

Memo

Date: September 6, 2019
To: TPAC, JPACT and Interested Parties
From: Dan Kaempff, Principal Transportation Planner
Subject: 2022-24 Regional Flexible Funds Allocation Project Evaluation Process and Next Steps

Purpose

This memo provides detail on the upcoming steps in the 2022-2024 Regional Flexible Funds Allocation (RFFA) process.

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 RFFA is the process to identify which transportation projects and programs will these funds. In this cycle, Metro anticipates allocating approximately \$142 million¹, comprised of federal Surface Transportation Block Grant (STBG) and Congestion Mitigation/Air Quality (CMAQ) program funds, to be obligated in the 2022-2024 timeframe.

In April 2019, JPACT and Metro Council adopted the 2022-2024 RFFA policy direction² which affirmed continuing to use a two-step process for how the region is to invest these funds. Details for Step 1 investments, including the regional bonding commitment and funding levels for region-wide programs, can be found in the RFFA policy document.

Step 2 is the process to allocate funds to locally generated Community Investment projects. An estimated \$43 million is targeted for Community Investment Fund projects, divided into two project categories and funding targets.

- **Active Transportation and Complete Streets** (~\$32.25 million): This project focus area prioritizes infrastructure support for non-auto trips and ensuring safe streets that are designed for all users.
- **Regional Freight and Economic Development** (~\$10.75 million): This project focus area supports the development of the region's economy through investment in key freight projects or programs.

Eligible applicants for RFFA Step 2 project funding include:

- Clackamas County and its cities
- Multnomah County and its eastern cities
- Washington County and its cities

¹ Funding amount is contingent on information to be provided by ODOT and will be finalized prior to JPACT approval of a final investment package in December, 2019

² https://www.oregonmetro.gov/sites/default/files/2019/04/08/22-24_RFFA_Policy_final_adopted_version.pdf

- City of Portland
- Oregon DEQ
- TriMet
- ODOT
- Port of Portland
- Parks and Recreation Districts

In order to be eligible to receive RFFA funding, projects must be located within the region's Metropolitan Planning Organization (MPO) boundary.

Metro issued a call for project proposals on April 5, 2019. The deadline for submission was June 21. A total of 23 project proposals were submitted.

The projects were evaluated on how meaningfully they achieve outcomes in the four policy priority areas of the 2018 Regional Transportation Plan (RTP). The four policy areas are:

- advancing **Equity**
- improving **Safety**
- implementing the region's **Climate Smart Strategy**
- managing **Congestion**

These policy priorities emerged through development of the 2018 RTP, and were affirmed by JPACT and Metro Council to be used to evaluate and select projects through the 2022-2024 RFFA.

There are four components that comprise the information TPAC and JPACT will consider.

1. Technical evaluation – measuring the project outcomes and alignment with RTP policy priorities
2. Risk assessment – evaluation of projects for their level of preparedness and risks to project delivery
3. Public comment – a 30 public comment period is scheduled for September 6 to October 7. Metro Council will hold a public hearing on September 26, with JPACT members invited and encouraged to attend to hear public testimony.
4. Priority identification – county coordinating committees and the City of Portland will have the opportunity to identify which projects they consider to be their priorities.

TPAC and JPACT will use this information in their discussions of the RFFA projects throughout the fall of 2019, leading to a scheduled adoption of a final project package by Metro Council in January 2020.

Evaluating the project proposals

The 2022-24 RFFA cycle uses a new evaluation process. Instead of creating an overall numerical score for each project, the new methodology illustrates the relative policy outcomes of the projects.

A team of transportation professionals from regional agencies not submitting project applications evaluated the projects. Team members were:

- Glen Bolen – ODOT
- Hau Hagedorn – TREC
- Dan Kaempff - Metro

- Lake McTighe – Metro
- Jeff Owen – TriMet

In each of the four policy areas, project outcomes were considered in two different ways:

1. the project's **Opportunity** to make improvements in the policy area, looking at the level of need with regard to the four policy areas;
2. the public **Benefit** of making those improvements, evaluating how well the project addressed the need

This resulted in eight different policy outcomes to be evaluated for each project. Each of these outcomes was scored on a scale of -1 to +3, as shown in the legend below in Figure 1. The legend provided guidance to the evaluation team on how to evaluate the resultant degree of improvement made the projects in each of the eight policy areas. The descriptions were meant to provide guidance for what is meant by a “significant” vs. “substantial” (etc.) improvement.

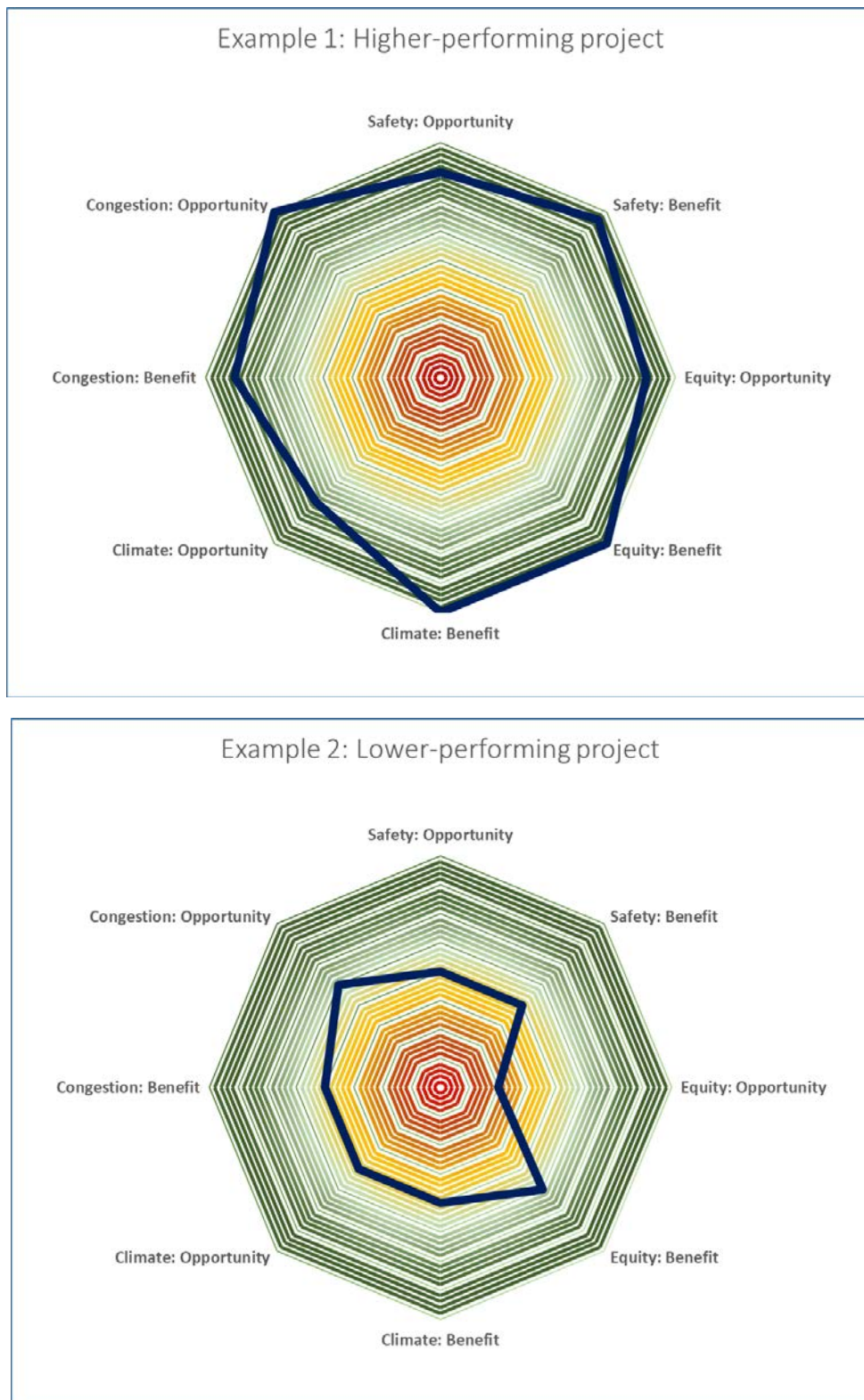
Figure 1. – RFFA Scoring Definitions

Significant improvement	Makes a transformative change; improves multiple modes; creates new connections; eliminates a major safety issue; positive impacts on large # of people in EFA; solves major freight access issue (both volume of freight and congestion issue)	3
Substantial improvement	Upgrades existing conditions in a number of ways; improves safety in a high crash area but may not implement highest level of countermeasures possible; improves existing connections; positive impacts on medium # of people in EFA; makes improvements in a moderate freight volume location	2
Partial improvement	Makes improvements in an area that does not have a large number of severe or fatal crashes; does not include many or significant countermeasures (meets minimum standards); does not address needs of many people in EFA; benefits to freight are minimal	1
Does not improve	Project area does not have significant safety issue; does not serve EFA; does not improve connections or access to community places/jobs/transit/etc.; does not improve freight mobility	0
Worsens conditions	Creates more vehicle traffic; exposes more people on bicycles or feet to risk; slows down freight mobility; increases negative impacts on people in an EFA; worsens environmental outcomes	-1

How to read project outcome charts

The eight policy outcomes for each project were plotted on a “radar” type of chart. Figure 2 gives examples of charts representing higher and lower performing projects. Higher performance is illustrated with the line closer to the outer edge of the radar screen, while lower performance is illustrated by the line being closer to the center of the screen.

Figure 2. – Project Evaluation Chart Examples



All of the project charts are included as an attachment to this memo. More detail on the project evaluation can be found at www.oregonmetro.gov/rffa. As can be seen by comparing the individual charts, many of the projects have higher outcomes in certain policy areas and lower outcomes in

others. Information is presented in this manner to provide decision-makers with a means of comparing the individual projects' relative merits in order to create a final package of approved projects that best fulfill the RFFA and RTP policy objectives.

Risk Assessment

The project application included a series of questions intended to gather information on the project's relative stage of preparedness and to identify any risks to the project being delivered as designed, on time and within budget. This information is being reviewed by Kittelson & Associates, who is in the process of preparing a risk assessment report. The report will provide additional context to the policy evaluation outcomes to identify any potential risk that a project may need to change or reduce scope, and therefore change the benefits identified in its performance evaluation rating.

The risk assessment report may also be used in creating recommendations to adjust scope, schedule and/or budget of project proposal to address risks. These adjustments may be identified and addressed:

- a. prior to funding allocation approval by JPACT and Metro Council, and/or incorporated as a condition of approval of project funding,
- b. prior to approval of programming project funding in the TIP, or
- c. during development of the inter-governmental agreement in preparation to issue Notice to Proceed with the project.

Metro and Kittelson have completed an initial assessment of the projects and are preparing questions to send back to the applicants for further information or clarification. Responses to these questions will be used in developing a final risk assessment report, scheduled to be completed in early October, prior to county coordinating committee priority identification processes.

Public Comment

A 30-day public comment period begins September 6, focusing on outreach to community and neighborhood organizations, county coordinating committees and other stakeholders. A joint public meeting of JPACT and Metro Council is planned in September to give decision-makers the opportunity to hear public testimony on project proposals. A summary of input received through the public comment period will be made available along with the Technical Evaluation and Risk Assessment reports to inform the final RFFA decision making process. The public comment website can be found at www.oregonmetro.gov/rffa.

Priority identification

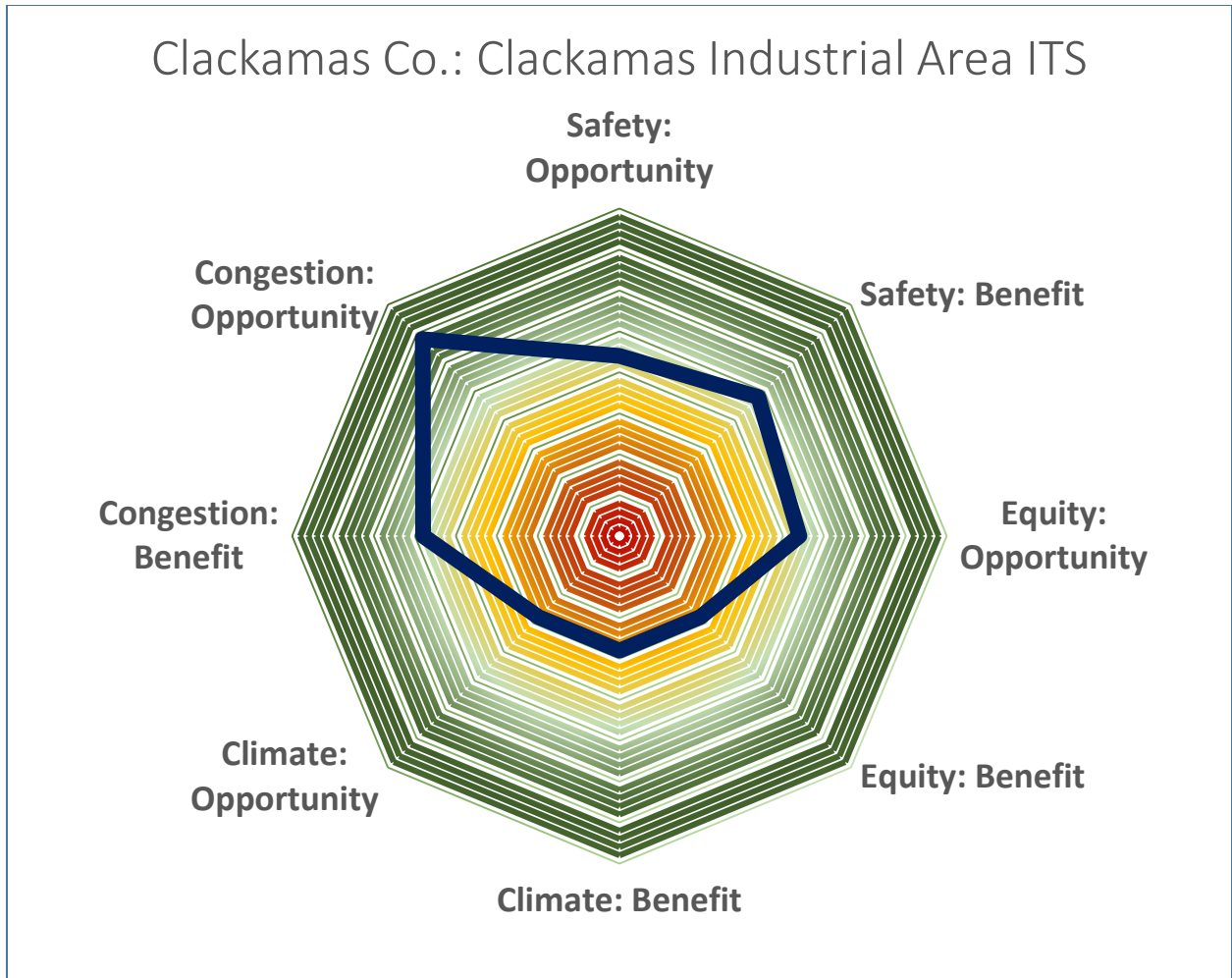
Each county coordinating committee and the City of Portland will have the opportunity to provide recommendations to decision-makers on which projects submitted from their jurisdictions best reflect their local priorities. Recommendations should be provided to TPAC and JPACT for the JPACT meeting on November 21, 2019.

2022-2024 RFFA Project Selection Timeline

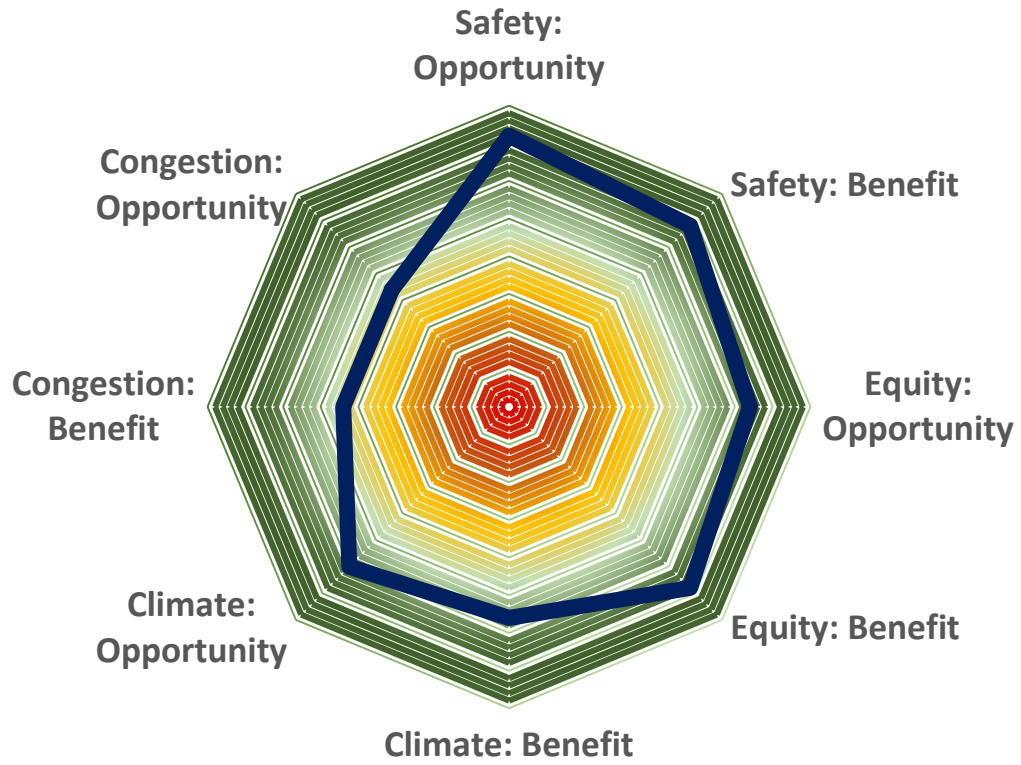
Technical analysis & public input	Project evaluation & risk assessment	June- August
	Public comment period	Sept. 6 – Oct. 7
	Council public hearing (with JPACT members invited)	September 26
Identifying county coordinating committee priorities	Report and discussion with TPAC/JPACT on evaluation, risk assessment, draft public comment report	TPAC: October 4 JPACT: October 17
	Final public comment report	October
	Coordinating committee discussion, identification of priorities	October, November
Developing and adopting the final approved 22-24 RFFA investment package	TPAC, JPACT discussion	TPAC: November 1 JPACT: November 21
	TPAC recommendation	December 6
	JPACT direction to Council on investment package	December 19
	Council action to adopt investment package	January 2020

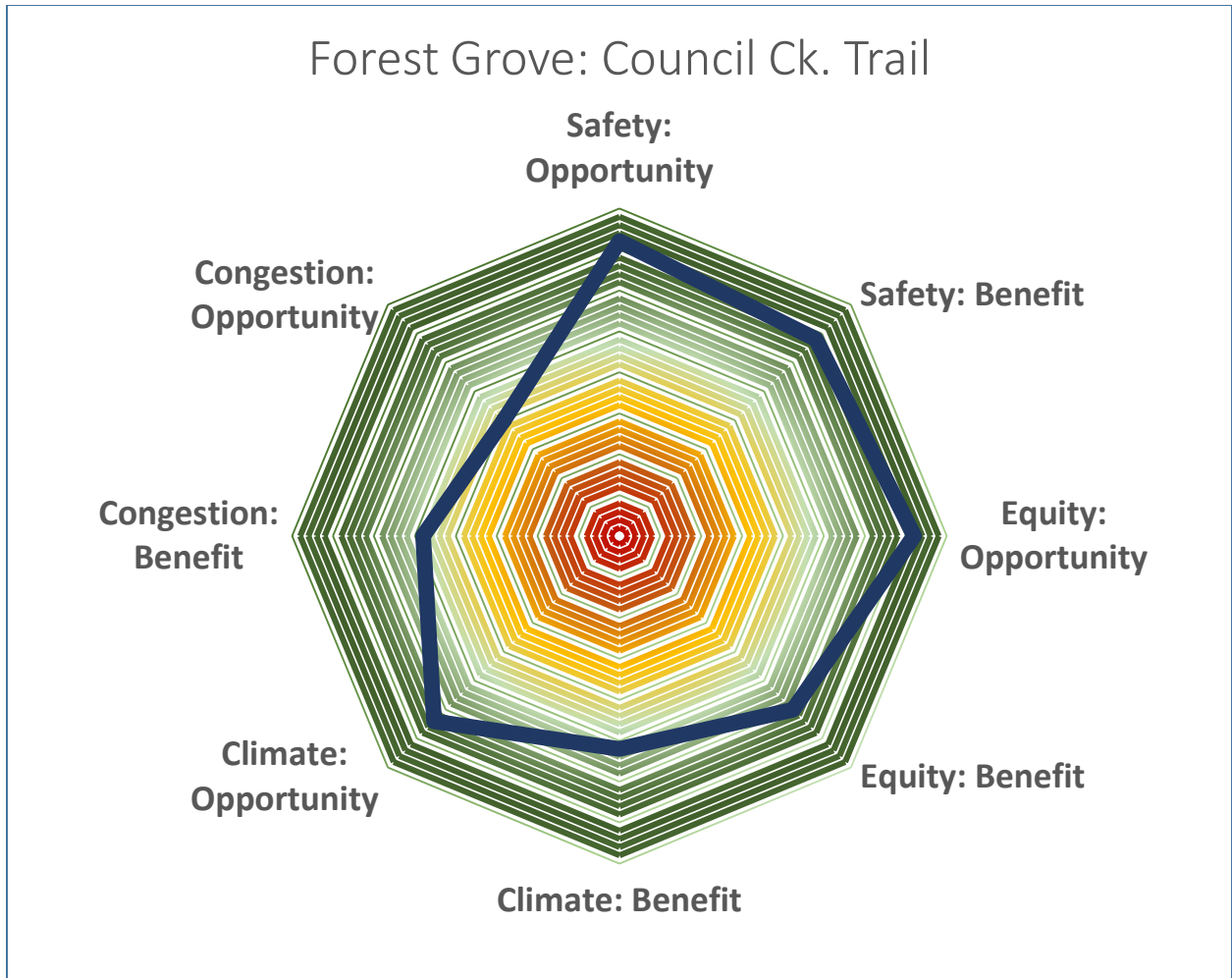
Step 2 RFFA project applications received

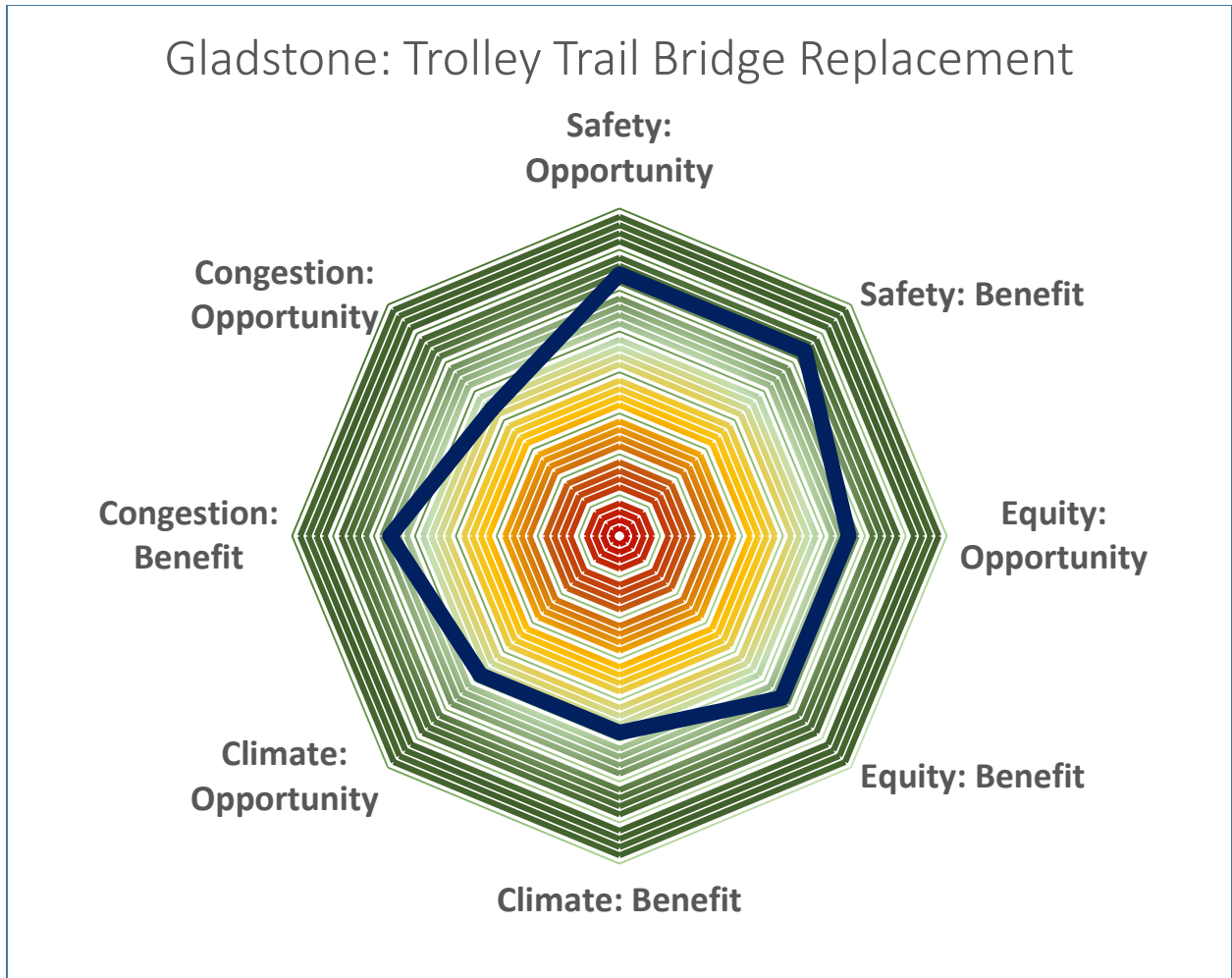
	<u>County</u>	<u>Applicant</u>	<u>Project name</u>	<u>RFFA request</u>	<u>Total project</u>	<u>Purpose</u>
Active Transportation & Complete Streets						
1	CL	Clackamas Co	Courtney Ave Bike/Ped Improvements	\$ 5,079,992	\$ 5,661,420	Construction
2	CL	Gladstone	Trolley Trail Bridge Replacement	\$ 1,228,800	\$ 1,375,800	Project Dev.
3	CL	Milwaukie	Monroe Greenway	\$ 3,860,788	\$ 10,182,688	Construction
4	CL	Oregon City	Hwy 99E Bike/Ped Improvements	\$ 673,000	\$ 753,000	Project Dev.
5	CL	West Linn	Hwy 43	\$ 6,468,000	\$ 9,240,000	Construction
6	PDX	Portland	Willamette Blvd AT Corridor	\$ 4,456,000	\$ 6,106,000	PD, Cons
7	PDX	Portland	MLK Blvd Safety & Access to Transit	\$ 4,123,000	\$ 4,723,000	PD, Cons
8	PDX	Portland	Central City in Motion: Belmont-Morrison	\$ 4,523,400	\$ 6,462,000	PD, Cons
9	PDX	Portland	Stark/Washington Corridor Improvements	\$ 5,332,000	\$ 6,532,000	PD, Cons
10	PDX	Portland	122nd Ave Corridor Improvements	\$ 4,543,700	\$ 6,491,000	PD, Cons
11	PDX	Portland	Springwater to 17th Trail	\$ 5,534,000	\$ 6,534,000	PD, Cons
12	PDX	Portland	Taylor's Ferry Transit Access & Safety	\$ 3,676,000	\$ 4,276,000	PD, Cons
13	MU	Gresham	Division St Complete Street	\$ 5,240,760	\$ 6,840,760	PD, Cons
14	WA	Forest Grove	Council Creek Trail	\$ 1,345,950	\$ 1,500,000	Project Dev.
15	WA	Tigard	Red Rock Creek Trail	\$ 314,055	\$ 350,000	Project Dev.
16	WA	Tigard	Bull Mountain Rd Complete St	\$ 4,486,500	\$ 5,000,000	Construction
17	WA	Washington Co	Aloha Safe Access to Transit	\$ 5,193,684	\$ 5,788,125	Construction
18	WA	Washington Co	Cornelius Pass Bike/Ped Bridge (US 26)	\$ 628,110	\$ 700,000	Project Dev.
Freight Mobility & Economic Development						
19	CL	Clackamas Co	Clackamas Industrial Area ITS	\$ 1,768,040	\$ 1,970,400	Construction
20	PDX	Portland	Cully/Columbia Freight Improvements	\$ 3,434,193	\$ 5,084,193	PD, Cons
21	WA	Sherwood	Blake St Design	\$ 785,137	\$ 875,000	Project Dev.
For consideration in both categories						
22	MU	Multnomah Co	Sandy Blvd: Gresham to 230th	\$ 1,275,985	\$ 1,422,025	Project Dev.
23	MU	Multnomah Co	223rd & Sandy to RR Undercrossing	\$ 3,862,190	\$ 4,304,234	PD, Cons
			Total RFFA requests:	\$ 77,833,284		
			Estimated Step 2 funding:	\$ 43,278,025		
			(difference):	\$ (34,555,259)		

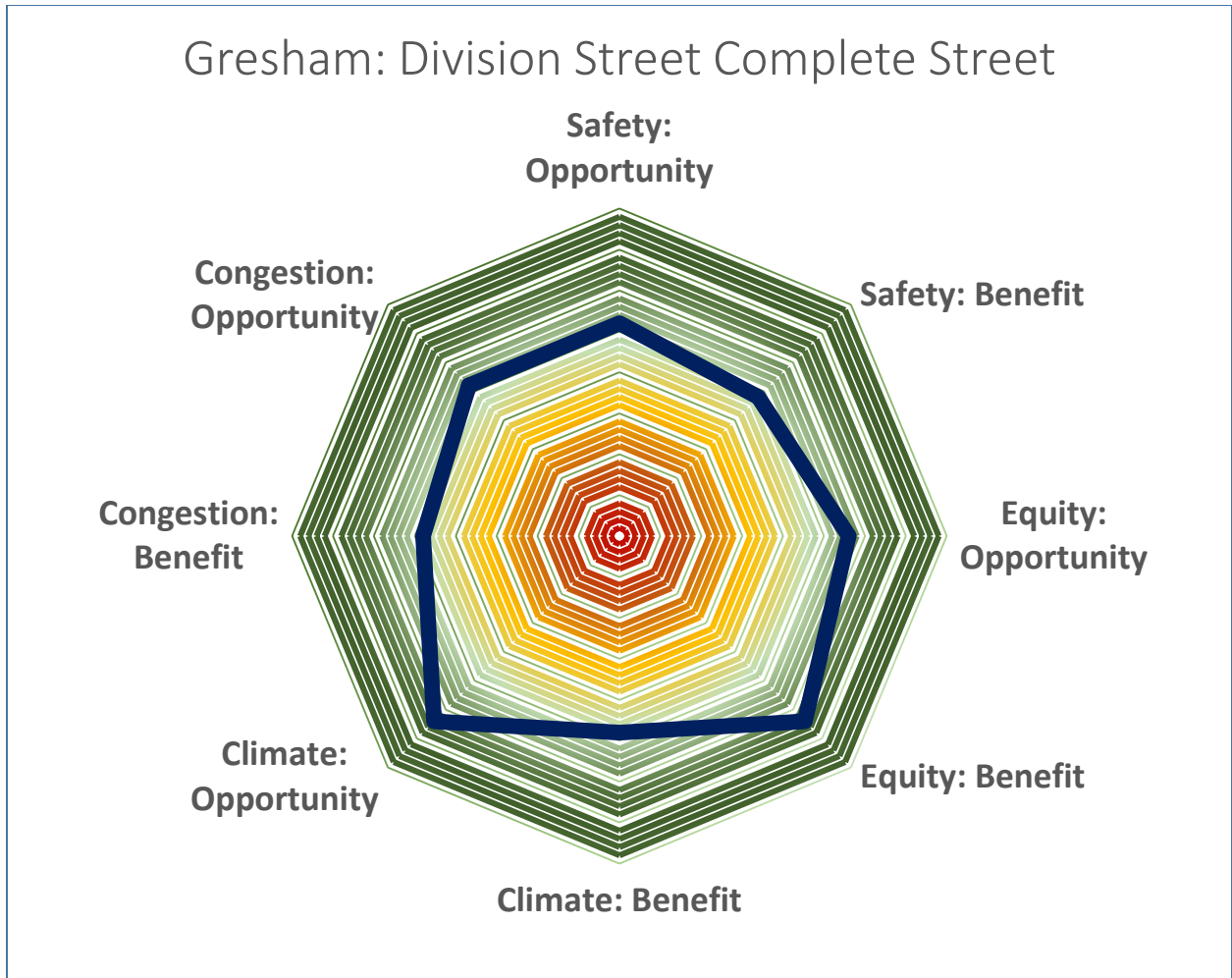


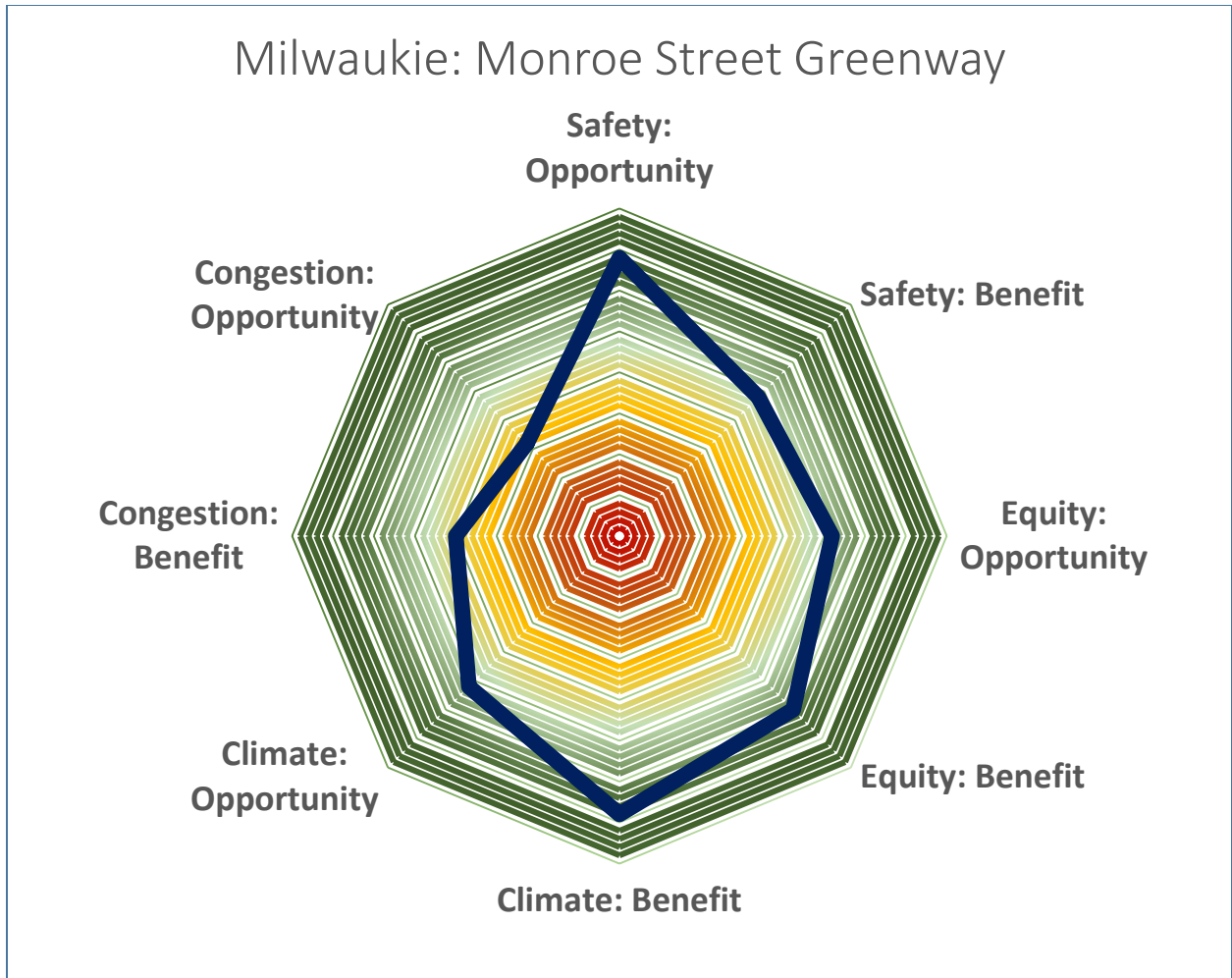
Clackamas Co: Courtney Ave. Bike/Ped Improvements



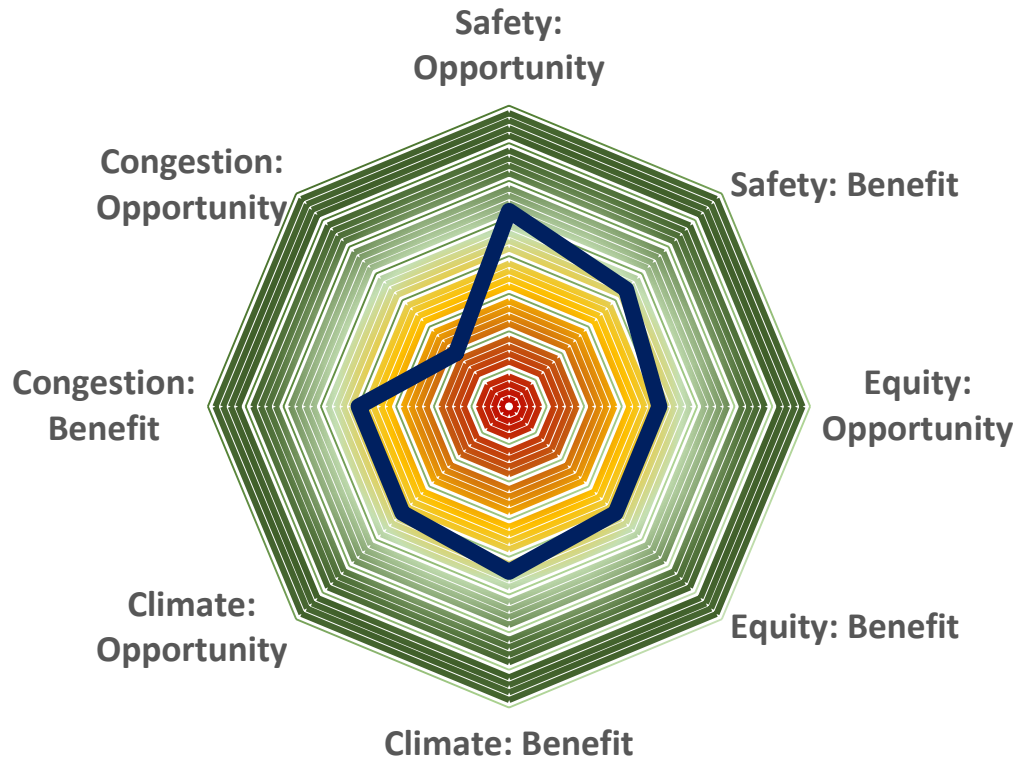




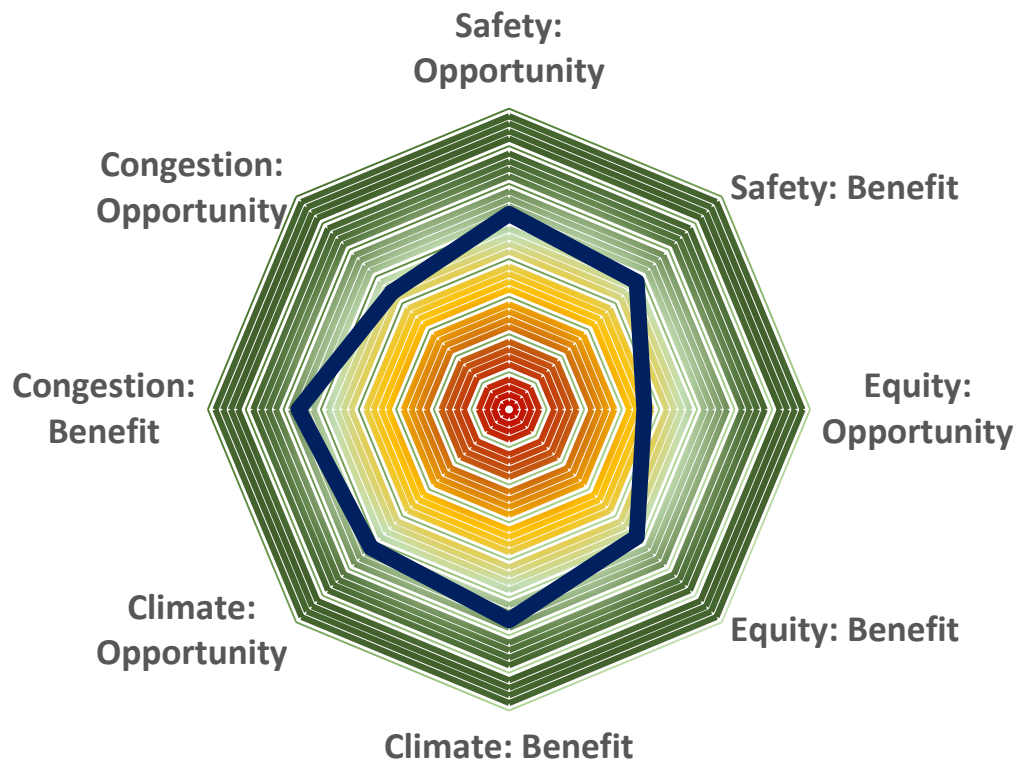


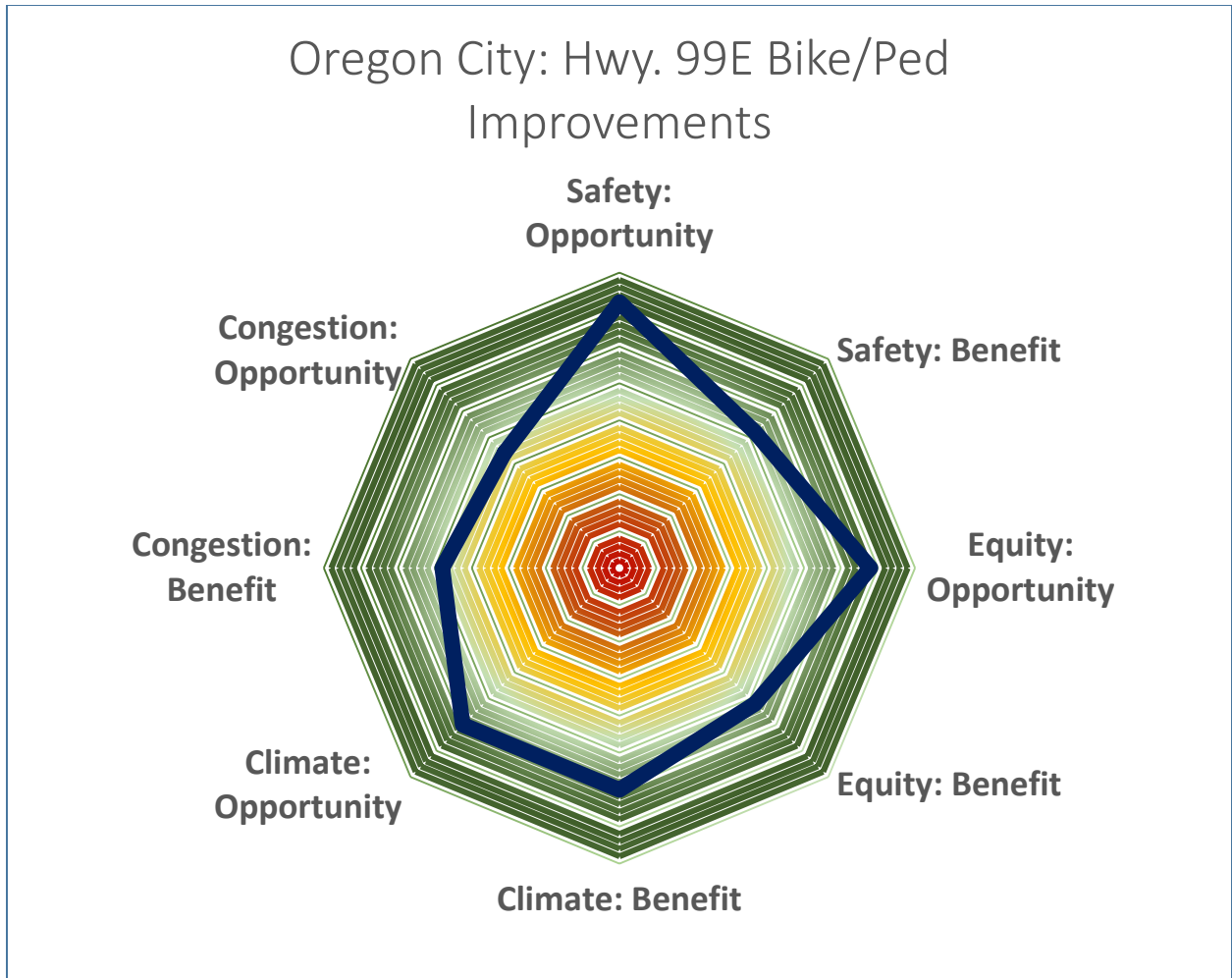


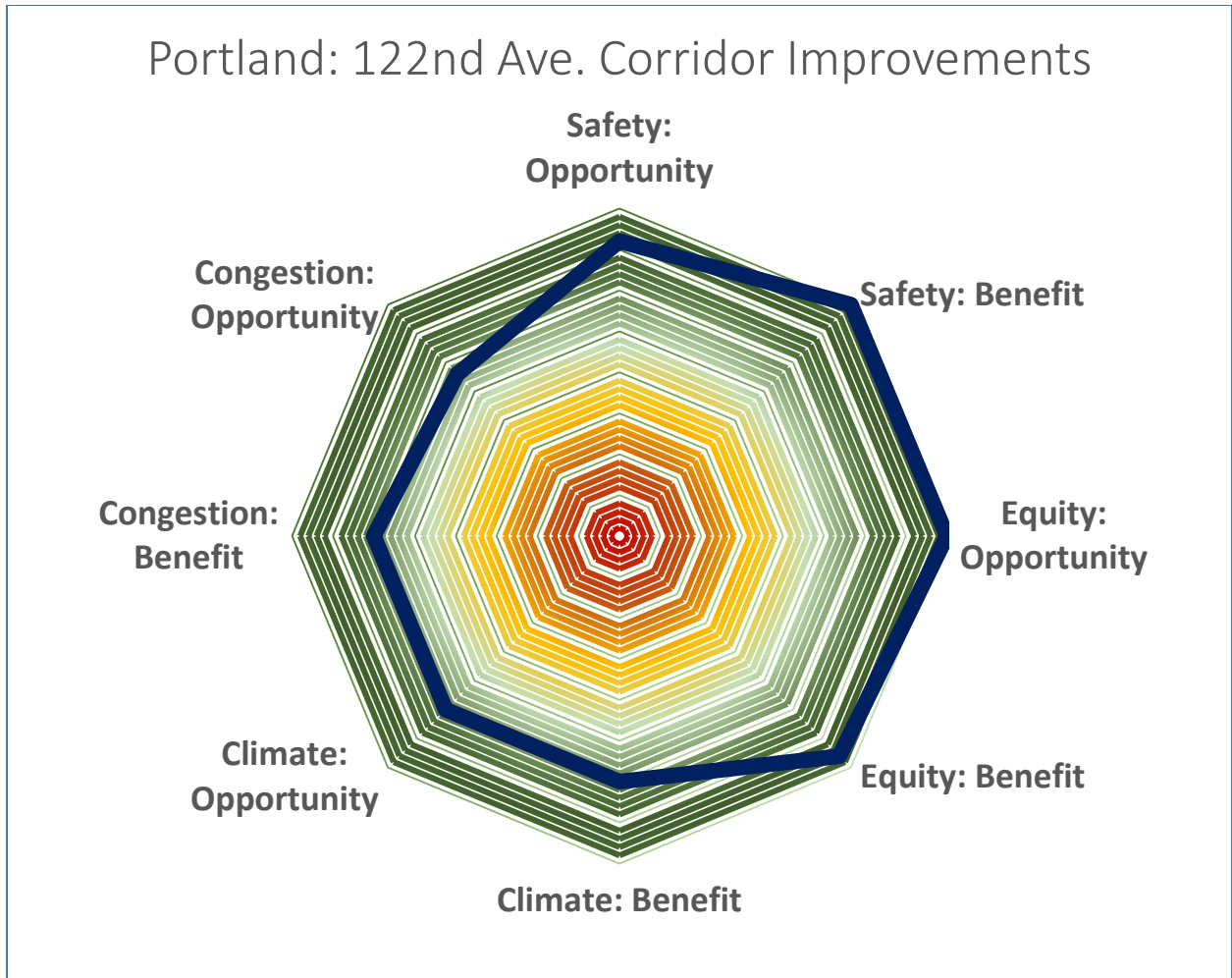
Multnomah Co.: 223rd Ave - Sandy Blvd. to RR underpass

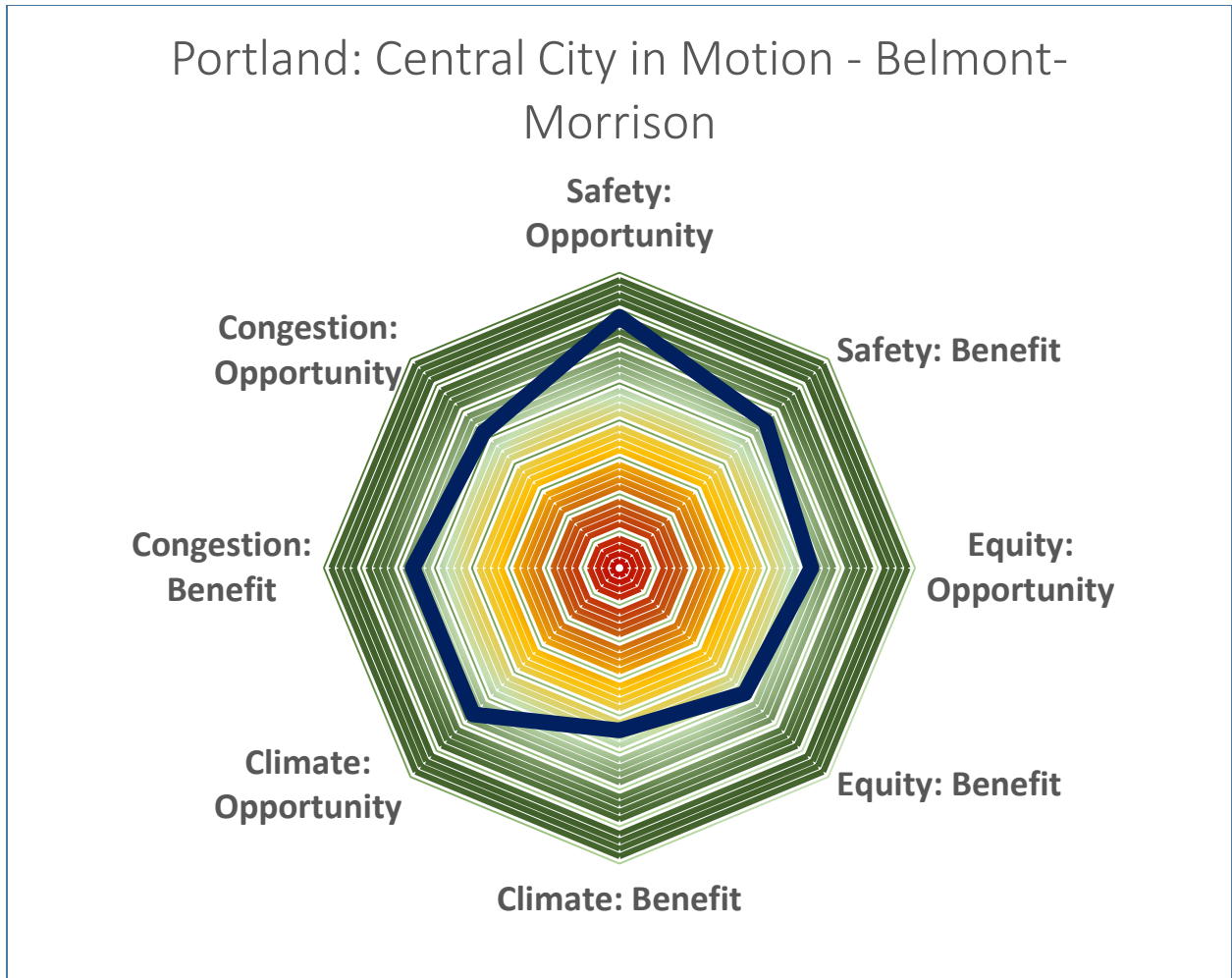


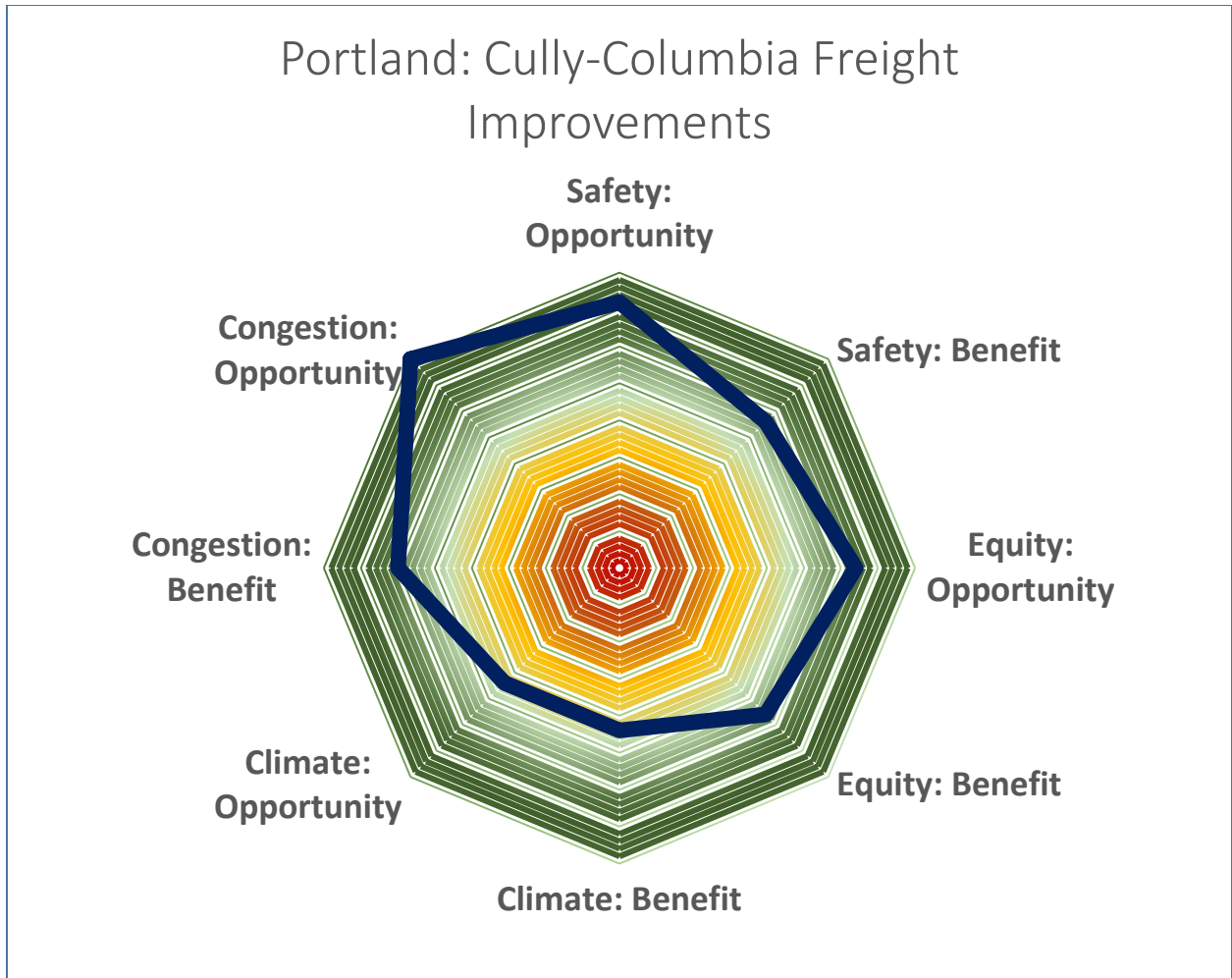
Multnomah Co.: Sandy Blvd. - Gresham to 230th Ave

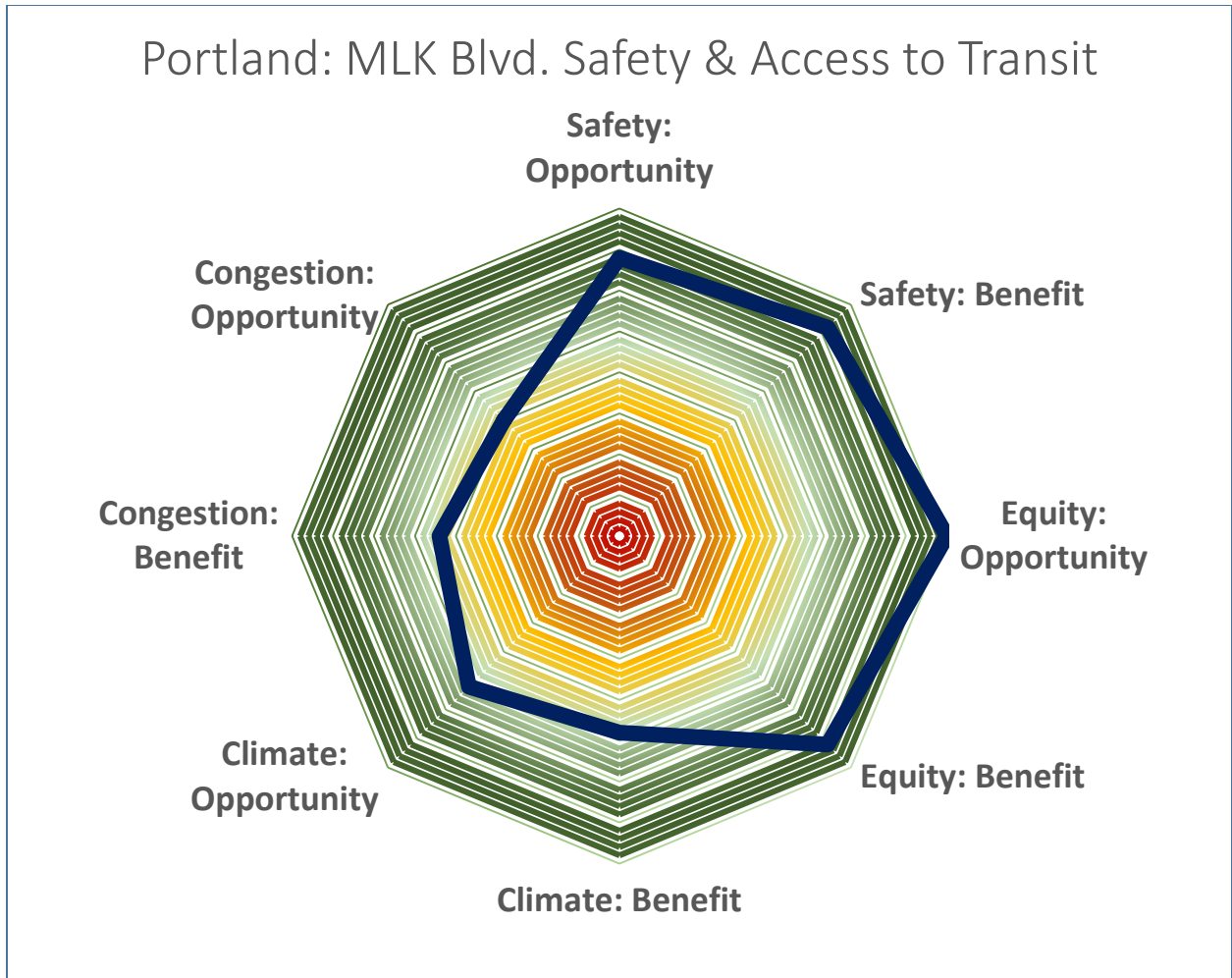


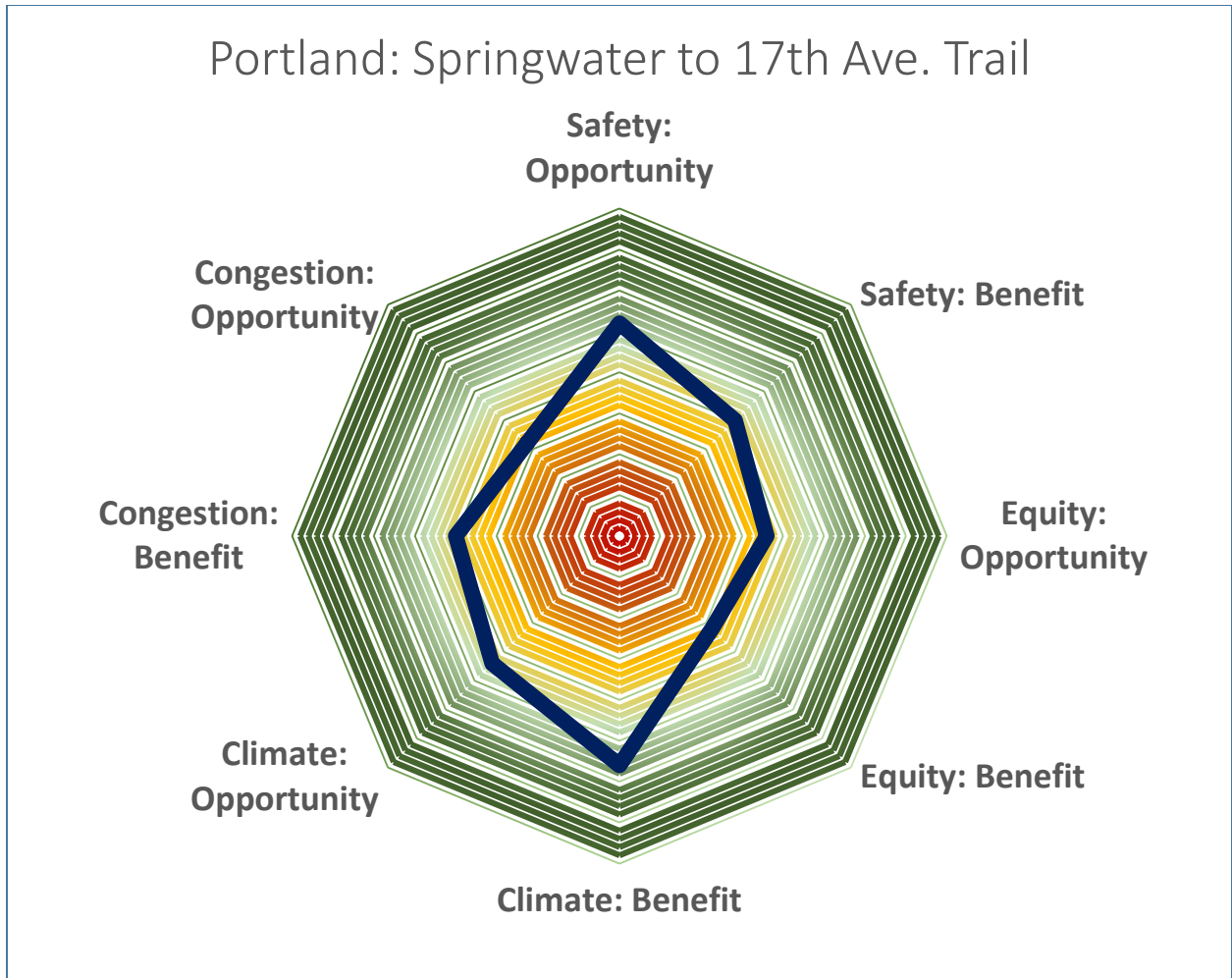


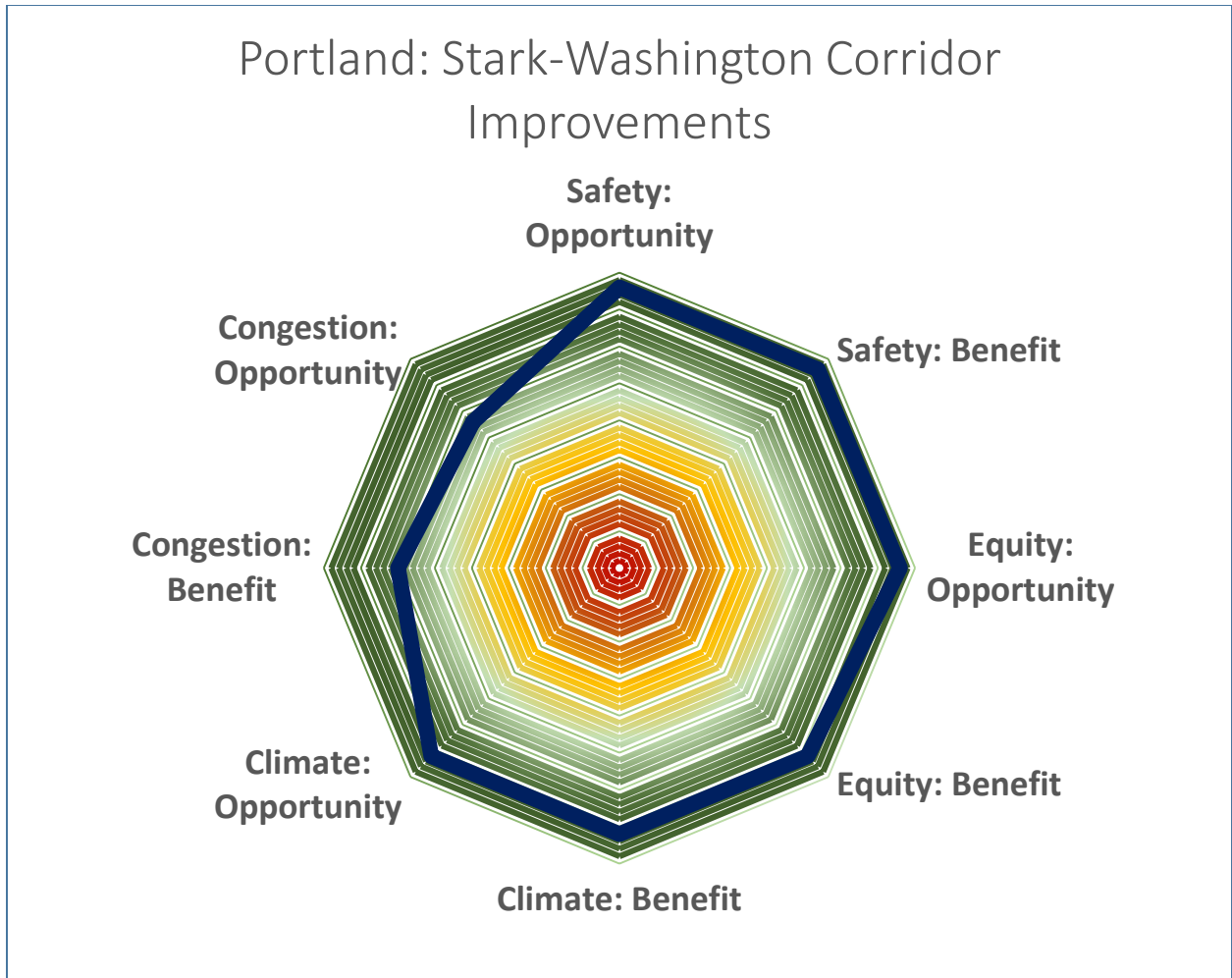


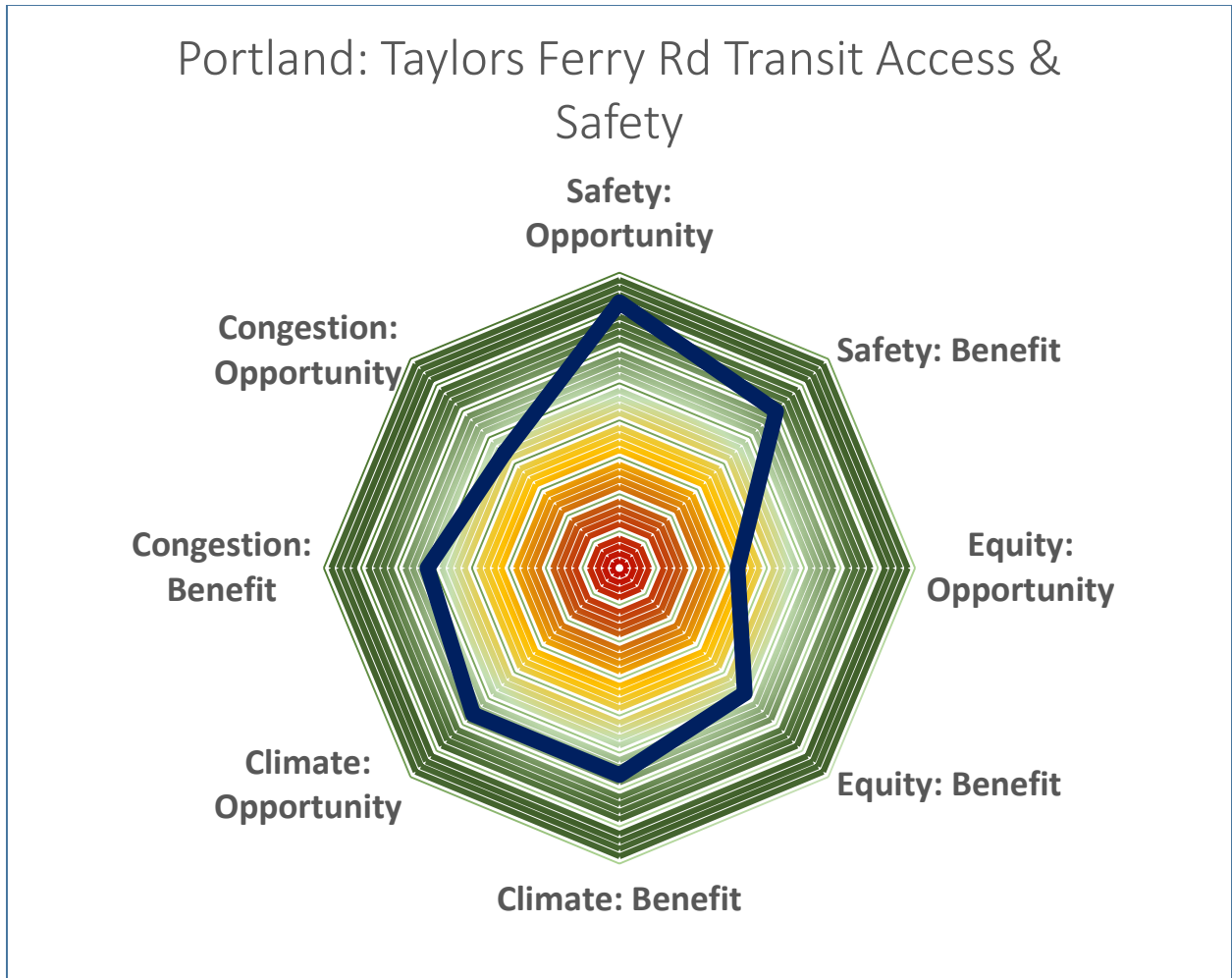


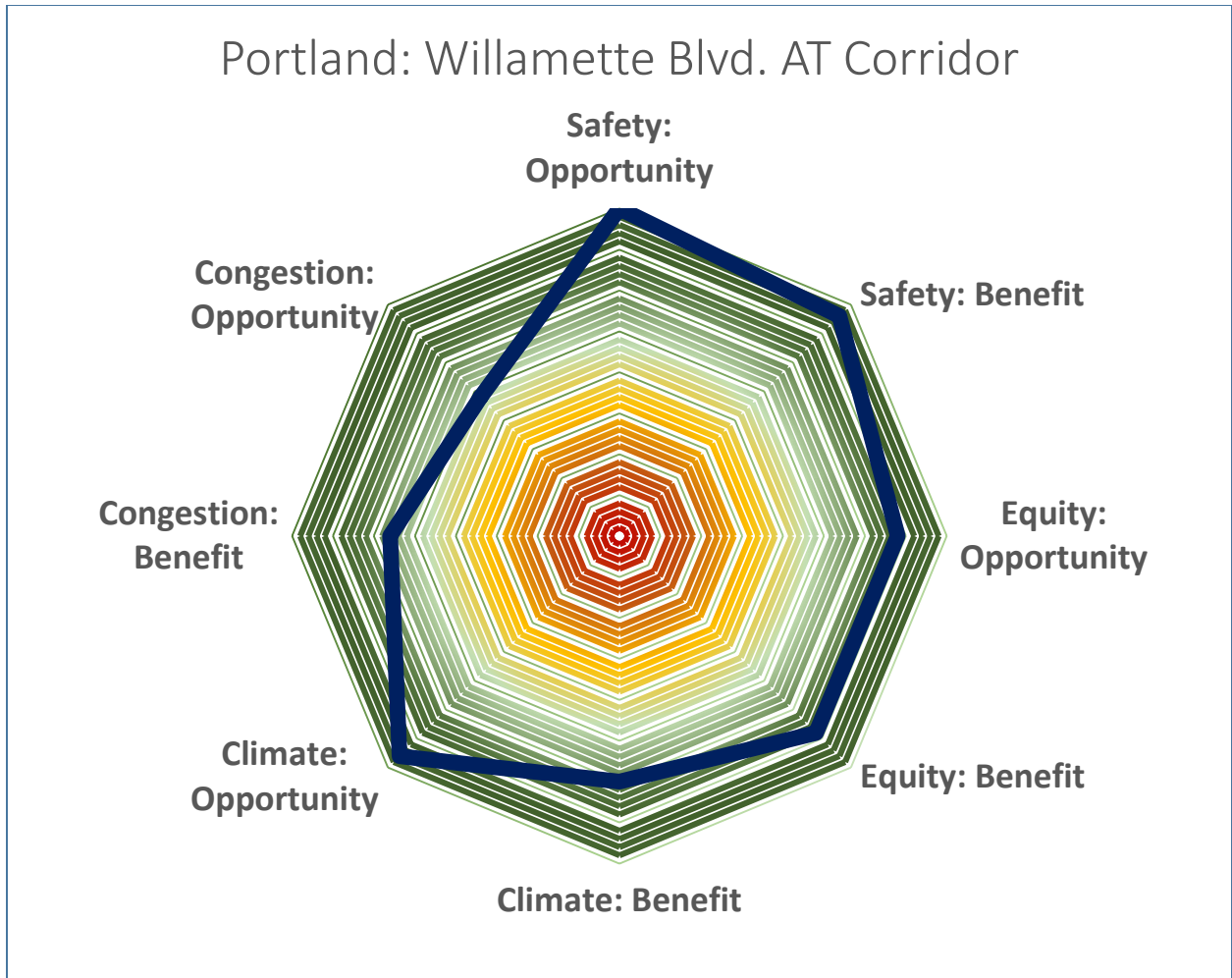




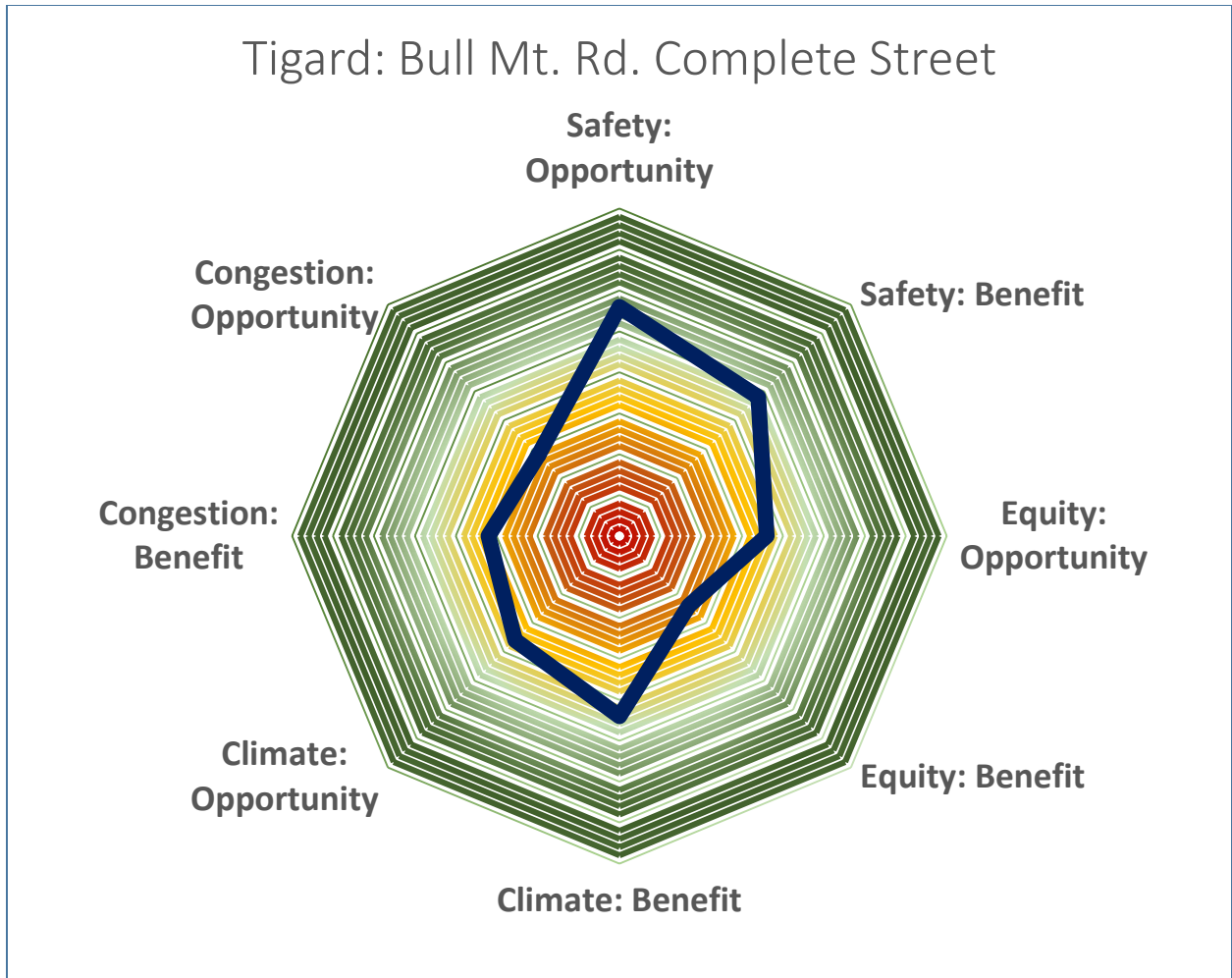


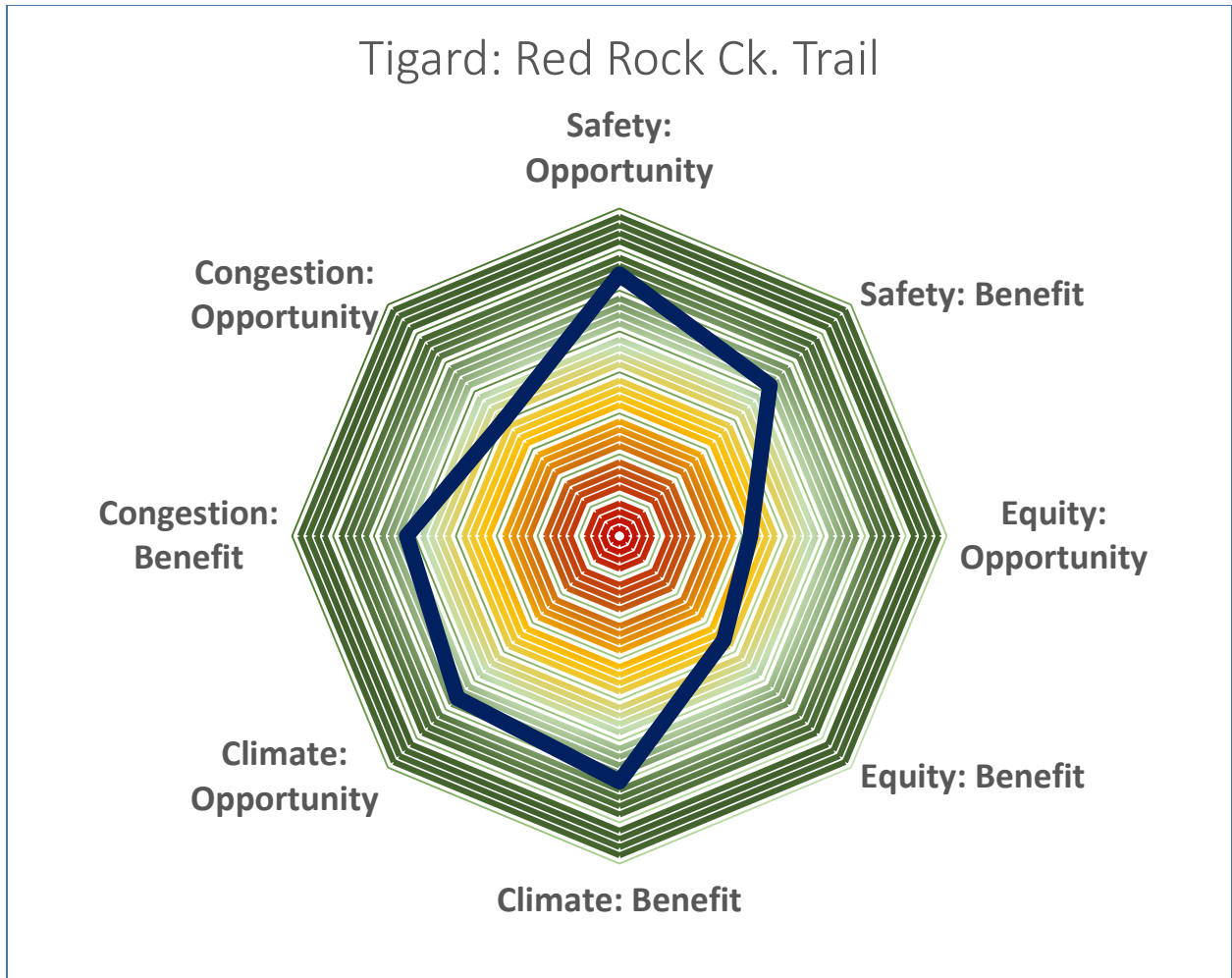


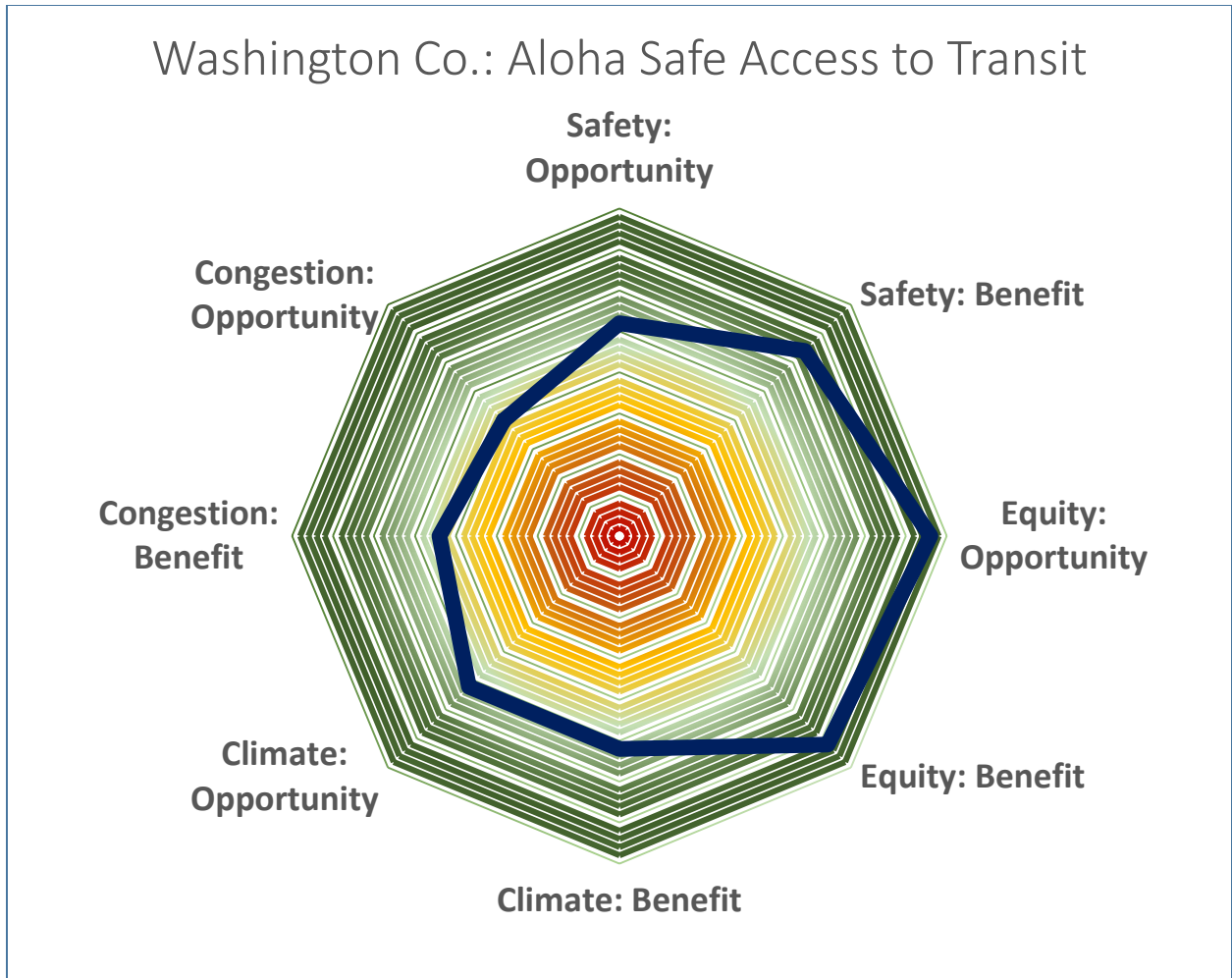




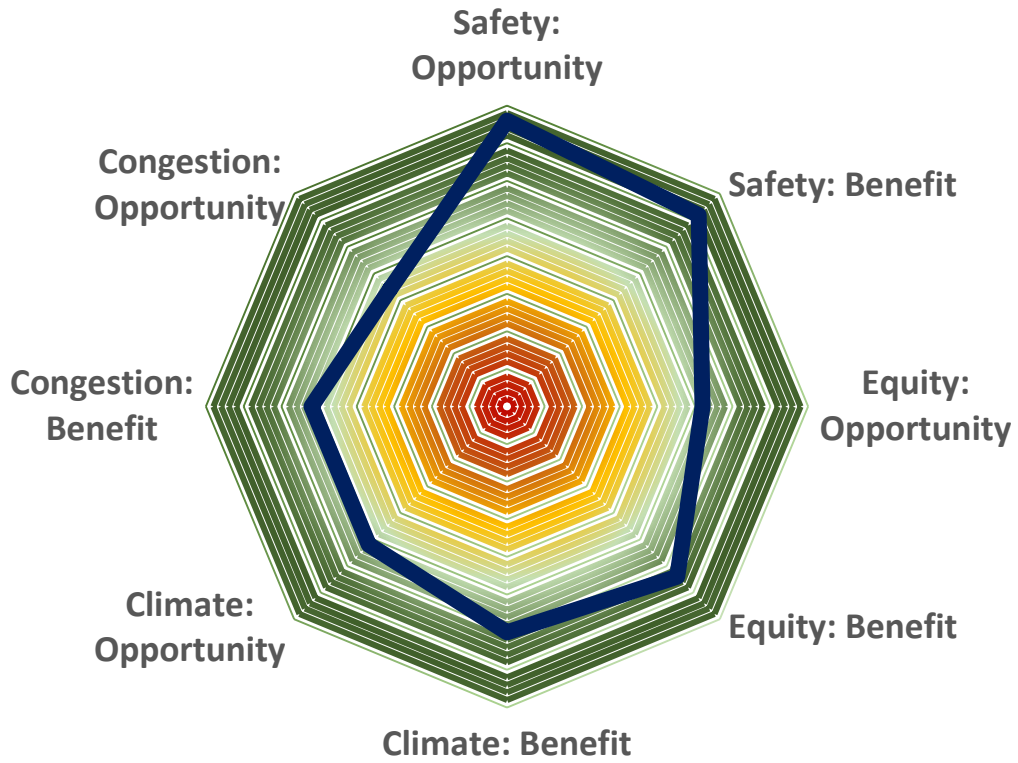








Washington Co.: Cornelius Pass Bike/Ped Bridge (US26)



West Linn: Hwy. 43 Multimodal Improvements - Mapleton Dr. to Barlow St.

