2028-2030 Regional Flexible Funds Allocation

Application Handbook for:

Regional Flexible Funds

Applications due Friday November 15, 2024 by 4 p.m.

Contents

Background

Every three years the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council decide how to spend the region's allotment of federal transportation money, known locally as the Regional Flexible Funds. The Regional Flexible Funds Allocation (RFFA) is the process to identify which transportation projects and programs will receive these funds.

In this cycle, Metro anticipates allocating approximately $153 million, comprised of federal Surface Transportation Block Grant (STBG) and Congestion Mitigation/Air Quality (CMAQ) program funds, to be obligated in the 2028-2030 timeframe. It is regional practice to allocate these funds to several transportation focus areas, as shown in Table 1 below.

Table 1: Total 2028-2030 Regional Flexible Funds

Step 1A: Transit & Project Development Bond Repayment Commitment	$51,780,000
Step 1A.1: New Project Bond Proposal	$TBD
Step 1B: Region-wide Program Investments, Planning	$40,557,783
Step 2: Capital Investments	Estimated $47-$60M TBD on outcome of bond
Estimated Total 2028-2030 RFFA	**$153 million**

Investments through Steps 1A and B were previously identified and adopted through the 2028-2030 RFFA Program Direction (Resolution 24-5415, adopted by Metro Council July 11, 2024). This handbook is focused on the Step 2 Capital Investments portion of the 28-30 RFFA funds, approximately $47 - $60 million.

This handbook is to assist eligible public agencies in preparing applications for the Step 2 Capital Investment project funds.

Regional Transportation Plan (RTP) Goal Areas and Policy Priorities

Following the adoption of the 2023 Regional Transportation Plan (RTP) in November 2023, JPACT and the Metro Council decided that Regional Flexible Funds for individual projects should be focused on advancing the region towards the five interconnected goals identified through the Plan. These goals are:

- Equitable Transportation
- Safe System
- Climate Action and Resilience
- Mobility Options
- Thriving Economy

Specific investment direction for the 2028-2030 Regional Flexible Funds can be found in the 2028-2030 RFFA Program Direction.

The investment priorities and goals from the 2023 RTP form the basis for the criteria and performance measures used in evaluating the proposed projects.

Applicant Requirements

ELIGIBILITY

Applications for Regional Flexible Fund Step 2 projects may be submitted by eligible public agencies for projects located within the Portland region's Metropolitan Planning Organization (MPO) boundary area. These public agencies include Washington County and its cities, Clackamas County and its cities, Multnomah County and its eastern cities, the City of Portland, Oregon Department of Environmental Quality, SMART, TriMet, Oregon Department of Transportation (ODOT), Port of Portland, and Parks and Recreation Districts.

LOCAL AGENCY CERTIFICATION/PROJECT DELIVERY

Agencies applying for Regional Flexible Funds will need to plan for project delivery.

For recipients of Regional Flexible Funds, agencies that are certified by ODOT for parts or all project delivery may lead the delivery for project development tasks they are certified to lead. If an agency is not certified for all or portions of project delivery tasks, they will need to arrange for a certified local agency or for ODOT to lead delivery of the project. The project budget should account for the costs of project delivery administration by the certified agency or ODOT and the risk of that agency implementing federal guidance in a manner that may be more expensive than an applicant agency previously presumed as a lead agency with local funds.

For more information on ODOT's role in the administration of federal funding programmed to local agencies, see: https://www.oregon.gov/ODOT/LocalGov/Pages/index.aspx. Additional information is included in the Local Agency Guidelines manual, which can be found at the above link.

For more information on the ODOT certification process, see:

https://www.oregon.gov/ODOT/LocalGov/Pages/Certification.aspx and
https://www.oregon.gov/ODOT/LocalGov/Pages/certification-guidance-forms.aspx

Applicants must demonstrate capacity to provide required local match. This will include the ability to execute an agreement with ODOT to govern the implementation of the project and the financial capacity to place local match funds on deposit and carry project costs until reimbursement of eligible expenses is approved.

PRE-APPLICATION & LETTER OF INTENT TO APPLY

As part of the 2028-2030 Regional Flexible Fund Step 2 allocation process, a short pre-application period was held in August 2024. The pre-application purpose was to gather early information on potential Step 2 applications and provide applicants the opportunity to request consideration for application assistance.

All interested eligible public agencies were asked to submit a Letter of Intent to Apply during the pre-application period specifying a non-binding list of potential applications the eligible public agency plans to submit. ***Participation in the pre-application is a requirement for applications to be accepted in the Step 2 call for projects.*** Public agencies which did not submit a Letter of Intent to Apply during the pre-application period are ineligible to submit a Regional Flexible Fund Step 2 application.

Following the pre-application period, a summary of the Letters of Intent to Apply is to be made available to regional partners by the opening date of the Step 2 Call for Projects. This summary is also available on the 2028-2030 Regional Flexible Fund webpage.

Project Eligibility Factors

To be considered for funding, a candidate project must meet several eligibility factors as described in the following sections.

PROJECT TYPE AND INCLUSION IN REGIONAL PLANS

For projects to be eligible to receive Regional Flexible Funds, the project scope must be an eligible use of these funds as defined in the Strategic Regional Funding Approach (interim). This approach can be found in the 2028-2030 RFFA Program Direction beginning on page 4. For the purposes of selecting projects for the Regional Flexible Fund Step 2 category, eligible project types include:

- Active Transportation (including on and off-street facilities, transit stop and/or station access, and paved trails)
- Transportation System Management and Operations
- High Capacity Transit Expansion
- Arterial Expansion, Improvements and Reconstruction[1]
- Regional Travel Options
- Transit-Oriented Development

Projects funded through the Regional Flexible Fund must be included on 2023 RTP Constrained Project List prior to the submission of the application.

PROJECT PHASES AND MINIMUM FUNDING REQUESTS

Regional Flexible Funds can be used on a wide spectrum of project phases, from initial consideration of alternatives, through project design, preliminary and final engineering, right-of-way (ROW) acquisition, and construction.

As federal transportation funds, Regional Flexible Fund awarded projects will be expected to enter the federal aid process. Metro established minimum funding amount for various project phases, in efforts to recognize the additional requirements and costs of delivering a federal aid project. Shown in Table 2 are minimum cost thresholds for the Step 2 project phases. These cost thresholds are inclusive of the minimum local match.

Table 2: Project Phase Minimum Funding Requests

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[1] Limited to arterial freight facilities for Intelligent Transportation Systems, small capital projects and project development

Project Phase	Minimum Funding Requests
Project development	$700,000
Right-Of-Way (ROW)/Construction	$4 million

Project development is defined as planning, coordination, and engineering activities up to right-of-way acquisition.

Limits on Total Applications

A minimum number of applications for Step 2 must be submitted to meet the federal requirements for conducting a competitive allocation process. To ensure sufficient time is available to evaluate applications, Metro is limiting the number of applications for consideration in this cycle to a total of forty-two (42). Each sub-region, listed below, has the following target limits to applications submitted for projects within its boundaries (Table 3). These limits are based on population and employment data within the portions of each sub-region within the Transportation Planning Area.

Table 3: Sub-Region Application Limits

City of Portland	12
Washington County	11
Clackamas County	10
Multnomah County (exclusive of Portland)	9

Coordination and discussion of proposed projects among applicants – both at the Coordinating Committee level as well as across the region – is encouraged. To support the conversations, a summary of the Letters of Intent to Apply received by Metro during the Pre-Application period will be made available to regional partners. The information is to help to ensure each sub-region does not exceed their designated target project limit.

Steps in the Project Funding Process

There are several steps to comprise the process to select projects for the Regional Flexible Funds Step 2 allocation. This section gives an overview of the process to provide applicants with an understanding of how the information provided in their applications will be used.

APPLICATION OVERVIEW

The application form contains five (5) sections and eight (8) subsections. The sections include the following:

- Programming
- Map
- IDs/Contacts

- Attachments
- Project Questions
  - Project Questions includes subsections: Applicant and Project Information, Funding Request Details, Purpose, Current Conditions, Project Details, Project Design, Community Involvement, and Delivery

All sections must be completed for the application to be accepted by Metro. The application form gathers information that will be used for several purposes, including verifying eligibility requirements and analysis in the Outcomes Evaluation and Risk Assessment reports used to help select projects for funding. The application information is also necessary for the technical analysis and programming work needed to update the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).

All Regional Flexible Fund awarded projects are to be included in the MTIP. Therefore having accurate and complete information in the project application helps ensure projects awarded Regional Flexible Funds can be programmed in the MTIP in a timely manner to access awarded funds.

Metro understands projects applying for Project Development funding only may not be able to respond to some of the application questions – particularly regarding final design and cost – with a high level of detail or accuracy.

The Regional Flexible Fund Allocation evaluation criteria are aligned to the five Regional Transportation Plan goals: Equitable Transportation/Safe System/Climate Action and Resilience/Mobility Options/Thriving Economy. All the criteria are weighted equally. The focus of the responses to application questions should be on addressing the performance measures aligned with these criteria. (See pages 25-38 of this handbook and the August 14th TPAC workshop.)

New to the 2028-2030 Regional Flexible Fund Step 2 allocation cycle is the addition of Design as a stand-alone criteria to apply in the Outcomes Evaluation. The Design criteria and performance measures are to help capture how the design of the project advances the five listed criteria. The Design criteria and performance measures are applicable to candidate projects seeking funds through construction.

APPLICATION ASSISTANCE
Through Program Direction adopted in July 2024 and bonus federal funding made available to the Portland metropolitan region, Metro is able to offer application assistance for the Step 2 competitive allocation for the 2028-2030 cycle. This assistance is to support applicants in completing thorough applications for the Step 2 process.

Kittelson and Associates will provide application assistance and brings familiarity with the RFFA Step 2 process and a wide variety of expertise and experience with designing transportation projects, project delivery, and navigating the federal aid process. The allocation of application assistance to applicants for Step 2 was part of Letter of Intent to Apply in the Pre-Application period. Following the Pre-Application period those eligible applicants who indicated interest in application assistance received notice on the status of their requests.

OUTCOMES EVALUATION AND RISK ASSESSMENT

Once the application window closes on November 15, 2024, work begins on the Outcomes Evaluation and Risk Assessment. The Outcomes Evaluation and Risk Assessment processes will occur concurrently, from mid-November 2024 through January 2025.

The Outcomes Evaluation is a technical analysis to measure how well the projects advance regional goals as defined in the 2028-2030 RFFA Program Direction. In the Outcomes Evaluation, projects receive a rating for how well they perform relative to each of the criteria areas as described below, as well as an overall project score. The Outcomes Evaluation takes a data-informed look at project's location, design and context. A regional work group, comprised of Metro staff, agency staff not affiliated with applying jurisdictions, and community members, will perform the evaluation and prepare a written report detailing the outcomes.

Most of the information used to rate projects in the Outcomes Evaluation is based on the applicant's responses to questions in the Project Questions section in the application. The primary regional data sources used in the Outcomes Evaluation can be found through data resources publicly available and many on the Metro website. Data resources include, but not limited to the Regional Barometer, Regional Land Information System (RLIS), High Injury Corridors Story Map, Economic Value Atlas, RTP Policy Maps, and MetroMap. Links and locations to Metro data sources that may be used in the application are indicated in the performance measures (Table 7) below. Some sample data sets within the data resources to be useful for applicants include: equity focus areas, crash data, RTP network maps, Economic Value Atlas employment data, etc. While Metro will conduct the geospatial analysis for the Outcomes Evaluation for each project application based on location information provided through the Map tool in the application (see Guidance for Completing the Application), the data resources are to support applicants in responding in the Project Questions section. Projects will be rated based on responses to the questions.

It is recognized that some datasets may be several years old and not the most current available. Applicants are welcome to utilize additional local or national data resources to supplement information provided in their application, but asked to include citation or reference to the additional resource. (Example citations and reference include providing a hyperlink or naming the specific data set, such as the U.S. EPA EnviroAtlas or City collected bike counts of the project area.) The additional sources can be used to assist applicants to provide data in the application and will help the evaluation work group fully understand and rate the candidate project. The applicant should indicate the updated or additional data (with sources) in their response in the Purpose subsection of the application.

In the case of applications for project development funding there may be project details that are not yet fully determined or known. This will be taken into consideration in the Outcomes Evaluation rating. A project's level of planning and development work undertaken is not a determinant of funding. But the amount of funding requested should reflect the current project development status and be sufficient to complete all the phases identified in the project scope. Applicants should provide as much detail as possible and make it clear in their responses how the requested project development funds in the application will be used to resolve any unknown project details to progress the project.

As in the previous Regional Flexible Fund Step 2 evaluation, Metro will hire a consultant to conduct a risk assessment of the project proposals. This evaluation measures the thoroughness of the candidate

projects' scoping, timeline and budget, and identifies any associated risks to the project being completed as indicated in the application. Applicants have the opportunity to respond to clarifying questions or in certain circumstances amend their application following the initial risk assessment report to address any findings. The purpose of the risk assessment is to ensure that the regional funding awarded to a project is sufficient to complete the federal aid project delivery process as described in the application and with a schedule to obligate within the 2028-2030 time frame. Examples topics of what the risk assessment report includes:

- Ensuring the Regional Flexible Fund award is appropriate for the level of project development completed. For example, a project that has unresolved issues – such as right-of-way acquisition, utility relocation, environment impacts, railroad crossings, impacts on ODOT system, etc. – may be awarded Regional Flexible Funds limited to further project development work to identify and fully resolve these issues. This assists the applicant in developing a more accurate funding request for subsequent project phases in future RFFA cycles or from other funding sources.
- Reviewing the project schedule to identify any risks to the project timeline.
- Identifying interested parties that may be missing from the application to ensure awareness of the project, necessary coordination, and working through any outstanding issues, etc. In particular, right-of-way (ROW) issues frequently present problems to project delivery if these issues are not identified early and accounted for in the project scope and cost estimate. The risk assessment report will identify the level of communication and coordination existing between the applicant's planning, project management and ROW staff (or consultant).

By identifying risks early in the funding process, adjustments to the application may be put in place by the applicant, or the requested funding amount may be amended and/or targeted towards additional project development activities to better position the project for successful delivery.

A useful tool to help ensure that all aspects of a project scope are accounted for and considered is ODOT's Local Agency Technical Scope Sheet. While completing this Scope Sheet is not required as part of the 2028-2030 Regional Flexible Fund Step 2 application process, agencies will need to complete it should their project ne awarded Regional Flexible Funds and needs to be delivered through the ODOT local project delivery process.

PUBLIC COMMENT
Following issuance of the Outcomes Evaluation and Risk Assessment reports, Metro will conduct a public comment period starting on March 24 through April 28, 2025, focusing on outreach to community and neighborhood organizations, county coordinating committees and other interested parties. A summary of input received through the public comment period will be made available along with the Outcome Evaluation and Risk Assessment reports to inform the final 2028-2030 RFFA decision making process.

COUNTY COORDINATING COMMITTEE/CITY OF PORTLAND RECOMMENDATIONS
Each county coordinating committee and the City of Portland will have the opportunity to provide recommendations to decision-makers on which project applications submitted from their jurisdictions best reflect their local priorities. Project information gathered through the Outcomes Evaluation, Risk Assessment and Public Comment will be provided to assist in making coordinating committee recommendations. Recommendations are to be provided in advance of the June 2025 TPAC and JPACT meetings. (Tentative dates: TPAC – June 6, 2025; JPACT – June TBD – falls on Juneteenth holiday.)

From May through July 2025, TPAC will be asked to consider and discuss the four input components: Outcomes Evaluation, Risk Assessment, Public Comment, and County Coordinating Committee recommendation to support the development of a Regional Flexible Fund Step 2 package of projects to put forward for JPACT consideration.

During the same months, JPACT will consider the same four input components and discuss the TPAC recommendation. JPACT will be requested to take action to refer a package of projects to Metro Council in July 2025.

Metro Council will consider and take action on the JPACT-referred package of 2028-2030 Regional Flexible Fund Allocation recommendation in July 2025.

2028-2030 RFFA Step 2 Call for Projects opens	September 6, 2024
Applicant's workshop	August 14, September 4 and 11, 2024
Applications due (by 4:00 p.m.)	**November 15, 2024**
Outcomes Evaluation, Risk Assessment	November 2024 - February 2025
Risk Assessment refinement opportunity	February 2025
Public Comment period	March 24 – April 28, 2025
TPAC/JPACT briefings and discussions	May – June 2025
Coordinating committee priority identification	May 2025
TPAC recommendation to JPACT	July 2025
JPACT approval of final Regional Flexible Fund Allocation	July 2025
Metro Council action	July 2025

Guidance for Completing the Application

The following guidance will assist applicants in responding to the application questions and understanding how it will be used. The guidance walks through each section or "tab." The application section Project Questions walks through the sub-sections within the section. To access the application, please use the link: https://portal.oregonmetro.ecointeractive.com. For more information, see the Completing an Application section of this handbook.

NOTE: Applications must be submitted to Metro no later than 4:00 p.m. on Friday, November 15, 2024.

SECTION: PROGRAMMING – SUBSECTION: PROJECT ADMINISTRATION

At the top of the Programming section and the first page to land on in the full application is a subsection called Project Administration. This subsection is locked and applicants are unable to fill in any information. The main information helpful for applicants is to verify in the field *Plan Revision* that the entered information says "Metro / CFP / 28-30 RFFA Call for Projects / CFP." If any other information is in the *Plan Revision* field, then please do not go any further in completing the application and click the Help Desk icon (?) at the top of the page (next to the account icon) to notify both Metro and EcoInteractive of the issue.

Additionally, with the start of an application, an autogenerated identification number will get assigned to the application. In the *ID* field, the applicant can see the identification number. When working with EcoInteractive's Help Desk or with Metro staff, referencing the autogenerated identification number aids in finding the application within the application tool.

SECTION: PROGRAMMING – SUBSECTION: PROJECT INFORMATION

This subsection captures the basics of a candidate project; the project name, the project description, the lead agency, the project type, and other factual information.

The information provided in the Programming section is used to program projects in the Metropolitan Transportation Improvement Program (MTIP), so having descriptive and accurate responses are important. Without being programmed in the MTIP, a project funded with federal funds cannot advance. Pay particular attention to the project name and project description. Choose a name that clearly indicates the primary project location (i.e. street or trail section) and the type of activities to take place as part of the scope of the project. Examples of clear project names are:

> "SE 129th Street – Bike Lane and Sidewalk Project"

> "SE Belmont St: 7th Ave – 34th Ave"

> "Willamette Greenway Trail: Columbia Blvd Bridge"

> "Red Electric Trail: SW Bertha - SW Capitol Hwy"

For the project description, please focus on identifying the major scope elements of the project and the location (if known) of those elements in a paragraph layout in a bulleted format. Using active voice to describe the scope elements (e.g. construct new, add new, rehabilitate, reconfigure, etc.) and please refrain from using "improve," "improvements," or "modify" in the project description. When putting together project descriptions identify and distinguish which scope elements are new construction activity (e.g. adding a new bike lane, extending a sidewalk where one is not present, construct new pedestrian crossings with island) versus a reconstruction type activity to the existing condition (e.g. rehabilitate and upgrade existing deficient pedestrian crossings, replace existing traffic signal). For each scope element, identify the basic purpose for the scope element (e.g. construct new sidewalks between Garden Ave and Main St for pedestrian safety).

Provided as part of guidance for preparing the project name and project description, please see the supplemental attachment "2028-2030 Regional Flexible Funds Step 2 Call for Projects – Project Name

and Description Guidance" For further questions, please consult with Metro staff if you have any questions regarding proper naming requirements and project description.

For the Project Type question, please select the general project type (e.g. active transportation, roadway, transit) for the candidate project. For candidate projects including multiple project elements and therefore can be classified as multiple project types, please indicate the primary project type.

For the Lead Agency question field, please indicate the public agency who is the lead in the application. This may differ from the public agency which will deliver the project.

For the County and Municipality question fields, please identify the County and Municipality or Municipalities the candidate project is located. The County and Municipality are optional question fields.

For Project Categories and Features, please select the most appropriate project category and project features aligned to the candidate project scope elements. Project features are multiselect, so as many features as appropriate may be selected.

For most of the Regional Transportation Planning section will be filled in through the location detail provided in the Map and Project Questions sections and verified through geospatial analysis undertaken by Metro staff. Applicants do not have access or need to fill in information for the spatially-based application fields. The two fields applicants are to enter information are the Total Estimated Cost for the candidate project and the Total Requested Regional Flexible Funds. These totals need to match the totals and information provided in the Programming Information subsection of the application for,

SECTION: PROGRAMMING – SUBSECTIONS: CUSTOM LOCATION, LOCATION INFORMATION AND SELECT FIELDS

The Custom Location Information and select fields – *Regional Network Classifications, Regional Network Classifications Details, Facility Design Classification* –will be filled in through the location detail provided in the Map and Project Questions sections of the application and verified through geospatial analysis undertaken by Metro staff. The Location Information section is not applicable for the purpose of the Regional Flexible Fund Step 2 Call for Projects. While these two sections and select fields may be visible in the application, applicants do not have access or need to fill in information in these sections or fields of the application.

SECTION: PROGRAMMING – SUBSECTIONS: PROGRAMMING INFORMATION

The Programming Information subsection is where applicants are to breakdown the candidate project's cost estimate and Regional Flexible Fund requested amount by phase and federal fiscal year. The same table is also where applicants are to show the use of the local match funds by year and phase.

The following sections provide instructions on entering the Regional Flexible Fund request in the Programming Information section. In addition, subsequent sections outline the different factors applicants should consider in developing their candidate project's total cost estimate and the Regional Flexible Fund requested amount.

Entering Funding Requests and Estimated Costs

Applicants are asked to provide the total cost estimate for the candidate project and the requested Regional Flexible Funds in two areas of the Programming section; in the Project Information subsection and the Programming Information subsection.

In the Project Information subsection, simplified totals for candidate project cost estimate and requested Regional Flexible Funds are asked for entry. Whereas the Programming Information subsection is where applicants are to breakdown the candidate project's cost estimate and Regional Flexible Fund requested amount by phase and federal fiscal year.

Entry for the Programming Information subsection requires understanding the programming project delivery phases. The project delivery phases are abbreviated in the Programming Information subsection of the application and Table 4 provides a key to the abbreviated phases.

Table 4. Programming Phase Abbreviations Key

Phase Abbreviation	Key
PL	Planning
PE	Preliminary Engineering
RW	Right-of-Way
CN	Construction
UR	Utility Relocation
OT	Other

Entry for each project phase may not be applicable for certain project applications. For example, project applications only seeking Project Development funding from the Regional Flexible Fund Step 2 may will only need to enter requested Regional Flexible Fund amounts and local match for the Planning and/or Preliminary Engineering phases.

Apply Project Costs to Programming Phases When Entering Funding Information

In the Programming Information subsection of the Programming section in the application, indicate all project phases for which the applicant requests Regional Flexible Funds and the general year the phase work will begin. For each phase, show the amounts of regional, matching and (if applicable) any other funds to use for the candidate project. Breakdown the candidate project cost estimate according to the project delivery phase (i.e. PL, PE, RW, CN, UR, OT; see Table 4. Programming Phase Abbreviations Key). This will allow the applicant to identify the amount of funds requested and those to be provided by local or other sources for each project phase, by fiscal year. In entering the total cost estimate and requested amount of Regional Flexible Funds, please remain mindful of ODOT costs of project delivery and account for that in your cost estimation.

To begin entering this information in the Programming Information subsection begin by using the (+) Add Row button at the bottom of the subsection. When filling in the estimated project cost for the phase, please skip entering any information for the "EA State Date" and the "AC/CP" fields.

When filling in the funding-related information in the subsection, a drop down tool on the right side at the top of the Programming Information subsection (or below the matching calculator slider; see the Local Match Requirements and Calculating section of this handbook) offers a viewing filter to help remove fields in the funding line row. Applicants can remove the "EA State Date" and "AC/CP" fields to help reduce accidentally entering information in these fields.

To reiterate, the total amount of Regional Flexible Funds requested, and funds supplied by local or other sources should equal the candidate project cost for each project phase.

For each source of funds for each phase of the candidate project will require a new line item in the Programming Information subsection. The phase year also needs to be applied with each line item. Starting from the total cost, with the factors outlined in the following sections applied, for the phase and breaking down the anticipated amount of Regional Flexible Funds requested is the recommend approach to entering funding information in the Programming Information subsection.

Further, once summarized together, the Regional Flexible Funds requested by phase in total should equal the Total Requested Regional Flexible Funds entered in the Project Information section. Between the requested Regional Flexible Fund (RFFA) programmed amount and the local match programmed amount, and any other funds being matched with the project (if applicable) the combined total should reflect the total estimated cost entered in the Project Information subsection.

Local Match Requirements and Calculating

Regional funds will cover only a portion of eligible project costs. The total project amount must be shown as a combination of regional funds and required matching funds. The match rate is shown as a percentage of the total costs. The minimum required match for Regional Flexible Fund projects is 10.27%. This means that Regional Flexible Funds will pay 89.73% of eligible project costs and the local agency is responsible for covering the balance.

The easiest way to calculate matching funds is to begin with the total estimated amount of funding from all sources required to complete a project phase, then calculate the percentage of local and regional funds based on that total.

For example, if a project phase is estimated to cost $100,000, the amounts of Regional Flexible Funds and local match funds would calculated be as follows:

Funding type	Match rate	Total estimated amount for phase	Regional Flexible Funds	Local funds
RFFA*	10.27%	$100,000	$89,730	$10,270

*Assumes no other funds included in the project.

Alternatively, a Match Calculator is provided on the top far right side of the Programming Information subsection on the Programming section of the application. Use the small slider tool to have a set of fields and calculator appear. Applicants can enter the total estimated amount for the phase, select the fund (e.g. Regional Flexible Fund) and the required local match (if applicable to the fund) will auto populate. From there, the applicant can hit the "Add Funding" and the information will be entered in the Programming Information subsection.

Project Cost Estimating and Funding Request Factors and Considerations

Adequate budget to deliver Regional Flexible Fund awarded projects has been a significant issue in the on-time, on-scope project delivery. To that end, Metro conducts a risk assessment as a part of the evaluation of all applications to identify risks to candidate projects being able to complete the described project scope on budget and within a proposed timeline. Metro continues to update the Regional Flexible Fund application materials and resources to better understand and reduce these risks for all the candidate projects. As the applicant, documenting and explicitly addressing the following issues in the

candidate project cost estimation methods, will improve the candidate project application risk assessment rating.

In addition, Metro requires applicants provide an attachment with the application documentation of the methods used to generate the candidate project cost estimate. Provide a total estimated project cost in the Attachment section and in the Project Information subsection of the Programming section of the application, even if the funding request is not for all phases of the project.

Inflation

One of the critical risk factors impacting project delivery is cost estimation. It is important to demonstrate that the total costs of all project phases and activities have been accounted for and properly costed in the budget.

The project cost estimate should include the costs associated with expected inflation. Based on the Regional Flexible Fund Allocation decision schedule, prior project delivery experience and expectations for project delivery, the following schedule can be utilized to calculate a generic project delivery, spending schedule, and account for the number of years of annual inflation that should be accounted for. If the applicant can demonstrate, based on project complexity and/or the applicant's delivery capabilities, they are able to achieve project milestones more quickly, Metro staff will facilitate advancing Regional Flexible funds to meet an earlier implementation schedule. However, the candidate project initial cost estimate should account for inflationary costs associated with the following project implementation timeline.

- July 2025: Project funding awards finalized
- Fall 2025 – Spring 2026: Kick off meetings and refinements of project sequencing; initial programming of funds by project phase in MTIP
- Summer 2026 – September 2026: MTIP and STIP adopted; submission to federal partners; approval by federal partners
- October 2026 – September 2027: Project kick-off, IGA development, LPA budget and staff preparation
- October 2027 – September 2028: Project Development phases (Planning or PE)
- October 2028 – September 2029: Project ROW phase
- October 2029 – September 2031: Construction phase

Note: For planning and cost estimating purposes, assuming two years for construction is acceptable.

Federal Aid Project Cost Elements

There are unique or additional cost elements associated with federal aid projects that need to be accounted for in candidate project cost estimates. These include:
- Project management to address federal aid process requirements. Non-certified agencies will need have the project budget provide reimbursement to their project delivery agency (ODOT or another certified agency). Certified agencies can incorporate these costs into other project cost elements but should indicate how they have done so.
- NEPA process costs and project mitigation design elements.
- Meeting federal right-of-way (ROW) procedural and cost requirements beyond local agency process.
- Construction engineering and traffic management requirements beyond local agency process.

Right of Way, Utilities, and Stormwater

Most projects require a right-of-way phase, if only for construction easements. If an estimate is available, include costs for right-of-way needs as described in Delivery subsection question 6. Otherwise, list the number of acquisitions, easements, and relocations.

Review the response to Delivery subsection question 6. Describe whether investigation into the presence of utilities in the project area has been completed and listed in the Delivery subsection question 7. Account for the costs associated with further investigation needed for utilities relocation or easements.

The addition of impervious surfaces, or even adjustments to existing surfaces may trigger stormwater requirements. Account for these costs as they are described in response to the Delivery subsection question 12.

Intelligent Transportation Systems, System or Demand Management Projects or Components

Incorporation of system and demand management components into capital projects is highly encouraged and should be incorporated into project cost estimates. Stand-alone system management projects such as a signal system upgrade may be programmed differently than traditional capital projects. Metro staff encourages applicants considering such an application or scope components to reach out for a consultation for further guidance and to navigate the minimum requirements and application.

SECTION: PROGRAMMING – SUBSECTIONS: CHANGE REASON DETAILS

For all Regional Flexible Fund Step 2 applications, only the New Project radio button selection under the "change reason" is applicable. Applicants which select anything otherwise may risk not having their application submitted properly or received.

SECTION: MAP

In lieu of applicants providing as part of their application a GIS shapefile, applicants are requested to draw their candidate project in the map tool. The map tool displays the street network for the Portland metropolitan region. Applicants are to use the drawing tool to depict the start and end locations of the candidate project and/or placing points at the individual intersections. Please do not use the snapping tool. Instead trace drawings to the light grey lines representing Metro's street network as closely as possible. Candidate projects which are focused on a general area can draw a polygon/shape representing the general project location area. Projects representing trails or future constructed streets should match the proposed alignment (if known) as closely as possible. Drawings are limited to lines, points, and/or polygons. Limit the geometry type to one of these options for each project.

The drawings identified in the Map will get exported for the purposes of geospatial analysis and filling in the spatially-based fields in the application, which will then be used as part of the Outcomes Evaluation analysis. Applicants would be highly benefitted to provide an accurate drawing (as possible) on the map with the candidate project limits and/or area. Please ensure the drawing matches any descriptions of the project location provided in the Project Questions section in application to help verify the project location.

SECTION: IDS/CONTACTS

The IDS/Contacts section is where applicants are to enter identification (ID) numbers for the candidate project. The two identification numbers are:

- Regional Transportation Plan (RTP) ID
- ODOT Key Number

The RTP ID is a required field. All candidate projects must be included on the 2023 Regional Transportation Plan financially constrained project list. Projects identified in the 2023 RTP have an associated RTP ID number. Please enter the associated RTP ID. Please do not use a RTP ID from a previous plan cycle (e.g. 2014 or 2018). If there are questions or uncertainties regarding the RTP ID, please contact Metro staff.

Enter the ODOT Key Number if applicable. Most candidate project applications will not likely have an ODOT Key Number unless the project was previously awarded Regional Flexible Funds or awarded federal transportation in the past and are currently active projects in the development process.

SECTION: ATTACHMENTS

A completed application form are to include the following attachments:
- A vicinity map showing and detailing the limits of the project, and overhead and cross-section photos of the current conditions.
    - For the vicinity map, a map or overhead photograph of the entire project area with the boundaries or limits clearly delineated.
    - For the current conditions cross-section, drawings or illustrations detailing the cross-section of all project segments as it is today. A useful online tool for creating street cross-sections is streetmix.net.
    - Additional street photos (overhead and cross-section) detailing the current conditions (may use Google Street View, Microsoft Bing Maps or similar) may also be included. (Not required)

- A drawing/schematic of the anticipated completed project.
    - For the candidate project "as completed" cross-section, drawings or illustrations detailing the cross-section of all project segments post construction. A useful online tool for creating street cross-sections is streetmix.net.
    - Additional drawings/mockups detailing the candidate project may also be included. (Not required)

- A supplemental document that shows the methodology used in the development of the cost estimate and addresses the guidance in Programming section of this applicant handbook. A word document or spreadsheet would suffice.
- A two-page (one sheet, both sides) candidate project fact sheet. This should include brief descriptions of the candidate project area, purpose and need, proposed project design, Regional Flexible Funds amount requested, estimated total project costs, and photos or illustrations of the project area and design. A template is included in the application materials.

For a standardized naming convention, please begin to name each attachment with the Project Name/Title and specific attachment type. An example is provided below.

- Willamette Greenway Trail: Columbia Blvd Bridge – Cost Estimate Methodology

As applicants upload the attachments in this section, applicants are to assign the attachment to a document type for each individual attachments. Please assign the document type according to the Table 5 below.

Table 5. Application Attachment and Assignment in Application Tool

Attachment	Assignment in Application Tool
Vicinity map	Project Location Maps
Current conditions cross-section	Project Exhibits
Proposed constructed cross-section	Project Exhibits
Cost estimate methodology	Award/Costs
Candidate project fact sheet	Miscellaneous
Additional project photos, drawings (current or proposed)	Project Photos

Attachments up to 250MB are accommodated in the attachments section. If an attachment is larger, please plan to compress the attachment in efforts to upload. The attachments section cannot accommodate a zipped file.

SECTION: PROJECT QUESTIONS - SUBSECTION: APPLICANT AND PROJECT INFORMATION

This subsection captures basic information not captured in the Programming or IDs/Contact sections of the application.

Applicant and Project Information Subsection Question 4: This question looks to gather information about how the candidate project links to regional modal (e.g. High Capacity Transit, Active Transportation, Trails), topical (e.g. Safety, Climate Action) plan or safety audit. Please note whether the candidate project is explicitly identified in a project list prioritized to seek funding. Please do not reference RTP inclusion here as a RTP identification number must be included in the IDs/Contact section.

SECTION: PROJECT QUESTIONS – SUBSECTION: FUNDING REQUEST DETAILS

In addition to the cost and funding information entered, having a clear understanding of the applicant's commitment to its responsibility to deliver the candidate project as proposed in the application is critical to the risk assessment and the proposed scope of work impacts the outcomes evaluation. Therefore, the Funding Request Details questions aim to get an understanding of the applicant's approach to cost overruns and leadership support in the event of a funding shortfall. The subsequent questions should reference and link back to the information provided in the Programming Information subsection of the Programming section of the application.

Funding Request Details Subsection Question 1: In the event of project cost overruns, it is important that the applicant can cover any shortfalls to ensure the project will be delivered as described in the application. Describe the anticipated source of the "Other funds" is to indicate the applicant has the financial capacity to provide required matching funds and any additional funds needed to fully fund the estimated project cost.

Upon award of Regional Flexible Funds the applicant is to begin budgeting local funds and awarded Regional Flexible Funds in its capital improvement program and agency budget process. Demonstration of commitment of local funds to meet match requirements and fully fund the project phases will be needed by the fiscal year to program the awarded funds in the MTIP, or the awarded Regional Flexible funds cannot be made available.

Funding Request Details Subsection Question 2: Regional Flexible Funds are awarded for the delivery of a project. Applicants applying for and awarded Regional Flexible Funds are responsible for delivering the project as described in the application. For this reason, it is critical that the project scope description and cost estimate are carefully composed and appropriately account for all project delivery considerations with an adequate contingency cost to address project delivery risks. In the event of project cost overruns, it is expected the applicant will first prioritize covering any shortfalls with additional local revenues to ensure the project will be delivered as described in the application. It is in this context that applicants should craft a response to Funding Request Details Subsection Question 2. Indication of leadership support for the delivery of the project, if awarded Regional Flexible Funds, and the event of a funding shortfall should be incorporated into the response.

A reduction in project scope to meet cost overruns may be requested, but is not encouraged without first demonstrating additional local resources have been exhausted and are not feasible. A scope reduction request may be subject to approval by JPACT and/or the Metro Council. The award of Regional Flexible Funds is informed and greatly influenced by the performance evaluation of the applications in each funding cycle. A reduction in project scope may change the performance of a project and its relative competitiveness with other project applications during the original award process, and in such circumstances would not be fair to the other project applications that did not receive funding.

SECTION: PROJECT QUESTIONS – SUBSECTION: PURPOSE
Comprised of six questions, this subsection focuses on understanding the candidate project's purpose and the candidate project's ability to advance the region towards the five interconnected RTP goals.

Responses to the six questions should focus on how the project responds to and advances regional goals, policy objectives, and the RFFA criteria (see the Criteria and Performance Measures section of this handbook for more details). What is being requested here is demonstration the proposed project is aligned with regional policy and is a good fit for Regional Flexible Funds. In responding to this question, think about "why" your project aligns with regional policy. Discuss why it will advance regional priorities. To help support the response, bringing in context information not captured in the Current Conditions application questions or drawing information from local data sources can be used as part of the responses.

Responses to Question 6 should help build on the first five questions, but provide further details about the specifi0c problems or opportunities the candidate project intends to address. This response should focus on the "what" and "how"; what are the issues and how does the project address them. Again, additional context information and local data can be incorporated as part of the response.

SECTION: PROJECT QUESTIONS – SUBSECTION: CURRENT CONDITIONS
The current condition section is new and focuses on gathering an understanding the existing conditions of the project area and having the existing conditions information consistent (as information is available)

across all applications. The responses in this section should focus on what are the existing conditions. Other subsections of the Project Questions provide the opportunity to describe the existing conditions/deficiencies and link how the candidate project addresses those conditions, and why the candidate project is the best choice to result in better quality outcomes.

If a question is not applicable, do not enter a response or write in not applicable. Additionally, several questions request existing conditions information if it is available. If the information is not readily available, a response is not required.

Links to data resources to help support responding to the current conditions question can be found in Table 4.

SECTION: PROJECT QUESTIONS – SUBSECTION C: PROJECT DETAIL

This section seeks to gather a detailed technical description of the specific project elements. Responses in this section should focus on how the project scope elements lead to the outcomes described in the purpose subsection. The Design subsection of questions focuses in on the specific design details of the project (if known at the time of application). Some application questions may seem similar between the Project Details subsection and the Design subsection. The difference is the Project Details subsection asks the applicant to describe and link the candidate project's scope elements to regional policy objectives and outcomes that may not be captured through the application questions in the Design subsection.

Be as specific as possible in responses. Metro also recognizes candidate projects applying for project development funds may not have all of the scope details determined at this stage, but describing the scope components in consideration or already committed supports the ability to perform the outcomes evaluation for the candidate project.

The first three question of the Project Detail subsection aims to reconfirm the selected Project Type, Project Category, and Project Features identified in the Programming section of the application. (Note: this information provides the project specifications in a format required for MTIP programming.)

Project Detail Subsection Question 4: List all the streets, including intersecting streets, trails or areas that will be changed or impacted through the project. Areas could include neighborhoods, centers, transit stations, communities, etc.

Project Detail Subsection Question 5: Clearly indicate the project's beginning and ending points. The beginning and ending points should match the drawing in the Map section and the vicinity map provided as part of the attachments.

Project Detail Subsection Question 6: In this question, indicate which intersections and or street crossings will be included in the project. Provide both the names of both streets, or the street and the trail that make the intersection. If the project does not include an intersection or trail crossing indicate that. If there is an intersection or trail crossing within the boundary of the project that is not improved, explain why.

Project Detail Subsection Question 7: While more specified details will be asked in the Design subsection of the application, please select from the drop down menu the design classification for the candidate

project facility. If the candidate project is for a general area or includes multiple facilities, please select all that apply.

Project Detail Subsection Question 8: A resource tool to help identify known locations of crashes leading to fatalities and serious injuries is Metro's High Injury Corridors story map. Safety countermeasures are specific treatments that address and reduce specific types of crashes. The Federal Highway Administration has a list of FHWA's proven safety countermeasures. Answers to this question should describe how the project addresses any known serious safety concerns and the different safety countermeasures included in the candidate project's scope components or explored as part of the design treatments for the candidate project.

If the question is not applicable to the candidate project, please do not enter a response or enter "not applicable" or "n/a."

Project Detail Subsection Question 9: Responses to the question can be straightforward by identifying the specific safety action plan or audit which identified the candidate project. The response to this question might repeat part of the response from Question 4 in the Applicant and Project Information section. If the candidate project is not identified through a local, regional, or state process, then please leave the question blank or include "not applicable" or "n/a."

Project Detail Subsection Question 10: Applicants are encouraged to use Metro's walkshed tool to respond to the application question. The question focuses on understanding the candidate project's proximity via a walking distance and/or enrollment area to a K-12 school and how the scope components of the candidate projects address barriers to young people getting to and from school by means of walking, pedaling, or rolling. If known by the applicant, identifying how scope components address a school identified hazard to safe access to getting to and from school. Answers to this question may refer to design treatments identified in the Project Design subsection.

If the question is not applicable to the candidate project, please do not enter a response or enter "not applicable" or "n/a."

Project Detail Subsection Question 11: To support the ultimate success of the candidate project, if awarded and implemented, describe what transportation demand management strategies are included or planned as part of the project scope. Responses to the question can include individualized marketing campaigns, mailers, or efforts highlighting the new project infrastructure such as a neighborhood block party or Sunday parkways event, or walking school bus. The question seeks to understand what holistic approach the applicant plans to apply to the candidate project to make it successful.

Project Detail Subsection Question 12: Responses to this question should focus on the scope components which are specific to addressing resiliency from extreme weather conditions (e.g. excessive heat, ice storms, flooding) as well as natural disaster conditions (e.g. wildfires and earthquakes). Examples of such scope components includes stormwater features, native plantings, tree canopy, or upgraded infrastructure to withstand seismic events. While most candidate projects will likely include some of these example scope components to address other purposes for the projects, responses to this question should highlight those components which go above and beyond or with a primary purpose to address resiliency. Candidate projects located on Regional Emergency Transportation Routes should indicate that information and speak to the scope components which reinforces, enhances, maintains, or

creates multimodal travel on a segment of the regional emergency transportation route in event of extreme weather conditions or natural disaster.

If the question is not applicable to the candidate project, please do not enter a response or enter "not applicable" or "n/a."

Project Detail Subsection Question 13 and 14: Responses to Project Detail Subsection questions 13 and 14 seek to gather an understanding of how the candidate project advances regional economic objectives. Focused on the factors identified in the [Economic Value Atlas](#), such as supporting growing industries or creating access to family-wage jobs, the Economic Value Atlas aids to provide information, understanding and communicate economic conditions that surround transportation investment decisions. Applicants are encouraged to utilize the Economic Value Atlas to help describe the economic conditions as it relates to developable lands and target industries in proximity to the candidate project.

Project Detail Subsection Question 15 and 16: Responses can begin by describing the existing deficiency in the multimodal network connecting to the industrial or transport facility. Are there infrastructure elements on the access road missing creating a barrier to feeling safe and traveling to the area outside of a personal vehicle? Following, responses should describe the new access the candidate project would create to the industrial or transportation facility. Responses should focus and describe the elements of the project scope which facilitates walking, pedaling, rolling, and/or transiting to these facilities and the gaps or deficiency addressed.

A gap is considered "complete" if the project links two existing facilities (e.g. a bicycle and pedestrian bridge that connects two complete bicycle and pedestrian facilities). A gap is considered partially filled if the project extends a facility, but a gap still remains at some point within or adjacent to the project area (e.g. a new sidewalk on a designated freight route that ends at an intersection without pedestrian crossing enhancements).

Additional context in the response, such as the type of schedule for the businesses in the industrial area (i.e. 3- 8 hour shift, 24 hour operation schedule or overnight shift schedule), information on the travel needs for the workers – via travel survey results – in the industrial or transport facilities areas not being addressed, and the existing transportation options supported through the candidate project are helpful details to include.

Example multimodal access projects to industrial and transport facilities may include complementary separated pedestrian and protected bikeway infrastructure features to support first-last mile access to fixed route transit or roadway restriping to accommodate pedestrian infrastructure and enhanced crossings in the existing right-of-way of an industrial area access road.

If the question is not applicable to the candidate project, please do not enter a response or enter "not applicable" or "n/a."

Project Detail Subsection Question 17: Describe any known or potential constraints which may limit the project scope components and design elements. In this question, responses can focus on a broad range of constraints including environmental factors, challenges in receiving approvals (i.e. railroad approval), right-of-way constraints, etc. In responding to the identification of constraints, please also explain why the applicant is unable to overcome the constraint.

Project Detail Subsection Question 18: Responses to this question should focus on describing the differences between the candidate project scope and the project description/definition for the project in the financially constrained 2023 Regional Transportation Plan project list. What are the main differences between the candidate project scope and the RTP project description? Explain why the two differ. Examples of differences can be the candidate project scope only looks to complete a portion of the defined RTP project due to costs or the candidate project scope seeks to complete one component aspect of the defined RTP project. In some cases, the candidate project identified a programmatic category (e.g. Sidewalk and Pedestrian Safety Projects in various locations in Milwaukie) in the RTP project list as its link of inclusion in the financially constrained list. In those cases, the applicant response needs to demonstrate the candidate project scope is consistent with the definition provided in the programmatic category.

SECTION: PROJECT QUESTIONS – SUBSECTION: PROJECT DESIGN

New to the Step 2 application are specific questions related to the candidate project's design details. Not all questions in the Design section are applicable to every candidate project. But for those applicable, be as specific as possible with responses. For candidate projects seeking project development funding only, several of the questions in the Design subsection are likely not questions the applicant will be able to answer at this time. For project development applications, partially answered design section questions according to desired design or known scope elements for the candidate project are acceptable. To the degree candidate projects can describe the design elements in consideration or already committed for the candidate project supports the ability to perform the outcomes evaluation for the candidate project.

The first 2 questions of the Design subsection are to further classify the candidate project and provide an opportunity to describe the project with the specificity of the design details. In Design subsection question 1, select all that apply in terms of project classification. In Design subsection question 2, describe the design features of the candidate project. Responses to Design subsection question 2 can be more detailed than the project description provided in the Project Information subsection of the Programming Section.

For Design subsection questions 3 through 40, responses are "Yes/No." If the question is not applicable because it is not part of the scope of the candidate project, please select "None" and skip the subsequent question if it is a linked question based on a "Yes" response. If the applicant response is "No" or "None" in the "Yes/No" question, then in most cases the subsequent question is likely not applicable. If the subsequent question is not applicable to the candidate project, please do not enter a response or enter "not applicable" or "n/a" in the text box.

Responses to the Design subsection questions should illustrate how the scope element identified adheres to the design principles and approach presented in Metro's Livable Streets and Trails guidance. The candidate project scope elements of the candidate project must be consistent with the preferred designs appropriate for the functional and design classification identified. (See Project Detail subsection question 7 and refer to Chapter 3 of the Designing Livable Streets and Trails Guide for information on functional and design classifications.) If a candidate project design elements/scope components are not the preferred treatment for the design classification, then Design subsection questions 35 and 36 and the Project Detail subsection question 17 provide the opportunity for the applicant to discuss the

constraints, trade-offs, and rationale. Include as part of the response for Design subsection questions 35 and 36 how the alternate design approach will still help achieve regional goals and objectives.

Regional trails do not have a design classification but do have a pedestrian and bicycle functional classification (in addition to "regional trail"). However, some trail projects may be parallel to or within the ROW of a street with a design classification and that should be noted. Additionally, some regional bike and pedestrian routes/projects will not have a design classification if they are not on the arterial network. If the applicant's jurisdiction also has its own local functional and design classifications, applicant may choose to supplement the answer with additional details.

Design subsection questions 41 through 57 focus on how various functions are currently served on an existing facility and how the function changes (if at all or applicable) with the implementation of the candidate project. For each question, select one of the three options for how the function is served in the existing environment. Then select one of the three options for how the function is served in the implemented environment. Please reference Chapter 3 of the Designing Livable Streets and Trails guidebook for further description of the listed functions in questions 41 through 57 to support selecting responses.

SECTION PROJECT QUESTIONS – SUBSECTION: COMMUNITY INVOLVEMENT

Comprised of four questions, this section focuses on understanding the "who." This includes who has been involved with the project to date, who needs to be involved with the project in the future, what public outreach has been undertaken, and what influences does different interested parties have in efforts to move the project forward.

Community Involvement Subsection Question 1: Responses to the question should focus on the approvals and formal support provided by the applicant's governing body to prioritize and pursue funding opportunities (including the Regional Flexible Funds) for the candidate project.

Community Involvement Subsection Question 2: Response to this question should focus on identifying all the necessary community, agency partners, utilities, and other interested parties and their involvement to date. The question seeks to understand if there are gaps in project partners not involved to date and what roles the different partner have in influencing or moving the project forward. Explaining how involvement with those partners already engaged will continue through the project phases to be funded with Regional Flexible Funds is also beneficial context.

Community Involvement Subsection Question 3: Responses should provide detail on how the community has been engaged and involved in the project to date and discussing how community helped to shape the candidate project requesting Regional Flexible Funds. Emphasis on understanding community engagement particularly with communities of color, communities with lower incomes, and communities with limited English language proficiency is a key focus of this question. Also understanding how community involvement helped to shape the project purpose and its prioritization to seek funding now rather than later is helpful context for the response to the question. Speaking to what scope elements of the project design came about because of community input is also beneficial.

Community Involvement Subsection Question 4: Responses to the question should focus on the applicant's understanding on the timing of public outreach efforts as part of the candidate project's development and any public outreach activities undertaken to date. Combined with questions in the

Delivery section, applicants should speak to how public outreach may end up reshaping the candidate project depending on its stage of development.

SECTION: PROJECT QUESTIONS SECTION – SUBSECTION: DELIVERY

The questions in this section are intended to gather detail on the project's existing level of planning and project development. It is critical that projects receiving regional funds through the Regional Flexible Fund competitive allocation process can be delivered as they are described in the application, on time and within budget.

Through responses to questions in this section and (if electing to complete) the ODOT Local Agency Technical Scope Sheet, applicants should demonstrate full awareness of the factors that may impact these project delivery goals (scope, schedule, budget). This should be demonstrated in the following ways:

- Recognition of the current stage of project development and understanding the necessary steps and requirements the applicant will undertake for the project to progress under the federal aid process.
- Showing that there is communication and cooperation between all applicable stakeholders involved – including ODOT, utility companies, railroads, landowners, etc.
- Identification of all potential environmental impacts and issues associated with both the construction as well as the completed project.
- If the applicant is not a certified project delivery agency and will need ODOT to deliver the project, they should demonstrate an understanding of the ODOT project delivery process and document ODOT's awareness of and ability to deliver the project should it be funded.
- A budget and timeline which reflects the previous four considerations.

For applicants seeking to fund project development activities, it may not be possible to definitively answer some of the questions in the Delivery subsection. At a minimum, responses should indicate how the project development funding will explore and respond to the project delivery issues listed in the application and prepare the project for future stages of design, ROW and construction.

Applicants are encouraged to consult with an ODOT Local Agency Liaison (LAL), if available, in developing their project application. Additionally, video recordings of previous Regional Flexible Fund preparation workshops can be found on the TPAC webpage. TPAC workshops where Metro staff and/or ODOT LAL's presented applicable information include: February 14, June 12, and August 14, 2024.

Responses in this section will be used in developing the Risk Assessment of the projects. Applications that have a minimum of demonstrated project development and readiness may be referred back for additional information or may be recommended to be funded for project development activities only.

Delivery subsection question 10 and 11 address any consultation with Tribal Governments that may have occurred to date and if work has been done to determine the presence of cultural resources in the project area. *Please do not disclose the specifics of any known cultural resources in your application in efforts to not inadvertently publicly disclose information without appropriate Tribal Government approvals.* For this purpose, responses are limited to "Yes" or "No" for this question.

After the Delivery subsection, there are no other remaining application questions.

Completing an Application

New to the 2028-2030 Regional Flexible Fund Step 2 Call for Projects is an online application submission tool for applicants to complete their candidate project applications. The new application submission tool is within Project Tracker, which is Metro's new Metropolitan Transportation Improvement Program database. Hosted and supported by EcoInteractive, a separate handbook and video are provided on the 2028-2030 Regional Flexible Fund webpage which outlines how to navigate Project Tracker and specifically the Call for Projects application. The application can be accessed through the Regional Flexible Fund webpage or click the link below to access.

Metro Project Tracker Dashboard Home Page (includes 28-30 Regional Flexible Fund Call for Projects): https://portal.oregonmetro.ecointeractive.com

Applicants will be asked to create an account. To register an account, use the following link:

Metro Project Tracker Account Creation Form: https://portal.oregonmetro.ecointeractive.com/signup

Once an account is created the applicant filling in the application will want to navigate to the "28-30 RFFA Call for Projects (CFP)" module. From that module, applicants may begin a new application.

All applicants registered with the same organization will have access to all the applications being submitted by their organization. This means all registered accounts with the City of Troutdale as their organization would have access to all applications in the 28-30 RFFA Call for Projects started by an account associated with the City of Troutdale. Knowing this, access and version control with multiple staff members working on an application at one time should be considered and coordinated.

Applications can be saved and returned to at any point during the Call for Project window (Friday September 6 – Friday November 15, 2024). An application is not submitted until the applicant has hit "Submit for Review." The "Submit for Review" button is only available when the application is not in editing mode. If an applicant inadvertently submits an application prior to completion, then the applicant has the ability to unsubmit by navigating to the submitted application and hitting the "Unsubmit" button near the top of the right hand corner of the application.

Once the application is submitted, the application will remain in a pending review which can be observed as part of the application status when entering the module. Once the application is accepted, the application status will change to accepted. Accepted means Metro has verified all the necessary fields and attachments were submitted by the applicant. Accepted status does not indicate any form of award status.

Applications are due by 4:00 p.m. on Friday, November 15, 2024.

Technical issues and questions can be submitted through the 28-30 RFFA Call for Projects application. Use the (?) on the top right corner of any page of the application. (Located next to the user account symbol.) If there are any questions regarding the Regional Flexible Fund Step 2 application questions, required attachments, etc., please send an email to rffa@oregonmetro.gov.

Metro and EcoInteractive will hold regular office hours to help support applicants in navigating the application submission tool and for other application specific questions. The office hours are hosted

virtually on a weekly basis and are an informal drop in style affair. Information regarding the office hours are below:

2028-2030 Regional Flexible Fund Step 2 – Office Hours

- Thursdays from 1 p.m. to 2 p.m.
- Starting September 19 to November 14, 2024.
- Join by using the following Zoom link: https://us02web.zoom.us/j/81780422769?pwd=IJttbG3uisjadxcyTT2nMSypwrmypB.1

Criteria, Performance Measures, and Data Resources

The 2028-2030 RFFA Program Direction identifies project selection criteria that form the basis for the project outcomes evaluation. These criteria are derived from the five goals that emerged from regional input for the 2023 RTP. Projects that receive Regional Flexible Funds should demonstrate how they will make improvements to the regional transportation system in the following ways identified in Table 6:

Table 6. 2023 Regional Transportation Plan Goals and 2028-2030 Regional Flexible Fund Allocation Evaluation Criteria

RTP Goal Area*	28-30 RFFA Evaluation Criteria
Equitable Transportation – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.	• Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community
Safe System – Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.	• Reduced fatal and serious injury crashes for all modes of travel
Climate Action and Resilience – People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.	• Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases stability of existing critical transportation infrastructure

RTP Goal Area*	28-30 RFFA Evaluation Criteria
Mobility Options – People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming	• Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips
Thriving Economy – Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.	• Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities
Design* - Supporting the implementation of livable streets and trails that advance the region towards the 2040 Growth Concept vision and regional transportation system vision.	• Design clearly demonstrates prioritized values/objectives of the project appropriate to context and facility/design classification • Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design

The five RTP goals are the primary basis for the project Outcomes Evaluation and are weighted equally.

Following adoption of the 2028-2030 RFFA Program Direction, Metro staff reviewed the 2025-2027 Regional Flexible Fund Step 2 Outcomes Evaluation performance measures as a starting basis for defining the performance measures for the current cycle. After discussions with TPAC at the June and August 2024 TPAC workshops the performance measures outlined in Table 7 are to be used in the project Outcomes Evaluation, which provides a technical analysis of how each proposed project is advancing the above criteria. Much of the data used in the Outcomes Evaluation is found through data tools developed and maintained by Metro including (no particular order), not limited to:

- Regional Land Information System (RLIS)
- Social Vulnerability Explorer
- High Injury Corridors Story Map
- Economic Value Atlas
- Regional Barometer
- Regional Safe Routes to School Walkshed Analysis Tool
- Regional Transportation Plan Policy/System Maps
- Designing for Livable Streets and Trails

The data sources for the performance measure are listed in Table 7. The data resource may be used by applicants to help describe a candidate project.

Metro staff have developed the following performance measures to be used in evaluating candidate project application. The measures are primarily objective and quantifiable, but there are also subjective measures included as well in order to capture additional information used to provide a complete picture of proposed projects relative to the criteria. A successful application will clearly illustrate how the project performs on each of the performance measures.

Table 7: 2028-2030 RFFA Performance Measures

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
RTP Goal: Equitable Transportation • Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community	Project makes improvements in an Equity Focus Area (EFA)	Project is located in a regional equity focus area Equity focus area includes greater than regional average numbers of: people of color, households with lower-incomes, people who do not speak English well	Regional Land Information System (RLIS) Equity Focus Area (2022) dataset
	Improves access to community places for Black, Indigenous, and People of Color (BIPOC), and underserved communities	Closes active transportation gaps/completing the system or substandard facilities along frequent transit lines and stations in EFAs Addresses active transportation gaps or substandard facilities in areas with higher than average Community Service accessibility score	Regional Land Information System (RLIS) Bike Routes, Sidewalks, Transit Bus System (Routes and Stops), Rail Transit datasets MetroMap Transportation datasets Economic Value Atlas Community Services accessibility score dataset
	Makes active transportation improvements in area with poor community health outcomes	Project is in an area with below regional average life expectancy Project is in an area with higher than regional average diesel particulate matter concentration	Regional Barometer Community and Environment datasets Regional Land Information System (RLIS)

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
		Project is in an area with higher than regional average level of air toxics Project is located on high injury corridors within an Equity Focus Area.	Equity Focus Area (2022) dataset High Injury Corridors and Intersections StoryMap
	Improves access to low and middle wage jobs	Project is in an area with an above regional average number of low and middle-wage jobs within 30 minutes (by all modes)	Economic Value Atlas Labor Access and Jobs Access dataset
	Removes, reduces disparities and barriers (jobs, transit, services for equity communities)	Description of the barrier and disparity being addressed Project increases or improves travel options in areas with lower than regional average vehicle access	Economic Value Atlas Vehicle Availability Rate dataset Social Vulnerability Explorer No Vehicle Access dataset
	Improves access in area with high lack of access to vehicle/high housing + transportation burden	Improves access to travel options (or provides a new travel option) in an area with below regional averages in housing and transportation costs.	Economic Value Atlas Affordability dataset Social Vulnerability Explorer No Vehicle Access, Low Income Housing Cost Burden datasets
	Demonstrated transportation project was/is identified by community as a priority	Description of how public input informed the project's prioritization to seek out funding opportunities.	Local dataset

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
		Description of communities engaged, particularly engagement with marginalized communities, and how community input informed the design and prioritization of the project to seek funding opportunities.	
RTP Goal: Safe System • Reduced fatal and serious injury crashes for all modes of travel	Project location is designated as a priority for safety improvements	Project area/roadway is identified and documented as a safety priority through a state, regional or local process (e.g. transportation safety plan or transportation safety action plan). Project addresses a specific area or roadway with historically high numbers of serious injury crashes.	Regional Land Information System (RLIS) Crashes dataset High Injury Corridors and Intersections StoryMap Regional Transportation Safety Strategy ODOT ATNI priority location Locally adopted safety action plan
	Design elements prioritize pedestrian safety	Project scope describes the design elements and how they will improve pedestrian safety. Project does not include any designs that will degrade pedestrian safety.	Designing Livable Streets and Trails High Injury Corridors and Intersections StoryMap
	Fills (completely, partially) an active	Project closes active transportation gap or upgrades a substandard facility	Regional Land Information System (RLIS)

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
	transportation or trails network gap	on/within a high injury corridor.	Bike Routes, Sidewalks, Transit Bus System (Routes and Stops), Rail Transit datasets Regional Transportation Plan Policy Maps High Injury Corridors and Intersections StoryMap
	Project addresses active transportation safety within a walk-zone of a school	Project contains elements and features that increases active transportation access within a school walk zone. Higher priority for K-12 schools walk zone. Bonus if elements and features address and are within a school identified safety hazard area.	Regional Safe Routes to School Walkshed Map Tool
RTP Goal: Climate Action and Resilience • Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather	Provides/increases transit option, biking/walking (Climate Smart Strategy rating = 5 stars)	Project adds or improves an identified connection to transit. Project improves transit operations (stop or intersection enhancement).	Regional Land Information System (RLIS) Sidewalks, Transit Bus System (Routes and Stops), Rail Transit datasets Regional Transportation Plan Policy Maps

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
events (e.g. flood, heat) • Increases seismic stability of existing critical transportation infrastructure			Regional High Capacity Transit Strategy Regional Transit Strategy
	Provides/increases active transportation (e.g. walking, bicycling) (Climate Smart Strategy rating = 3 stars)	Project adds active transportation infrastructure. Project addresses an active transportation network gap or substandard facility.	Regional Land Information System (RLIS) Bike Routes, Sidewalks datasets Regional Transportation Plan Policy Maps Regional Active Transportation Plan
	Improves system management via technology (TSMO) (Climate Smart Strategy rating = 2 stars)	Project is on a prioritized TSMO strategy corridor Project includes specific TSMO elements in scope that substantially improves efficiency and safety for all modes of travel.	Regional Transportation Plan Policy Maps Transportation System Management and Operations (TSMO) Strategy
	Improves/adds street connectivity (Climate Smart Strategy rating = 1 star)	Project encourages local and collector street circulation to minimize local traffic on regional arterial streets.	Regional Land Information System (RLIS) Streets, Bike Routes, Sidewalks datasets

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
		Project included on regional bicycle/pedestrian networks.	Regional Transportation Plan Policy Maps
	Integrates transportation demand management strategies (outside of TSMO) as part of the project (Climate Smart Strategy rating = 3 stars)	Project scope includes Transportation Demand Management strategies to support and compliment the infrastructure project.	Regional Travel Options Research TDM Inventory, TDM Needs and Opportunity
	Supports development patterns of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern of the designated priority 2040 land use.	2040 Growth Concept Map and Reports Regional Land Information System (RLIS) Concept Corridors, Concept Centers, Concept Main Streets datasets Designing Livable Streets and Trails
	Increases tree canopy, green infrastructure and decreases impervious surfaces to mitigate for climate change	Project is located in an urban heat island and adds street trees or other green infrastructure to reduce heat island. Project is located in a high environmental hazard potential risk area and project scope includes mitigation elements such as green infrastructure to manage stormwater.	Regional Barometer Environment, Climate Adaptation datasets Regional Land Information System (RLIS) Canopy 2019 dataset MetroMap Water datasets

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
		Project is in an area with lower tree canopy coverage.	
	Addresses an Emergency Transportation Route	Project is on an Emergency Transportation Route AND project scope elements look to increase the resilience of infrastructure (e.g. seismic, flooding, wildfires) or add mobility options.	Regional Transportation Plan Policy Maps Regional Land Information System (RLIS) Regional Emergency Transportation Routes dataset
	Decreases impervious surface	Project scope includes elements to manage stormwater. Project scope looks to maintain or decrease impervious surfaces by integrating surface water management strategies.	MetroMap Water datasets Regional Barometer Environment, Climate Adaptation datasets
RTP Goal: Mobility Options • Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips	Increases reliability and efficiency for all travel modes	Project includes treatments to increase reliability and efficiency for all modes, considering roadway/street functional classification and design classification. Examples include bicycle signals to support the "green wave", signal timing, travel time messages, and leading pedestrian intervals.	Designing Livable Streets and Trails

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
	Project area has a high number of crashes (all severities)	Project addresses safety issue and mitigates for potential traffic congestion occurred through incident management in an area identified as a high crash location.	Regional Transportation Plan Policy Maps Transportation System Management and Operations (TSMO) Strategy High Injury Corridors and Intersections StoryMap
	Improves transit reliability	Project elements includes infrastructure or technology strategies which increases transit reliability. Project addresses an identified transit delay or reliability location in the transit network. Bonus if elements address an identified transit delay on a transit route with high ridership.	Regional Transit Strategy Enhanced Transit Treatments (ETC) (Regional Transit Strategy: Ch. 4, Table 2) Bus Delay Analysis Tool TriMet Ridership & Performance Statistics Designing Livable Streets and Trails
	Increases reliability by removing a barrier on regional freight system	Project scope elements addresses removing a freight barrier and supports multimodal travel.	Regional Transportation Plan Policy Maps
	Improves/adds street connectivity	Project increases street connectivity to support direct and multiple route options AND provides shorter trips for people walking,	Regional Land Information System (RLIS) Streets, Bike Routes, Sidewalks, Transit Bus System (Routes

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
		bicycle, and/or accessing transit.	and Stops), Rail Transit datasets Regional Transportation Plan Policy Maps
	Provides/increases transportation option	Project fills a gap or addresses a deficiency/substandard facility in the regional transit, bicycle, or active transportation network.	Regional Transportation Plan Policy Maps Regional Land Information System (RLIS) Streets, Bike Routes, Sidewalks, Transit Bus System (Routes and Stops), Rail Transit datasets
RTP Goal: Thriving Economy • Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities	Supports/increases industrial/commercial developability (see Economic Value Atlas)	Project improves access to a tract/area with the number of developable acres that is greater than the regional average.	Economic Value Atlas Developability dataset
	In/supports development patterns of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern of the designated priority 2040 land use.	2040 Growth Concept Map and Reports Regional Land Information System (RLIS) Concept Corridors, Concept Centers, Concept Main Streets datasets

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
	Provides/increases access to Target Industries (see Economic Value Atlas)	Project improves access to a tract with a number of target industries that is greater than the regional average.	Economic Value Atlas Target Industries dataset
	Increases multimodal mobility and access to industrial and transport facilities	Project is on the regional freight network. Project scope includes elements to increase access industrial and transport facilities (e.g. creates a new connection and/or multimodal connection). Project scope fills a gap or addresses a substandard active transportation facility and/or increases access to transit infrastructure on a regional freight facility.	Regional Transportation Plan Policy Maps Economic Value Atlas Goods producing jobs; other tradable goods jobs Regional Land Information System (RLIS) Title 4 lands MetroMap Planning datasets
	Increases access to jobs	Project is in an area with an above regional average number of jobs accessible within 30 minutes (by all modes).	Economic Value Atlas Job Access and Labor Access datasets
Design • Design clearly demonstrates prioritized values/objectives of the project	In/supports future desired development of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern	2040 Growth Concept Map and Reports Regional Land Information System (RLIS)

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement	Data Resource
appropriate to context and facility/design classification		of the designated priority 2040 land use.	Concept Corridors, Concept Centers, Concept Main Streets datasets
• Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design	Design elements prioritize pedestrian and bicycle access, mobility, safety, and other functions based on the project facility's designated regional and local design classification. Note: local design classifications are consistent with regional design classifications but may use different terms and provide more detailed design guidance	Design elements prioritize the functions identified by the project that are appropriate for the project area/roadway design classification (see Table 6, prioritizing functions by regional design classification).	Designing Livable Streets and Trails
	Project design represents the best possible improvement in project area, based on functional and design classification and contextual constraints.	Project design approach and elements are context sensitive and respond to identified constraints (geographic, right-of-way, financial, etc.) with the highest level of design possible consistent with the functional and design classifications.	Designing Livable Streets and Trails

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

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