



Partnerships and Innovative Learning Opportunities in Transportation (PILOT) 2019 Application Handbook

Apply [online](#) between December 3rd,
2018 and February 1, 2019

zoomgrants.com/zgf/Metro/2019_PILOT_Grants

Public service

We are here to serve the public with the highest level of integrity.

Excellence

We aspire to achieve exceptional results

Teamwork

We engage others in ways that foster respect and trust.

Respect

We encourage and appreciate diversity in people and ideas.

Innovation

We take pride in coming up with innovative solutions.

Sustainability

We are leaders in demonstrating resource use and protection.

Metro's values and purpose

We inspire, engage, teach and invite people to preserve and enhance the quality of life and the environment for current and future generations.

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.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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IMPORTANT DATES

December 3, 2018: Applications open
February 1, 2019: Applications due
April 2019: Awards announced
By June 30, 2019: All contracts must be signed
End of June 2021: Projects should be complete

ABOUT THE PILOT PROGRAM

The Partnerships and Innovative Learning Opportunities in Transportation (PILOT) is a new, one-time competitive funding program. The goals of the program are to:

- **Test** how emerging technologies – including ride-hailing; car, scooter, or and bike sharing; ride matching; microtransit; and online/mobile travel information, payment, and incentives – can improve equitable, shared, and active transportation options
- Collect and share **information** on how projects perform
- Develop **partnerships** between public agencies, community groups, new mobility companies, and others that support ongoing success in the region’s work on emerging technologies

Funding available

Up to \$150,000 is available for this cycle of PILOT funding, in grants ranging from \$25,000 to \$150,000. No matching funds are required.

Who can apply?

Community-based organizations, public agencies, or private companies can apply for PILOT funding. One of the goals of the pilot program is to develop partnerships between public or community organizations that understand the transportation needs among the people that they serve and technology providers who have developed new solutions that can help meet these needs. We encourage teams consisting of partners from across the non-profit, public, and private sectors to apply.

What do I need in order to apply?

Required elements of a PILOT application include the following. All of this information must be submitted via Metro’s online grant application portal, which you can access using the link on the cover of this handbook.

- General information about the project, lead applicant, and lead organization
- Answers to seven evaluation questions
- A scope of work

- A budget, including a description of how you estimated project costs
- A signed Metro W9 form

Applicants may also submit the following **optional** elements:

- Supporting reports, research, documents, or other information.
- Letters of partnership or support
- A detailed scope of work (Word or PDF format)
- A detailed budget (Excel, Word or PDF format)
- The letter of interest describing the project, if applicable. Metro encouraged interested applicants to submit letters of interest in October 2018; you do not need to have submitted a letter of interest in order to apply.

Metro’s work on transportation and technology

The PILOT program is guided by the following Metro policies and strategies. You can consult these documents as you develop your application to better understand the background behind the PILOT program and its desired outcomes:

The [Emerging Technology Strategy](#) outlines actions that Metro and its partners can take to guide innovation to advance equity and improve travel options throughout the Portland region. Pages 31-34 outline the policy priorities that set the stage for the PILOT program’s focus on shared, active, and equitable transportation, and pages 36-39 describe why Metro launched the PILOT program and outline the relationship between PILOT and Metro’s other grant programs.

The [2018 Regional Transportation Plan \(RTP\)](#) is a blueprint to guide investments for all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and freight throughout the Portland metropolitan region. Metro Council is scheduled to adopt the 2018 RTP, along with the Emerging Technology Strategy, at the end of 2018. Chapter 3 includes the region’s policy priorities for transportation equity (p. 18). Depending upon the scope of your project, you can also find relevant information on the region’s policies with respect to transit (p. 74), bicycling (p. 105), walking (p. 117), and travel information and management (p. 126).

The [Strategic Plan to Advance Racial Equity, Diversity, and Inclusion](#) focuses on removing barriers for people of color and improving equity outcomes for communities of color and other historically marginalized communities by improving how Metro works internally and with partners around the Portland region. Goal E (p. 45-50) describes how Metro seeks to advance equity through funding programs like PILOT.

The [Climate Smart Strategy](#) is a set of policies, strategies and near-term actions to guide how the region moves forward to integrate reducing greenhouse gas emissions with ongoing efforts to create the future we want for our region. The strategy describes how the region intends to reduce climate impacts by making it easier to take transit (p. 13-14), making active transportation safe and convenient (p. 15-16), and promoting alternatives to driving alone (p. 21-22).

EVALUATING THE APPLICATIONS

A review panel of people with expertise in emerging technology, equity, and transportation policy will review and score PILOT applications and make a recommendation about which projects Metro should fund. The review panel will be looking for projects that:

- Address a clear and pressing community **challenge** related to improving shared, active, and equitable transportation
- **Test** a new approach that uses emerging technology to address this challenge and is well-tailored to meet the needs of the community
- Engage a team of **partners** with the necessary experience, capacity, and/or relationships to successfully carry out its role in the project
- Conduct a sound, thorough, and unbiased **evaluation**, and share results and data with Metro and its partners
- Include a comprehensive approach to advancing transportation **equity** through in the challenge addressed, the solution tested, the project's evaluation, and the way that partners and community members are engaged throughout the project
- **Engage and educate** the intended users of the project

The PILOT application contains evaluation questions related to each of these criteria. Make sure your application is clear, compelling and sufficiently developed so that reviewers can understand how well it meets the program's objectives. Since the review panel will be taking a comprehensive look at how each project addresses equity, we encourage you to include information on how your project addresses equity throughout your answers to the evaluation questions, in addition to answering the question specific to equity. Along with considering your written answers when scoring applications, the review panel will also evaluate whether your pilot project can effectively address each of the evaluation factors given your proposed work plan and budget.

Metro defines **transportation equity** as the removal of barriers to improve equitable outcomes for and eliminate transportation-related disparities faced by **historically marginalized communities**, especially communities of color. Other historically marginalized communities include people with low English proficiency, people with low incomes, youth, older adults and people living with disabilities.

In June 2016, Metro elevated [racial equity](#) as a core goal for the agency. Metro focuses on racial equity with the goal of improving life and economic outcomes for all groups, and ensuring that race is no longer the most significant factor in predicting life outcomes. Due to a history of exclusionary and discriminatory policies, communities of color experience the most widespread barriers to improving social well-being. The most significant barriers for people of color are typically shared with other marginalized groups. Metro is committed to using its policies, programs, services and destinations to create conditions that allow everyone to flourish.

The table below summarizes the evaluation criteria, the points available for each criterion, the associated evaluation questions, and what an application must do to receive the maximum points available.

Criterion	Evaluation question	Applications that receive maximum points will...
Challenge (10 points)	What community challenge does your pilot project address? We encourage you to include information (potentially including data, research, or feedback from community members) to help us understand why this is an important challenge to address.	Address a challenge that is related to improving shared, active, and/or equitable transportation, and provide compelling information to demonstrate why this is an important challenge to address
Test (10 points)	What new approach to addressing this community challenge are you proposing to test, and why?	Propose an approach that is well-tailored to the challenge at hand and that that differs from or adds value to existing technologies, services, and programs currently available or underway in the Portland region.
Partnerships (20 points)	Please describe your project team members and their roles. Why is this the right team for this pilot project?	Involve partnerships across sectors, and demonstrate that each team member brings the necessary experience, capacity, and/or relationships to successfully carry out its role in the project
Information (20 points)	What performance measures will you use to evaluate this pilot, and how will you collect the data that you need to conduct the evaluation? How will you share the data and results with Metro and its partners?	Demonstrate a plan to conduct a sound, thorough, and unbiased evaluation; write a report summarizing the results; and share the results and underlying data with Metro.
Equity (20 points)	How does your pilot project address transportation equity?	Identify meaningful actions to address transportation equity, including: <ul style="list-style-type: none"> - Addressing a transportation challenge experienced by historically marginalized communities - Testing an approach designed to meet the needs of historically marginalized communities - Working with partners who are focused on serving historically marginalized communities - Evaluating how the pilot project meets the needs of historically marginalized communities - Engaging and educating historically marginalized communities about the pilot project
Engagement (10 points)	How do you plan to educate and engage people about your pilot project so that they use it as intended?	Identify an effective strategy to educate and engage target users of the project that is feasible given the work plan and budget

MINIMUM GRANT REQUIREMENTS

In order to apply for PILOT funding, projects must:

- Involve testing emerging technology, including any of the following:
 - Automated, connected, or electric vehicles
 - New mobility services such as ride-hailing, car/bike/e-bike/scooter sharing, and microtransit
 - Innovative mobile or online approaches to providing travelers with travel information, incentives or payment options
 - Programs or services that improve equitable access to any of the above for communities of color, people living on limited incomes, older adults, people with disabilities, people with limited English proficiency, or other historically underserved communities. Examples include cash-based payment options, discounted fares, projects that increase access for people with disabilities, or culturally specific education and outreach.
- Test emerging technology using implementation projects
- Demonstrate the potential to measurably impact how people travel using shared, active, or equitable transportation options. Example measures of this impact could include mode shift, vehicle miles traveled, or increase in emerging technology usage by underserved communities
- Designate a lead applicant that is eligible to enter into a grant agreement with Metro
- Be located within the [Urban Growth Boundary](#)
- Be clearly achievable given proposed resources and personnel.

Organizations awarded PILOT funding must:

- Sign and enter into a grant agreement with Metro that specifies legal and contractual obligations. Once the contract is signed by all parties, funds become available for reimbursement.
- Take responsibility for executing subcontracts with project partners
- Have adequate funding available to initiate the project. PILOT funds will be paid as reimbursement for grant eligible expenses.
- Submit invoices in order to receive payment. Grantees will be reimbursed for grant eligible expenses 30 days after submitting a complete and allowable invoice.
- Evaluate project outcomes related to transportation choices, equity, and other topics, and share evaluation data with Metro. Final project evaluations and supporting data will be due to Metro prior to final payment.

- Provide regular progress reports to Metro staff. Recipients may be required to deliver up to three presentations to Metro Council and/or the project review panel.
- Attribute credit to Metro on all project materials, such as reports, booklets, brochures, web pages, and social media posts. Attribution on materials must read “Made possible with support from Metro.” Grantee will include the Metro logo on all marketing and advertising materials, both print and online (size permitting).
- Share project photos, flyers, and any other items that have potential value to partners with Metro

PILOT funds may not be used for:

- Activities or events held outside the [Urban Growth Boundary](#)
- Materials or costs not related to the proposed project
- Costs that may be incurred in preparing this grant application
- General organizational support, annual appeals or fund drives
- Direct grants or loans that primarily benefit specific individuals or businesses
- Any attempt to: directly influence legislation or public policy; participate or intervene in any political campaign on behalf of or in opposition to any candidate for public office; induce or encourage violations of law or public policy or improper private benefit to occur
- Activities or events held on property whose owner discriminates against individuals or groups because of race, color creed, national origin, sex, age or disability, in violation of Title VI of the Civil Rights Act, as amended; 42 U.S.C. Section 2000d; Section 303 of the Age Discrimination Act of 1975, as amended; 42 U.S.C. Section 6102; Section 202 of the Americans With Disabilities Act of 1990; 42 U.S.C. Section 12132

APPLICATION ASSISTANCE

Applicants are encouraged to contact Metro staff to discuss your idea. Staff do not play a role in advocating for applicants or making the funding recommendation, and instead is available to help you make your application as strong as possible. Contact information is available below.

CONTACT INFORMATION

For more information or individual assistance with the grant application, please visit the PILOT website or contact Eliot Rose at eliot.rose@oregonmetro.gov or 503.797.1825.