



Memo

Date: August 29, 2024
To: Grace Cho, Metro Principal Planner
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From: Ken Lobeck, Metro Funding Program Lead
Subject: 2028-2030 Regional Flexible Fund Step 2 Call for Projects – Project Name and Description Guidance

SUMMARY

Agencies submitting projects for Regional Flexible Funding Allocation (RFFA) award need to include a project name and description as part of the RFFA application. During the 2028-30 RFFA funding call, Metro also will be utilizing a new module to the new MTIP Project Tracker database to support online application submissions. Properly including the project name and description in the new Regional Flexible Fund Step 2 Call for Projects module will assist in later streamline programming actions. The following pages provide a few suggestions to help the applicant enter an effective project name and description for later MTIP and STIP programming actions.

The MTIP and STIP Project Name and Description

Both the MTIP and STIP share common requirement that all programmed projects include a properly formatted name and description that identifies the major scope elements the project will deliver. Over the past several years, ODOT, MPOs, FHWA, and FTA have developed a project naming and description convention process to help better standardize the name and description used in the MTIP and STIP. The project naming and description convention process rules primarily supports the capabilities and limitations of both the MTIP and STIP database systems plus later required materials used to deliver the project (e.g, intergovernmental agreements, right-of-way support agreement, work order contracts, etc. The naming and description convention process also supports FHWA and FTA identified requirements.

While attempts occurred to develop a process that is clear and easy to apply, the final result remains more of an artform than a straightforward checklist. Because of the existing interpretations that can occur, Metro and ODOT often review the project's draft name and description and modify it as needed prior to MTIP and STIP programming actions. Over the past several years, Metro and ODOT have refined the project naming process in the attempt to reduce the range of interpretations. The following pages provide the available guidance form these discussions to properly develop:

1. The project name for both the MTIP and STIP.
2. The project's short description for both the MTIP and STIP.
3. The project's detailed description included in the MTIP is used to meet necessary federal and/or Regional Transportation Plan (RTP) consistency requirement

Developing the Project Name and Description Suggestions in Accordance with the MTIP and STIP naming convention guidelines.

Step 1: Start by Developing the Project’s MTIP Detailed Description:

- **Defined:** The MTIP requires a detailed project description to be included with all programmed projects that identify all major scope elements and especially any capacity enhancing scope elements.
- **Usage:** The detailed description is used to validate that the scope elements are eligible for federal funds, are consistent with the RTP goals, and act as the basis for comparisons if project scope changes occur later.
- **Identifying Scope Elements List** the major scope elements and their location if known in either a paragraph layout in a bulleted format.
- **Entry suggestions:**
 - Use active verbs to describe the scope elements (e.g. Construct new sidewalks, rehabilitate/resurface street pavement, add new traffic signal, etc.)
 - Consider and identify which scope elements are considered a new upgrade versus extension or construction activity or a reconstruction type activity to the existing condition.
 - Cite specific locations when possible (e.g. add new separated bike lanes between 1st Street and 3rd Street)
 - Identify the basic purpose for the scope element (e.g. construct new sidewalks between Garden Ave and Main St for increase pedestrian safety)
 - Include the secondary eligible scope elements also part of the project (Replace and upgrade street lighting, include median landscaping, complete stormwater required upgrades, etc.)
 - Avoid using the word “improvements and “modify” as part of the scope element description as these two verbs are considered vague and do not clearly state what is being improved or changes.

Sample Verb Choices to Describe the Scope Element		
Verbs Normally Reflecting Non-Capacity Type Upgrades	Verbs Indicating Capacity Enhancing or Adding New Scope Elements	Verbs that can be used either way depending on the scope element
Reconstruct	Add	Align
Replace	Construct	Purchase
Reconfigure	Expand	Procure
Realign	Extend	Upgrade
Rehabilitate	Increase	Refine
Repave	Widen	Install
Remove		Complete
Reduce		

Once the scope elements are identified, combine together into an expanded description. A few examples are shown on the next page. For the detailed description, more details are

better. The length may vary, but it's normally in the range of about 500-700 character spaces.

Sample MTIP Detailed Project Descriptions:

Key 21178:

- Project Name: US26 (Powell Blvd): SE 99th - East City Limits
- Lead Agency/Applicant: ODOT
- Status: Capacity enhancing project.
- Detailed Description:
On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings. Phase 2 includes all segments except Segment 2: 122th Ave to SE 136th Ave which is in Key 19690.

Key 23247:

- Project Name: Project Name: 148th Ave Safety and Access to Transit: SE Powell to NE Halsey
- Lead Agency/Applicant: Portland
- Status: Non-capacity enhancing/exempt project
- Detailed Description:
Improve comfort and access for people walking, biking, and taking transit along 148th Ave by installing pedestrian crossing upgrades including median refuge islands and visibility markings, sidewalk infill, ADA-compliant curb ramps, buffered and protected bike lanes, and a signal rebuild.

Key 16986:

- Project Name: NW Division Complete St Phase I: Wallula Ave – Birdsdale Ave
- Lead Agency/Applicant: Gresham
- Status: Non-capacity enhancing/exempt project
- Detailed Description:
In Gresham on NW Division St between NW Wallula Ave and NW Birdsdale Ave, Construct Phase 1 active transportation improvements to include ADA improvements, sidewalks, curbs, curb ramps, and bike lanes to add 800' of new sidewalks (gap fills) & bicycle lanes to connect with new transit stations being developed on the north and south sides of NW Division St separately with Phase II planned to extend NW Division St with similar active transportation improvements from NW Birdsdale Ave and the Gresham-Fairview Trail

MTIP Detailed Description Summary:

- The MTIP Detailed description contains the major and secondary scope activities for the project.
- More details are better.
- Consider the appropriate action-verb to clearly communicate the purpose of the scope element.
- Don't worry too much about the length of the detailed description. It's more important that you include all of the major scope elements.

- The MTIP Detailed description is not present on the public MTIP document. The detailed description is used for RTP consistency validation, and as an internal comparison reference when cost changes, scope revisions, or other major changes are occurring to the project.

Step 2: Develop the MTIP and STIP Short Project Description:

- The MTIP and STIP short description is the one included in both public documents
- The short description consolidates the detailed description into a concise description usually about a sentence in length.
- The average short description comprises about 200-300 character spaces.
- The short description usually includes only the major scope elements for the project.

Sample MTIP and STIP Short Project Descriptions (Compare to the previous MTIP Detailed Descriptions provided):

Key 21178:

- Project Name: US26 (Powell Blvd): SE 99th - East City Limits
- Lead Agency/Applicant: ODOT
- Status: Capacity enhancing project.
- MTIP Short Description:
On US26 (Powell Blvd) in SE Portland, widen from three to four lanes (inclusive of a center turn lane) with sidewalks and buffered bike lanes or other enhanced bike facility. Add enhanced pedestrian and bike crossings.

Key 23247:

- Project Name: Project Name: 148h Ave Safety and Access to Transit: SE Powell to NE Halsey
- Lead Agency/Applicant: Portland
- Status: Non-capacity enhancing/exempt project
- MTIP Short Description:
Complete ped/bike elements such as adding buffered/protected bike lanes, constructing enhanced pedestrian crossings, completing signal modifications and lighting upgrades to improve comfort and access for people walking, biking, & taking transit.

Key 16986:

- Project Name: NW Division Complete St Phase I: Wallula Ave – Birdsdale Ave
- Lead Agency/Applicant: Gresham
- Status: Non-capacity enhancing/exempt project
- MTIP Short Description:
Phase 1 (of 2 phases) to extend NW Division St between NW Wallula Ave and NW Birdsdale Ave with active transportation improvements to include ADA improvements, sidewalks (gap fills), curbs, curb ramps, and bike lanes.

MTIP Short Description Summary:

- The short description will become the official public description for the project.
- It will be the starting point to develop the project intergovernmental agreement (IGA) and other required federal delivery documents.
- The short description based on the MTIP detailed description.
- The short description contains about 200-300 character spaces.
- The main differences between the MTIP Detailed Description and Short Description are the following:
 - The detailed description will try to incorporate every scope activity as much as possible.
 - The detailed description often included project limits, cross street references, milepost references, or other location identifiers. The short description usually does not include location references.
 - The short description provides a reduced and concise description for the project.
 - The short description emphasizes the major scope elements being funded.

Step 3: Assigning the Project Name

- The project name will be entered into the MTIP and STIP based on the agreed upon FHWA/FTA/ODOT/MPO project naming convention.
- The structure for the project name usually includes the following:
 - Route/arterial name (the project is located) + cross street limit references (and/or summary upgrade action).
 - The STIP limits the project name currently to **no more than 65 character spaces**.
 - The three roadway project name examples:
 - Key 21178: US26 (Powell Blvd): SE 99th - East City Limits.
 - Key 23247: 148th Ave Safety and Access to Transit: SE Powell to NE Halsey.
 - Key 16986: NW Division Complete St Phase I: Wallula Ave – Birdsdales Ave
 - Transit project name follow a different naming process based on whether the funding is Urbanized Zone formula based or discretionary based.
 - Transit project naming may focus on the overall upgrade aspect and the year the funds were appropriated or awarded if project location details are not applicable. A few examples:
 - Key 22179: TriMet Bus and Rail Preventive Maintenance (2024)
 - Key 22194: SMART Bus and Bus Facilities (Capital) 2023
 - Key 23474: TriMet 82nd Ave MAX Station Improvement Project
 - Key 22176: TriMet Bus Purchase (2024).
- Project Naming Summary:
 - The project name is currently limited to no more than 65 character spaces.
 - The project naming process for roadway upgrade projects differs from transit project.
 - The roadway/highway upgrade project naming emphasizes the route name plus applicable cross street limits as the key portions for the project name.

- The transit upgrade naming approach is split between if the funding is formula based or discretionary.