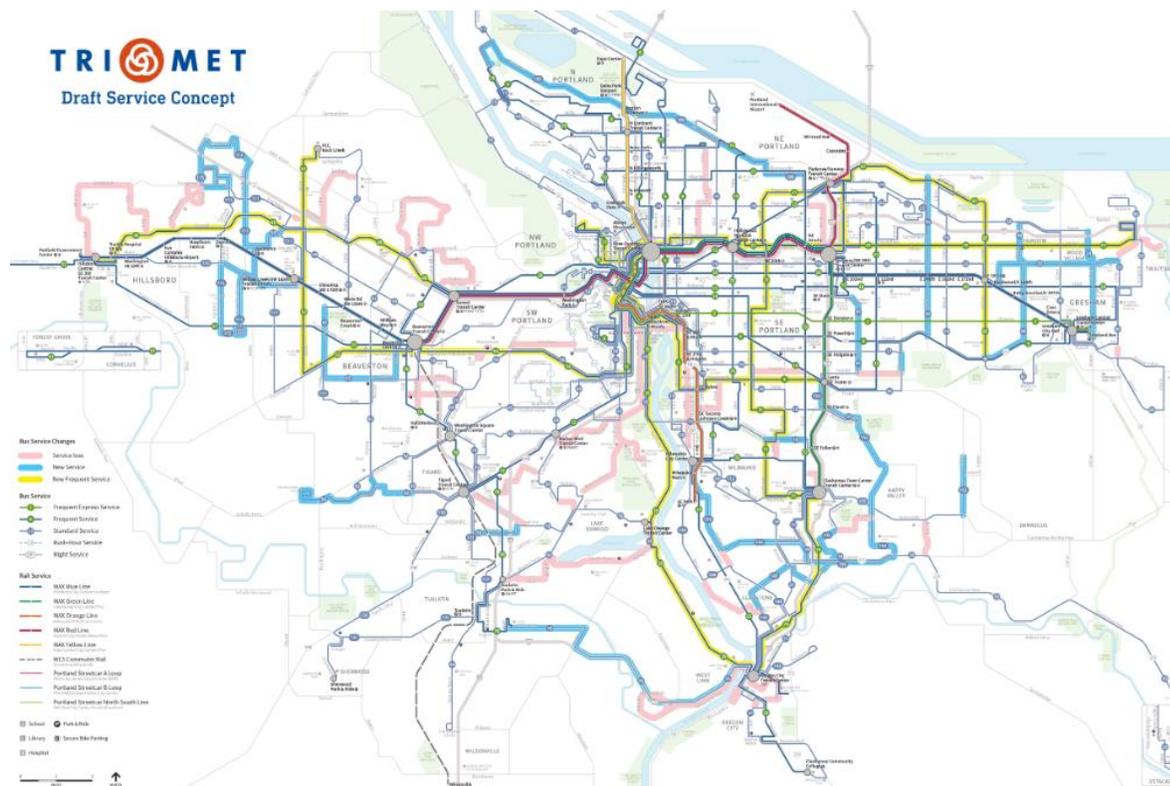
The plan will also make recommendation for where to direct future service expansions.

Specifically, we're exploring:

- where buses serve now and where they should serve in the post-pandemic future,
- whether riders traveling more between suburbs rather than in and out of Downtown Portland, and
- if more buses should operate where people ride the most or spread across the region to serve more neighborhoods, regardless of ridership potential.

TriMet will complete Forward Together-Phase I in December 2022. Phase I will provide recommendations of where to reallocate existing transit service and where to direct future service expansions with projected STIF funding over the next several years. The FY24-25 PTIP relies on these recommendation for service expansions and improvements. Forward Together-Phase II will make recommendations for important service expansions and improvements with funds that go beyond what we know we can afford with current STIF funding projections. Future funding will need to be identified in order to make these improvements. Though future service expansions are still being determined via the Forward Together process, TriMet will continue to pursue transit center and layover expansions to accommodate future growth in bus service. With transit facility expansions already underway in Troutdale and Gresham, the FY24-25 PTIP will direct funds towards increasing capacity for buses at Beaverton Transit Center and Oregon City Transit Center, with some funds going towards design work for smaller improvements. **Figure 11** is a draft service map based on the above goals. Staff is collecting input from the community on the changes shown in the map.

Figure 11: Year 2022 Public Outreach Response to Proposed TriMet PTIP Projects - All Respondents



TriMet's current route sign-up software, used to support bus and MAX operators select their work three times a year, is 40-years old. The PTIP is also directing funding towards a scheduling software upgrade that would support bus operators and bring the scheduling process into the 21<sup>st</sup> century.

The PTIP also expands funding to the City of Portland to operate the Portland Streetcar. Portland Streetcar is the third largest transit provider in the state by ridership. Fifty-four percent of the region's affordable housing is along the alignment. The PTIP has supported Portland Streetcar operations since 2019. The FY24-25 PTIP calls for maintaining and expanding funding to further support operations and long-term asset maintenance and upgrades.

### Low-Income Fare

The committee approved continued funding of the low-income fare program with the HB 2017 funding. This program allows low-income TriMet customers to pay an Honored Citizen fare once registered for the program. The Honored Citizen fare is half off the price of a full adult fare, and 72% off a monthly pass. Low income is defined as 200% of the federal poverty level, which for 2018 equals an annual income of \$24,276 for an individual, or \$50,196 for a family of four.

It is projected that about \$29.6 million in STIF Formula Funds will be dedicated to the Low-Income Fare program.

Members of the following programs are automatically eligible to receive an Honored Citizens Fare:

- Oregon Health Plan/Medicaid
- SNAP/EBT (Electronic Benefits Transfer) Card
- Temporary Assistance for Needy Families (TANF)
- Free and Reduced-Price Lunch
- HUD Housing Choice Voucher
- LIHEAP (Home Energy Assistance)
- Employment Related Daycare
- Women Infants and Children (WIC)

TriMet's Low-Income Fare program began in July 2018; over 32,500 customers are currently registered for the program (go to <https://trimet.org/lowincome/index.htm>).

New in this update of the PTIP is a Summer Pass Program for low-income high school students. Piloted in the summer of 2022, the Summer Pass Program will be available to high school aged youth whose families earn a low-income. Students will sign up for the program through their school before the summer break.

Also piloted in 2022 are Transit Access Grants for seniors, people with disabilities and low income veterans. This program provides funding community based organizations to provide free transit passes to seniors, people with disabilities, and low-income veterans. Though this program doesn't provide enough funding to make the system fareless for these groups, it does improve access to the transit system for those in the most need. Funding for the Summer Pass Program and the Transit Access Grants will continue in FY24-25.

### Regional Coordination and First and Last-Mile Shuttles

The HB 2017 legislation required that funding be used to help facilitate trips between the TriMet district and areas outside the TriMet district. Additionally, the committee set aside funding for first and last-mile shuttles in areas that are not cost effective for TriMet to serve but could be served via a 3<sup>rd</sup> party operator. The committee recommends continued funding of the Regional Coordination Program to operate shuttle service in these areas:

\$16 million in STIF Formula Funds will be dedicated annually to the Regional Coordination Program.

- Gresham to the Troutdale Reynolds Industrial Park
- Oregon City
- Airport Way/Columbia Corridor
- Clackamas Town Center to Clackamas Industrial Area
- Wilsonville to Bridgeport/Tualatin Park & Ride
- Clackamas Town Center to Clackamas Community College
- Forest Grove
- Tualatin Industrial Area
- North Hillsboro Industrial Area

The committee also recommended providing funds to third parties to increase the number of shuttles operating in the region. These shuttles would serve new areas that are difficult for TriMet to serve cost effectively.

### Expand TriMet's Trip Planner

The PTIP also directs funding for TriMet to upgrade the online trip planner to allow customers to plan a trip between origins and destinations in the TriMet district and our partner transit agencies like C-Tran in Vancouver, WA, SMART in Wilsonville, Sandy Transit, Canby Area Transit, and South Clackamas Transit District in Molalla. Additionally, the trip planner would enable customers to plan a trip between origins and destinations in the TriMet district and the first and last mile shuttles mentioned above.

### Human Services Transportation for Seniors and People with Disabilities

The committee recommended continuation and expansion of set aside funds for community-based transportation services for seniors and people with disabilities. These may include shopping and medical shuttles, on-demand services and transportation provided by volunteers with mileage reimbursement. Funds could also be used for capital purchases like new vehicles or scheduling and dispatch software. Funding would be operated by private, third parties or TriMet. Funding for specific services will be allocated via a solicitation process.

About 2% of STIF Formula Funds will be dedicated annually to expand transportation services for seniors and people with disabilities.

### School Transportation

The committee is required to set aside a minimum of 1% of funds for School Transportation for grades 9 through 12. The committee proposes to continue to use 1% of funds to expand TriMet's existing Access Transit Program to include high school students enrolled in free and reduced lunch

1% of STIF Formula Funds in the TriMet service district will be dedicated annually to expanding TriMet's Access Grant Program to area high schools for low-income students in grades 9 through 12.

programs. High schools throughout the TriMet District could apply for funds to buy discounted transit tickets and passes for students. The amount of funds available to high schools would depend on the schools share of students enrolled in free and reduced lunch programs within the region. Schools that participate in TriMet's Youth Pass program would not be eligible for the Access Transit program. If unallocated passes remain unclaimed after the initial solicitation of interest, those passes will be made available to schools with unmet demand on a proportional basis. For more information on TriMet's Access Transit Program, go to <https://trimet.org/accesstransit/relief.htm>.

## Bus Stop Amenities

The PTIP will continue to fund new and replacement shelters (and glass), ADA improvements, digital information displays for customers living and working in low-income areas. Additional funding will go towards a new bus shelter design that is more vandalism proof and can be installed in areas with narrow sidewalk.

Also, new funds will go towards replacing bus shelters that are over 20-years old and frequent cleaning of existing shelters.

\$2.8 million in STIF Formula Funds will be dedicated to the bus stop amenities.

## Zero Emission Buses

The allocated funding will allow TriMet to make significant strides in implementing its Zero Emission Bus (ZEB) program. The funds will go towards the purchase of the 24 long-range battery electric buses, charging infrastructure at Powell and Merlo garages, a power upgrade at Powell Garage, initial engineering and design work of an overhead catenary charging system, and project development work for the future Columbia

An estimated \$56.7 million in STIF Formula Funds will be dedicated to the Zero Emission Bus Program.

Garage. Just over \$7 million per year will be placed in a carry-forward account to be used in the FY26-27 biennium to purchase additional ZEBs. These improvements comprise the next steps TriMet must take in order to stay on schedule with a complete electric bus transition by 2040.

## Investing in safety & security on the system

While prior PTIP updates directed funding to security cameras, lighting, and sightline improvements, this update directs significant funds to TriMet's Safety Response Team (SRT). The PTIP calls for stabilizing and increasing the number of SRT Ambassadors from 24 to 56. SRT Ambassadors provide a safety presence onboard TriMet's buses and trains. Ambassadors are unarmed and do not conduct fare checks. They have had conflict de-escalation, mental health crisis, and customer service training. SRT Ambassadors are equipped with radios, food, and some basic items such as water and socks. Their presence onboard buses and trains increases overall security for our customers.

The PTIP also sets aside funding for continued upgrades to security cameras on the system.

## Staffing

The PTIP directs TriMet to fund staff to ensure that the above projects can be carried out. Staff funding will provide and support labor in planning, zero emissions buses, transit and lay over expansions, safety and security, better bus work, and compliance administration.

## 6 Clackamas County

### 6.1 Projected Funding

The projected STIF formula funding within Clackamas County, outside of the TriMet Service, is summarized in this section for the 2-year period of FY 2024 - FY 2025. **Table 2** lists the projected HB 2017 funding for Clackamas County in total, for the individual transit service providers within Clackamas County, and for the remaining portion of rural Clackamas County. New STIF formula funding for Clackamas County in FY 2024 - FY 2025 is estimated at nearly \$7.5 million with \$2.5 million carried over from the prior biennium. Additionally, Clackamas County will receive \$2.6 million in Special Transportation Formula Funds and \$6.5 million in Regional Coordination Funds.

Much of Wilsonville is located in Clackamas County, but a portion lies within Washington County where the new employee tax is collected. For the purpose of PTIP reporting, funding to the City (SMART) as allocated through both Clackamas and Washington counties are reported under Clackamas County.

**Table 2** also lists the funding allocated to Wilsonville through Washington County.

Table 2: Projected HB 2017 Funding – Clackamas County

FY2024-FY2025	CAT	SAM	SCTD	SMART**	Clackamas Co
STIF Formula Funds	\$883,152	\$645,874	\$647,511	~ \$3,536,000	\$1,821,869
Carryover from FY2021-23	\$297,664	\$116,872	\$191,000	~ \$1,520,000	\$2,080,818
STF Formula Expected	\$259,488	\$297,099	\$266,770	~ \$634,454	\$1,166,391
RCP	n/a	\$900,000	n/a	~ \$3,624,000	\$2,756,583
<b>Total</b>	<b>\$1,440,304</b>	<b>\$1,959,845</b>	<b>\$1,105,281</b>	<b>\$9,314,454</b>	<b>\$7,825,661</b>

\*\* Includes funding estimates for SMART with Clackamas and Washington counties

### 6.2 Needs Assessment

#### 6.2.1 Stakeholder Outreach - Public Participation

Each of the five Clackamas County local service providers conducted their own individual public outreach for their projects, using a combination of the following techniques:

- Presentations to their advisory boards and city councils
- Gathered input from their communities through one-on-one and other small meetings
- Surveys of bus riders and others
- Workshops and public meetings
- Presentations to the Clackamas County Coordinating Committee (C4)

The Clackamas County HB 2017 Transit Advisory Committee (CC HB 2017 TAC) was established through an intergovernmental agreement (IGA) between the service providers. This joint advisory committee was created to develop a specific recommendation for the projects to be included in the overall TriMet HB 2017 Public Transportation Improvement Plan. The committee includes representation from seniors, persons with disabilities, low income households, educational institutions and a transit provider outside of Clackamas County, as well as the transit providers within Clackamas County.

The CC HB 2017 TAC met on June 10 and August 18, 2020. The meetings were publicized in advance through traditional news media, on social media, and on county and transit provider websites. Each meeting included a public comment period. At these meetings, the service providers reviewed their existing service and provided background for their project proposals. After discussion, the committee recommended the full suite of projects be moved forward to the full TriMet HB 2017 PTIF Committee.

CC HB 2017 TAC reviewed and recommended projects to be included in Tri-County PTIP.

### 6.2.2 *Transportation Needs*

All the projects emerged from various planning processes. The specific plans that the projects were drawn from include:

- TriMet Coordinated Transportation Plan for Seniors & Persons with Disabilities, 2020
- South Clackamas Transportation District Transit Master Plan Update (2020)
- Sandy 2020 Transit Master Plan
- SMART 2017 Transit Master Plan (under refinement in 2022-2023)
- Canby Transit Master Plan (2017)
- Mt Hood Multi-Modal Plan (under refinement in 2022)
- Clackamas County Transit Development Plan (2020)

### 6.2.3 *Coordination with Other Districts*

Transit service providers in Clackamas County have a long history coordinating planning and operations.

Canby is a central point of coordinated bus services between CAT, SMART (Wilsonville) and SCTD (Molalla). SAM coordinates local bus service with the Mt. Hood Express (Clackamas County) with linkages in Sandy, and with TriMet on connections to Estacada.

Local transit service providers have a long history coordinating transit services within and beyond Clackamas County. Their continued efforts are helping improve the frequency and reliability of service connections between Oregon communities, especially those with low-income residents.

Clackamas County is continuing its coordination efforts to consider expanded systems connectivity between the Mt. Hood Express and new, "Around the Mountain" bus service to Hood River. SMART provides connections between Wilsonville and Salem and coordinates service with Cherriots. CAT coordinates bus service along Highway 99E between Canby and Woodburn.

### 6.3 Proposed Service Improvements

**Table 3** lists the proposed transit service investments to improve frequency and reliability of service between Clackamas County communities. The improvements will help reduce fragmentation in the provision of transportation services outside the TriMet service district.

Service enhancement projects are numbered in accordance with **Table 3**, and listed below by county, city or transit service provider within Clackamas County. **Table 3** also notes the project type, applicable priority criteria addressed by the project, and the estimated cost. Proposed transit service enhancements in Clackamas County include:

Table 3: Clackamas County Service Enhancement Projects

Project	Description	Type				Priority Criteria					Expenditures			Notes		
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population				
1	Transit Operations	Mt Hood Express Service: Continued funding for existing Village Shuttle and Mt Hood Express services from the City of Sandy to Rhododendron and Government Camp. This includes funding for one Express run daily and one Villages shuttle daily added during the funding cycle in FY19/21. All other operational and match costs needed to maintain existing service levels. This project includes funding		x			x	x	x			\$ 435,000		\$ 22,145		
		Local Service Connections: Work with Clackamas County small transit providers to address missing connections in Clackamas County between existing transit providers as identified in the Clackamas County Transit Development Plan (TDP), other transit master plans, or local plans. Once project is identified help design an implementation plan and provide operational funding support to implement the		x	x			x	x	x			\$ 162,000			
		Village Shuttle Service: Provide continued funding for the Villages Shuttle provides point deviated fixed route service between Sandy and Rhododendron four times daily seven days per week. Provide funding support for all operational and match costs needed to maintain existing service levels		x		x		x	x	x			\$ 36,807			
		Boring Lifeline Service: This project provides service to the unincorporated community of Boring, which is outside of the service area of any senior center or transit service. This is a partnership between Clackamas County Social Services Division (SSD) and the City of Sandy - Sandy Senior & Community Center (SSCC) to sustain services for residents age 60 plus or with a disability.		x				x	x	x			\$ 64,609			
2	Planning and Capital	Transit Hub Site Development: Building on Transit Hub initial study. Match and planning costs to study and engage in initial site development activities and provide match for larger Oregon Solutions Project regarding the rest stop relocation. (S311)		x				x	x			\$ 20,026				
		MTX Capital Purchases: Provide match to purchase one new bus to stabilize fleet capacity of existing service as well as address future service expansion resulting from Transit Development Plan/ Vision of Transit around the Mountain project. (S311)		x					x	x			\$ 21,567			
		MTX Infrastructure Upgrades: Provide match for updates to the infrastructure for Mt Hood Express. Improve / place shelters and improve customer information, on-street signage, and other transit amenities to improve the safety and transit experience for rural transit riders. (S311)		x					x	x			\$ 3,594			
		Maintenance: Provide match for Vehicle maintenance costs associated with the Mt Hood Express, Village Shuttle and Transportation Reaching People. (S311)		x					x	x			\$ 8,729			
		Technology Upgrades: Support and provide match for implementation and maintenance of new technology solutions for the Mt Hood Express, Last Mile Shuttle, and Transportation Reaching People programs. Upgrades to dispatch software, real time vehicle arrival information, on board technology, upgraded websites, etc. (S311)		x	x				x	x			\$ 10,270			
		Vehicle Match: Provide full match to State funds for purchase of three buses in FY22/23 to preserve existing service and address fleet needs for the Mt Hood Express and Transportation Reaching People Programs. All new bus purchases in FY20/21 and many of our older buses are in desperate need of upgraded equipment to meet the needs of the Express service. Upgraded equipment includes the purchase of bike trailers, ski boxes, in bus technology, etc.		x	x				x	x			\$ 150,000			
3	Community Based Transportation	Clackamas County Transportation Programs: Support and increase demand response services for Seniors and Persons with disabilities. This project would increase the availability of demand response services for Clackamas County residents. Money would be used for preventative maintenance, Operations, Senior Centers, Taxis, Paid Driver's, and other program expenses.	x	x				x	x	x		\$ 165,000	\$ 198,206	\$ 414,512	1	
		Clackamas County Dedicated Dialysis: Support Dedicated Dialysis rides provided by paid and volunteer drivers through the Transportation Reaching People program.	x	x					x	x	x		\$ 50,000	\$ 122,080	\$ 88,805	1
		Clackamas County Dedicated Medical: Support Dedicated Medical rides provided by paid and volunteer drivers through the Transportation Reaching People program.	x	x					x	x	x		\$ 122,080	\$ 92,893	1	
		Clackamas County Specialized Services: Support transportation services provided by the Senior Centers and other rural Transit providers in Clackamas County. Rides provided by both paid drivers and volunteers.	x	x					x	x	x		\$ 105,000		\$ 341,064	1
		Clackamas County Volunteer Programs: Support Transportation services provided by Transportation Reaching People Program. Transportation provided by volunteer drivers. This includes staff salaries, volunteer mileage, and other volunteer program operations.	x	x					x	x	x		\$ 125,000		\$ 67,459	
		T-19: Match provided for T-19 rides provided by Transportation Reaching People and the Clackamas County	x	x					x	x	x				\$ 32,513	
		TRP Vehicle Purchase: Purchase one new Transit Van for the Transportation Reaching People program to expand the fleet and provide additional services			x				x	x	x		\$ 205,000			
4	Clackamas County Admin and Program Reserve	Administrative Costs: Approved category to cover the costs of administering and providing match for all STIF related projects, including project/plan development.	x						x			\$ 215,000				
		Program Reserve: Approved category to cover the costs of projects within the STIF Plan. Will address any potential losses or increased match requirements in STIF, S311, S310, FLAP, Local Funds or STIF funding used to preserve existing service during the next biennium or to provide additional support for un-anticipated increases in operations/project costs.	x							x			\$ 849,710			
		Audit: Annual required audit by TriMet	x							x			\$ 20,000			
5	Clackamas County Shuttles	Regional Coordination Project: This project was previously approved under the FY19-21 STIF Plan. Continued and expansion funding for the Clackamas Community College (CCC) free Xpress Shuttle, Oregon City Last Mile Shuttle, and Clackamas Industrial Last Mile Shuttles that provide enhanced transit access throughout the community, particularly for transit dependent and low income populations. Rollover funding will be used to purchase additional vehicles to provide this extra service and maintain existing service levels. This shuttle is open to the public and provides a direct link between Oregon City and Continued operations of the CCC Xpress Shuttle, Oregon City Last Mile Shuttle, and Clackamas Industrial Last Mile	x	x	x			x	x	x	x	\$ 900,000				
		Regional Coordination administrative costs	x	x				x	x	x	x		\$ 1,690,123			
			x						x	x	x		\$ 166,460			
6	Estacada to Clackamas Community College	City of Sandy vehicle purchase to provide transit connection between Estacada and CCC Campus in Oregon			x			x	x	x		\$ 175,000				
		City of Sandy operations costs to provide transit connection between Estacada and CCC Campus in Oregon										\$ 445,000				
7	Regional Coordination Program Reserve	Reserve funding to be used if needed on any of the Regional Coordination STIF projects.	x					x	x	x		\$ 300,000				
<b>Clackamas County Total</b>											<b>\$ 6,222,488</b>	<b>\$ 543,782</b>	<b>\$1,059,391</b>			

[1] Funds rolled over from FY2021-FY2023 STIF Formula Funds.

**Table 3: Clackamas County Service Enhancement Projects (cont.)**

Project	Description	Type				Priority Criteria					Expenditures			Notes
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population		
<b>City of Wilsonville</b>														
1	Electric & CNG Fleet Procurement			x		x	x	x	x			\$ 1,540,000		
2	Operations				x	x	x					\$ 6,064,000	\$ 634,454	1
3	Planning and Administration	x	x									\$ 1,076,000		
<b>Wilsonville Total</b>											<b>\$ 8,680,000</b>	<b>\$ -</b>	<b>\$ 634,454</b>	

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

Project	Description	Type				Priority Criteria					Expenditures			Notes
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population		
<b>City of Canby</b>														
1	CAT Demand Response				x	x	x							\$ 259,488
2	City of Canby DBA Canby Area Transit CAT Saturday Service				x		x	x	x			\$ 274,061		
3	Canby Loop				x		x	x	x			\$ 606,755		1
4	Program Contingency	x												\$ 300,000
<b>Canby Total</b>											<b>\$ 880,816</b>		<b>\$ 559,488</b>	

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

**Table 3: Clackamas County Service Enhancement Projects (cont.)**

Project	Description	Type				Priority Criteria					Funding			Notes
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population		
<b>SCTD</b>														
1	Molalla City Bus Deviated Fixed Route Service			x		x	x	x					\$ 266,770	
2	Enhanced Transit Service - Maintain STIF Service			x		x	x					\$ 250,000		
3	System Infrastructure Improvements		x				x					\$ 66,000		
4	Electronic Customer Information	x		x		x	x					\$ 25,000		
5	Annual Audit Required by TriMet	x										\$ 30,000		
6	Program Reserve			x		x	x					\$ 107,511		
7	Purchase Transit Vehicles			x		x	x					\$ 360,000		
<b>SCTD Total</b>											<b>\$ 838,511</b>		<b>\$ 266,770</b>	

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

**Table 3: Clackamas County Service Enhancement Projects (cont.)**

Project	Description	Type				Priority Criteria				Funding			Notes
		Administrative Planning	Capital Purchase	Service Expansion		Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population	
City of Sandy													
1	Expanded Services Continuance			x		x	x	x	x	\$ 268,556			
2	Sandy Area Metro Shopper			x		x	x	x	x	\$ 61,081			
3	Administration Costs	x								\$ 45,000			
4	Program Reserve	x	x	x	x					\$ 51,400			
5	Capacity Project		x			x				\$ 116,872			1
6	Electric Vehicle Infrastructure			x						\$ 45,000			
7	Local Dial - a - Ride Program SAM Rides			x		x	x	x				\$ 273,113	
8	Deviated Route - Estacada Service			x		x	x	x			\$89,515		
9	Elderly & Disabled Door - to - Door Service			x		x	x	x			\$85,322		
10	SAM Bus and Bus Stop Upgrades			x								\$ 23,986	
11	Regional Coordination			x		x	x	x	x	\$ 900,000			
<b>Sandy Total</b>										<b>\$ 1,487,909</b>	<b>\$174,837</b>	<b>\$ 297,099</b>	

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

Clackamas County

- Transit Hub Site Development - building on the preliminary Transit Hub planning project – further – study and engage in initial site development activities and provide match for larger Oregon Solutions Project regarding the rest stop relocation.
- Continued funding for existing Village Shuttle and Mt Hood Express services from city of Sandy to Rhododendron and Government Camp, respectively.
- Vehicle Maintenance – includes maintenance costs associated with the Mt Hood Express, Village Shuttle, Transportation Reaching People, and Last Mile Shuttle services.
- Administrative Costs - Cover costs of administering STIF program, including project and plan development.
- Local Service Connections - Work with Clackamas County small transit providers to address missing connections in Clackamas County between existing transit providers as identified in the Clackamas County Transit Development Plan (TDP), other transit mater plans, or local plans. Once project is identified help design an implementation plan and provide operational funding support to implement the new or expanded service.
- Program Reserve - approved category to cover the costs of preserving existing service for Mt Hood Express and Transportation Reaching People (TRP) program (carryover funds).
- Audit - approved category to cover the costs of required STIF Audit(s).
- Mt. Hood Express Infrastructure - updates to the infrastructure for Mt Hood Express. Improve or place new shelters and improve customer information (on-street signage).
- Paid Driver - Increase and support demand response services for Seniors and Persons with disabilities for rural Clackamas County residents. Funds would be used for preventative maintenance, operations, taxis, paid drivers, and other paid driver expenses.
- Senior Center - Support transportation services provided by the rural Senior Centers and rural transit providers in Clackamas County. Rides provided by both paid drivers and volunteers and deliveries of meals to home bound seniors.
- Volunteer Program - Support transportation services provided by the Transportation Reaching People program. Transportation provided by both paid and volunteer drivers. This includes staff salaries, volunteer mileage, operations, and preventative maintenance.
- Elderly & Disabled - Purchase one new Transit Van for the Transportation Reaching People program to expand the fleet and provide additional services.
- STF: Mt Hood Express Service Continuation Weekend Service - provides commuter and point deviated fixed route bus service between the City of Sandy and various destinations along the Highway 26 corridor, ending at Timberline Lodge since 2008 and has been expanded to serve

Government Camp and Timberline Lodge. Mt Hood Express (MHX) provides fully accessible public transit for employment, recreation and other needs to both local residents as well as visitors from the Metro area and beyond.

- STF Waivered Non - Medical Transportation Match - All Clackamas County residents who are receiving community-based care through the State's Department of Human Services (DHS) Medicaid long-term support services in the community or in their home are eligible. This award provides matching dollars for waived non-medical (T19) transportation program.
- STF/STIF: TRP Dedicated Dialysis - This transportation project is open to all Clackamas County older adults (60+) who have limited access to transportation for dialysis treatment and utilizes both STF and STIF funds. A majority of these rides are provided by paid Transportation Reaching People (TRP) drivers, but TRP volunteer drivers also provide limited rides in their own vehicles. These rides are provided using three wheelchair accessible vans, two wheelchair accessible buses, and a wheelchair accessible transit van. Taxis are utilized on a limited basis and only when a TRP driver/vehicle, paid or volunteer, isn't available. Riders receive curb to curb service.
- STF: Senior Center Specialized Services - Service is provided to Clackamas County residents who are either 60 plus or have a disability living in the designated service areas. Rides are provided using both paid and volunteer drivers. Hoodland, Molalla and Sandy also use taxis on a limited basis. The ride must originate within the service area of the Center, but can go to a destination outside the service area. This service is frequently the only option available to riders as most are outside paratransit boundaries.
- STF/STIF: TRP Dedicated Medical Service - This transportation project is open to all Clackamas County older adults (60+) who have limited access to transportation for medical appointments and utilizes both STF and STIF funds. A majority of these rides are provided by paid Transportation Reaching People (TRP) drivers, but TRP volunteer drivers also provide limited rides in their own vehicles. These rides are provided using three wheelchair accessible vans, two wheelchair accessible buses, and a wheelchair accessible transit van. Taxis are utilized on a limited basis and only when a TRP driver/vehicle, paid or volunteer, isn't available. Riders receive curb to curb service.
- Boring Transportation Service Purchased Service - This project provides service to the unincorporated community of Boring, which is outside of the service area of any senior center or transit service. Vulnerable residents of this community lost their access to transit/paratransit services when the community withdrew from the TriMet service district.
- Regional Coordination - Provides transportation services to Oregon City, Clackamas Industrial Area, Clackamas Community College, and a route from Estacada to Clackamas Community College.

#### City of Wilsonville (SMART)

- Regional Coordination Program - Route 2X Tualatin - Provide express service between Tualatin Park and Ride and Wilsonville Transit Center. Enhanced service between 6:00 am and 9:00 pm to Tualatin Park and Ride using RCP funding
- Expanded Services Continuance - Continue funding for existing service on Route 1X mid-day service, Route 2X in-town service, Route 7 neighborhood shuttle. (Continued)

- Clackamas Town Center Express - Provide weekday service between Wilsonville Transit Center and Clackamas Town Center with limited stops if Oregon Department of Transportation allows use of bus-on-shoulder.
- STF Out-of-Town Medical Dial-a- Ride - Provide transportation service for customers in Wilsonville and providing them rides to medical facilities in the greater meter area.
- Meridian Hospital Medical Shuttle - Medical Shuttle service to Meridian Medical Center.
- 80X to Woodburn - Provide express service between Wilsonville and Woodburn (bus purchase in capital project #1. (New)
- Administrative Costs - Administration of the STIF program including project/plan development, on-going operating costs, procurement, expand facilities and audit costs. (Continued)
- TOD Customer Service - Approximately 2 full time equivalent positions and ongoing costs associated. (New)
- Basalt Creek Service Study - Create plan/study to understand the future need for transit services in the Basalt Creek area. (New)
- Signage Updates Create plan for SMART bus stop and bus stop amenities. (New)
- Program Reserve - The Program Reserve project allows for up to an additional 10% of total projected agency funding to accrue. This project is designated to support current STIF plan projects if project expenses exceed total planned expenses or if other funding (match) sources are reduced. (Continued)

#### City of Canby (CAT)

- Route 99X Saturday Service and Dial-a-Ride - Continued funding for the Saturday service for both 99x and Dial-A-Ride Service. (Continued) Depending on actual funding received the service may include expanded service hours. (New)
- City Circulator – Increased frequency of service to low income communities, Expansion of bus routes and bus services to areas with a high percentage of low-income households, coordination between public transportation service providers, and implementation of programs to provide student transit services for students grades 9-12.
- Program Reserve – Reserve for grant funding shortfalls - this shortfall will address any potential loses in STIF, 5311, 5310 or STF funding used for operation during the next biennium or to provide help for increasing contractor rates due to inflation.
- STF CAT Demand Response - Provides Complimentary Paratransit (CP) services to destinations inside the Canby Urban Growth Boundary (CUGB); a twice daily shopping shuttle; and a Premium Dial-A-Ride service for eligible CP customers to and from destinations within the Oregon City city-limits.

#### South Clackamas Transportation District (SCTD)

- Enhanced Transit Service - Maintain and increase transit services, especially for Seniors and Persons with disabilities, within or originating in Molalla, a low-income area. Maintain days of service to include Saturdays on intracity route; M-F AM peak-hour service on Molalla-CCC intercity route; service hours M-F on Molalla-Canby intercity route; and increase service to Clackamas Community College connecting with other regional transit services.
- Audit - approved category to cover the costs of required STIF Audit(s).
- Program Reserve - To support current STIF projects if actual expenses exceed planned expenses for STIF or matching funds.
- Molalla City Bus Deviated Fixed Route Service - Maintain the current Molalla City Bus (intra-city) deviated fixed-route service. The service operates free of charge, five days a week (M-F) from 7:30 AM - 5:35 PM, and on Saturdays from 9:30 AM – 3:45 PM. Includes major trip destinations within Molalla including three assisted living centers, an adult community center, library, and City Hall. It also serves banking, shopping, health services and many neighborhoods in Molalla, including areas with high concentrations of low-income and LEP (Limited English Proficiency) populations.

#### City of Sandy (SAM)

- Expanded Service Continuance - Continue funding for existing STIF service on SAM Gresham, SAM Estacada, SAM Shopper. (Continued)
- Administration Costs - Administration of the STIF program including development, reporting, audit costs, procurement, and expanding facilities. (Continued)
- Program Reserve - Category to cover cost of preserving service. (Continued)
- Capacity Planning/Construction Plan for improved admin space, adequate and private training room, addition of a driver restroom/break area. (FY21-23) (Continued)
- Sandy Area Metro Shopper - Funding for STIF service on SAM Shopper Saturdays. This includes operation costs for at least 5 hours of Saturday service. Plan for improved admin space, adequate and private training room, addition of a driver restroom/break area. (FY21-23) (Continued)
- Deviated Route - Estacada Service - This service is an intercity commuter route with the ability to deviate in a rural, underserved service area. Deviations are primarily requested by individuals who are not physically able to walk or ride to the main highway for transportation and live in mobile home parks located along the route. This is a scheduled route, so individuals only need to telephone the Sandy dispatch office to request a route deviation.
- Elderly & Disabled Door - to - Door Service - This service is available to frail elderly and person with disabilities who live in Sandy city limits for services (primarily medical) which they cannot receive in city limits. It is the only medical rides program available for seniors and/or persons with disabilities in city limits for out-of-town demand response services for rides originating in the city limits.
- Local Dial - a - Ride Program SAM Rides - The SAM rides service provides the only public transit demand response option available to the general public. It is available for everyone in city limits as well as a 3-mile radius from city center. It is a destination-to-destination service and provides the complimentary ADA paratransit service for SAM fixed routes.

- SAM Bus and Bus Stop Upgrades - This project aims to improve safety and security at transit facilities by improving lighting at each sheltered stop. This project would improve, replace or add solar powered lighting to each shelter as needed throughout town.
- Regional Coordination - This project funds Route 2X and Clackamas Express which provides transportation from Sandy to Clackamas Town Center.

#### 6.4 Proposed Capital Improvements

Capital improvement projects are also numbered in accordance with **Table 3**, and listed below by county, city or transit service provider within Clackamas County. Proposed transit capital improvements in Clackamas County include:

##### Clackamas County

- Purchase one new bus to stabilize fleet capacity of existing service as well as address future service expansion resulting from Transit Development Plan/ Vision of Transit around the Mountain project. (Carryover funds)
- Technology - Implement and maintain new technology solutions for the Mt Hood Express, Last Mile Shuttle, and Transportation Reaching People programs. Upgrades to dispatch software, real time vehicle arrival information, on board technology, upgraded websites, etc. (Carryover funds)
- Mt Hood Express and TRP - Provide full match to Federal funds for purchase of two buses in FY21-FY23 to preserve existing service and address fleet needs for the Mt Hood Express and Transportation Reaching People Program (TRP). Also provide dollars for upgraded equipment to meet the needs of the Express service, including bike trailers, ski boxes, and bus technology.
- Updates to the infrastructure for Mt Hood Express. Improve / place shelters and improve customer information (on-street signage).
- Elderly & Disabled Capital Purchase - Purchase one new transit van for the Transportation Reaching People program to expand the fleet and provide additional services.

##### City of Wilsonville (SMART)

- Electric & CNG Fleet Procurement - Buy or provide match for alternative fuel buses to include 6 CNG cutaways, purchase & install of electric charging infrastructure, construction match for facilities expansion, and construction/expansion for bus stops/amenities--(New)

##### South Clackamas Transportation District (SCTD)

- Infrastructure Improvements - Continue to improve on-street amenities at stops and shelters and improve customer information (on-street signage).
- Electronic Customer Information – Continue enhancing customer information via electronic channels (such as websites, mobile apps) including real-time vehicle arrival information, improved trip planning, and other electronic tools to improve rider information, mobility and access.

- Purchase 3 new E-size buses.

City of Sandy (SAM)

- Electric Vehicle Infrastructure - Make Ready Infrastructure for Electric Vehicle, Charging Stations and Match for electric vehicle dependent on amount of funding received. (New)

## 7 Multnomah County

### 7.1 Projected Funding

The projected HB 2017 funding within Multnomah County, outside of the TriMet Service, is summarized in this section for the 2-year period of FY 2024 - FY 2025. Table 3 lists the projected HB 2017 funding for Multnomah County, estimated at \$129,595. Additionally, Multnomah County will receive almost \$1.1 million in Special Transportation Formula Funds (STF) and \$2.8 million in Regional Coordination Funds.

Table 3: Projected STIF Formula Funding – Multnomah County

	<b>FY 2024</b>	<b>FY 2025</b>	<b>Total</b>
Multnomah County	\$63,204	\$66,391	\$129,595
STIF Population Funds	\$546,431	\$546,431	\$1,092,861
Regional Coordination Program	\$1,582,000	\$1,250,000	\$2,832,000

### 7.2 Needs Assessment

#### 7.2.1 Stakeholder Outreach - Public Participation

Due to the low revenue projections, Multnomah County was not instructed to create a committee to determine how to use the funds. Multnomah County Transportation Division staff met with several internal and external stakeholders to determine how to proceed. Internal stakeholders include staff in the Health Department, Department of County Human Services, and Department of Community Services. Outreach to additional stakeholders and the public is included in planning and coordination projects.

#### 7.2.2 Transportation Needs

Due to the COVID pandemic, planned in-person public outreach on the transit needs of rural residents was postponed temporarily. The County restarted this process in Fall 2022, with in-person outreach to promote the dial-a-ride service and to conduct a bilingual (English- and Spanish-language) rural transit needs survey. Transportation Division staff continue to

coordinate regularly with the Department of Human Services Aging, Disability and Veterans Services.

### Supporting Plans

The Transportation System Plan for Unincorporated Multnomah County does not include a transit element but does have several policies that note a desire to coordination and provide some level of service in the rural areas:

#### **Policy 13: TDM, Outreach, and Transit**

Implement a range of Transportation Demand Management (TDM) policies encouraging existing businesses and requiring new development (beyond single-family residential use and agricultural uses) to help reduce vehicle miles traveled (VMT), and alleviate congestion on county roads caused by seasonal and special event traffic, as well as through commuter traffic.

#### **Policy 14: TDM, Outreach, and Transit**

Coordinate and work with transit agencies and service providers (including, but not limited to, TriMet, CC Rider, and C-Tran) to identify existing transit deficiencies and the improvements necessary to increase access to transit services by potential users.

#### **Policy 24: TDM, Outreach and Transit**

On rural roads with heavy through traffic, consider implementing appropriate measures such as Transportation Demand Management (TDM) to reduce such traffic.

Policy guidance for transit planning and service delivery in rural Multnomah County is also provided by regional (TriMet Coordinated Transportation Plan) and state plans, in particular the draft goals of the Oregon Public Transportation Plan (see **Attachment E**).

Additional research is being completed to (1) aggregate transit disadvantaged populations demographics in rural areas (areas outside of TriMet), (2) gather information about destination and travel needs relative to those populations, (3) generate prioritized list of transit related projects/improvements, and (4) adopt a Transit Element Appendix to the County Transportation System Plan.

### *7.2.3 Coordination with other districts*

Multnomah County is continuing its coordination with service providers that have transit connections closest to the rural areas. This includes TriMet, Columbia County Rider, Columbia Area Transit, Columbia Gorge Express, Sandy Area Metro, and Ride Connection.

## Rural Area Transit

Proposed service investments will continue demand-response service started in the last biennium and planning for additional service in rural Multnomah County. The County will also continue to coordinate with services currently provided in the rural areas:

1. Service provided by Columbia and Hood River Counties (fixed-route or deviated fixed-route through rural Multnomah County) and provides service through the rural area

In order to ensure the newly provided demand-response service or potential expansion of services matches the community's needs, further planning, evaluation and public outreach will be required.

## Marketing, Administration and Planning Support

Additional outreach, assessment and planning will be necessary to determine the need, type of service and specific projects to best meet the needs outside the TriMet service district. Planning began in the previous biennium to establish existing conditions for transit in the rural area and research travel needs. Public outreach to develop and prioritize a project list was put on hold due to COVID-19. This planning is underway in FY 2023 and additional planning will be conducted to refine the service proposals for implementation and seek supplemental funding sources as necessary.

Multnomah County will also use funds to support administration of the program and marketing of services provided.

## Demand-Response Service

Demand-response service is provided under a contract with Ride Connection to connect residents outside of the TriMet service district with TriMet transit hubs and to provide door-to-door service for populations with mobility or special needs. Priority is given to elderly, disabled, and those without access to a vehicle. We are proposing to continue this service and market it to the rural areas. The County will evaluate service levels to determine if demand is being met for determining future investment.

## Expanding Inter-Regional Service Coordination

Inter-regional coordination is a cost-effective way to introduce and supplement services to rural communities. Columbia and Hood River counties have services that run through Multnomah County to connect to the TriMet's service district. The County will continue to explore opportunities for connecting with these regional transit services, including participating in regional planning and coordination meetings, such as the Gorge Regional Transit Strategy, the Hood River County Transit District/Columbia Area Transit (CAT) Master Plan update Gorge congestion/waterfall corridor planning.

## 7.3 Proposed Service Improvements

**Table 5** shows the two- year budget proposal breakdown for planning, coordination, and outreach programming and for demand response service operations, marketing and administration. Expenditures listed in Table 3 are greater than the total projected revenue above in order to provide spending authority in the event that revenues exceed projections.

Table 4: Summary of 2-Year, Rural Multnomah County Transit Budget Proposal (only HB 2017 funds)

Project	Description	Type				Priority Criteria					Expenditures			Notes
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population		
<b>Multnomah County</b>														
1	Rural Transit	x	x		x	x						\$ 284,000		1
3	Regional Coordination	x	x		x	x						\$ 2,632,000		1
4	Transit Access to Jobs: First-Last Mile Solutions/Regional Coordination		x		x							\$ 200,000		
5	Title XIX Match	x	x										\$1,092,861	
<b>Multnomah County Total</b>											<b>\$ 3,116,000</b>		<b>\$1,092,861</b>	

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

### 7.4 Proposed Capital Improvements

No capital improvements are planned for FY 2024 – FY 2025.

### 7.5 Proposed Regional Coordination Project Funds

Multnomah County will receive \$2,632,000 for the Regional Coordination Program. Multnomah County anticipates programming the revenue on the following Regional Coordination Project activities:

- Operate three job-connector shuttle (Swan Island, Troutdale, and ACCESS) using contracted services.
- In partnership with the City of Portland and community organizations, continue to promote the county’s newest community/job-connector shuttle, the Alderwood-Cornfoot-Columbia Employment Shuttle Service. Increase ACCESS’s service hours (either by adding weekend hours or increasing span) after evaluating ridership and needs
- Coordinate with agency partners and businesses/employees served; assess opportunities to enhance services long-term.
- Marketing, evaluation, and outreach.
- Oversee contracted operations and administer program.

## 8 Washington County

### 8.1 Projected Funding

The projected HB 2017 funding within Washington County, outside of the TriMet Service, is summarized in this section for the 2-year period of FY 2024 - FY 2025. Table 6 lists the projected STIF Formula funding for Washington County, estimated at \$772,439. Additionally, Washington County will receive \$5.8 million in Regional Coordination funds.

**Table 6: Projected STIF Funding – Washington County**

	<b>FY 2024</b>	<b>FY 2025</b>	<b>Total</b>
Washington County	\$376,641	\$395,798	\$772,439
Regional Coordination Program	\$3,063,657	\$2,758,657	\$5,822,314

### 8.2 Needs Assessment

This section summarizes the key findings from an assessment of needs completed for the development of the TDP and list of priorities for the PTIP as required by HB 2017. The needs assessment and prioritization took into consideration factors such as demographics, travel demand and information gathered through public engagement.

#### 8.2.1 Stakeholder Outreach - Public Participation

The Washington County Board of Commissioners appointed the Transit Advisory Committee to advise the Board on prioritizing public transportation projects to be funded from the Statewide Transportation Improvement Fund for areas outside TriMet and SMART service districts and for regional coordination projects within the TriMet District in Washington County for consideration by TriMet's HB 2017 Transit Advisory Committee for the three-county area. Chaired by Washington County Board of Commissioners (Board) Chair Harrington, the committee includes two members representing the County (one elected official and one staff member), one representative each from the cities of Banks, Gaston and North Plains, plus members who represent diverse demographic, geographic and transit perspectives. Three ex-officio members represent SMART, TriMet and Ride Connection. The committee met four times and reviewed the community needs and recommended a list of priorities to be funded in the next biennium and for inclusion into the Transit Development Plan.

#### 8.2.2 Demographic Characteristics

Washington County covers 727 square miles; the vast majority - 617 square miles - are outside the urban growth boundary (UGB), and outside of the TriMet and SMART service districts. Washington County's population, which is more than 600,000 people with approximately 30,000 residents living in the rural area, has seen increases in ethnic and cultural diversity. Within the TriMet District, the County has become a more diverse and increasingly dense urban area.

Large parts of urban area, within the TriMet Service District, have higher than the regional average concentration of low-income households, people of color, people living with a disability, youth and older adults. In the rural area, outside the TriMet District, the residential population is primarily concentrated

within the three incorporated cities of Banks, North Plains and Gaston. Outside the Metro UGB area the population is slightly older, more affluent and less racially diverse compared to the urban area, as shown in Table 7.

Table 7: Washington County Average Comparative Statistics

	Rural	Urban	TriMet Service District
<b>People per square mile</b>	140	4,210	3,150
<b>Concentration of Low-Income Households (200% federal poverty level)</b>	19%	21%	24%
<b>People of Color (non-white)</b>	20%	40%	35%
<b>Older Adults (65+)</b>	15%	13%	14%
<b>Youth (&lt;18)</b>	23%	23%	21%

Employment densities are overall significantly lower outside of the Metro UGB, with farms and nurseries being the most common rural employers. Within rural Washington County, the highest concentrations of jobs are located in Banks and North Plains with pockets of more dense, low-wage job sites (60+ employees) immediately south of Forest Grove, north of Cornelius and south of Hillsboro along the Hwy 219 and 210 corridors.

### 8.2.3 Public Engagement

Public engagement is a critical part of any planning effort and essential to understanding unmet transit needs and how Washington County can address those needs. The following summarizes the stakeholder outreach and engagement that informed Washington County's TDP and STIF priorities:

- Ride Connection conducts annual on-board surveys to collect rider demographics and improvement priorities.
- Ride Connection conducted an online community survey as part of a transit feasibility study for Aloha/South Beaverton/Cooper Mountain/Scholls area in June 2020 with ninety participants.
- Washington County conducted an online survey for its Strategic Solutions for First Mile/Last Mile Transit Connections Report in fall, 2019 with over 320 participants.
- Washington County Disability, Aging and Veteran Services (DAVS) completed a needs assessment survey in August 2020 with over 700 participants.
- Washington County in partnership with Ride Connection conducted an online survey to inform the Transit Development Plan in August 2022 with over 282 participants.
- Washington County's transit advisory committee members shared their understanding of community needs for transit and solicited input from other stakeholders.

Collectively some major themes and needs emerged, which are summarized below:

#### General

- More frequent, direct or express transit, reduced service fragmentation and improved access
- Transit riders are nearly twice as likely to say that safer streets would encourage more transit use.
- Non-riders were twice as likely to say that information about time and cost savings would encourage them to use transit.

- High level of interest in shuttles as a viable option in areas not currently served by transit.

### Services

- Better connections to recreational opportunities, work, other transit, and shopping.
- Better connections to TriMet's MAX and Frequent Bus service.
- New service in areas without existing service.
- Improved service in areas with existing service (e.g. better frequency, extended hours, weekends).
- Better meet the dial-a-ride (DAR) needs, including rural DAR service, reduce wait time for DAR
- Improved "first and last mile" service (e.g. to/from fixed transit service, businesses such as health care/shopping/banks) using shuttles and/or integrating with demand-response service
- Eliminate or reduce service and/or geographic gaps
- Funding for additional vehicles, operations/maintenance, paid drivers
- Meeting currently unmet medical needs (e.g. routine and life sustaining treatments like dialysis)
- Better service to the Oregon coast, Tanasbourne and PCC Rock Creek and Portland.

### Infrastructure

- Improve transit infrastructure (e.g. accessible/safe/secure bus stops, including seats/shelters/lighting/signage)
- Improve access to transit infrastructure (e.g. complete sidewalk gaps, crosswalks, mid-block crossings, wayfinding, curb cuts, reduce out-of-direction travel)
- Improve street network connectivity

### Coordination

- Coordination and partnerships between transit providers/public agencies/community-based organizations/medical partners to reduce service fragmentation, schedule changes, fare policies/reciprocity, infrastructure needs, stop locations, shuttle services, travel training, carpool matching programs.
- Improved marketing.
- Universal pass, coordinated planning tools and stops would encourage use of cross-county services.

### Technology

- Real-time information technology.
- Automatic stop announcements.

## *8.2.4 Transportation Needs*

Washington County's Strategic Solutions for First Mile/Last Mile Transit Connections Report identified strategies for improving access to public transportation in the county. The study mapped areas inside the urban area that are not within typical walking distance to transit service and considered density of households and jobs. The study identified several emerging transit market areas currently not served by fixed-route transit that warrant further analysis to determine the viability of potential future shuttle service. In a subsequent quantitative demographic assessment (Community Connector Study)

Washington County examined equity needs and ridership propensity as an initial screening of candidate areas. Areas that score highest on these dimensions are recommended for more near-term implementation, while the other areas are recommended for longer-term service expansion as funding becomes available. All of the areas are included in the TDP. These areas include:

- Cedar Mill/Bethany/North Bethany
- Northwest Hillsboro
- South Hillsboro/Tanasbourne
- Witch Hazel/Orenco
- Aloha/South Beaverton/Cooper Mountain
- Durham/King City
- River Terrace/Bull Mountain
- Central Tigard
- Portions of Cornelius north and south of OR 8
- Downtown Sherwood
- Basalt Creek area

#### Supporting Plans

Washington County's Transportation System Plan goal for transit is to make it a seamless, integrated, affordable, safe, accessible and viable travel option for all people living, working and visiting Washington County. Transit is a critical component of Washington County's transportation system, reducing automobile trips and congestion, providing travel options for people without vehicles or those who choose not to drive, curbing greenhouse gas and other emissions, and reducing transportation costs for individuals and families.

Washington County's Transit Development Plan (adopted February 2021 and to be amended December 2022) provides a broad look ahead to the type of transit system and supportive infrastructure required to meet Washington County's mobility needs outside TriMet and SMART service districts as well as community connector and last-mile services. The Transit Development Plan (TDP) guides decision-making for Washington County for the next five plus years. The TDP accounts for the community need and planned services identified through recent transit service planning efforts in Washington County and adjacent counties, including the following:

- Transit Element of the Washington County Transportation System Plan (2019)
- TriMet's Unified Service Enhancement Plan (2018)
- Coordinated Transportation Plan for Seniors and Persons with Disabilities (2016)
- SMART Transit Master Plan (2017)
- Tillamook County Transit District Intercity Transit Enhancement Plan (2018)
- Yamhill County Transit Area Transit Development Plan (2018)
- Tri-County Public Transportation Improvement Plan (2018)
- Washington County Near-term Transit Study (2019)

- Washington County Strategic Solutions for First Mile/Last Mile Transit Connections Report (2020)
- TriMet's Forward Together (2022)
- Washington County Community Connector Study (2022)

### 8.3 Proposed Service Improvements

**Table 8** lists the transit program priorities, and **Table 9** lists the categories and priority criteria they support. The majority of these improvements build upon successful existing services and leverage other state and federal funding programs. These priorities can be funded with the County's allocation of STIF formula funds and Regional Coordination funds allocated by TriMet. Maintaining existing service is the highest priority. Service expansion and capital investment could be delayed if necessary due to lack of revenue or other factors. Specific service improvements will be refined through continued community outreach. For more information on the transit service investments, read the County's Transportation Development Plan on the County website:

<https://www.washingtoncountyor.gov/lut/planning/public-transportation-services>

Table 8: FY 2024-25 – Washington County Transit Service Enhancements

Project description	Priority improvement
<b>westLink:</b> Deviated fixed route operations serving Forest Grove, Hillsboro, Banks and North Plains.	<ul style="list-style-type: none"> <li>• Maintain existing and committed service (to be initiated in FY 2023)<sup>1</sup></li> <li>• Add weekend service, earlier and/or later service based on community input</li> </ul>
<b>Local Service:</b> Provides community connections and employment area access with service to MAX, WES and Frequent Bus stops.	<ul style="list-style-type: none"> <li>• Maintain existing services in Forest Grove, Cornelius, Hillsboro, and Tualatin</li> <li>• Enhance and/or modify existing services in Cornelius, Hillsboro and Tualatin to meet increased demand and in coordination with potential near-term TriMet service changes</li> <li>• Serve new areas not currently served by fixed- route transit based on priorities in Washington County’s TDP and in coordination with potential near-term TriMet service changes</li> </ul>
<b>Demand Response:</b> Provides rides for any purpose including medical, meals, shopping, recreation, volunteering or work. Services are provided door-to-door.	<ul style="list-style-type: none"> <li>• Fund general public access for rural door-to-door service</li> <li>• Maintain services in expanded service area (initiated in FY 2021)<sup>2</sup></li> <li>• Improve efficiency and customer service through use of third-party platform to schedule and manage point-to-point rideshare services</li> </ul>
<b>Interregional Coordination:</b> Improves coordination with services provided by adjacent counties.	<ul style="list-style-type: none"> <li>• Continue coordination with Yamhill, Columbia and Tillamook Counties to improve service connections<sup>3</sup></li> <li>• Add and/or improve service and stop coordination</li> <li>• Build service awareness through increased marketing</li> </ul>
<b>Rural Workforce Shuttle</b>	<ul style="list-style-type: none"> <li>• Initiate point-to-point service to rural employment areas from urban areas</li> <li>• Expand/adjust based on demand</li> </ul>
<b>Marketing</b>	<ul style="list-style-type: none"> <li>• Increase awareness and ease of use of services through developing printed materials, media buys, branding and other marketing strategies</li> </ul>
<b>Administration</b>	<ul style="list-style-type: none"> <li>• Manage STIF program and comply with Agreed Upon Procedures (AUP) as required by TriMet and ODOT.</li> </ul>
<b>Capital and Infrastructure</b>	<ul style="list-style-type: none"> <li>• Improve technology, bus stops, fleet, charging stations</li> </ul>
<b>Planning</b>	<ul style="list-style-type: none"> <li>• Update Transit Development Plan and identify priorities for FY 2025-27 including evaluation of current services for meeting STIF goals</li> </ul>

STIF funding supplements services provided by Ride Connection using Federal funds.

<sup>2</sup> STIF funding supplements Demand Response services provided by Ride Connection using other funding sources.

<sup>3</sup> STIF funding supplements coordination subsidies provided by Ride Connection using other funding sources.

Table 9: PTIP Project List – Investment Category and Priority Criteria

Project	Description	Type				Priority Criteria						Funding			Notes	
		Administrative	Planning	Capital Purchase	Service Expansion	Improve Frequency/Reliability Between Communities	Reduce Fragmentation in Services	Increase Service Frequency to Low Income Communities	Student Transportation	STIF Formula	STIF Human Services	STIF Population				
<b>Washington County</b>																
1	Project 44: Planning	Update Transit Development Plan and identify priorities for FY 2025-27 including evaluation of current services for meeting STIF goals.	x										\$ 100,000			1
2	Project 45: Westlink	Inter-city shuttle service connecting the cities of Forest Grove, Banks, North Plains and Hillsboro with access to TriMet, Tillamook County Transit NW POINT, and Yamhill County Transit service providers. Upgrade and/or construct up to 2 enhanced stops with bus stop sign, pole, shelter and bench.				x	x	x	x				\$ 458,650			
3	Project 46: Rural Demand Response	Provides general public access for rural door-to-door service for any purpose including medical, meals, shopping, recreation, volunteering or work. Services are provided door-to-door.				x	x						\$ 101,500			
4	Inter-Regional Coordination	Improves coordination with services provided by adjacent counties. Continue coordination with Yamhill, Columbia and Tillamook Counties to improve service connections. Add and/or improve service and stop coordination. Build service awareness through increased marketing.				x	x						\$ 129,000			1
5	Project 48: Local Community Connector Services/Regional Coordination	Provides community connections and employment area access in areas not currently served by fixedroute transit inside TriMet Service District to MAX, WES and Frequent Bus stops. Community Connectors funded through TriMet's Regional Coordination program. Improve technology, bus stops, fleet (EV), charging stations, includes match set-aside for discretionary grants as leverage to fund capital and infrastructure investments.				x	x		x				\$ 6,048,814			1
6	Project 49: Administration and Marketing	Manage STIF program, improve efficiency of service delivery, provide quality customer experience and increase awareness of services	x	x				x	x	x	x		\$ 170,000			1
7	Project 50: Rural Workforce Shuttle	Provide point-to-point service to rural employment areas from urban areas. Public shared-ride, shuttle or micro-transit to serve farm, nursery and other agricultural industry work force needs. Expand/adjust based on demand.				x	x				x		\$ 210,000			
<b>Washington County Total</b>												<b>\$ 7,217,964</b>				

[1] Funds rolled over from FY2021-FY2023 STIF Formula funds.

### 8.4 Projected HB 2017 Funding and Budget

The projected HB 2017 funding within Washington County, which includes sub allocated TriMet Regional Coordination funds and revenue generated outside of the TriMet Service District, is summarized in this section for the 2-year period of FY 2024 – FY 2025. The projected HB 2017 funding also includes projected carry forward funds, including additional revenue not expended from the prior biennium. Table 10 lists the projected HB 2017 funding for Washington County, estimated at under \$7.1 million.

#### Estimated HB 2017 Fund Budget

Table 10 shows the proposed two-year budget breakdown for operational costs by service type, administration, capital, marketing, and planning. The Local Services budget includes operational costs and capital expenses for vehicle purchase.

**Table 10: Summary of 2-Year, Washington County Transit Budget Proposal (only HB 2017 funds)**

Program	FY 2024	FY 2025	Total
westLink	\$205,000	\$211,150	\$416,150
Demand Response	\$50,000	\$51,500	\$101,500
Inter-regional Coordination	\$60,000	\$61,800	\$121,800
Rural Workforce Shuttle	\$104,400	\$107,500	\$211,900
Local Services (Regional Coordination funded)	\$2,750,900	\$2,936,500	\$5,687,400
Capital	\$197,000	\$50,000	\$247,000
Planning	\$47,500	\$75,000	\$122,500
Marketing	\$30,000	\$35,000	\$65,000
Administration	\$52,000	\$53,000	\$105,000
<b>Total</b>	<b>\$3,496,800</b>	<b>\$3,581,450</b>	<b>\$7,078,250</b>

## 9 Regional Coordination Program and Plan

The HB 2017 Transit Advisory Committee recommended the inception of the Regional Coordination Program (RCP) to directly address STIF Rule requirements. The purpose of the RCP is to guide STIF funding for two key services: (1) last mile shuttle services within TriMet’s service district, and (2) regional, coordinated public transportation services that reduce fragmentation between TriMet and communities outside the TriMet service district, but inside Clackamas, Multnomah, and Washington counties.

Six tenets were selected to guide the planning, development and project selection for the RCP:

<b>Equity</b>	Improve access for low-income or minority populations.
<b>Improve Access to Jobs and Job-Related Support Services</b>	Improve access for low-income individuals to industries and geographic areas that provide entry-level job opportunities and job-related support services such as education, vocational and skills training, and child-care.
<b>Last Mile Shuttles</b>	Improve connectivity and reduce fragmentation between TriMet and communities outside TriMet’s service district, but inside Clackamas, Multnomah and Washington Counties.
<b>Regional Coordination</b>	Take a coordinated regional approach, bringing together the regional public transportation agency, community-based, and alternative transportation providers, human services agencies, employment and training programs, employers, transportation associations, and other stakeholders in a collaborative process.
<b>Provide Appropriate Transportation Options</b>	Address travel needs at times of day and on days of the week that correspond with entry-level employment opportunities. Services such as travel training enable people to find transportation solutions even if their needs change in the future. A network of services may offer alternatives and options to address identified needs.
<b>Use Resources Effectively</b>	Be cost-effective in service design and delivery in order to provide maximum levels of transportation and related support with the program resources available without duplicating existing public transit services in the Region. Make the best use of existing resources/services and advances in technology, leverage STIF funds whenever possible, and target STIF-funded services to address priority needs.

### 9.1 2022 PTIP Update to RCP Program

See **Attachment F** for the full descriptions of the recommended RCP projects.

In October 2022, the HB 2017 Advisory Committee approved the continued allocation of funding to the RCP projects for the FY 2024 - FY 2025 biennium. The list of RCP services includes all programs originally funded in the FY19-21 and FY22-23 biennia with inflationary adjustments. Additionally, the program was more than doubled to accommodate new shuttles and services coming from outside the district. The new services did not go through a solicitation process with a subcommittee. This is because the HB 2017

Transit Advisory Committee instructed staff to expand the program as much as possible at the end of the 2020 plan process. Staff worked with the Public Transportation Providers to ensure that the program could expand in a sustainable way.

## 10 Conclusion

### Engaging the Community

The PTIP reflects extensive public engagement with transit riders and plan stakeholders at the local, grass-roots level throughout the region. Outcomes of the public engagement efforts are used to affirm transit improvement priorities and funding allocations that were considered by local committees in Clackamas, Multnomah and Washington counties (Chapters 6-8) and by the HB 2017 Transit Advisory Committee (Committee) (TriMet service district, Chapter 5).

Public input and the technical findings and recommendations contained in the PTIP reflect a broad consensus of the Committee with respect to transit service and program improvements within the TriMet service district. The Committee also embraced the individual plan recommendations from cities and transit districts who service communities outside the TriMet service district but within the tri-county area. The Regional Coordination Subcommittee recommends specific improvements to enhance transit connections between service districts (Chapter 9). Their recommendation is included in the PTIP, as approved by the HB 2017 Transit Advisory Committee.

### Charting the Allocation of HB 2017 Funds

The 2022 PTIP targets planned revenue and service improvements and programs for FY 2024 - FY 2025. The plan allocates STIF Formula Fund moneys to the region's transit service providers, and carefully considers plan targets of expected HB 2017 revenue within each of the region's individual service areas and counties, and in total (Chapter 2).

### Defining Low-Income Communities for Plan Investments

A key objective of HB 2017 is to improve transit services in Oregon's low-income communities. The PTIP takes special effort to define what constitutes the low-income communities that will benefit from HB 2017 investments. The TriMet Transit Equity Advisory Committee helped develop the region's Diversity and Transit Equity Index (Chapter 4). The Index was approved by the HB 2017 Transit Advisory Committee and applied in the plan to guide improvement plans and programs that benefit low-income communities.

### Assessing Need and Identifying Proposed Service and Capital Improvements

The PTIP addresses the transportation needs of people residing in and traveling within the region, especially those residents in low-income communities. Key project and program provisions of the PTIP include:

- Increasing the frequency and adding new or expanded bus service in low-income communities (Chapters 5-8)
- Implementing expanded reduced fare programs for low-income households (Chapter 5)
- Procuring low or no emission electric buses (TriMet – Chapter 5 and SMART – Chapter 6)
- Improving the frequency and reliability of service connections between communities inside and outside of the TriMet service district (Chapter 9)
- Fostering coordination between transit service providers to reduce fragmentation (Chapters 5-9), and
- Expanding TriMet's Access Transit Program for students in grades 9 through 12 (Chapter 5)

The comprehensive set of projects and programs contained in the PTIP demonstrate the region's commitment to investing the Keep Oregon Moving Act with recommended services and facilities to better serve low-income communities within the Tri-County Region.

**Attachment A**

**HB 2017 Advisory Committee**

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## HB2017 Advisory Committee Members

Adam Argo Rider Representative, Clackamas County	Cameron Bennett Portland State University Student
April Bertelsen City of Portland	Dan Bower Executive Director, Portland Streetcar
Dwight Brashear Executive Director, South Metro Area Regional Transit	Jan Campbell Chair, TriMet Committee on Accessible Transportation
Aron Carleson Executive Director, Hillsboro Schools Foundation	Pat Daniels Executive Director, Constructing Hope
Mercedes Elizible Central City Concern	Reza Farhoodi Rider Representative, Portland
Jodi Guiezloe Parker OR-ID Council of Laborers	Jarvez Hall East Metro Economic Alliance
Duncan Hwang Metro	Sarah Iannarone The Street Trust
John Issacs Portland Business Alliance	Deanna Palm Executive Director, Washington County Chamber of Commerce
Victoria (Vee) Paykar Climate Solutions	Sushmita Poddar Rider Representative, Washington County
Mary Lou Ritter Special Transportation Funds Advisory Committee	Roy Rogers Commissioner, Washington County
Paul Savas Commissioner, Clackamas County	Mariana Valenzuela Centro Cultural
Jessica Vega Pederson Commissioner, Multnomah County	Coi Vu IRCO
Julie Wilcke-Pilmer Ride Connection	

### Special Transportation Fund Advisory Committee (STFAC) Members

Annadiana Johnson

Rebecca Miller

Claudia Robertson, Vice Chair

Robyn Johnson

Jan Campbell, Chair

Teresa Christopherson

Leon Chavarria

Margo Moore, TriMet Staff

Julie Wilcke, Ride Connection

Eric Olsen

Julia Stephens

Andi Howell, City of Sandy

Carol Bernhard

Eric Loomis, City of Wilsonville

Nickole Cheron

Rocky Bixby

Dave Daley

Mike Foley

Mary Lou Ritter

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## **Attachment B**

### **TriMet Low-Income Fare Program**

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**Date:** December 13, 2017

**To:** Board of Directors

**From:** Neil McFarlane



**Subject:** **ORDINANCE NO. 347 OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) ADOPTING A LOW INCOME FARE PROGRAM AND AMENDING TRIMET CODE CHAPTER 19 (FIRST READING)**

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**1. Purpose of Item**

Ordinance No. 347 amends TriMet Code Chapter 19 and adopts a new Low Income Fare program.

**2. Type of Agenda Item**

- Initial Contract
- Contract Modification
- Other Ordinance

**3. Reason for Board Action**

The TriMet Code may be amended only by adoption of an ordinance. Adoption of Ordinance No. 347 requires two readings.

**4. Type of Action:**

- Resolution
- Ordinance 1<sup>st</sup> Reading
- Ordinance 2<sup>nd</sup> Reading
- Other

**5. Background**

TriMet has a long history of creating programs to make transit more affordable for youth, seniors, and riders with disabilities.

This Ordinance allows TriMet to create a new Low Income Fare program giving eligible registered individuals earning up to 200% of the federal poverty level the opportunity to purchase adult single use and day passes at 50% off and monthly passes at 72% off the cost of the adult fare.

This effort combined with our work on decriminalizing the fare citation process, and implementing the Hop Fastpass system, reinforces our commitment to make the system more equitable and accessible.

In 2013 under the direction of the Board, TriMet created the Access Transit programs that provide grants and discounted fares to nonprofit organizations, which in turn use these resources to assist low-income riders.

While these programs have provided much needed access for low-income persons served by nonprofits, TriMet did not previously have the resources to implement a comprehensive system wide program to provide a reduced-price fare for the broader population of low-income riders. For over three years, TriMet and partners have been looking into the feasibility of implementing a Low Income Fare program that would be sustainable, meaningful, targeted, and manageable. Addressing the transportation needs of low-income residents required a comprehensive approach and involvement by many regional jurisdictions and partners to move the idea forward.

Under the direction of TriMet's Board, TriMet's General Manager and Metro Councilor Sam Chase convened a regional Low Income Fare Taskforce (Taskforce) which explored the feasibility of a local program through a regional collaborative effort. The Taskforce included 22 members from across the tri-county area, and consisted of local elected officials, community based organizations, business associations, and stakeholders from secondary and post-secondary institutions.

Over the course of five months, the Taskforce met and built an understanding of existing programs around the country, heard from current program representatives, discussed potential program parameters, including subsidies, eligibility levels and the need to balance potential tradeoffs, and debated funding options and strategies.

At the conclusion of the process, the Taskforce agreed to the following:

- Members agreed to support the development of a regional Low Income Fare program; and
- Members recommended eligibility of up to 200% of Federal Poverty Level:

Members chose 200% of the Federal Poverty Level as the eligibility threshold because it aligned with many other state and federal poverty program requirements, and would provide the most benefit while leveraging the eligibility determination process of current systems reducing barriers for enrollment in a local program.

The Taskforce members recommended a program subsidy equivalent to Honored Citizen and Youth fare structures at 50% off an Adult ticket/day pass, and 72% off the Adult monthly pass.

The primary funding strategy identified by the Taskforce was to advocate for public transportation funds as part of the State's transportation package, with the commitment that any new resources coming to TriMet be prioritized to fund a new low Income fare program and increased services. Over the course of the legislative session, many of the Taskforce members leveraged their partnerships and networks, and testified in support of this strategy.

In August 2017, Governor Kate Brown signed HB 2017 a new historic transportation package that included resources for public transit. The resources allow staff to begin work on building out a new regional Low Income Fare program planned for launch in July of 2018.

## **Title VI Fare Equity Analysis**

In accordance with Title VI of the Civil Rights Act of 1964, FTA Circular 4702.1B and TriMet's 2016 Title VI Program, TriMet conducts an equity analysis any time fare changes are proposed to ensure that changes do not unfairly impact people of color and low-income populations. The proposal to decrease Adult fares for eligible low-income riders in July 2018 calls for such an analysis prior to the TriMet Board of Directors taking action.

### **Findings**

#### **Disparate Impact Analysis (Minority Riders)**

The analysis found that a greater percentage of minority riders would be positively affected (i.e., eligible trips) by the fare change than the percentage of minority riders on TriMet services as a whole.

Therefore, the proposal to decrease single fares, 1-day, and monthly passes by different percentages does not present a potential Disparate Impact.

#### **Disproportionate Burden Analysis (Low-income Riders)**

The analysis found that the specific structure will positively benefit low-income riders. The program eligibility requirement is inclusive of TriMet's definition of a low income rider. Thus, the program stands to benefit all low-income riders as defined by TriMet's Title VI policy.

Therefore, this proposal does not present a potential Disproportionate Burden on low-income riders.

### **Community Outreach and Public Comment**

TriMet's Diversity and Transit Equity Team and other staff utilized a variety of outreach and community engagement efforts in order to gather feedback, understanding, and input into the development of a regional Low Income Fare program.

#### **Transit Equity Advisory Committee (TEAC)**

The vision of a regional Low Income Fare program had long been championed by the members of TEAC, and in the spring of 2016 they adopted the development of a program as a major initiative to pursue as a committee. TEAC members identified the research areas to focus on, reviewed the products and recommendations of the research team, helped inform the process of the Taskforce, advocated for the passage of HB 2017 and helped build out the community engagement process.

#### **TriMet Community Partner Forums**

As part of its community outreach efforts, TriMet's Diversity & Transit Equity Department completed a series of community forums targeting 80 Access Transit partner agencies who serve transit dependent communities. The goal of these forums was to provide awareness and engagement opportunities for our community partners around the upcoming changes, which included an overview of the Low Income Fare program.

## Community Partner Forum Schedule:

Date	Location	Address	Time
October 30 <sup>th</sup>	Rosewood Initiative	16126 SE Stark St.	10am-12 noon
November 7 <sup>th</sup>	PCC- Willow Creek	241 SW Edgeway Dr.	10am-12 noon
November 16 <sup>th</sup>	Clackamas CC	19600 Molalla Ave.	10am-12 noon

### TriMet Fall 2017 Open Houses

TriMet staff held seven open houses in Oregon City, North Portland, Gresham, Tigard, Milwaukie, Hillsboro, and downtown Portland to facilitate budget discussions with community stakeholders and riders, communicate proposed service changes and enhancements and discuss new initiatives related to fare enforcement, and the implementation of a Low Income Fare program. At each event, a table was staffed to share information regarding the Low Income Fare program as well as to receive feedback on program development. Questions included: 1) where should participants register for the program; 2) what types of documentation should be required in order to verify eligibility; and 3) how often should participants have to reapply? Overall, the feedback received was positive and community members are looking forward to the implementation of the Low Income Fare program.

Diversity and Transit Equity Staff attended and presented on TriMet's efforts around establishing a regional Low Income Fare program to the East County Caring Committee in August of 2017, and on the program at the October 2017 Making Visible Differences Steering Committee.

### Online Survey

In addition to its in-person convening's, community forums, open houses, and community presentations, TriMet also sought feedback online through a webpage introducing a low-income fare <https://trimet.org/lowincome/index.htm> and encouraged riders and systems stakeholders to weigh in on programmatic areas to help inform the program model.

## 6. Financial/Budget Impact

The potential cost of implementing a Low Income Fare Program is expected to be approximately \$12.3 million per year. Funding is proposed to come from HB 2017 State revenue. Funding Risks: HB 2017 plan needs to be approved by the OTC; funding not likely to flow until early 2019 meaning some cost of upfront program development will not be covered, given this occurs in the programs ramp-up period we believe these one-time costs are low. Overall risks are low based on conversations with ODOT and legislative intent.

## 7. Impact if Not Approved

If the Board does not proceed with a first reading and public hearing of Ordinance No.347, the existing fare provisions of the TriMet Code would remain in place. However, as part of HB 2017 TriMet has been authorized to move forward with a local program and will soon be resourced to implement the initiative. TriMet has previously committed to local elected officials, community based organizations, riders, and system stakeholders of its intent to begin the new program by July of 2018. Failure to approve the ordinance could result in TriMet not being able to meet that timeline.

**ORDINANCE NO. 347**

**ORDINANCE OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) ADOPTING A LOW INCOME FARE PROGRAM AND AMENDING TRIMET CODE CHAPTER 19 (FIRST READING)**

THE BOARD OF DIRECTORS OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET), pursuant to the authority of Oregon Revised Statutes Chapter 267, having considered the transit equity service change analysis Final Report, does hereby ordain and decree the following Ordinance:

**Section 1- Adoption of Changes to TriMet Code Chapter 19**

Amendments to TriMet Code Chapter 19 are adopted as set forth in the Attached Exhibit A, which is incorporated into and made part of this Ordinance.

**Section 2- Experimental Fare**

Upon approval by the General Manager, a Low Income Fare consistent with the amendments to TriMet Code Chapter 19 in Section 1 may be implemented on a temporary basis as an experimental fare prior to the operative date of Section 1 of this Ordinance.

**Section 3- Effective Date**

This Ordinance shall take effect thirty days after the date of its adoption. The Amendments to TriMet Code Chapter 19 in Section 1 shall be operative on July 1, 2018.

Dated: December 13, 2017

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Presiding Officer

Attest:

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Recording Secretary

Approved as to Legal Sufficiency:



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Legal Department

**ORDINANCE NO. 347**

**EXHIBIT A**

TriMet Code (TMC) Chapter 19, Fares, Section 19.05 Definitions and Section 19.15 Fares, are amended as set for below. Additions are show in underline, bold text.

*Unchanged sections of the chapter omitted for brevity, indicated by a set of three asterisks (\*\*\*)*

**CHAPTER 19 – FARES**

19.05 **Definitions.** As used in this Chapter, unless the context requires otherwise:

A. “Honored Citizen” means:

- (1) Persons 65 years of age or older who show valid government-issued photo identification showing proof of age, or a valid TriMet photo Honored Citizen Card;
- (2) Persons under 65 years of age registered legally blind by the Commission for the Blind who show a valid TriMet Honored Citizen Card;
- (3) Persons under 65 years of age registered disabled by the Social Security Administration who show a valid TriMet Honored Citizen Card;
- (4) Persons under 65 years of age who are certified disabled by the State of Oregon Vocational Rehabilitation Division, State of Oregon Senior and Disabled Services Division or by the U.S. Railroad Retirement Board when each applies the same standards of disability as are applicable to persons who are determined to be disabled pursuant to subparagraph 3 above and who show a valid TriMet Honored Citizen Card;
- (5) Veterans under 65 years of age certified 100% disabled by the Veterans Administration who show a valid TriMet Honored Citizen Card;
- (6) Persons under 65 years of age qualifying as “Temporarily Disabled” under criteria established by TriMet, and so certified by a licensed physician, and who show a valid TriMet Honored Citizen Card;
- (7) Persons qualified eligible by the Clackamas, Clark, Multnomah or Washington County Association for Retarded Citizens, or the Clackamas, Multnomah or Washington County Mental Health Association under the criteria established by TriMet and those agencies, who show a valid TriMet Honored Citizen STAR Card (marked with a “STAR”);
- (8) Persons under 65 years of age, not verified disabled by the Commission for the Blind, Social Security Administration, United States Railroad Retirement Board or the Veterans Administration, but who qualify as disabled under criteria established by TriMet and are so certified by a licensed physician, and who show a valid TriMet Honored Citizen Card;

- (9) Persons certified by a licensed physician or health or social service professional to qualify for a TriMet Honored Citizen “A” Card (marked with an “A”) under criteria established by TriMet and who show a valid TriMet Honored Citizen “A” Card;
- (10) Persons qualified eligible by C-Tran who show a valid C-Tran Senior, C-Tran Disabled, or C-Tran C-Van Identification Card; and
- (11) Persons who show a valid Medicare Card and either (a) valid government-issued photo identification or (b) a valid TriMet photo Honored Citizen Card, as proof of identity for the Medicare Card.

Replacement TriMet Honored Citizen Cards are subject to payment of a \$5.00 fee.

B. “Honored Citizen Downtown Bus Pass” is a photo identification card issued to persons qualifying for Honored Citizen status as set forth in Section 19.05(A) above, who provide proof of residency within the area bounded on the North by NW Irving, except that at the intersection of NW Irving and NW Station Way it shall be bounded on the North by NW Station Way to NW Broadway and then by NW Broadway south to NW Irving and continuing west on NW Irving to the Stadium (I-405) Freeway, on the West and South by the Stadium (I-405) Freeway and on the East by the Willamette River, under criteria established by TriMet. The photo identification card allows fareless travel on bus and rail trips which begin and end within the area described above, for a period of two years from the date of issuance. The General Manager may promulgate Administrative Requirements governing the Program requirements of the Honored Citizen Downtown Bus Pass, including but not limited to the fee for participation in the Program.

**C. “Low Income Fare” is a fare designation available to persons who are determined by TriMet to meet the eligibility requirements for a reduced fare because the person can demonstrate to TriMet’s satisfaction through a process established by TriMet that their annual income is at or less than 200% of the Federal Poverty Level. The Federal Poverty Level is a measure of income issued by the United States Secretary of Health and Human Services.**

- (1) A person deemed eligible by TriMet for the Low Income Fare will be provided a non-transferable Low Income Fare identification card.**
- (2) The General Manager may promulgate Administrative Requirements governing eligibility, applications, the issuance and appearance of Low Income fare cards, renewals, and any other requirements for the Low Income Fare.**

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[subsequent subsections renumbered]

*(19.05 amended by Ordinances No. 162, Section 1; Ordinance No. 178, Section 1; Ordinance No. 190, Section 1; Ordinance No. 239, Section 1; Ordinance Nos. 277, 286, 299, 309, 312, 316, 317 and 323)*

A. Regular Transit Services:

The fares payable for use on the TriMet transit system shall vary according to the status of the rider and method of payment. Any person displaying a valid Low Income Fare identification card issued under TMC 19.05 is permitted to use as proof of payment any HONORED CITIZEN fare instrument, including eFare, described in this section. A valid Low Income Fare identification card qualifies as a TriMet Honored Citizen identification card when required to be displayed as proof of eligibility for an Honored Citizen fare. Persons eligible for the Low Income Fare are not eligible for the Honored Citizen Downtown Bus Pass.

The fares payable for use on TriMet and shall be as follows:

(1) Monthly Passes and 30-Day Passes

(a) <u>Status</u>	<u>Fare</u>
YOUTH	\$28.00
HONORED CITIZEN	\$28.00
ADULT	\$100.00

- (b) A 30-Day Pass shall be valid for travel on any regularly scheduled TriMet route in accordance with the status of the rider for the period of thirty (30) consecutive days from the date of purchase.

(2) Pre-Paid Tickets

(a) <u>Status</u>	<u>Fare</u>
YOUTH	10/\$12.50
HONORED CITIZEN	10/\$12.50
ADULT	10/\$25.00

- (b) Pre-paid unvalidated tickets may be used in the amount of their cash value for payment of additional fare, i.e., two Adult tickets may be used for an Adult 1-Day Pass. Refunds for overpayment will not be given.

(c) Field Trip Group Discount ("Class Pass") Tickets

- (1) Groups whose members are 18 years of age or younger, traveling with at least 15 but not more than 35 members on the bus, or with at least 15 but not more than 70 members on MAX, including other persons aged 18 or older traveling with

the group as designated group leader(s) or chaperone(s), are eligible for the Field Trip Group Discount (“Class Pass”) ticket. The cost of the ticket shall be \$1.00 per person. A ticket must be purchased for the trip. The ticket shall be valid for travel only for the date, route(s), time(s), and number of persons specified on the ticket. Each member must carry a ticket, or the group leader must carry a ticket for the group.

- (2) The group must schedule the trip at least 14 days in advance. Trips may be scheduled for weekdays or weekends using regularly scheduled service. Weekday trips must occur between the hours of 9:00 a.m. and 3:00 p.m. Specified trip times shall be at the discretion of TriMet. TriMet reserves the right to schedule trips according to anticipated available capacity on regularly scheduled service.

Possession of a Class Pass ticket in no way guarantees available vehicle capacity on scheduled trip times. In the event that all members of a group are unable to board the vehicle as specified on the Class Pass ticket, due to heavy passenger loads, the operator will arrange to have the Class Pass ticket be valid on the next regularly scheduled vehicle.

Groups wishing to reschedule a trip must cancel at least one business day in advance of the scheduled trip. Trips must be scheduled at least 14 days in advance of the new travel date. A new ticket will be issued to the group leader stating the new date, route(s), time(s), and number of persons in the group.

- (3) Class Pass tickets shall be available for purchase only at TriMet’s Ticket Office at Pioneer Square, or by mail. Tickets must be purchased at least 14 days in advance. Tickets are nonrefundable, nontransferable, and shall not be laminated or duplicated.

(d) Event Fare

An Event Fare shall be available to events for all tickets for the event which are purchased and distributed in advance through ticket outlets. The Event Fare shall be \$2.50 per ticket per day, which shall be valid fare for travel, all hours on the day of the event(s) for which the ticket is purchased. Tickets for the event which are sold at the door shall not be included in the Event Fare program.

(3) Cash Fares

<u>Status</u>	<u>Fare</u>
YOUTH	\$1.25
HONORED CITIZEN	\$1.25
ADULT	\$2.50

**(4) Annual Passes**

<u>(a) Status</u>	<u>Fare</u>
YOUTH	\$308.00
HONORED CITIZEN	\$308.00
ADULT	\$1,100.00

- (b) Annual Passes must be purchased as one lump sum; installment payments are not permitted, except that: (1) employers who enter into a written annual agreement to purchase Annual Passes in a minimum dollar amount of \$6,050, may elect to make quarterly installment payments subject to administrative program requirements, and (2) employers who enter into a written annual agreement to purchase Annual Passes, where the Annual Pass year ends on August 31, shall receive a pro-rated per pass price in the sum of: the number of months remaining in the Annual Pass year X the Monthly Pass price X .92. The price paid by employers for Annual Passes under a written agreement is subject to adjustment to include any Adult Annual Pass fare increases adopted by the TriMet Board that take effect during the term of the agreement. Employers shall pay any Adult Annual Pass price increases during the term of the agreement in accordance with administrative program requirements. However, the total amount of increase shall not exceed 3% of the employer's per pass price that was in effect on September 1 (or the effective date of the agreement).

**(5) Select Term Pass Program**

- (a) Colleges with a campus(es) located within the TriMet district may purchase for their qualified students at that campus(es), Term passes in accordance with the Select Term Pass program requirements set forth in this Paragraph (5) and the administrative program requirements established for the fare. A "campus" means a building(s) located at one physical location within the TriMet district under the control of a college. "Qualified students" are either full-time or part-time students, as defined by the college administrative criteria, who attend class at a campus. The college shall be required to enter into a written contract for purchase of the Select Term Pass in accordance with the administrative program requirements established for the fare. The Select Term Pass fare instrument shall be valid for travel for the Term Pass fare period.
- (b) The Select Term Pass fare instrument shall consist of the student's college photo identification card with an affixed TriMet issued validation sticker, or a TriMet approved eFare Program card ("eFare card"), and must be carried by the student as proof of fare payment.
- (i) If using TriMet issued validation stickers, colleges shall provide the student with a photo identification card, which shall also include the college's name. The validation sticker must be placed on the photo identification card. A student's photo identification card with an affixed Term validation sticker shall be valid through the month and year designated on the sticker.

- (ii) Colleges may use a TriMet approved eFare card, which shall be required to display the college's name, the student's name, and may include the student's photo. If the approved eFare card does not include a photo, the student may be asked to display other valid photo identification as proof of their identity. Students are required to tap their eFare card prior to each vehicle boarding and upon occupying any district areas requiring proof of fare payment.
- (iii) Colleges shall verify student status before providing an individual with a Term Pass fare instrument. The Term Pass fare instrument may not be provided to or used by non-students, is non-transferable, and is a valid fare instrument only for the person whose name appears on the card.
- (c) The Term Pass fare period shall be established in the written contract with the college. During the contract period, the Select Term Pass price shall be calculated on a per Term basis (Term Pass fare period). The price of the Select Term Pass shall be the sum of the number of months in the Term times the Board adopted Adult Monthly Pass fares that will be in effect during that Term, less a discount of 10%. The price will not be pro-rated. The price paid by college for the Select Term Pass under a written contract is subject to adjustment to include any Adult Monthly Pass fare increases adopted by the TriMet Board that take effect during the term of the contract. Colleges shall pay any Select Term Pass price increases during the term of the contract in accordance with administrative program requirements.
- (d) Only one pass may be sold to each qualified student per Term Pass fare period.

(6) 1-Day Pass

A 1-Day Pass shall be valid for travel on any regularly scheduled TriMet route, in accordance with the status of the rider, for the remainder of the service day in which the 1-Day Pass is valid.

<u>Status</u>	<u>Fare</u>
YOUTH	\$2.50
HONORED CITIZEN	\$2.50
ADULT	\$5.00

(7) 7-Day Pass

The 7-Day Pass shall be valid for travel on any regularly scheduled TriMet route in accordance with the status of the rider for the period of seven (7) consecutive days.

<u>Status</u>	<u>Fare</u>
YOUTH	\$7.50
HONORED CITIZEN	\$7.50

ADULT \$26.00

**(8) 14-Day Pass**

A 14-Day Pass shall be valid for travel on any regularly scheduled TriMet route in accordance with the status of the rider for the period of fourteen (14) consecutive days as follows:

<u>Status</u>	<u>Fare</u>
YOUTH	\$14.50
HONORED CITIZEN	\$14.50
ADULT	\$51.00

**(9) Washington County Commuter Rail (WES) Service**

Fares payable for use of Washington County Commuter Rail (WES) Service shall be the same as other regular fixed route fares established according to the status of the rider and the method of payment for travel as set forth in TMC Section 19.15.

**B. Door-to-door LIFT services:**

(1) The fare for door-to-door LIFT services, excluding rides paid for by agencies under contract with TriMet, shall be:

(a) Cash: \$2.50.

(b) Pre-paid Tickets: 10/\$25.00.

(c) Monthly Pass: \$74.00; non-transferable.

(d) Annual Pass: \$888.00; non-transferable.

(e) 20 trip punch card: \$48.00; valid for 20 trips on LIFT service only, non-expiring.

(f) 14-Day Pass: \$37.50; valid for travel on LIFT service for a period of fourteen (14) consecutive days, non-transferable.

(2) The following additional methods of fare payment will be accepted as total payment for door-to-door LIFT services:

(a) A regularly scheduled service route transfer plus \$1.50;

(b) Regularly scheduled service route tickets will be accepted on LIFT service for their face value toward the LIFT cash fare; or

(c) Adult 1-Day Pass.

- (3) Purchase of a pre-paid ticket or pass does not guarantee that a ride will be provided.
- (4) A LIFT pre-paid ticket, LIFT monthly pass or LIFT annual pass is valid for travel on regular fixed route service when accompanied by valid TriMet Honored Citizen identification.

C. Electronic Fare (“eFare”) Program

Use of an electronic fare payment system (“eFare”) Program shall be subject to the following fare provisions:

(1) eFare Cards

- (a) An eFare card is a contactless electronic fare instrument that allows a rider to tap at designated card readers to pay their fare.
- (b) The rider must tap their eFare card prior to each vehicle boarding to validate their trip or upon occupying district areas requiring proof of fare payment.
- (c) eFare cards are non-transferable.
- (d) The following fares shall be available using stored value from an eFare card account, according to the status of the rider:
  - (i) 2 ½ Hour Ticket  
A rider shall be allowed unlimited rides for a duration of 2 ½ hours following the initial eFare card tap.

<u>Status</u>	<u>Fare</u>
YOUTH	\$1.25
HONORED CITIZEN	\$1.25
ADULT	\$2.50

(ii) 1-Day Pass

Fares paid per card tap shall accumulate, and a rider shall be charged only up to the applicable 1-Day Pass price and not more (“capped”), regardless of how many taps the rider accrues during the service day. Once charges accrue to the applicable 1-Day Pass price during a service day, additional trips are free for the remainder of that service day.

<u>Status</u>	<u>Fare</u>
YOUTH	\$2.50
HONORED CITIZEN	\$2.50

ADULT \$5.00

(iii) 1-Month Pass

Fares paid per card tap shall accumulate, and a rider shall be charged only up to the applicable 1-Month Pass price and not more (“capped”), regardless of how many taps the rider accrues during the calendar month. Once charges accrue to the applicable 1-Month Pass price during a calendar month, additional trips are free for the remainder of that calendar month.

<u>Status</u>	<u>Fare</u>
YOUTH	\$28.00
HONORED CITIZEN	\$28.00
ADULT	\$100.00

- (e) Reloadable eFare cards shall be available for purchase for a fee of \$3.00.
- (f) A minimum \$5.00 load to an eFare card account shall be required, except that no minimum load shall be required for eFare cards loaded at the TriMet Ticket Office.
- (g) Annual Passes may be purchased as one lump sum, according to the requirements set forth in TMC Section 19.15(A)(4). Annual Passes shall be issued in the form of an eFare card.
- (h) Payment of fares for LIFT paratransit services by an eFare card shall be initiated either by tapping a card reader, or payment shall be deducted from the rider’s account when the LIFT operator picks up the rider and confirms the rider’s trip through their Mobile Driver Terminal (MDT). LIFT payments in this paragraph (h) exclude rides paid for by agencies under contract with TriMet. The following LIFT paratransit fares shall be available for payment from an eFare card account:
- (i) Single Ticket: \$2.50
- (ii) 1-Month Pass: \$74.00. Fares paid shall accumulate, and a rider shall be charged only up to the applicable 1-Month Pass price and not more (“capped”), regardless of how many taps the rider accrues during the calendar month. Once charges accrue to the applicable 1-Month Pass price during a calendar month, additional trips are free for the remainder of that calendar month.
- (iii) Annual Passes may be purchased as one lump sum, according to the requirements set forth in TMC Section 19.15(B)(1)(d).
- (iv) Payment of a LIFT fare under this paragraph (h) shall be valid as payment for travel on regular fixed-route service. In the case a rider begins their trip on fixed-route by tapping their LIFT eFare card, the applicable Honored Citizen fare and fare identification requirements shall apply.

(2) Other eFare Payment Instruments

Financial instruments issued by the major payment brands including VISA, MasterCard, American Express and Discover that are capable of providing payment through contactless tapping at designated card readers may be used to purchase the Adult 2 ½ Hour Ticket and Adult 1-Day Pass per paragraphs (1)(d)(i) and (ii) above. The rider must tap their fare payment instrument prior to each vehicle boarding to validate their trip or upon occupying district areas requiring proof of fare payment.

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## **Attachment C**

### **Diversity and Transit Equity Index Measures and Data Sources**

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## Diversity and Transit Equity Index Measures & Data Sources

### Key

#### # Index Measure

- Definition
  - Data Source

#### 1. People of Color

- Pct. population non-white and/or Hispanic/Latino
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: Title VI/Environmental Justice definition

#### 2. Low-Income Households

- Pct. households below 200% federal poverty level
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: Metro definition of low-income

#### 3. Limited English Proficiency Persons

- Pct. population speaking English less than “very well”
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Census Tract
  - Basis: TriMet definition

#### 4. People with Disabilities

- Pct. population with a disability
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Census Tract
  - Basis: Committee decision

#### 5. Adults Age 65 and Older

- Pct. population age 65 and over
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: TriMet Honored Citizen age

#### 6. Youth Age 21 and Younger

- Pct. population age 21 or under
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: Multnomah Youth Commission 2014 Youth Summit recommendation

#### 7. Households with Poor Vehicle Access

- Pct. households with zero vehicles OR 2+ workers and one vehicle
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Census Tract
  - Basis: Committee decision

**8. Access to Affordable Housing**

- Rental housing w/ rent under \$800 (B25056 Contract Rent & B25061 Rent Asked)
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: UC Davis Center for Regional Change Jobs/Housing Fit Analysis, modified for higher housing costs in Portland metro
- Affordable owner-occupied or available for sale valued at \$175,000 or less (B25075 Value & B25085 Price Asked)
  - Source: 2014-2018 American Community Survey
    - Geographic scale: Block Group
  - Basis: UC Davis Center for Regional Change Jobs/Housing Fit Analysis, modified for higher housing costs in Portland metro

**9. Access to Low/Medium Wage Jobs**

- Jobs with earnings of \$3,333/month or less
  - Source: 2017 Longitudinal Employer-Household Dynamics (LEHD)
    - Geographic scale: Aggregated to Block Group
    - C000 (Total Jobs), CE01 & CE02 (Low/Med Wage Jobs), CR02/CR03/CR04/CR05/CR07 (Minority Jobs), CT02 (Hispanic Jobs)
  - Basis: UC Davis Center for Regional Change Jobs/Housing Fit Analysis

**10. Access to Essential Services**

- Human & Social Services: NAICS codes Individual and Family Services (624190), Child and Youth Services (624110), Services for Elderly and Persons with Disabilities (624120), Temporary Shelters (624221), and Other Community Housing Services (624229)
  - Source: ESRI Business Analyst
    - Geographic scale: Aggregated to Block Group
  - Basis: CLF Equity Atlas 2.0
- Key Retail Services: NAICS codes Supermarkets and Grocery Stores (445110), Financial Institutions (522110), Barber & Beauty Shops/Salons (812111 & 812112), Laundries & Dry Cleaners (812310 & 812320), Hardware Stores (444130), Pharmacies & Drug Stores (446110)
  - Source: ESRI Business Analyst
    - Geographic scale: Aggregated to Block Group
  - Basis: CLF Equity Atlas 2.0/SF Dept. of Public Health, Health Development Measurement Tool, modified by committee
- Schools: Community colleges, High Schools, Middle or Junior High Schools, Skill Center or Alternative Schools
  - Source: Metro RLIS
    - Geographic scale: Aggregated to Block Group
  - Basis: Committee decision

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## **Attachment D**

### **STIF-Funded Transit Service Expansion and Improvements within the TriMet Service District**

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**Note:** This list is subject to revision and potential refinement of priorities with the HB 2017 Transit Advisory Committee approval.

### TriMet Revised Combined Scenario with Streetcar (HB2017 & TriMet Employer Payroll Tax)

Completed in FY21 & FY22

Jurisdiction	Line	Description
Clackamas	Jennings Rd. Line	New Line.
Clackamas	Webster Line	New Bus Line.
Clackamas	Line 30 - Estacada	Add Sunday Service.
Clackamas	Line 32 - Oatfield	Improve Saturday service; add Sunday service.
Clackamas	Line 32 - Oatfield	Extend to Oregon City High School.
Clackamas	Line 79 - Clackamas/Oregon City	Streamline route for faster service.
Clackamas	Line 79 - Clackamas/Oregon City	Increase frequency.
Clackamas	Line 99 - Macadam/McLoughlin	Add midday service.
Clackamas	Line 155 - Sunnyside	Increase frequency.
Clackamas/Portland	Line 72 - Killingsworth/82nd Ave	Upgrade to 12 minute frequent service.
E. Multnomah	Line 81 - Kane/257th	Increase frequency and span.
E. Multnomah/Portland	Division Transit Project	Downtown Portland to Gresham.
E. Multnomah/Portland	Line 4 - Division	Split into 2 lines for better on-time performance.
E. Multnomah/Portland	Line 74 - 162nd Ave.	Increase frequency.
E. Multnomah/Portland	Line 77 - Broadway/Halsey	Increase frequency.
E. Multnomah/Portland	Line 87 - Airport Way/181st Ave.	Upgrade to 15 minute frequent service.
Portland	PDX Night Bus	New bus line from PDX to Stark when MAX Red Line doesn't run.
Portland	Streetcar	Upgrade to 12 minute frequent service.
Portland	148th Ave. Line	New Line.
Portland	Line 6 - Martin Luther King Jr. Blvd	Upgrade to 12 minute frequent service.
Portland	Line 10 - Harold	Change route to serve SE 7th Ave; add Sunday service.
Portland	Line 14 - Hawthorne	Upgrade to 12 minute frequent service.
Portland	Line 15 - Belmont/NW 23rd	Upgrade to 12 minute frequent service.
Portland	Line 16 - Front Ave./St. Helens Rd.	Increase peak frequency.
Portland	Line 12 - Sandy	Upgrade to 12 minute frequent service.
Portland	Line 24 - Fremont	Extend to NW Portland & Goose Hollow MAX via Fremont Br.
Portland	Line 66 - Marquam Hill/Hollywood TC	Earlier and later trips.
Portland	Line 73 - 122nd Ave	Upgrade to 15 minute frequent service.
Washington/Portland	Red Line Max	Extend to Fair Complex.
Washington/Portland	Line 54 - Beaverton Hillsdale Hwy	Upgrade to 15 minute frequent service.
Washington/Portland	Line 56 - Scholls Ferry Rd.	Extend to Progress Ridge/South Cooper Mountain.
Washington/Portland	Line 61 - Marquam Hill/Beaverton	Earlier and later trips.
Washington/Portland	Line 64 - Marquam Hill/Tigard	Earlier and later trips.
Washington/Portland	Line 68 - Marquam Hill/Collins Circle	Earlier and later trips.
Washington/Portland	Line 96 - Tualatin/I-5	Add midday service.
Washington	Baseline Rd	New line between downtown Hillsboro & Willow Creek TC.
Washington	Line 42 - Denney/Hall	Early/late/weekend improvements with Line 76 upgrade.
Washington	Line 47 - Baseline/Evergreen	Reroute to South Hillsboro; increase peak frequency.
Washington	Line 48 - Cornell	Increase frequency to Hillsboro; increase frequency Sat/Sun.
Washington	Line 57 - Tualatin Valley Highway	24 hour service.
Washington	Line 76 - Beaverton Tualatin	Upgrade to 15 minute frequent service.
Washington/Portland/E.Multnomah	Line 20 Burnside/Stark	Upgrade to 15 minute frequent service.
Washington/Portland/E.Multnomah	Line 20 Burnside/Stark	Increase frequency between Portland & Beaverton.
Washington/Portland/E.Multnomah	Line 20 Burnside/Stark	24 hour service.

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## **Attachment E**

### **Oregon Public Transportation Plan Goals**

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### Goals of the Oregon Public Transportation Plan

1. **Mobility:** Public Transportation User Experience – People of all ages, abilities, and income levels move reliably and conveniently between designations using an affordable, well-coordinated public transportation system. People in Oregon routinely use public transportation to meet their daily needs.
2. **Accessibility and Connectivity:** Riders experience user-friendly and convenient public transportation connections to and between services and travel modes in urban, suburban, rural, regional, and interstate areas.
3. **Community Livability and Economic Vitality:** Public transportation promotes community livability and economic vitality by efficiently and effectively moving people of all ages to and from homes, jobs, businesses, schools and colleges, and other destinations in urban, suburban, and rural areas.
4. **Equity:** Public transportation provides affordable, safe, efficient, and equitable transportation to jobs, services, and key destinations, improving quality of life for all Oregonians.
5. **Health:** Public transportation fosters improved health of Oregonians by promoting clean air, enhancing connections between people, enabling access to services such as health care and goods such as groceries, and by giving people opportunities to integrate physical activity into everyday life through walking and bicycling to and from public transportation.
6. **Safety and Security:** Public transportation trips are safe; riders feel safe and secure during their travel. Public transportation contributes to the resilience of Oregon communities.
7. **Environmental Sustainability:** Public transportation contributes to a healthy environment and climate by moving more people with efficient, low-emission vehicles, reducing greenhouse gases and other pollutants.
8. **Land Use:** Public transportation is a tool that supports Oregon’s state and local land use goals and policies. Agencies collaborate to ensure public transportation helps shape great Oregon communities providing efficient and effective travel options in urban, suburban, and rural areas.
9. **Funding and Strategic Investment:** Strategic investment in public transportation supports the overall transportation system, the economy, and Oregonians’ quality of life. Sustainable and reliable funding enables public transportation services and infrastructure to meet public needs.
10. **Communication, Collaboration, and Coordination:** Public and private transportation providers and all levels of government within the state and across state boundaries work collaboratively and foster partnerships that make public transportation seamless regardless of jurisdiction.

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## **Attachment F**

### **Regional Coordination Program – Recommended STIF-Funded Projects**

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FY24-25 STIF Regional Coordination Program Estimates		FY24	FY25
<b>Existing Programs</b>	<b>Programs</b>	<b>Cost</b>	<b>Cost</b>
Washington County	GroveLink, Hillsboro, Tualatin, Borland Rd.	\$ 2,166,865	\$ 2,276,629
Clackamas County	Oregon City, Clackamas Industrial, CCC	\$ 780,000	\$ 883,513
Multnomah County	Swan Island, TRIP, ACCESS (Alderwood-Cornfoot-Columbia)	\$ 1,382,000	\$ 1,250,000
SMART	Route 2X	\$ 612,000	\$ 612,000
<b>New Programs</b>	<b>Programs</b>	<b>Cost</b>	<b>Cost</b>
SMART	Wilsonville - CTC via 1-205	\$ 1,300,000	\$ 1,100,000
Sandy	Clackamas Express (Sandy to Clackamas Town Center)	\$ 550,000	\$ 350,000
Clackamas County	Estacada to Clackamas Community College	\$ 216,000	\$ 404,000
Washington County	King City Shuttle expansion, Bethany - Cedar Mill Shuttle	\$ 634,000	\$ 744,820
PBOT/Multnomah County	Shuttle study	\$ 200,000	
		\$ 7,840,865	\$ 7,620,962

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