



Regional Travel Options 2019-22 Grant Application Handbook

Apply online

zoomgrants.com/zgf/Metro/2019-2022_RTO_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.

Stay in touch with news, stories and things to do.

oregonmetro.gov/news

Follow oregonmetro



Metro Council President

Lynn Peterson

Metro Councilors

Shirley Craddick, District 1

Christine Lewis, District 2

Craig Dirksen, District 3

Juan Carlos González, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700

TABLE OF CONTENTS

Metro Regional Travel Options Program	1
2018 RTO Strategy	1
Metro’s Strategic Plan to Advance Racial Equity, Diversity, and Inclusion	1
2018 Regional Transportation Plan	1
Metro’s Climate Smart Strategy.....	1
Regional SRTS Framework.....	2
2013-16 RTO Evaluation	2
2017 RTO Travel & Awareness Survey	2
Minimum Grant Requirements	2
Exclusions	3
Grant Categories	4
Core Partners – CLOSED until 2022	5
Emerging Partners – CLOSED until 2022	6
Marketing – CLOSED until Jan 2021	7
Sponsorships & Travel Options Assistance – OPEN	8
Infrastructure & Innovation – CLOSED until Jan 2021.....	9
Safe Routes to School – CLOSED until 2022	9
<i>Special Region-Wide Projects</i>	10
ZoomGrants Online Application	10
Important Dates	13
Application Tips	14
Research and Data.....	14
Planning for Measurement and Evaluation.....	15
Scoring	19
Brief Summary of Grant Cycle Requirements	21

Grant Agreement and Partnership Requirements	21
Invoicing	22
Reporting and Evaluation	22
Contact Information	23
Attachment A: Example Scope of Work	24
Attachment B: Example Budget Template	29
Attachment C: Multiple Account Evaluation Framework	30
Attachment D: RTO Strategy Travel Options Capability Index	32

METRO REGIONAL TRAVEL OPTIONS PROGRAM

The Regional Travel Options (RTO) program carries out regional transportation demand management (TDM) strategies to increase the use of travel options, reduce pollution, and improve mobility. Travel options include anything besides driving alone – carpooling, vanpooling, riding transit, bicycling, walking, and telecommuting. Metro makes grants through the RTO program to support partners’ work to educate, encourage, and provide information to people to increase their use of these options. RTO grant projects must advance the region’s goals, objectives, and priorities for transportation and land use. Specific guidance and direction for the RTO program related to these desired outcomes are available in the following documents available from the Metro website.

2018 RTO Strategy

The [2018 RTO Strategy](#) was developed in partnership with local governments, non-profits, and other program stakeholders, and adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council. The plan guides the RTO program and identifies four program goals.

Goal 1: Increase access to and use of travel options to reduce vehicle miles traveled, provide cleaner air and water, improve health and safety, and ensure people have choices for traveling around the region.

Goal 2: Reach existing and new participants more effectively by expanding the RTO program and working with new partners.

Goal 3: Encourage families to walk and bicycle to school safely by implementing a regional Safe Routes to School (SRTS) program.

Goal 4: Measure, evaluate, and communicate the RTO program’s impacts to continually improve the program.

Metro’s Strategic Plan to Advance Racial Equity, Diversity, and Inclusion

Guided by input from many regional partners and informed by research, Metro [has identified racial equity](#) as the approach to ensure that all people who live, work and recreate in the Portland region have the opportunity to share in and help define a thriving, livable and prosperous place.

2018 Regional Transportation Plan

The 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 adopted the [2018 RTP](#) at the end of 2018. The updated RTP features several Regional Strategies aimed at providing further guidance and direction for investment in a multi-modal system, including the 2018 RTO Strategy.

Metro’s Climate Smart Strategy

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.

Regional SRTS Framework

SRTS is a national effort to encourage students and families to walk and bicycle to school, improving transportation safety through targeted infrastructure improvements and enforcement, walking, and biking safety education, and encouragement programs. In June 2016, the Metro Council and JPACT approved \$1.5 million of [Regional Flexible Funds](#) to be spent on SRTS initiatives. The information in the [Regional SRTS Framework](#) is the first step in helping Metro develop regional policies and strategies for establishing and supporting SRTS initiatives across the region.

2013-16 RTO Evaluation

This evaluation measured the benefits and outcomes of RTO investments, producing reports on the topics of Commute Options, Active & Healthy Travel Options, Traveler Information & Travel Options Services, and Neighborhood and Community Travel Options.

2017 RTO Travel & Awareness Survey

The RTO Travel and Awareness Survey is an important measurement tool and is conducted every few years to provide insight into current regional trends in transportation choices, examine the willingness of drivers to start using sustainable travel modes, and focus RTO program efforts to maximize return on investment.

The evaluation and survey reports are available from oregonmetro.gov/travel-options-research



Applicants should be familiar with these documents to ensure the proposed project or program is aligned with Metro's regional goals and the objectives of the RTO program, and use the documents to help write a strong grant application.

MINIMUM GRANT REQUIREMENTS

An estimated total of \$6.6 million in Federal Transit Administration (FTA) funding is available from the RTO program to support projects carried out by regional partners from July 2019 through June 2022. Because funding comes from federal sources, there are specific requirements that applicants must meet to be eligible to receive funding. Government agencies, colleges, universities, public school districts or schools (K-12), and non-profit organizations are eligible to apply for an RTO grant.

Private, for-profit organizations are not eligible to directly receive FTA funding.

RTO funds can pay up to 89.73% of project or program costs. Cash match (non-federal/non-Metro) or in-kind local match (donated product or volunteer time) is required. The match must provide a

minimum of 10.27% of the project or program costs. Funds from other Metro grants or federal sources cannot be applied towards the minimum match requirement.

An exception to this requirement is that Sponsorship and Marketing recipients are not required to provide match. **RTO covers the match for Sponsorships and Marketing grants only.**



The minimum required 10.27% match is calculated by dividing the grant amount requested by 89.73% and then subtracting the grant amount requested. For example: \$250,000 grant amount requested / .8973 = \$278,614 - \$250,000 = \$28,614 minimum required match funds. You may also use the grant calculator below by double-clicking the box.

Federal Funds Match Calculator (by project amt.)

	Unrounded	
Enter total project amt.	\$ 10,000.00	\$ 10,000.00
Match ratio	89.73%	89.73%
Federal portion	\$ 8,973.00	\$ 8,973.00
Local portion	\$ 1,027.00	\$ 1,027.00

Federal Funds Match Calculator (by federal amt.)

	Unrounded	
Enter Federal amt.	\$ 10,000.00	\$ 10,000.00
Match ratio	89.73%	89.73%
Local portion	\$ 1,144.00	\$ 1,144.54
Total Project amt.	\$ 11,144.00	\$ 11,144.54

Enter amount in green box
Adjust match ratio as needed in pink box (usually 89.73%)

During the grant cycle, grantees must:

- Deliver projects or programs within the agreed-upon scope, timeline, and budget
- Provide a minimum match of 10.27% of the total project amount
- Submit invoices with supporting documentation each quarter
- Submit progress reports each quarter using consistent reporting methods
- Submit a separate final report at the end of the grant that summarizes the grant activity, results, and lessons learned

Exclusions

Regional Travel Options grant funds cannot be used for any of the following:

- Projects or programs held outside the Metro boundary
- Materials or costs not tied to the scope of work
- Costs incurred in preparing this or other grant applications
- General organizational support, annual appeals, or fundraisers
- Incentives/gifts for membership or contribution to an organization
- Direct grants or loans that primarily benefit specific individuals or businesses
- Meals, alcohol, or coffee for meetings
- Infrastructure projects that build bicycle, pedestrian or transit infrastructure such as sidewalks, crosswalks, bicycle lanes, signals, warning signage, transit stop enhancements, etc.
- The purchase of bicycles, scooters, etc. for either use in a shared system, or as prizes/awards (*the single exception to this is the purchase of bicycles for use as training tools for SRTS programs*)
- 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

Further criteria for each funding category is available in the next section. For more information or individual assistance with the minimum grant requirements, contact RTO staff (see the Contact Information section).

GRANT CATEGORIES

The RTO grant program has seen several changes in this cycle, aimed at increasing partnerships and collaboration, providing flexibility, achieving greater performance, and establishing a new regional SRTS program. Specifically, all RTO projects and programs must:

- Increase access to, and use of, travel options (biking, walking, public transit, telecommuting, carpool, and vanpool)
- Occur within the [Portland Metropolitan Planning Area](#)
- Align with the 2018 RTO Strategy and the 2018 Regional Transportation Plan
- Advance Metro's regional goals

Applications for RTO funding are through the grant categories below. A table outlining funding availability and due dates by grant category can be found in the Important Dates section.



See the [RTO Grants Dashboard](https://oregonmetro.gov/tools-partners/grants-and-resources/travel-options-grants) at oregonmetro.gov/tools-partners/grants-and-resources/travel-options-grants for current funding availability.

Core Partners – CLOSED until 2022

Three-year grants for long-standing partners with fully developed RTO programs.

Core Partners are defined as organizations that have a long-standing history of delivering travel options programs, been prior recipients of multiple RTO funding awards, and maintained an organizational commitment to continuing travel options work. Core Partners are at a level 4 or 5 on the RTO Strategy's Travel Options Capability Index and **have been previously selected for the initial 2019-2022 grant cycle by an assessment conducted by RTO staff.** Any organizations who wish to be considered for Core Partner funding in future cycles are **encouraged to apply for Emerging Partner funding first.** To be eligible for funding, Core Partners are, at a minimum, required to:

- Work with Metro staff to develop a three-year work plan, performance measures, goals, and budget for RTO funds
- Use Metro and RTO data to help inform work plan objectives and tasks
- Thoughtfully consider and incorporate equity into the program
- Report on program progress and outcomes consistently and every quarter
- Submit a final grant report that summarizes results, goals or milestones reached, and lessons learned

Funding: Estimated \$4,050,000 available. Individual Core Partner grant awards have been previously discussed and agreed upon by Metro and partners, detailed in the table below.

Core Partner	Three-Year Grant Funds
TriMet	\$1,200,000
City of Portland	\$900,000
City of Wilsonville SMART	\$300,000
Westside Transportation Alliance	\$300,000
Ride Connection	\$300,000
Clackamas Community College	\$150,000
Portland Community College	\$150,000
The Street Trust	\$150,000
Oregon Walks	\$150,000
Community Cycling Center	\$150,000
Go Lloyd	\$150,000
Explore Washington Park	\$150,000
TOTAL	\$4,050,000

Core Partners must still complete a grant application to receive funding. The Core Partner application process opens on January 1st, 2019. Complete applications are due by March 31st, 2019. Grants begin July 1st, 2019 and end June 30th, 2022.

Emerging Partners – CLOSED until 2022

Grants for partners wishing to expand their travel options work towards the Core Partner level.

Emerging Partners are defined as organizations that have conducted travel options work in a limited capacity previously and wish to expand their efforts into full-time, ongoing work. This funding is intended to encourage and assist partners with advancing towards Core Partner status. Emerging Partner funding is for planning and program development activities only. Upon successful completion of the grant, Emerging Partners will be considered for Core Partner funding in the next grant cycle.

Applicants seeking Emerging Partners funding **should be at a level 2 or 3 on the RTO Strategy's Travel Options Capability Index** (Attachment D) as determined through an assessment conducted by RTO staff. Proposed projects in this category should detail the planning and organizational activities necessary to demonstrate how the organization intends to move up to level 4 on the Capability Index.

Planning – A primary purpose of this funding category is to help applicants in developing a detailed local Travel Options plan, adding a detailed travel options section to a local plan, or completing a planning document that defines and establishes a local commitment to conducting travel options work and builds upon planning guidance found in a transportation system plan or similar. A Travel Options plan should include, at a minimum:

- the specific group of people the applicant intends to serve (e.g., an Equity Focus Area, neighborhood or community; a business or industrial area, a 2040 Center, a city, or other demographic or geometric definition)
- details of the specific transportation issues facing the identified area or group
- the organization's goals and objectives, and a strategic set of actions the organization is committing to take towards addressing those issues
- the organizational changes related to oversight, staffing and funding required for the organization to effectively carry out the actions identified in the plan

This level of planning and organizational development is required of applicants who wish to advance their Travel Options work to the level expected of a Core Partner.

Funding: \$15,000 – \$150,000 maximum. Estimated \$450,000 available.

The Emerging Partner application process opens on January 1st, 2019. Emerging Partner grant applications are reviewed and scored starting on April 1st, 2019. If funds remain after awarding grants to successful applicants who have applied by March 31, 2019, completed applications are accepted and evaluated in the order received until funds run out or until March 31st, 2020, whichever comes first. Emerging Partner grants are awarded in a 2-3 year grant agreement,

beginning as early as July 1st, 2019 and must end by June 30th, 2022. Metro and grantee will determine grant start and expiry dates in the grant agreement.

Marketing – CLOSED until Jan 2021

Funds to develop and produce marketing campaigns, materials, or initiatives to support community outreach.

For Marketing projects, Metro provides funding and staffing support to assist partners in project managing the development, design, and production of marketing campaigns and/or materials. Selected partners have access to Metro's on-call marketing, graphic design, production, and translation vendors to create materials needed for community outreach efforts and work closely with Metro to develop outreach targets, messaging, and strategy. Some examples of how this funding can be utilized by partners include:

- Outreach materials – creating materials targeted towards underserved groups, such as non-English speakers
- Program expansion – testing new approaches, messages or creating materials to expand an existing program, such as community outreach at local events or a suite of online content
- Community-specific campaigns – such as an awareness campaign about new infrastructure or transit options, or creating workplace travel options messaging and materials to encourage more transit and active transportation commuting
- Translation and interpretation services – for use in a culturally-specific outreach program

Funding: Up to \$50,000* maximum. Estimated \$240,000 available.



Awards are in the form of payments to Metro's contracted vendors in exchange for services provided for the grantee. Metro handles payment of vendors on the grantee's behalf. No match is required for Marketing grants. Marketing applicants submit a proposed scope of work and budget on the initial project or program idea, to be refined and finalized in collaboration with Metro and the contractor. Selected Marketing partners enter into a partnership agreement with Metro rather than a grant agreement.

The Marketing application process re-opens on January 1st, 2020. Once a Letter of Interest has been submitted for a Marketing grant, RTO staff will be in touch to discuss the proposed project or program. Projects begin as early as July 1st, 2020 and must end by June 30th, 2022. Marketing grant applications are competitive and are accepted, reviewed, and scored on an annual schedule.

~~1st Round: Accepting applications until March 31st, 2019 for projects starting Jul 1st, 2019 – Jun 30th, 2020. Up to \$80,000 available.~~

~~2nd Round: Accepting applications until March 1st, 2020 for projects starting Jul 1st, 2020 – Jun 30th, 2021. \$80,000 available.~~

3rd Round: Accepting applications until March 1st, 2021 for projects starting Jul 1st, 2021 or later and ending by June 30th, 2022. Additional \$80,000 available.

Sponsorships & Travel Options Assistance – OPEN

Small awards under \$5,000 intended for small purchases to support transportation outreach efforts or event production. No match is required for Sponsorships & Travel Options Assistance.

The following are examples of eligible activities for this funding category. If you are interested in funding for items or projects that are not listed below, please submit a Letter of Interest (instructions on page 15) explaining your project and include any questions. An RTO Staff member will determine if your request is eligible for this grant category and get back to you with more information.

Some eligible activities in this funding category are:

- Maps, educational videos or materials, or supplies for transportation outreach or events
- Translation of transportation materials
- Transportation safety items, such as lights, helmets, bike locks, face masks, or hand sanitizer
- Supportive infrastructure to enhance active transportation, such as wayfinding signage, bike fix-it stations, or bike parking
- Bike repair services or support
- TDM program or challenge incentives, such as gift card incentives or transit incentives for essential workers
 - Excludes vehicle incentives such as bikes or scooters, and Safe Routes incentives
- Training people on travel options, which includes transit, biking, walking, telecommuting, e-scooters, carpooling, and vanpooling

Important Note: Safe Routes to School incentives are not eligible for Sponsorship funds at this time. If you are interested in incentives for a Safe Routes to School programs, contact Noel Mickelberry, Metro’s Safe Routes to School Program Coordinator at noel.mickelberry@oregonmetro.gov

For projects over \$5,000, consider applying for an Infrastructure & Innovation grant. Funding: Up to \$5,000 maximum. Estimated \$154,500 available.

~~\$51,500 available from July 1st, 2019 – June 30th, 2020. Approximately half of the funds available awarded Jul 1st – Dec 31st, 2019, and remaining awarded Jan 1st – Jun 30th, 2020.~~

\$51,500 available from July 1st, 2020 – June 30th, 2021. All funds are available at once.

\$51,500 available from July 1st, 2021 – June 30th, 2022. Approximately half of the funds available awarded Jul 1st – Dec 31st, 2021, and remaining awarded Jan 1st – Jun 30th, 2022.

Applications can be submitted at any time. Sponsorship applications are scored in the order received until all funds for the fiscal year are awarded.

Infrastructure & Innovation – CLOSED until Jan 2021

Grants for installing supportive infrastructure needed to help people use active transportation modes, and grants to test how new techniques or emerging technologies can improve equitable, shared, and active transportation options.

Projects should encourage or assist people with using non-single occupancy vehicle modes. Innovative projects should focus on the widespread deployment of new and helpful technologies rather than the development of new technologies. Eligible activities in this funding category are including, but not limited to, the following:

- Supportive infrastructure projects that improve the user experience or remove barriers related to travel options use, such as bicycle parking, repair or water refill stations, sharrows, or various types of wayfinding
- New approaches that help people make first/last-leg connections to transit, encourage more efficient employee commute management, support community-centered shared mobility projects, or provide new ways for people to share rides or new alternatives to driving
- Innovative approaches to reaching communities of color, low-income households, and other historically-marginalized communities with travel options marketing and information
- Public demonstration projects or events, such as Better Block or Open Streets

Funding: \$3,500 – \$200,000 maximum. Estimated \$1,050,000 available.

Approximately \$350,000 available each fiscal year, starting July 1st, 2019, 2020, and 2021.

Applications for Infrastructure & Innovation funds open January 1st, 2019. Complete applications are due annually **by March 31st, 2019, 2020, and 2021**. See the [RTO Grants Dashboard](#) at oregonmetro.gov/tools-partners/grants-and-resources/travel-options-grants for current funding availability. Grant agreements are **one year, with for the option to submit subsequent applications for additional funding to conduct a second phase once a successful project or program is complete**. Grants begin as early as July 1st, 2019 and must end by June 30th, 2022.

**This funding opportunity is separate from Metro's Partnerships and Innovative Learning Opportunities in Transportation (PILOT) program run by Eliot Rose. For more information in the PILOT funding opportunity, visit [the PILOT webpage for more information](#).*

Safe Routes to School – CLOSED until 2022

Grants to support existing and new efforts in the region's schools aimed at educating children to walk, bike, or roll safely to school.

RTO SRTS funds are available as three-year grants and are prioritized to support travel options work in [Title 1 or equivalent schools](#) or schools with high impact scores identified in the [Regional](#)

SRTS Framework. Applications should indicate if these schools are included in the proposed project or program. Eligible activities in this funding category are:

- Direct funding to school districts, jurisdictions or non-profit partners which supports community-based activities that connect youth to education and encouragement opportunities related to school travel
- Staff time and resources needed to conduct education and encouragement activities
- Innovative or early-stage concepts such as new technologies, new partners, or project ideas with a high potential equity impact technologies for shifting school commute modes

Funding: Estimated \$900,000 available. Minimum and maximum grant award amounts are not yet determined, pending further outreach with regional SRTS partners and ODOT to determine how best to coordinate and leverage all available sources of funding.

The Safe Routes to School application process opens on January 1st, 2019. Complete applications are due by March 31st, 2019. Grants begin July 1st, 2019 and end June 30th, 2022.

Special Region-Wide Projects

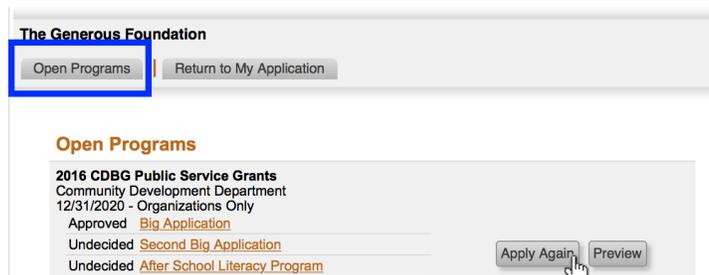
This funding category is reserved in ZoomGrants for investments administered through the RTO program. Unless directed otherwise, no applications are accepted through this category.

ZOOMGRANTS ONLINE APPLICATION

The application for all RTO grants is available via the online platform ZoomGrants. All applications must be submitted using ZoomGrants. If applicants wish to apply for more than one funding category, an additional application is required for each category. Applicants may submit as many applications to any category they wish. If an applicant receives grant funds, grantees will use ZoomGrants throughout the grant cycle to submit reports and invoices and receive grant communications.

To get started, follow the links below:

- Create or update an existing [ZoomGrants account](#)
- Preview or [start the application](#)
- If you have an RTO application already and would like to start another, [Click Open Programs and Apply Again](#). *If the Open Programs button is not shown, the account being used is likely a collaborator account, see the ZoomGrants FAQ.*



- Submit a Letter of Interest to open the full application

The Letter of Interest is a new application feature, now included based on partner feedback during the RTO Strategy update process. The purpose of the Letter of Interest is for applicants to provide an initial overview of the proposed project or program, ask questions, and receive RTO staff feedback before submitting a full application. Once submitted by the applicant, RTO staff review the Letter of Interest to confirm initial eligibility, ensure the applicant is applying in the appropriate grant funding category, as well as answer any questions or provide comments. RTO staff cannot advocate for any applicants during scoring but can provide any needed assistance to help create strong grant applications during the application process. All applicants must complete the Letter of Interest. Letters of Interest may take up to 15 business days to be reviewed, answered, and approved. Once the applicant's Letter of Interest is approved, the rest of the grant application is open for completion. **Applicants are encouraged to consider this timeline when planning for an application deadline.**

Applicants are highly encouraged to visit ZoomGrants University before creating their application to get an overview of ZoomGrants. RTO recommends reviewing the [Applicant FAQ](#) page and the [How-To Guide for Applicants](#) slides. For more tips on writing a grant online, visit [10 e-grant tips](#).

Applicants should be thoughtful about the set-up of their application owners, additional contacts, and collaborators. **Applicants are required to be diligent about maintaining the ZoomGrants grant application throughout the grant cycle and submitting quarterly reports and invoices on time.** Many agencies use ZoomGrants and applicants can use their accounts to apply for grants from any agency. Therefore, **Metro staff cannot reset passwords or maintain accounts on behalf of an organization or individual.**

Use this handbook as a reference while filling out the application. For technical questions regarding the ZoomGrants system, try [troubleshooting through ZoomGrants University](#), [submit a ticket](#), or contact the ZoomGrants Help Desk at Questions@ZoomGrants.com or toll-free 1-866-323-5404 (Mon – Fri 8 a.m. – 5 p.m. Mountain Time). For questions about application content or requirements, see the RTO Staff Contact Information section in this handbook or click Contact Admin in the Help section of ZoomGrants.

ZoomGrants FAQ

<http://help.zoomgrants.com/index.php/article-categories/appfaqs/>

I already have an account. Why can't I create an application?

<http://help.zoomgrants.com/index.php/zgu/i-already-have-an-account-why-cant-i-create-an-application/>

The 'Saving' screen is still flashing... now what?

<http://help.zoomgrants.com/index.php/zgu/the-saving-screen-is-still-flashing-now-what/>

How do I change or reset the email address or password on an applicant account?

<http://help.zoomgrants.com/index.php/zgu/how-do-i-change-or-reset-the-email-address-or-password-on-an-applicant-account/>

How can I invite another user to work on my application or add someone else to our account?

<http://help.zoomgrants.com/index.php/zgu/invite-collaborators/>

The person who controlled our account is leaving or has left our organization. What now?

<http://help.zoomgrants.com/index.php/zgu/the-person-who-controlled-our-account-is-leaving-or-has-left-our-organization-what-now/>

Setting Up Your Applicant Account and Creating Applications

<http://help.zoomgrants.com/index.php/zgu/setting-up-your-account-and-creating-applications/>

Formatting Application Question Responses

<http://help.zoomgrants.com/index.php/zgu/formatting-question-responses/>

Tech Tips for Applicants Submitting Applications

<http://help.zoomgrants.com/index.php/zgu/applicant-tech-tips/>

IMPORTANT DATES

Review the deadlines for applications carefully. Letters of Interest must be approved to submit a complete application by the deadline. Late applications will not be accepted. The fiscal year (FY) runs July 1st to June 30th. Funding amounts are subject to change.

Grant Category Type \$	Core Partner Designated \$4,050,000	Emerging Partner Competitive \$450,000	Marketing Competitive Annual \$240,000	Sponsorship On-Demand \$154,500	Infrastructure/Innovation Competitive Annual \$1,050,000	SRTS Competitive \$900,000
January 1, 2019	OPEN and accepting applications	OPEN and accepting applications	OPEN and accepting applications	OPEN and accepting applications	OPEN and accepting applications	OPEN and accepting applications
March 31, 2019	DUE 11:59pm		DUE 11:59 pm for FY 19/20		DUE 11:59pm for FY 19/20	DUE 11:59pm
April 1, 2019	CLOSED 12:01am	SCORE, AWARD starting April 1 until closed or all funds awarded \$450,000 available NOW CLOSED	SCORE, AWARD funds available for FY 19/20 \$80,000 available	SCORE, AWARD funds available in the order received starting July 1 until closed \$25,750 available	SCORE, AWARD funds available for FY 19/20 \$350,000 available	CLOSED 12:01am SCORE, AWARD all funds
April-June 2019	SCORE, AWARD all funds					
July 1, 2019						
January 1, 2020						
March 1, 2020						
March-June 2020						
July 1, 2020						
January 1, 2021						
March 1, 2021						
March-June 2021						
July 1, 2021						
January 1, 2022				+ \$25,750 available		
June 30, 2022	Grant program activity ends					
July 31, 2022	Final reports and invoices due					

APPLICATION TIPS

Grant Writing

For tips on writing a grant application, there are many books and helpful sites online dedicated to writing grants that can be checked out from your local library. Try a quick Google search or start with these:

Karsh, Ellen, and Arlen Sue Fox. *The Only Grant-Writing Book You'll Ever Need*. Basic Books a Member of Perseus Books Group, 2014.

Browning, Beverly A. *Grant writing for dummies*. John Wiley & Sons, 2014.

granttrainingcenter.com/blog/

idealistcareers.org/grant-writing

Capability Index

The grant application requires all applicants to conduct a quick self-assessment of the organization's capability using the RTO Strategy's Travel Options Capability Index (Attachment D). **Capability is included only in the Emerging Partner application score. Capability for all other applicants is used as solely informational for all other grant categories to track RTO's performance over time.** For this reason, all applicants should complete this self-assessment, even Core Partners.

To conduct a self-assessment, read through the index and assign a number from 1-5 that captures the capability of the organization based on the criteria provided. The assessment should be supported in the rest of the application.

Research and Data

Robust grant applications are generally supported by research, qualitative storytelling, and quantitative data. There are numerous free research and data resources online. Applicants are not required to use these resources; however, if an applicant is unsure where to start, the following resources may be useful depending on the project or program.

data.gov/

rlisdiscovery.oregonmetro.gov/

census.gov/data/data-tools.html

scholar.google.com/

huduser.gov/portal/home.html

gis-pdx.opendata.arcgis.com/

pdx.edu/ibpi/

datausa.io/

oregonmetro.gov/regional-snapshots

census.gov/library.html

apta.com/resources/Pages/Default.aspx

civicapps.org/

enterprisecommunity.org/opportunity360/measure

ao.umn.edu/

In addition to these suggested sources, user-provided data is welcome. Applicants may also reach out to RTO staff for advice and support at any time.

Planning for Measurement and Evaluation

Applicants should have **a plan for measurement** at the outset of the program and collect relevant data and **evidence of activity throughout the grant cycle**, while also taking into consideration staff capacity and skills. Organizations should select measurement indicators from the Multiple Account Evaluation (MAE) Framework (Attachment C) that are the best fit for the program and **not attempt to include measures in the application or scope that the organization's staff cannot realistically complete** or that are not relevant to the project or programs goals. Applicants are expected to describe the methodology for data collection, measurement, and reporting and **grantees are expected to complete these items as laid out in the scope of work, partnership requirements, and grant agreement**. Because of this, applicants are encouraged to be thoughtful about how they detail the plan for measurement in the application. The MAE is a **menu of options** rather than a strict list of required reporting.

All data collected is used not only for federal compliance, but also to promote RTO partners, produce reports that highlight grantee programs, and reinforce the effectiveness of providing travel options programs in the region. Descriptions of previously funded programs and their results can be found in the [RTO 2013-2016 Evaluation reports](#) and on the Metro website.

GRANT APPLICATION CHECKLIST

- Create or update an existing [ZoomGrants account](#)
- Preview or [start the application](#)
- Complete Summary tab
 - The **Requested Amount** should be the amount to be received from Metro and *should not include the required match*. Use the grant calculator provided earlier in this handbook to calculate the federal amount requested. **This amount should be the same as the Expenses column total in the budget table.** For example, if your Requested Amount in ZoomGrants is \$150,000 in grant funds, your Expenses column in the Budget tab should total to \$150,000.
 - The **Requested Amount** should not exceed the maximum allowed for the grant category
 - All applicants must have or obtain a DUNS number, free from fedgov.dnb.com/webform/index.jsp
 - The **Supervisor or Department Head** should be easily available to log-in to the account and make changes should there be any staff changes during the grant cycle
- Complete Letter of Interest via Letter of Interest tab
 - Upload proof of non-profit status
 - Click the Submit Letter of Interest button

- **A confirmation email follows a successful submission. If no confirmation email is received within a few minutes, the Letter of Interest (LOI) was not successfully submitted**
 - Once LOI is approved by RTO staff, the remainder of the application is opened for editing and submission. However, you are encouraged to view the rest of the application and start to prepare the rest of the proposal while the LOI is processed
 - Letter of Interest meeting (optional) – After submission, RTO staff or the applicant may request a meeting to discuss the project or program before submitting a full application, RTO staff will be in touch with Marketing applicants to discuss the LOI in further detail
- Complete Application Questions tab
- Embedded Information (optional) - This feature allows the applicant to embed a third-party tool, like a Google Map of their project or a YouTube video
 - Responses should assume that the reviewer has no knowledge of the organization, the audience or service area, or travel options work
 - Supporting data, research, and previous results of the program or similar projects are highly encouraged
 - **Read each question and instructions carefully, answering them in full.** Use the scoring table to help write responses

□ Complete Budget tab



RTO highly recommends that the organization's finance staff complete budgets in collaboration with program staff. If you do not have finance staff to assist, contact Mary Anderson Mary.Anderson@oregonmetro.gov for assistance.

- Complete the Budget table in ZoomGrants in full detail
 - You may change the Item Descriptions as needed. “Materials & Supplies: Expense 1” can be changed to something such as “Materials & Supplies: Printed Brochures”
 - The budget should be for the activity that RTO funds will pay for as well as match. Do not include work or items that RTO funds will not pay for unless it is being applied and will be tracked as match
 - **IMPORTANT:** The Expenses column total should add to equal your Requested Amount in grant funds, not including the required match. For example, if your Requested Amount in ZoomGrants is \$150,000 in grant funds, your Expenses column should total to \$150,000, and your three Match columns added together should be a minimum of \$17,168, for a project

budget total of \$167,168. The Match must be a minimum of 10.27% of the total project or program costs, not 10.27% of the award amount. Double-check the expenses and match calculations of the budget table using the Federal Match Calculator found above the application tabs in the Library section of ZoomGrants. **Match is not required for Marketing or Sponsorships. Marketing and Sponsorships may leave the match columns blank.** Sponsorships should only complete the budget to be for the amount requested, up to \$3,500

- The expenses total should be the same as the requested amount in the Summary tab. Make sure to double check this number after the Budget table is complete



Marketing applicants will submit a proposed scope of work and budget on the initial project or program idea, to be refined and finalized in collaboration with Metro and the contractor. Marketing applicants should follow the guidance given by RTO staff during the follow-up Letter of Interest meeting

- Complete the Budget Narrative. **Marketing** and **Sponsorships** may skip the Budget Narrative section
 - “Upon request” answers do not count towards a completed application, applicants are required to answer questions in full
 - Have finance staff help with answering finance questions
- Attach an excel file of the budget using the template provided in the Additional Documents tab. **The excel file totals need to match the budget tab totals in ZoomGrants and include match funds, distributed by the proposed Scope of Work tasks.** See the example in ZoomGrants in Attachment B of this handbook.

Marketing and Sponsorships are not required to upload a budget template excel file

- ☐ Complete Scope of Work & Grant Requirements tab



RTO recommends using the Scope of Work Template in the Additional Documents tab for writing your scope, and to copy/paste the scope into the table sections below. See the ZoomGrants FAQ section of this handbook for troubleshooting with copy/paste and formatting in ZoomGrants.

Marketing applicants will submit a proposed scope of work and budget on the initial project or program idea, to be refined and finalized in collaboration with Metro and the contractor. Marketing applicants should follow the guidance given by RTO staff during the follow-up Letter of Interest meeting.

- Complete the Scope of Work table. **Sponsorships** may enter only one task in the Scope table if they choose

- **No more than 10 tasks are allowed.** Group tasks by topic area, and create subtasks (1a, 1b, 1c) if needed. One task should be or include measurement and evaluation
 - For each task, include a title, detail of the work to be conducted, and any outcomes or results of the tasks. **Deliverables should be listed and should be tangible items that will be completed and submitted as evidence of activity**
 - The anticipated task completion dates are estimates. If a task is ongoing, enter the grant completion date, such as 6/30/2022 or something similar
 - **The scope of work should be for the activity that RTO funds will pay for. Do not include work that RTO funds will not pay for**
- Review the Partnership Requirements and initial next to each. See the section Summary of Post-Funding Requirements for more information on Partnership Requirements
 - Review the Federal Certifications and initial

Attach a word file of the Scope of Work using the template provided in the Additional Documents tab. **The scope tab and scope document should match in detail. Sponsorships** are not required to attach the scope of work document, the Scope of Work tab should include sufficient detail for a Sponsorship project

- Upload additional attachments or links in the Additional Documents tab
 - Budget Excel file **using the template provided. All details from this document should match the ZoomGrants Budget tab table.** Not required for Marketing or Sponsorships
 - Scope of Work **Word file using the template provided. All details from this document should also be included in the ZoomGrants Scope of Work tab table.** Not required for Marketing or Sponsorships
 - Completed W-9 PDF file, signed by hand or with a certified PDF signature, **using the form provided**
 - Project or Program Map identifying the areas the project or program will serve. Use an online map such as [Google MyMap](#), the template provided, or upload your own. For programs that operate at a large scale such as county or regionwide, think critically if the project or program reaches all areas mapped and attempt to represent the service area as accurately as possible
 - Letters of Partnership if the project or program has confirmed partners, detailing the roles and responsibilities of the participating partners. Letters from agencies that support the project or program (financially or otherwise) may also be attached

- Organization’s written Procurement Policy. Required for Core Partners, Emerging Partners, Infrastructure/Innovation grants, and Safe Routes to School grants. See your finance staff for assistance or contact Mary.Anderson@oregonmetro.gov
 - Indirect Cost Rate Agreement, if applicable, see your finance staff for assistance or contact Mary.Anderson@oregonmetro.gov
 - Most recent Audited Financial Statements, if applicable, see your finance staff for assistance or contact Mary.Anderson@oregonmetro.gov
 - Most recent Single (A-133) Audit, if applicable, see your finance staff for assistance or contact Mary.Anderson@oregonmetro.gov
 - Certificate of Insurance, Not required for Marketing or Sponsorships. See your finance staff for assistance or contact Mary.Anderson@oregonmetro.gov
 - Additional (optional, but encouraged) supporting information such as maps, photos, documents, or other information that support the grant application
- Review the grant application thoroughly, reread the instructions provided, and make edits where necessary
 - Click the **Submit** button!
 - A confirmation email follows a successful submission. **If no confirmation email is received within a few minutes, the application was not successfully submitted**
 - To apply for more than one RTO grant, log-in into ZoomGrants, click Open Programs, and click Apply Again. If the Open Programs button is not shown, the account being used is likely a collaborator account. See the ZoomGrants FAQ for more information*

SCORING

Applications are scored according to the schedules laid out in the Grant Categories section, also viewable in the Important Dates table. The review process may include follow-up communication or requests for refinement of the application. The scoring committees for each grant category are comprised of Metro staff and other regional partners with experience in the particular area of focus.

Questions	Recommendations	Points
Letter of Interest	Applications with an approved Letter of Interest start with five points.	5
Current Conditions and Improvement	Strong applications will have a solid description of the current conditions based on data and research, and a clear rationale for the desired improvements.	10
Travel Options Strategy	Strong applications will have a well-selected strategy that addresses the current conditions and needs based on reliable data and research.	10

Audience	Strong applications will identify the audience and communities served, supported with demographic data. *Projects or programs that focus on the needs of people of color, low-income residents, seniors, youth, people with disabilities, Title 1 or equivalent schools, and/or schools with high SRTS impact scores will receive x2 weighting for this question.	10 *x2
Building on the Grant (Not Required for Sponsorships)	Strong applications will outline previous travel options experience, if applicable, and will consider the continuation or expansion of the project or program or travel options work once the RTO grant ends.	10
Benefits	Strong applications will detail the resulting benefits of the program to the local community, as well as those that align with regional goals.	10
Partnerships (Not Required for Sponsorships)	Strong applications will include partnerships with organizations that add capabilities and capacity to strengthen the project's outcomes and reach.	10
Data Collection	Strong applications will show costs, efforts and logistics to collect relevant data, including meeting data standards or applying methods to support project work and evaluation.	5
Final Report (Not Required for Sponsorships)	Strong applications will describe the methodology and costs for completing a final report that summarizes the grant activity and benefits from the project or program.	5
Goals (Not Required for Sponsorships)	Strong applications will identify specific, measurable, attainable, realistic, timely goals for the project or program.	5
Project Management, Staff Capacity	Strong applications will have a balanced consideration for how the staff are equipped to deliver a successful grant.	5
Core Partner, Marketing, SRTS Sponsorships		85 55
Infrastructure/Innovation Only	Strong applications will demonstrate how the proposed project facilitates the increased use of travel options, by providing small infrastructure, outreach to new audiences, or using new methods or technology.	5
Emerging Partner Only	Emerging Partner applications should demonstrate a minimum capability score of 2 or 3 in order to qualify for an Emerging Partner grant and include a thoughtful description of the self-assessment.	5
Emerging Partner, Infrastructure/Innovation		90

Metro [has identified racial equity](#) as the approach to ensure that all people who live, work, and recreate in the Portland region have the opportunity to share in and help define a thriving, livable, and prosperous place. Additionally, [RTO Strategy](#) Goal 2 prescribes allocation of resources that prioritizes projects or programs that serve people of color, low-income residents, seniors, youth, people with disabilities, Title 1 or equivalent schools, and/or schools with high impact scores (as identified in the [Regional SRTS Framework](#)). Therefore, applications for projects or programs that serve these communities receive an additional x2 weighting for the audience question in the scoring process. Those applicants who receive this weighting may go over the highest possible points.

Strong applications may also contain letters of support, evidence of work previously conducted, photos, maps, or any other documents or links that provide further insight into the answers provided.

Metro reserves the right to award grantees an amount of funding other than the amount requested in the application if warranted in the opinion of the evaluation committee.

BRIEF SUMMARY OF GRANT CYCLE REQUIREMENTS

Grantees are required to maintain their grant in a variety of ways throughout the project or program cycle. Once projects or programs are selected for award, grant recipients have numerous opportunities to learn more about award requirements that occur during the grant cycle.

The following is a summary of the grant cycle requirements, but grantees should refer to their grant agreements for final requirements of the project or program and the Grantee Guide available from oregonmetro.gov/tools-partners/grants-and-resources/travel-options-grants.

Grant Agreement and Partnership Requirements

Grantees enter into a contractual agreement with Metro that specifies legal and contractual obligations. Once all parties sign the contract, funds become available for reimbursement.

All grantees, including all project or program team members, engage in a partnership with Metro, RTO staff and other RTO program partners. Partnership multiplies the benefits of an RTO grant by applying current strategies and brands while incorporating lessons learned. The purpose of partnership requirements is to set up partners for success in their grant projects. These requirements help partners produce reliable evidence of the efficient and effective use of their regional funds. RTO is available to support partners by providing tools and guidance to achieve a successful grant project starting at project planning and even after the grant cycle is complete. Grantees must consider the Partnership Requirements during the planning, measurement, and reporting of their grants and include steps during these processes to complete the requirements where appropriate. Partners are responsible for communicating these requirements to appropriate staff members. Partnership requirements apply to anything included in the grant agreement or made possible by the grant agreement. Exceptions to the requirements can be requested by emailing RTO staff and if agreeable, may be granted with confirmation provided in writing by RTO staff.

Invoicing

Due to federal funding requirements, there is no advance payment of grant funds, including Sponsorships. Grantees are reimbursed for grant eligible expenses 30 days after submitting a complete and allowable invoice. All costs requested for reimbursement must be allocable, allowable, reasonable, and in line with the scope of work to be reimbursed. The invoice documentation provided must provide enough detail for an external third party to determine that the costs are appropriate. Funds for payment may be held for reporting or reduced for disallowable expenses.

Grantees are required to follow [federal procurement standards](#) for all purchases above \$10,000 and third-party contracting, as explained in [FTA's Third Party Contracting Guidance 4220.1F](#). Applicants should consider these procurement requirements while planning and budgeting for the project or program.

Invoicing via ZoomGrants is required for all grantees, except Marketing grantees. Core Partner, Emerging Partner, Infrastructure/Innovation, Sponsorships and Safe Routes to School grantees fill out the online invoice in ZoomGrants and attach relevant financial documents supporting the invoice every quarter of their grant agreement. Marketing grantees do not complete the online invoice in ZoomGrants. Instead, Metro finance staff will update the application to reflect payments made to consultant staff for the project.

 *Indirect Costs: Federal Supercircular 2 CFR 200 contains guidance that allows recipients of federal funds through a prime recipient such as Metro, to recuperate indirect costs. As a result, contingent upon approval by Metro, subrecipients may elect (1) not to recuperate indirect costs, (2) elect to use a flat 10% de minimis rate as noted within 2 CFR 200.414, or (3) request to negotiate an indirect cost rate with Metro. If the organization chooses to negotiate an indirect cost rate, see the Indirect Cost Negotiation Reference Guide in the ZoomGrants Library and contact RTO staff for further guidance.*

Reporting and Evaluation

Reporting via ZoomGrants is required for all grantees. Grantees fill out the online report in ZoomGrants and attach relevant activity documents supporting the report every quarter of their grant agreement. Marketing grantees may wish to coordinate reporting with the provided contractor to submit all appropriate supporting documentation on the progress of the project or program.

Grantees are also required to submit a final report summarizing the entire grant activity upon grant expiry. Invoices or funds may be held for payment until quarterly reports are accurate and complete or a final report is submitted.

CONTACT INFORMATION

For more information about RTO grants, please visit [the RTO website](#) or contact RTO at rto@oregonmetro.gov or 503-797-1757.

RTO Staff

Daniel Kaempff, RTO Program Manager – Daniel.Kaempff@oregonmetro.gov

Caleb Winter, RTO Grant Manager – Caleb.Winter@oregonmetro.gov

Marne Duke, RTO Communications – Marne.Duke@oregonmetro.gov

Mary Anderson, RTO Financial Analyst – Mary.Anderson@oregonmetro.gov

Kale Mattias, RTO Grant Reporting & ZoomGrants – Kale.Mattias@oregonmetro.gov

Pamela Blackhorse, RTO Program Assistant – Pamela.Blackhorse@oregonmetro.gov

Noel Mickelberry, SRTS Grant Manager – Noel.Mickelberry@oregonmetro.gov

ATTACHMENT A: EXAMPLE SCOPE OF WORK

A Word document of this sample scope of work is available in ZoomGrants under the Additional Documents tab. See the grant checklist in this handbook for tips or contact a member of RTO Staff.

WALKING MAP AND WAYFINDING SYSTEM

Project Description

This project will develop and implement an integrated Walking Map & Wayfinding System for Downtown. It will include a walking map as well as directional/information signage for access to/from and within Downtown. The Wayfinding signage will include three general types of signs:

- An informational kiosk, located either at the Transit Center or another central location within Downtown
- Trail signage within Downtown
- Standard directional signage at key intersections/decision points

The Walking Map will include a broad downtown map (approximately ½ mile radius from Transit Center) corresponding to the Wayfinding System area, as well as a Main Street inset map.

The Map/Wayfinding system area will be generally centered on the Transit Center and will encompass a roughly half-mile radius from the center. It will include key origins and destinations such as residential neighborhoods, Senior Centers, Transit Center, City library, City Hall, post office, schools, and pharmacy. Others may be included based on references such as the State of the Centers report from Metro. A strategy for picking origins/destinations will be discussed by the working group; taking into consideration life-stage (young, family-age, post-family) and trip type (commute vs. discretionary).

Project Goals/Expected Outcomes

The specific targeted outcomes of this project include:

- Increase walking trips to downtown by educating nearby residents, employees, and transit users about the numerous services within walking distance in downtown, while showcasing walking as an easy way to go
- Reduce vehicle trips and parking demand downtown by encouraging people who currently drive downtown to choose walking instead
- Foster a “Park Once” environment downtown by highlighting the ease and convenience of walking among multiple destinations within downtown.
- Integrate the Transit Center with downtown by informing transit passengers about services and activities available in downtown within a short walking distance
- Increase pedestrian and bicycle use of trails for nearby residents and other trail users by installing signage to improve and clarify connections to available destinations

These are proposed to be achieved by overcoming current pedestrian barriers into and out of downtown; highlighting the numerous services within downtown to encourage multi-purpose trips downtown within an easily walkable area; and, enhancing the ease of using the trail within Downtown.

Overcoming Pedestrian Barriers to Downtown Access

A recent assessment conducted as part of the TriMet Pedestrian Network Analysis revealed that walking conditions are generally adequate within downtown. However, getting into and out of downtown can be challenging. The Walking Map/Wayfinding System is intended to clarify options for walking trips into and out of downtown to access downtown services as well as regional transit connections.

Within Downtown

Once a pedestrian gets downtown, walking conditions are generally adequate. The Walking Map/Wayfinding System will aim to create a “park once” environment. The Walking Map will emphasize the short walking distance between downtown services, thereby encouraging combined trip purposes for downtown visitors, without having to move a car.

Enhance Trail Connections

Trails provide off-street natural area connections to downtown from residential neighborhoods; however, there is currently no signing to point out the direction or distances of possible destinations. The proposed WayFinding System includes signage for the trail within downtown to enhance this valuable resource.

Evaluation Plan

The Walking Map and Wayfinding System will be evaluated using a combination of surveys and pedestrian counts to be conducted before and after the implementation of the project. Both elements of the evaluation will be taken to reflect “typical” conditions. The evaluations will track perceptions of pedestrian conditions and activity levels in downtown and will provide a baseline for on-going performance evaluation of downtown walking conditions.

Project Staff

The primary project team members are summarized below. To ensure cost effectiveness of the proposal, the team includes an intern or temporary planner to assist the project manager throughout the project.

For key project team members, the table shows the % of time that they will work on this project. To reflect the varying activities throughout the project, this is indicated as a range or at the level during the individual’s primary involvement. In addition to the primary project staff, the project manager will enlist the support of other staff members who have relevant expertise, experience, or responsibilities. The total hours that these individuals will dedicate to the project are marginal. However, their expertise will inform various phases of the project. In addition to the City staff identified above, a portion of the signage production and map printing will be contracted out. Selection will be subject to pricing and product delivery options.

Staff Name	Title	Project Role	Experience (yrs)	% of Time
-------------------	--------------	---------------------	-------------------------	------------------

Name	Title	Project Manager	10	50%
Name	Title	Project Assistant	4	25%

Project Tasks

Task 1: Establish Project Charter, including Working Group

Project leader will develop a Project Charter to identify project participants, including city staff, other local participants, and other agency participants including Metro. Staff will conduct direct outreach to stakeholders and current community volunteers to establish the Working Group, as well as other stakeholder input. Outreach for these purposes is expected to include:

- Downtown Stakeholders
- Central City Advisory Committee
- Transportation Advisory Committees
- Pedestrian/Bicycle Subcommittee
- TriMet
- Pedestrian Coalitions

There will be one kick-off meeting to explain the project; identify priorities; and review the timeline and schedule.

Deliverables

1. Project Charter, including list of project staff, community members, and other agency participants;
2. Project schedule and preliminary Working Group schedule

Task 2: Pedestrian Perceptions Survey and Pedestrian Counts – “Before” Conditions

Develop a survey instrument and distribute through the city’s website, with broad-based publicity including the city newsletter, neighborhood networks, related community advisory and volunteer committees and city staff. The survey will be distributed and promoted broadly, including announcement in the monthly newsletter, with target minimum 100 completed, and supplemented with field pedestrian counts in order to establish a baseline for pedestrian activity, using methods consistent with other pedestrian data collection efforts. In addition to using the survey to establish a “before” condition of user perceptions of pedestrian conditions, the survey responses will help staff identify issues and concerns among respondents to inform the map and signage development as well as future needs.

Deliverables

3. Final Survey instrument (“Before” conditions), with input from RTO staff
4. Completed survey forms
5. Pedestrian counts

Task 3: Pedestrian System Data Collection

Data collection for the Walking Map and Wayfinding System will include use of the City's GIS mapping system, fieldwork, and informal interviews. It will also build on work completed for the TriMet Pedestrian Network Analysis.

Deliverables

6. List of data collected
7. Summary of interviews

Task 4: Create Draft & Final Walking Map and Wayfinding System

This task will be the bulk of the effort and budget for the project. The City's graphics art and GIS mapping capabilities will be used to create maps and signage concepts. Up to three working group meetings are expected. Additional feedback opportunities may include the City's website and City advisory boards and committees. Also, a design process for the trail signs will include review of City and regional trail signs to allow for consistency and clarity of style. Project marketing materials (web and print) will include the Drive Less/Save More logotype.

Deliverables

8. Draft & Final Citywide and Main Street Walking Map
9. Draft & Final signage styles sheets
10. Draft & Final Signage system plan with needs and locations

Task 5: Production & Installation

Much of the sign production will be handled by City staff. It is expected that the Informational Kiosk may be more complex and would be contracted out. The signs will be installed by City staff.

Deliverables

11. At least 1 information kiosk; 2-4 trail signs; and 10 to 20 general direction/distance pedestrian signs; or equivalent combination of on- and off-street wayfinding tools
12. Photos of all signs installed

Task 6: Map Distribution

The final map prototype will be developed by City graphics arts staff. Printing will be contracted out to a local commercial printer (following federal and other guidelines included in or referred to in this IGA). The map will be distributed through local housing organizations, community centers, downtown businesses, civic organizations, City buildings, and other downtown locations. The City will ask for RTO staff input on distribution plans. The map will be posted on the City's website and will be announced in newsletters.

Deliverables

13. Completed Walking Map –Posted on the City's website and approximately 2,000 copies
14. Distribution plan

Task 7: Modify Survey Instrument and Administer – “After” Conditions

The “Before” survey will serve as the base of the “After” survey in order to allow for capture changes in perceptions. Some modifications might be warranted based on lessons from the project process or due to changing conditions in the field; the survey will also assess awareness of this map/signage project. Pedestrian counts will also be conducted. These will be scheduled to avoid construction, but also to match the time of year of the baseline counts.

Deliverables

- 15. Survey instrument, modified as needed, with input from RTO staff
- 16. “After” pedestrian counts

Task 8: Evaluation and Final Report

A final report will summarize the findings of the Before and After surveys, the process for public input and engagement, the final outcomes, and lessons learned.

Deliverables

- 17. Final report

Project Schedule

The majority of the project will be completed within eleven (11) months, by MM/DD/YY, with the “After” survey and final report being completed within approximately eighteen (18) months, by MM/DD/YY. The estimated timeline per task is summarized below.

Task	Task Title	Schedule
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

ATTACHMENT B: EXAMPLE BUDGET TEMPLATE

An Excel budget template is available in ZoomGrants under the Additional Documents tab. See the grant checklist in this handbook for tips or contact Mary Anderson at Mary.Anderson@oregonmetro.gov for assistance.

Proposed Budget												
Expense Category	Detail	Total	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7	Task 8	Task 9	Task 10
Personnel	Project Manager	\$ 50,000	\$ 20,000	\$ 10,000	\$ 6,000	\$ 6,000	\$ 8,000					
Personnel	Coordinator	\$ 24,500	\$ 10,000	\$ 5,000	\$ 5,000	\$ 2,000	\$ 2,500					
In-Kind Volunteer Time	Event Volunteers	\$ 5,000			\$ 2,500		\$ 2,500					
Travel		\$ -										
Materials and Supplies												
	Printing Posters	\$ 3,068		\$ 2,000		\$ 1,068						
	Supplies for Events	\$ 10,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000					
	Room Rental	\$ 3,150	\$ 600	\$ 600	\$ 600	\$ 600	\$ 750					
	Incentives	\$ 5,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000					
Contracted Services												
	ABC, Inc. (Survey)	\$ 20,000				\$ 20,000						
	XYZ, Inc. (Data Collection)	\$ 30,000					\$ 30,000					
	MLK, Inc (Action Plan)	\$ 9,000		\$ 9,000								
Equipment		\$ -										
Other		\$ -										
Approved Indirect Costs	10% of Labor Costs	\$ 7,450	\$ 3,000	\$ 1,500	\$ 1,100	\$ 800	\$ 1,050					
Total Costs		\$ 167,168	\$ 36,600	\$ 31,100	\$ 18,200	\$ 33,468	\$ 47,800					
Approved Indirect Cost Rate		10%										
Requested Grant	\$	150,000										
Local Match	\$	17,168										
Proposed Budget	\$	167,168										
								Sources of Local Matching Funds				
								Source of Funding	Type of Funding	Notes		Amount
								Local Revenue	Cash	Staff Time		\$ 12,168
								Volunteer Time	In-Kind	Volunteers for XYZ event		\$ 5,000
											Total	\$ 17,168.00

ATTACHMENT C: MULTIPLE ACCOUNT EVALUATION FRAMEWORK

Data Collected	Indicator	Description	Result	2018 RTO Strategy Performance Baseline	2018 RTO Strategy Performance Target	
ENVIRONMENT measures the enhancement and protection of the region's natural environment and progress towards reducing climate change.						
	Auto trips reduced	Emissions reductions	Reductions in pollutants that cause climate change and local environmental issues.	Tons or pounds of emissions reduced	--	
	Auto trips reduced	Annual gas savings	Reduction in non-renewable resources used.	Gallons and dollars saved	--	
EQUITY and HEALTH measures the distribution and accessibility of equitable, affordable, and healthy travel options for people of color, low-income residents, seniors, youth, and people with disabilities.						
	Auto trips reduced	Combined transportation and housing savings	Savings from trips that are not drive alone, combined with known or average housing costs.	Dollars saved per household served	--	
	Demographics	Travel options improvements for historically marginalized communities	Increasing access to travel options for people of color, seniors, youth, people with disabilities, low-income residents, and/or Title 1 or equivalent schools.	Before and after for communities served, testimonials and/or descriptions	Identified barriers* and Percentage of investments focused on meeting equity goals* (Goal 2)	3-5 barriers identified and reduced or removed Percentage increase over previous grant cycle*
	Geographic description					
	Active trips	Health improvements	Improvements to health from biking, walking or using transit.	Percentage or number of active trips	--	
ECONOMY measures improvements to the local economy from reduced congestion and parking demand, which impact accessibility to goods, services, and jobs.						
	Active trips	Improving access to jobs by travel options	Improving access to travel options with the purpose of, or resulting in, connecting people to jobs.	Before and after comparison for communities served and/or description of improvements made	--	--
	Demographics					
	Geographic description					
	Auto trips reduced	Decreasing parking demand	Savings from reduced parking costs.	Dollars saved	--	--
EFFICIENCY measures how projects and programs leverage available resources, work with partners, and support regional policy by providing high quality, successful programs and services.						
	Auto trips reduced	Vehicle miles reduced	Reducing vehicle miles traveled annually.	Number of vehicle miles reduced	47 million miles reduced per year (Goal 1)	Increase over previous grant cycle*
	Auto trips reduced	Increasing non-drive alone mode share	Improving the share of non-drive-alone modes, for commute trips (including ECO and SRTS programs) and non-commute trips.	Percentage or number of non-drive-alone trips	33.7% Non-SOV commute rate and SRTS Non-SOV rate* (Goal 1 and 3)	40% Non-SOV commute rate and SRTS Non-SOV rate*

	Auto trips reduced	Cost effectiveness	Tracking cost of program or project and/or number of staff per capita compared to the measurable results achieved.	Average cost per vehicle mile reduced or participant or impression	Number of Travel Options Staff per capita* Number of SRTS Coordinators per capita* (Goal 2 and 3)	Increase over previous grant cycle*
	Participants					
	Impressions					
	Partnership description	Leveraging resources	Leveraging investments, increasing collaboration, and aligning program or projects with other regional partners.	List of partners, and/or overall project or program cost	17 2017-2019 grantees Number of partners* (Goal 2)	Number of grantees* Number of partners*
ENGAGEMENT measures the level of engagement provided to the local community, including enabling residents to receive information about travel options and gathering feedback from community members.						
	Participants	Participation	People actively engaged in an RTO-funded program, service, or activity.	Number of participants	250,000 commuters SRTS participants* (Goal 2 and 3)	Increase over previous grant cycle*
	Impressions	Awareness	People exposed to messages or information about a program, service, or activity.	Number of impressions	Awareness of RTO and SRTS programs* (Goal 2 and 3)	Increase over previous grant cycle*
<i>Additional RTO Strategy performance measures and targets provide an incremental approach to track progress towards regional goals in addition to the indicators above. * indicates baseline or performance target to be collected in the upcoming program evaluation.</i>						
	Capability scores	Partner capability	Building RTO partner capability through grants and support	Average capability score	Baseline established in 2019-2022 cycle	Increase over baseline*
	SRTS programs	SRTS expansion	Jurisdictions or school districts (not individual schools) with a formalized SRTS program	Number of formalized SRTS programs	8 formalized SRTS programs (Goal 3)	All districts have access to coordinator (may not be housed at district)
	Grant reporting	Performance measurement	Measure one or more indicators per project in context of project goals and funding	Percentage of grantees reporting on MAE indicators	70% of grantees collect measurable data that addresses goals	100% of grantees collect measurable data that addresses goals

ATTACHMENT D: RTO STRATEGY TRAVEL OPTIONS CAPABILITY INDEX

	1 – Unaware Few or no RTO activities	2 – Exploratory Occasional, ad-hoc RTO activities	3 – Defined Basic level of RTO activities	4 – Adoptive Advanced level of RTO activities	5 – Optimized High level of RTO activities	Score and Explanation
Maturity level	Partner has no awareness or understanding of RTO or has no plans to begin local program. Efforts to reduce auto trips are not a part of business model	Local program is in exploratory stage. Partner is aware of RTO, sees value in program engagement, but has not yet committed to ongoing efforts. Is interested in or may have participated in RTO events primarily led by others	Initial level of program development & implementation. Partner has made ongoing commitment to conducting one or two RTO program activities annually	Further level of program development & implementation. Partner has partially operationalized RTO activities. Has dedicated staff responsible for conducting multiple ongoing RTO program activities	Fully developed and mature program. Partner has fully operationalized RTO activities. Has dedicated manager + staff supporting an array of RTO program activities	Score: ____ Notes:
Staffing level	0.00 FTE	0.10-0.25 FTE	0.25-0.50 FTE	0.50-3.00 FTE	3.00 + FTE	FTE: ____
	No staff time dedicated to RTO activities	RTO activities are one of several duties performed by staff (in-house or contracted)	RTO activities comprise a significant portion of a staff person's time; is considered an important function of organization	RTO activities comprise most or all of one or more staff person's time; is considered a core function of organization	RTO activities comprise all of multiple staff person's duties, including; has dedicated organizational unit and manager	Score: ____ Notes:
Local funding	No local or regional funding	Minimal level of local funding, required to pay staff and provide marketing and support event(s) or project	Local funds provide match for RTO funds (~\$50K/yr), or RTO activities are 100% locally funded	Local funds provide match for RTO funds (\$50-100K/yr)	Local funds provide match for RTO funds (>\$100K/yr), plus additional local funding dedicated to program activities	Score: ____ Notes:
Partnerships	No agency or NGO partners	Collaboration with partners is informal and predominantly ad hoc	Staff collaborate with key partners focused on transportation issues	Staff collaborate with a variety of partners, including non-transportation-focused NGOs	Multiple agency & NGO partnerships	Score: ____ Notes:
Goals & objectives	None	Activities are informal, reactive, and not integrated into planning policy	Official policy supports TO work but lacks specific details on implementation	Policies support TO work with specific goals and actions	Specific, documented strategic direction, aligned with local TSP, regional & state plans	Score: ____ Notes:
Evaluation & measurement	None	Minimal data collected, mainly qualitative	Qualitative & some quantitative data collected on most activities	Qualitative & quantitative data collected on all activities	Qualitative & quantitative data collected, analyzed and evaluated for all program activities	Score: ____ Notes:

	1 – Unaware Few or no RTO activities	2 – Exploratory Occasional, ad-hoc RTO activities	3 – Defined Basic level of RTO activities	4 – Adoptive Advanced level of RTO activities	5 – Optimized High level of RTO activities	Score and Explanation
RTO partner status	None	May apply for sponsorship, attend CMG or other events occasionally	RTO funding recipient applies for competitive funding on periodic basis	Core RTO partner has agreed to performance metrics and other conditions in exchange for dedicated funding	Core RTO partner has agreed to performance metrics and other conditions in exchange for dedicated funding. Amount may be greater than Level 4 due to greater potential for ROI	Score: _____ Notes:
	Final Notes:					Avg Score: _____