

# Going Beyond Budget: Partnerships, Capacity Building, & Gaining Executive Support

ICLEI USA - Budgeting for Climate Action Cohort



*June 21, 2023*

*Jacob Sherman, MBA | New Mobility Program Manager*



**PBOT**  
PORTLAND BUREAU OF TRANSPORTATION

# Agenda

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- Introduction
- **Case study:** Zero-Emission Delivery Zone Pilot Project
- **Tools/frameworks:**
  - Change management
  - Building the case
  - Power of pilots
  - Securing resources
  - Building capable teams
- Questions & Discussion



## 30 second introductions

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- Name and pronouns?
- What do you do? (briefly)



# PBOT's Zero-Emission Delivery Zone Pilot

# USDOT Strengthening Mobility and Revolutionizing Transportation (SMART) Grants Program

## Discretionary grant program

- \$100 million appropriated for 2022-2026

## Two award types

- **Stage 1: Planning and Prototyping**, up to \$2M
- **Stage 2: Implementation**, up to \$15M, requires new application

## Stage 1 details

- Build internal buy-in and partnerships with stakeholders to refine and prototype concepts, and report on results
- At the end, develop an implementation plan; or decide to not proceed with the concept
- **Stage 1 results may uncover previously unknown institutional barriers, technical limitations, or poor performance relative to conventional solutions**

We were awarded a Stage 1 grant

The logo for the SMART program, featuring the word "SMART" in a bold, blue, sans-serif font. The letter "A" is stylized with a green and blue geometric shape behind it. A thick black horizontal line is positioned below the text.

# Freight decarbonization is a City priority

## Reducing greenhouse gas emissions from freight has been called for in:

- Climate Action Plan (2009)
- Sustainable Freight Strategy (2012)
- Climate Action Plan (2015)
- Climate Emergency Declaration (2020)
- Climate Emergency Workplan (2022)
- 2040 Freight Plan (to be adopted later in '23)

Additionally, BIPOC and low-income communities have long-established concerns over the negative health impacts of diesel pollution in the neighborhoods where they live.



ORTATI	T-8	★ Make freight cleaner.	PBOT	Adopt the 2040 Freight Plan, which includes strategies to reduce freight emissions equitably from freight. Pursue state funding opportunities to support implementation.
				Update the...



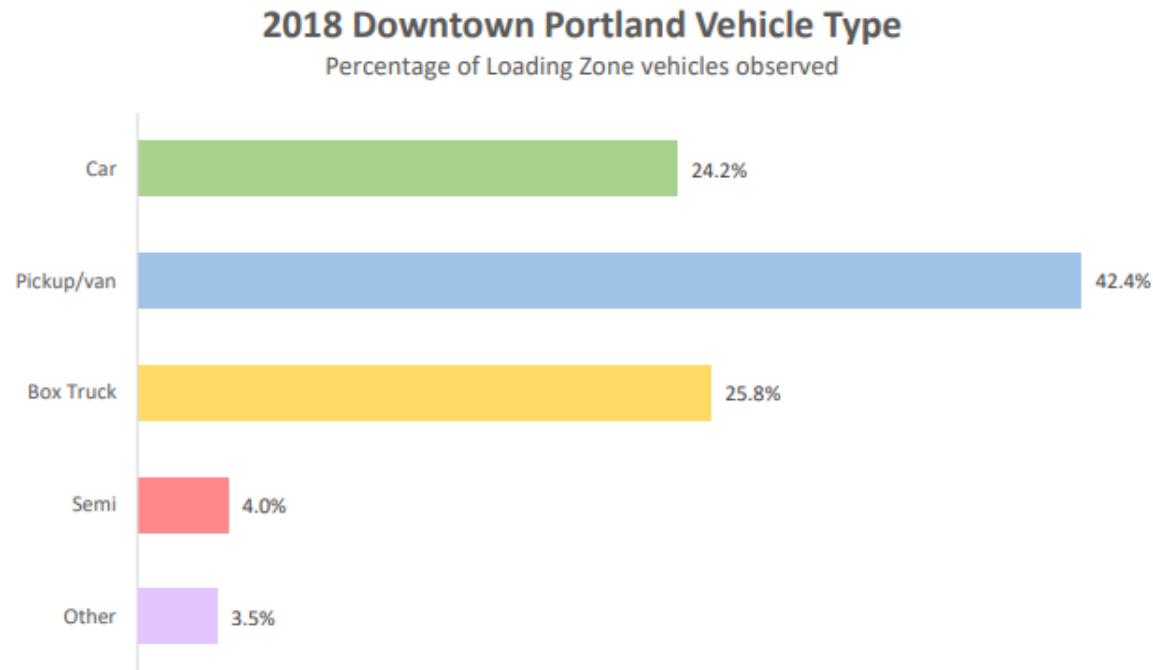
No.	Actions	Lead Implementer
<b>Strategy 2A. Evaluate and implement City programs to reduce GHG and local pollutants emissions.</b>		
2A.1	Pilot green loading zones and low emissions zones to send market signals, test implementation strategies, and collect data on the benefits and costs in consideration of broader implementation. The proposed strategies should include equity considerations for small and BIPOC owned fleet operators.	PBOT Policy, PBOT Park Operations, PBOT Urban Freight Coordination, BPS
2A.2	Conduct a feasibility analysis to...	PBOT Policy

# Zero emission delivery pilot could address key problems

- **Climate:** Transportation causes +40% of GHG in Portland and is rising. Trucks have an outsized-impact on local carbon emissions.
- **Public Health:** Nearly 40% of BIPOC Portlanders live close to the city's biggest sources of air pollution, such as freeways and industrial facilities.
- **Safety:** Downtown Portland is one of the areas with the most collisions involving trucks—types of crashes that are more likely to be serious or fatal.



# Many cars, vans, and box trucks can be electrified today



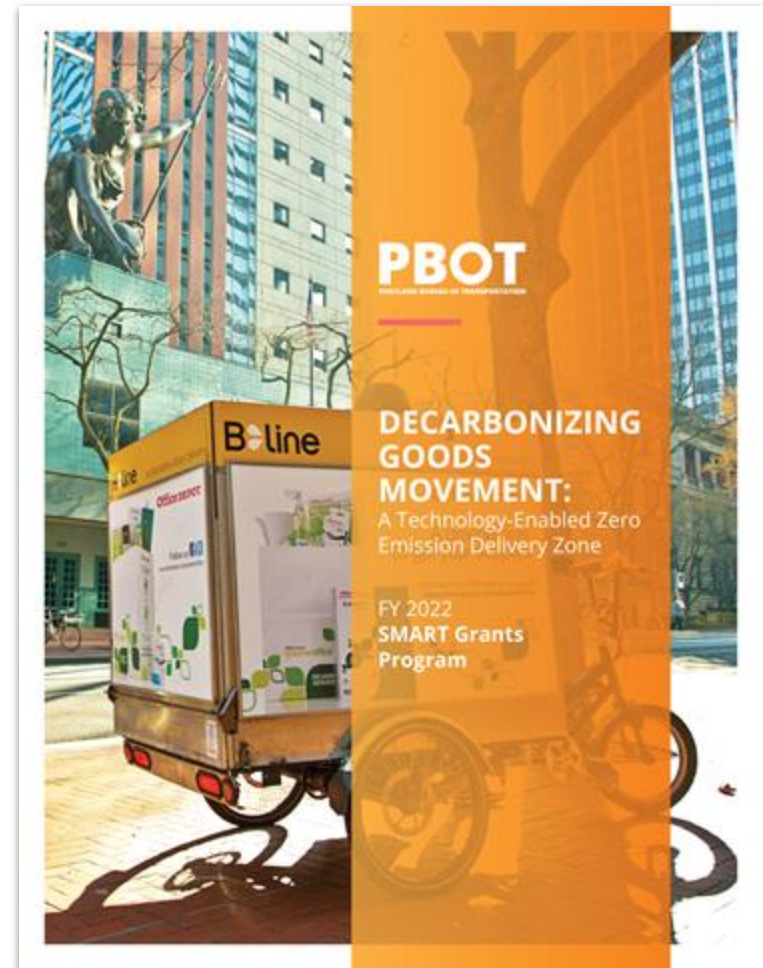
Source: PBOT, Downtown Loading Zone Parking Assessment, 2018

- **Over 92% of deliveries that occur downtown are in vehicle types that can be electrified.** Other options like e-trike delivery also exist
- There are significant federal resources available to help fleets transition to low and zero emission vehicles



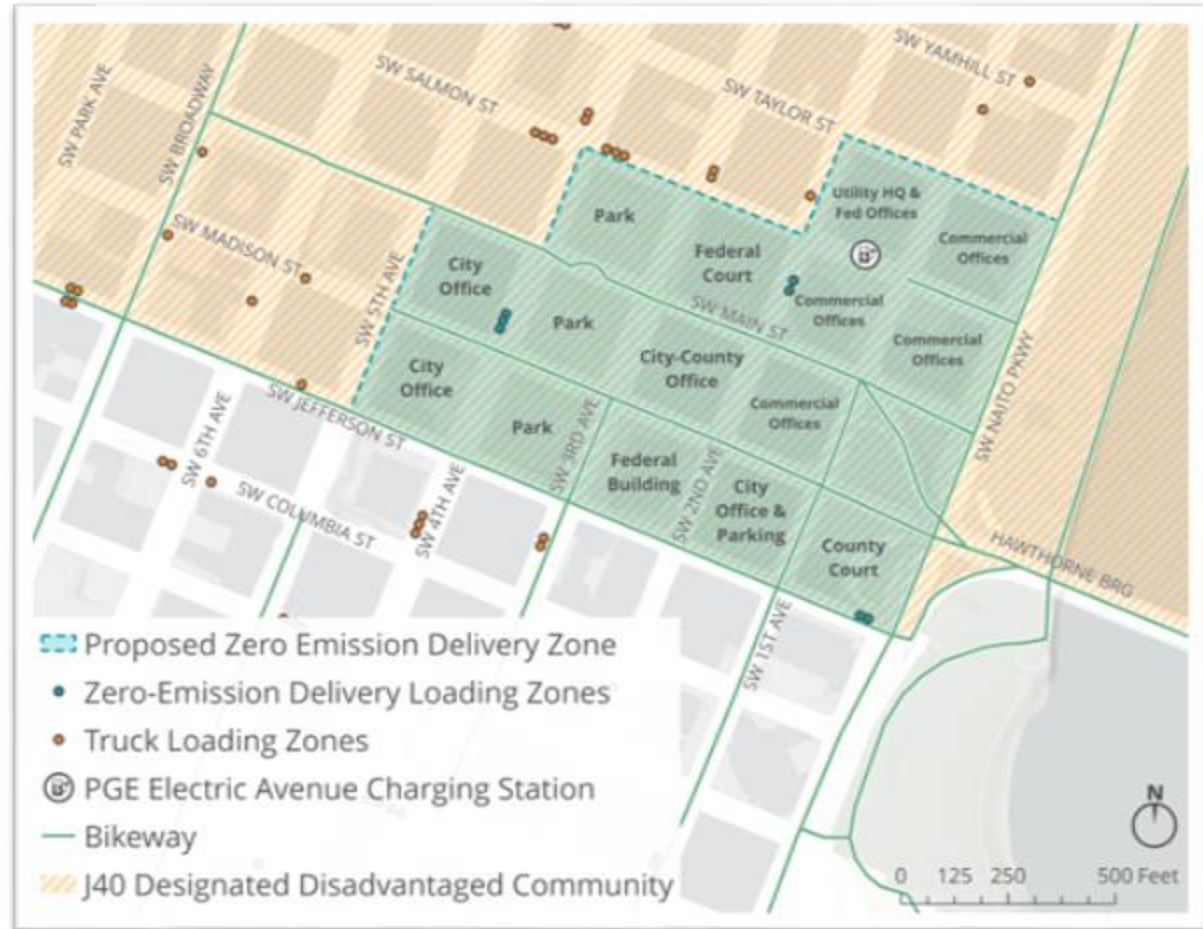
# Grant application overview

- Plan for and pilot **Zero-Emission Delivery spaces** in a small area of downtown Portland to send market signals and encourage more use of zero emission delivery vehicles
- Trial **sensor and other digital infrastructure**, like Curb Data Specification and digital permits, to test ability to measure performance of loading spaces
- **Partner** with businesses and building owners near loading zones, shippers and zero emission logistics companies to test delivery and logistics strategies



# Why these loading zones on these blocks in initial proposal?

- Initial proposal regulates use of commercial loading spaces on three block faces
- Area is anchored by public sector institutions with climate commitments
- All vehicles can:
  - Travel through zone
  - Use on-site loading bays
  - Park in metered spaces
  - Use other loading spaces nearby



# What else is funded by the grant?

- Stakeholder engagement and involvement in program design and piloting
- Funding to contract with B-Line and/or other eco-logistics companies for consolidation and delivery into the pilot project area
- Sensors and data collection on the use of the loading zone spaces and surrounding areas
- Peer-to-peer learning with eight other U.S. cities testing curb management strategies to share lessons learned and build on others' success
- Preliminary research and evaluation of the pilot project



*B-Line's e-cargo trikes at their warehouse exactly one-mile from the zero-emission delivery pilot area*

# Outcomes of Stage 1 SMART grant

- Send market signals about importance of zero-emission delivery to meet climate goals
- Identify opportunities and challenges of zero-emission delivery zone approach
- Identify opportunities and challenges of sensors and other digital technologies, including digitizing city permits
- Develop and strengthen partnerships with urban logistics providers, tenants, and other stakeholders in the area
- Identify incentives and strategies necessary to help urban logistics companies successfully transition to zero emission delivery



# Current timeline for SMART Grant pilot project\*

## SUMMER 2023

- Negotiate Stage 1 grant with USDOT
- Engage with stakeholders to identify issues and needs
- Refine pilot proposal
- Confirm partner participation

## FALL 2023 - WINTER 2024

- Launch grant-funded activities
- Hire staff & consultants
- Develop and refine project with stakeholders
- Develop monitoring and assessment process
- Review technology needs and procure technology/sensors
- Develop logistic partner contracts

## SPRING 2024 - FALL 2024

- Pilot zero emission loading spaces
- Collect data on spaces
- Collect feedback from delivery companies and businesses

## FALL 2024 - SPRING 2025

- Assess success of pilot
- Prepare Stage 1 pilot report

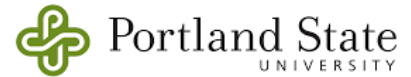
\* *Timeline subject to change*

# Current focus

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- **Completed:**
  - Updated website with more accurate information for the public
  - Developing lists of contacts for businesses and stakeholders in area
  - Cataloged current funding opportunities for fleets to transition to ZEV
- **In Progress:**
  - Mapping businesses and tenants in area to identify on-site loading bays and assess distance to different loading zone locations
  - Conducting field observations of loading zones to understand use
  - Developing outreach and education materials for business
  - Conducting preliminary outreach to local businesses and stakeholders
  - Contracting with USDOT
  - Refining project scope/timeline

# Stakeholder interest to date



# Potential areas of internal collaboration

- **Project development**
  - Refine scope of work
  - Stakeholder engagement and surveys
  - Site finalization
- **Digital technology**
  - Sensor procurement and installation
  - Data privacy assessments and community engagement
- **Parking implementation**
  - Code changes, permit upgrades, and exception processes
  - Sign design and installation
- **Zero-emission delivery options**
  - Engaging freight stakeholders and testing incentives
  - Engaging businesses to promote zero-emission delivery options
- **Evaluation, recommendations, and more**



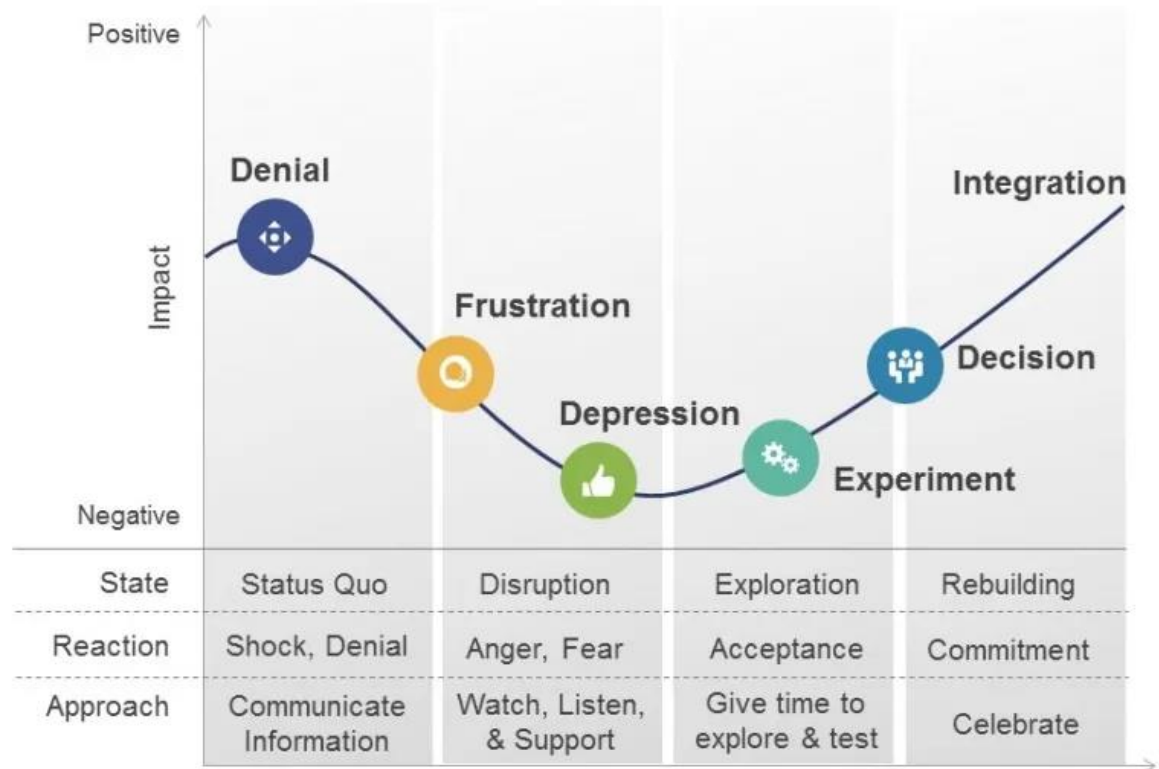


# Tools and frameworks

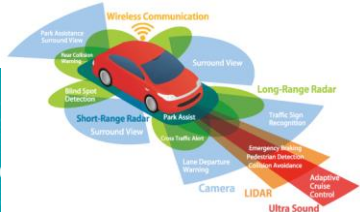
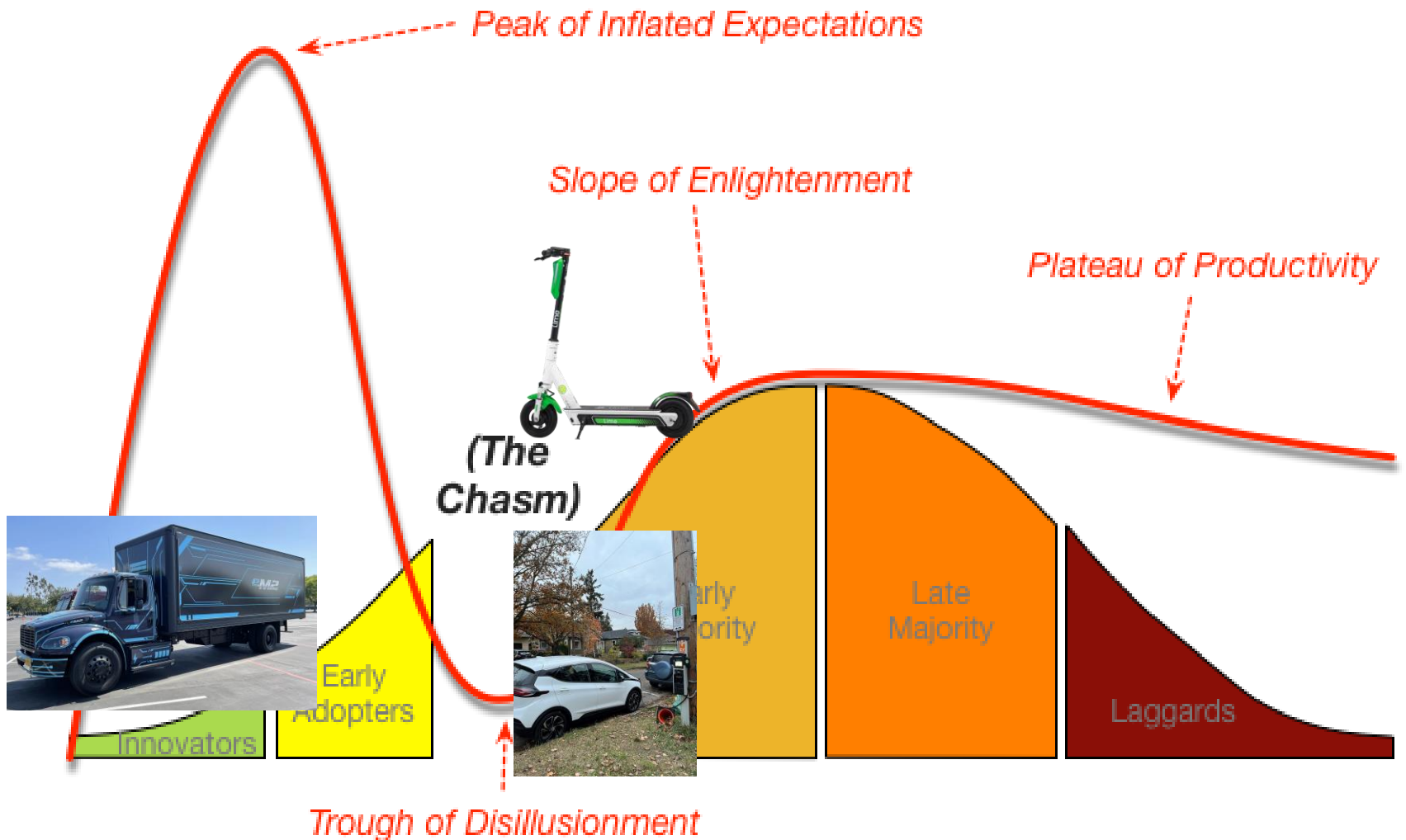
# Change management: In organizations *and* cities

"They don't make plans; they don't solve problems; they don't even organize people. What leaders really do is prepare organizations for change and help them cope as they struggle through it." - John Kotter in *What Leaders Really Do* (2001)

## The Kübler-Ross Change Curve



# Diffusion of Innovation Curve & Gartner Hype Cycle



# Building the case

- What why's can you connect with, whether implicit or explicit?
- What data do you have?
- How do you package it?  
And socialize it?
  - Memo and PPT?
  - Coffee?
- What are your partner's why's?

## The Golden Circle

### WHAT

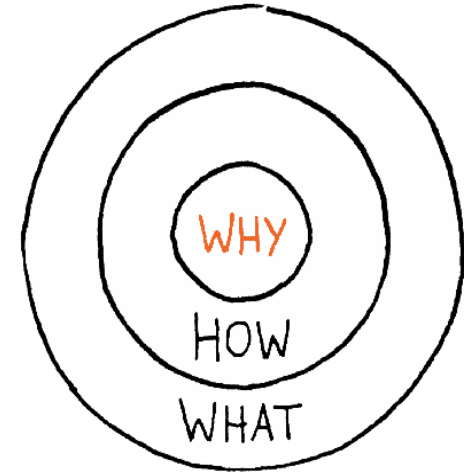
Every organization on the planet knows WHAT they do. These are products they sell or the services

### HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

### WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.



©2015 Simon Sinek, Inc.



Will it advance equity and address structural racism?

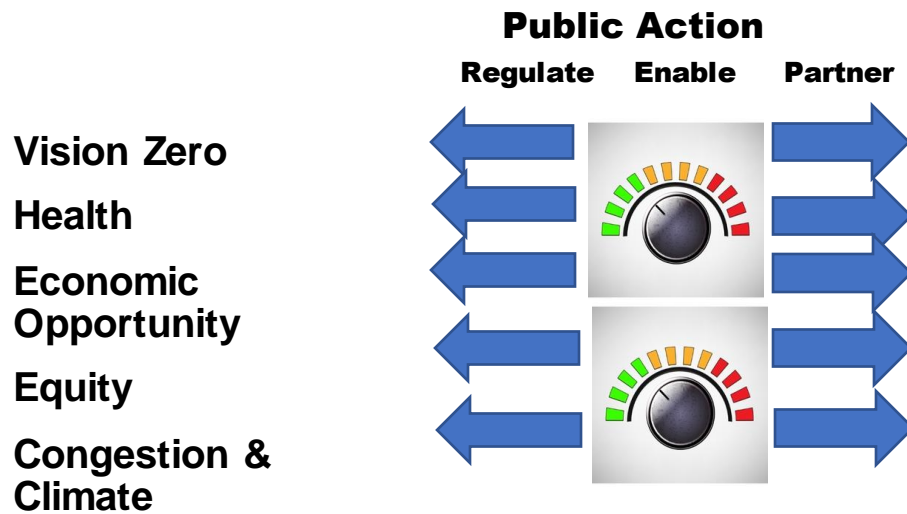


Will it reduce carbon emissions?

Source:  
PBOT's  
Strategic  
Plan

# Applying outcomes-based thinking to disruptive technology

How can cities assess the impact of specific proposals and influence them?



# The power of pilots



Pole charging pilot with Portland General Electric since 2020

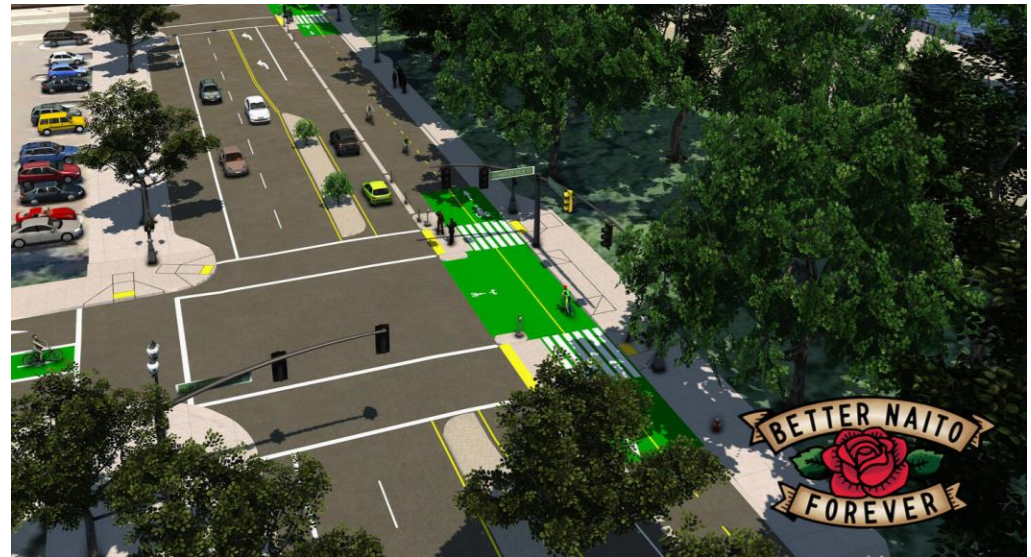


"Electric Avenue" DC Fast Charging in the ROW project with Portland General Electric since early 2010's

# The power of pilots



"Better Naito" pilot in 2015



Better Naito project in 2022

# Securing resources

- Placing small bets
- Matching funds from across and/or outside the organization
- Bipartisan Infrastructure Law and Inflation Reduction Act represent trillions of dollars in climate action investments
  - Federal grants
  - State & MPO allocations
  - Philanthropy?

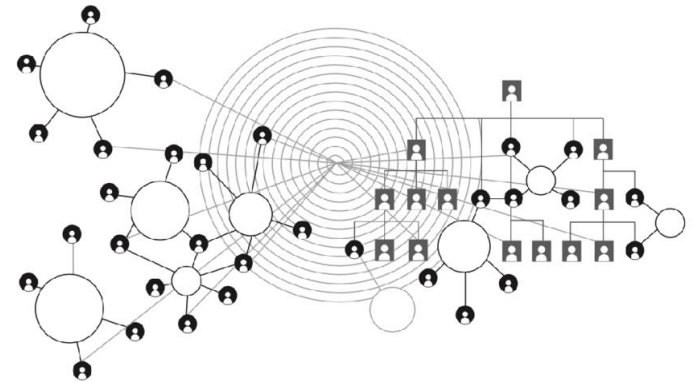
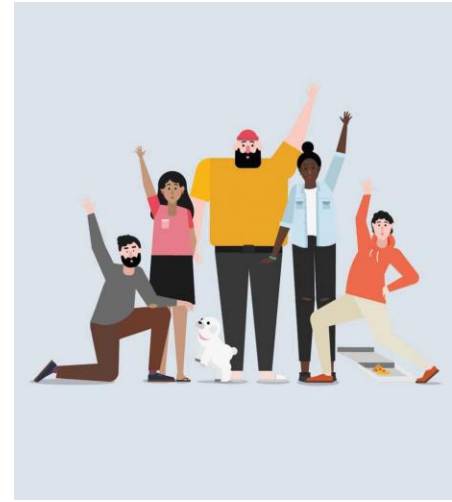


*"When it rains money, get a bucket."*



# Building capable teams

- Project managers who have experience with implementation
- "Flexible with ambiguity"
- Engage staff from across the organization – and at different levels
- Don't rely on formal structures for innovation
- Partners learn through doing



*"CBI-S Model" by Leith Sharp, Harvard University (2015)*

# Questions & Discussion

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- What resonated? What would you like more information about?
  - Are there specific challenges and opportunities facing your project that you'd like to discuss?

## Other follow up?

Jacob Sherman, New Mobility Program Manager

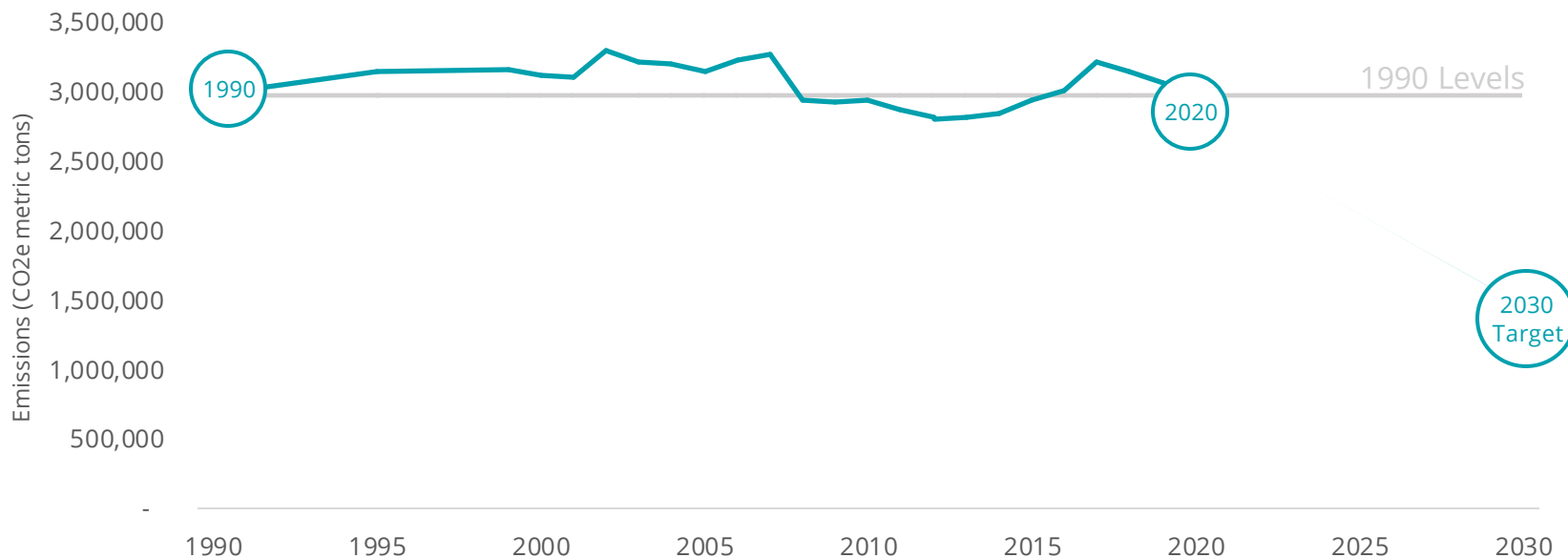
[Jacob.sherman@portlandoregon.gov](mailto:Jacob.sherman@portlandoregon.gov)

[Connect on LinkedIn](#)

Additional slides

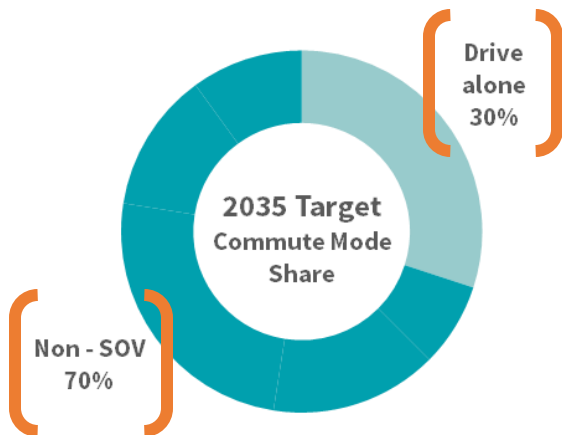
# +40% of local greenhouse gas emissions come from transportation

Transportation Emissions Trends (1990-2020)  
Multnomah County



# City Transportation Policy: Mode Shift and Climate Goals

The City of Portland has adopted policy to **reduce transportation-related greenhouse gases AND reduce drive alone trips**. Some interventions address both policy goals, while others only address greenhouse gas reduction.



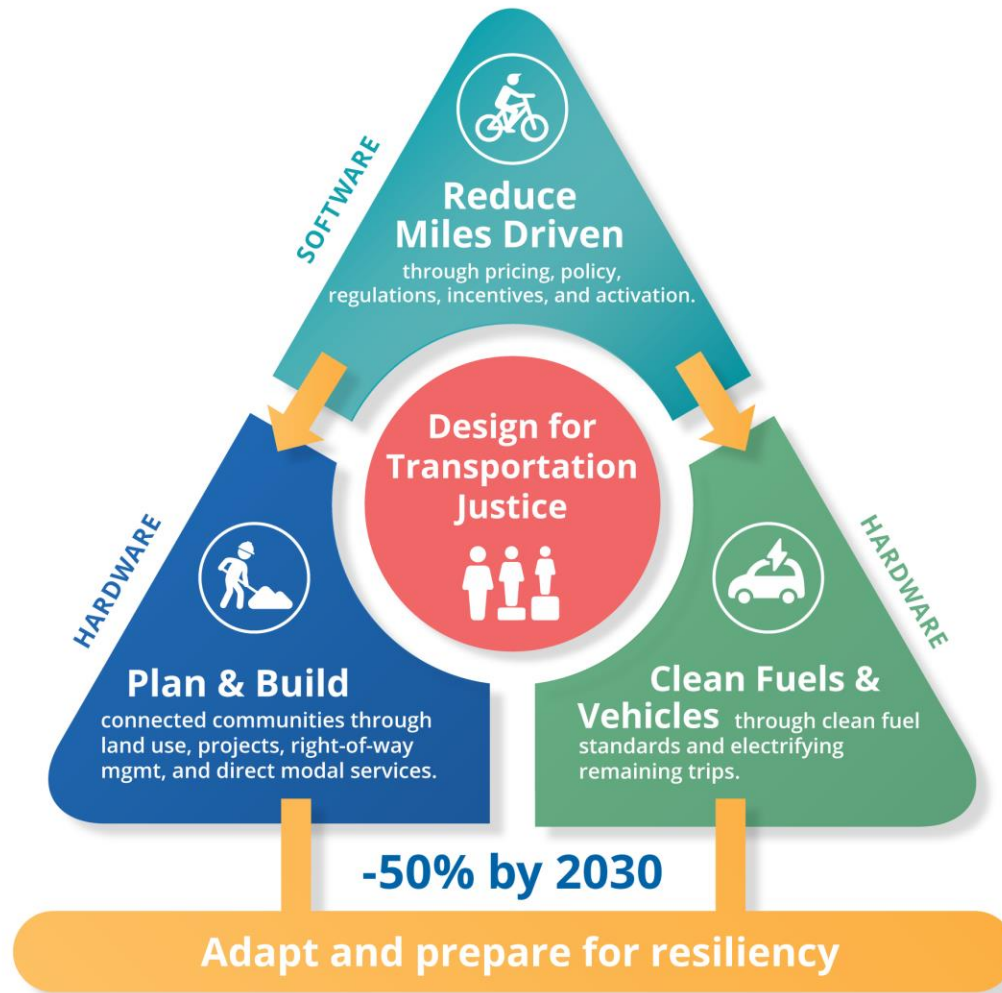
**Mode Shift Goal:** 70% non-drive alone commute trips by 2035



Roughly 40% of our carbon emissions comes from vehicle emissions

**Greenhouse Gas Emission Goals:**  
100% reduction in carbon emissions by 2050 and a 40% reduction by 2030

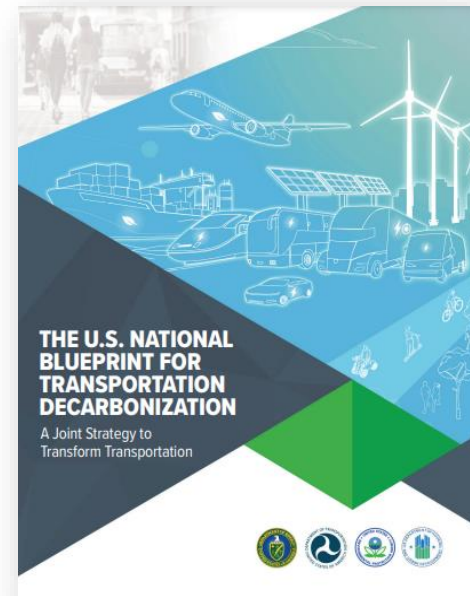
# City's strategy to reduce transportation-related greenhouse gas emissions



# U.S. Federal government has prioritized electrification above all else

- Bipartisan Infrastructure Law allocated **\$7.5 billion** for EV charging throughout the U.S.
- The Inflation Reduction Act allocated **\$36 billion** in Clean Fuel and Vehicle Tax credits
- Oregon Department of Transportation will spend **at least \$100 million for EV charging** in Oregon

*"...transitioning to clean options is expected to drive the majority of emissions reductions."*  
- The U.S. National  
Blueprint for Transportation  
Decarbonization





# Current transition to electrification is not equitable

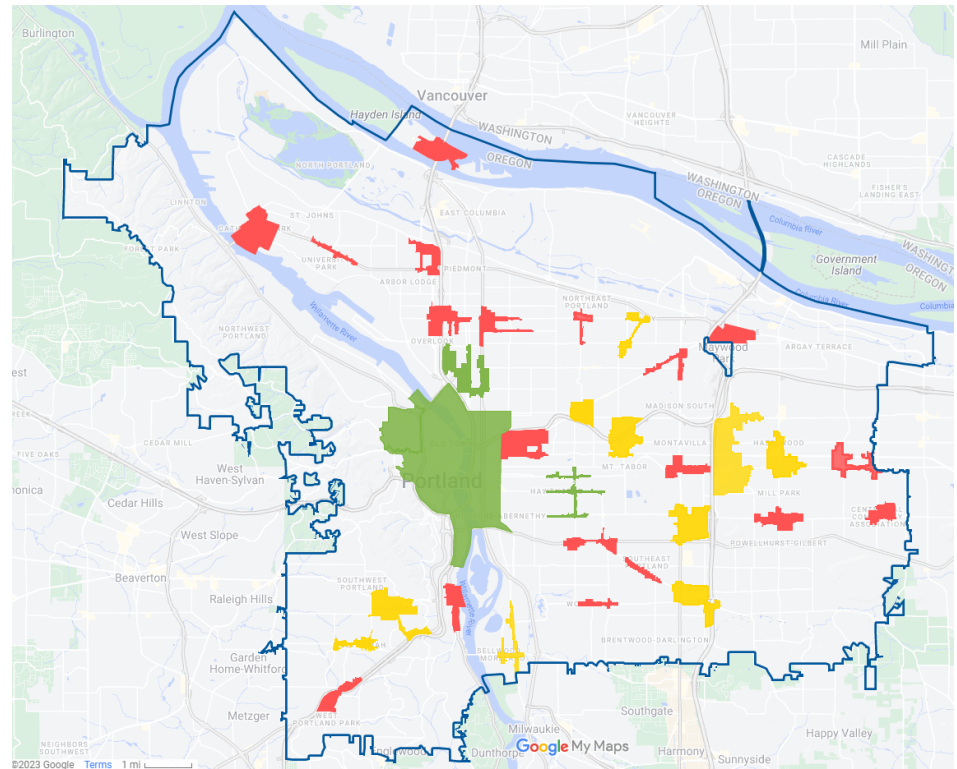
## Current transportation electrification progress in Portland:

- Over 1/3 of public chargers are in the Central City
- Fewer public chargers near multi-unit dwellings & in communities likely to continue relying on personal vehicles

## PBOT can use regulatory levers to influence the market to:

- Ensure all Portlanders can enjoy benefits of EVs
- Electrify all modes
- Support income qualified pricing programs

## Availability of public chargers in Portland's neighborhoods



Areas in **red** have 0 (zero) public EV chargers  
Areas in **yellow** have 1-5 public EV chargers  
Areas in **green** have 5+ public EV chargers

Source: PBOT

# Make Portland a top U.S. city for equitable transportation electrification

- Pilot EV charging in right-of-way (ROW) since early 2010s
- New City code changes to allow EV charging in ROW
- \$3.3m federal grant to build 50 chargers around city



# Promote electric mobility options:

- \$2m federal grant to pilot zero emission delivery zone in downtown
- Integrate EVs to permitted carshare and ridehail fleets
- Operate electric tram and Streetcar and early planning on mobility hubs
- Support City fleet and bus electrification



# Explore support for e-bikes and shared micromobility

- All-electric bikeshare fleet
- Over 1.1m e-scooter trips last year
- Proposed \$20m e-bike rebate program
- Consider infrastructure needs for new uses



## For more information

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- EV Charging: [Electric Vehicles | Portland.gov](#)
- Zero-Emission Delivery Zone Pilot: [Zero Emission Delivery Zone \(SMART grant\) | Portland.gov](#)
- E-Scooter Program: [E-Scooter Program | Portland.gov](#)
- BIKETOWN: [Portland Bike-Share | Portland.gov](#)

## Questions?

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