



TECHNICAL MEMORANDUM #8

DATE: April 7, 2016

TO: Project Management Team

FROM: Scott Mansur, Jordin Ketelsen, and Brad Coy – DKS Associates

SUBJECT: **Transportation Solutions Identification Process (Task 6.1)**

P11086-018

This memorandum documents the project identification and evaluation process that will be used to develop the project list for Lane County's current transportation system plan (TSP) update. The process includes the following four general steps:

1. Project identification
2. Initial screening and categorization
3. Detailed evaluation
4. Project prioritization and funding plan

These steps are described in detail in this memorandum, with additional details about the planned public and stakeholder involvement efforts included in Technical Memorandum #1.¹

Step 1: Project Identification

Project identification consists of the formation of a list of potential transportation projects for the County to consider for inclusion in its TSP. This list will be formed primarily using the following sources:

- Current project list in the adopted 2004 TSP
- Projects on Lane County facilities that have been identified in other local and state transportation plans
- Planning studies affecting County facilities that are being considered by jurisdictional partners
- New projects proposed by the public (or developed by the project team to address concerns raised by the public) through the online comment map, email correspondence, attendance at Community Workshop #1, initial stakeholder feedback at the start of the TSP update process, or other means
- New projects proposed by the Technical Advisory Committee (TAC) or Stakeholder Advisory Committee (SAC) during their second round of meetings (or developed by the project team to address concerns raised by these two groups)

¹ *Technical Memorandum #1: Public and Stakeholder Involvement Strategy (Task 2.1)*, DKS Associates, November 26, 2013.

DRAFT

The preliminary project list will be developed leading up to and during the first series of community workshops. While it is preferable to identify all potential projects during the early phases of the TSP update process, it is understood that some solutions may not be conceived or suggested until later in the process. Any new project ideas developed following the first series of community workshops will be considered for potential inclusion in the remaining solution identifications process on a case-by-case basis.

Step 2: Initial Screening and Categorization

During the preparation of the preliminary project list, initial screening will be performed, particularly for previously identified projects. This screening will help the project team determine whether the previously identified projects have been completed or additional studies have been performed that have resulted in refined projects. The screening will also help identify which project categories would benefit from detailed evaluation (i.e., Step 3).

In addition, the projects will be categorized into the following lists (which generally correspond with descriptions used for the currently adopted 2004 TSP project list):

- **Urban Upgrades** include the projects on County jurisdictional roadways located within urban growth boundaries (UGB). These projects will be separated from the remaining projects because they would be based on urban demand to support cities and would be contingent on partnership with cities and other funding, such as system development charges (SDCs) collected by the cities.
- **Rural Modernization** projects include improvements to County jurisdictional roadways outside of urban areas to meet cross-section and roadway design standards. The focus will be on arterial and collector streets, and projects are expected to include widening travel lanes and paved shoulders, improving pavement structure, and other similar cross-section and pavement improvements.
- **Bicycle and Pedestrian** projects include improvements that are primarily designed to serve bicycle and pedestrian needs. Many of the urban upgrades and rural modernization projects are also expected to include bike lanes, sidewalks, and/or wider shoulders consistent with roadway standards; however, this project category focuses on additional improvements such as multiuse trails, pedestrian refuge islands, additional shoulder width beyond minimum standards, and other similar projects.
- **Spot Improvements** will address a variety of safety and operational improvement needs throughout the County. They will focus on specific locations where the roadway will benefit from turn lanes to improve operational and safety needs, adequate clear zone to reduce fixed object collisions, and other similar projects.
- **Corridor Improvements** include multimodal corridors where additional travel lanes or more significant improvements are needed to accommodate increased motor vehicle capacity, a systemic safety need along an entire roadway, and other similar projects.
- **Future Studies** include future planning efforts needed to provide additional details for specialized projects or to help with the selection of a preferred alternative when insufficient information or analysis is available through the TSP update process.

These lists will help facilitate the detailed evaluation process identified in Step 3. As additional projects are identified, additional categories may be considered.

Step 3: Detailed Evaluation

After screening and categorizing the projects, the project team will perform a detailed evaluation of each project using evaluation criteria. Minor variations to the evaluation may be considered for each project category, and the County's financial situation will also be considered when determining the level of detailed evaluation to perform for the projects. For example, some projects may not require detailed evaluation to determine the appropriate prioritization and funding strategies.

The evaluation criteria have been developed based on the County's new proposed transportation goals and policies structure. The evaluation criteria provide a point-based technical rating method that will be used to provide a quantitative perspective of how well the projects meet the County's transportation goals and policies. Combined with other considerations, the resulting project scores will be beneficial for selecting projects to be included in the County's financially-constrained project list.

Table 1 lists the evaluation criteria and, the corresponding scoring methodology, and preliminary weights that could be applied to the criteria. Each criterion is associated with one or multiple of the County's proposed goals and includes a question that can be answered with either a "Yes" or a "No." A "Yes" answer corresponds with a score of +1 and a "No" answer corresponds with a -1 score. If the proposed project does not have any effect on a goal, the "No Change" answer may be given, which is associated with a neutral score of 0. By summing ratings (and weighting if desired), projects can be compared to help determine priorities.

One approach to weighting the criteria (which is the basis for the weighting shown in the table) is for every goal category to receive the same weight (for example, a total weight of "1"), which is then divided by the number of applicable criteria for the goal (for example, Goal 1 has two criteria, which would each have a 0.5 weighting). If a given evaluation criterion is not applicable, then that criterion can be removed from the weighting methodology and the other applicable criteria for the goal can have increased weighting so that the goal category maintains a total weight of "1".

The evaluation criteria focus on compliance with state and local plans and policies, the importance of multimodal transportation options, engineering design standards, and a desire to maximize positive (and minimize negative) economic, social (livability), and environmental impacts.

Table 1: Evaluation Criteria Scoring Worksheet

Criteria Goal(s)	Yes	No Change	No	Weight	Total
Goal 1: Safety – Provide a transportation system that is structurally and operationally safe for all users and modes.	Does the project address a safety need?				
	+1	0	-1	0.5	
	Does the project minimize conflicts between modes?				
	+1	0	-1	0.5	
Goal 2: Economic Vitality – Provide a reliable transportation system that enhances the economic health of Lane County.	Does the project support surrounding land uses?				
	+1	0	-1	0.5	
	Does the project enhance the economic health of Lane County?				
	+1	0	-1	0.5	
Goal 3: Natural Environment – Create and maintain a transportation system that first avoids, then minimizes, then mitigates impacts to the natural environment.	Does the project minimize environmental impacts?				
	+1	0	-1	0.5	
	Does the project reduce greenhouse gases?				
	+1	0	-1	0.5	
Goal 4: Equity & Accessibility – Provide safe and efficient access to destinations and populations within Lane County.	Does the project accommodate all transportation users?				
	+1	0	-1	0.5	
	Does the project support services to meet the needs of the transportation disadvantaged?				
	+1	0	-1	0.5	
Goal 5: Mobility – Promote the efficient and cost-effective movement of people, goods and services by all modes.	Does the project address a motor vehicle performance deficiency?				
	+1	0	-1	0.5	
	Does the project enhance freight mobility?				
	+1	0	-1	0.5	
Goal 6: Connectivity – Provide improved and new transportation connections within and between developed and developing areas.	Does the project enhance motorized connections?				
	+1	0	-1	0.5	
	Does the project enhance non-motorized connections?				
	+1	0	-1	0.5	
Goal 7: Active Transportation and Public Health – Create a built environment that encourages healthy, safe, comfortable and convenient active transportation options that are viable for all users.	Does the project encourage active transportation?				
	+1	0	-1	0.5	
	Does the project enhance bicycle and pedestrian facilities?				
	+1	0	-1	0.5	
FIRST PAGE TOTAL					

Criteria Goal(s)	Yes	No Change	No	Weight	Total
Goal 8: Coordination – Implement the Transportation System Plan by working with the public, community groups, transit providers, cities and other government agencies.	Does the project offer an opportunity to positively coordinate transportation improvements with other agencies?				
	+1	0	-1	0.5	
	Does the project advance regional transportation priorities?				
	+1	0	-1	0.5	
Goal 9: Funding – Seek adequate and reliable funding for transportation.	Is the project a cost-effective option for the County Road Fund?				
	+1	0	-1	1.0	
Goal 10: Maintenance and Preservation – Adequately maintain and preserve Lane County’s transportation facilities.	Does the project address a maintenance need and reduce more expensive future costs?				
	+1	0	-1	1.0	
SECOND PAGE TOTAL					
FIRST PAGE TOTAL (Copied from Prior Page)					
TOTAL PROJECT SCORE					

Step 4: Project Prioritization and Funding Plan

Using a combination of evaluation criteria scoring, feedback from project stakeholders, and financial considerations, three tiers of projects will be identified:

- **Priority Projects** are those on the financially-constrained project list. These projects are planned to receive the limited County revenue sources that are expected to be available through the TSP horizon year.
- **Opportunity Projects** are the desirable projects that would require additional funding sources, such as partnerships or grants. This list is intended to facilitate County efforts to seek additional funding and to be ready for grant opportunities as they become available.
- **Development-Related Projects** provide additional capacity and/or connectivity to support development areas. These projects would likely be constructed using development resources.