



# Regional Travel Options 2023-2026 Grant Application Handbook

March 2023

*Last updated: March 15, 2023*

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## REGIONAL TRAVEL OPTIONS GRANTS

The Regional Travel Options (RTO) grant program provides funding to support projects and programs that educate, encourage, and provide information to people in order to increase their use of travel options. Travel options include any mode of transportation besides driving alone – carpooling, vanpooling, riding transit, bicycling, walking, rolling, shared mobility and telecommuting. An estimated total of \$9.14 million in Federal Transit Administration (FTA) funding is available for the 2023-26 RTO grant cycle to support projects carried out by regional partners between July 1, 2023, and through June 30, 2026.

### How to Use This Guide

The RTO Grant Application Handbook includes a full overview of the RTO grant program, grant eligibility guidelines and requirements, application categories, process, and timelines. The primary document includes all of the information needed to apply for an RTO Grant. The Appendices include supplemental information by topic; please refer to these sections as needed. Refer to the Table of Contents for a breakdown of the Handbook sections and Appendices.

### 2023 Application Key Dates

The following table summarizes key dates for the first round of RTO funding in 2023. See the Important Dates section for a full calendar of important dates for the entire 2023-2026 RTO Grant Cycle.

January 3, 2023	Application available in ZoomGrants
January 18, 10:00 a.m. – 12:00 p.m.	Optional information session for the Core & Emerging Partners application track ( <a href="#">registration link</a> )
January 24, 2:00 – 4:00 p.m.	Optional information session for the General Grants and Small Grants application tracks ( <a href="#">registration link</a> )
<b>February 3, 5:00 p.m.</b>	<b>Core + Emerging Partners application track - Letters of Interest due in ZoomGrants</b>
<b>March 10, 5:00 p.m.</b>	<b>General Grants application track - Letters of Interest due in ZoomGrants</b>
<b>March 31, 5:00 p.m.</b>	<b>Full grant applications (all application tracks) due in ZoomGrants</b>
Late May	Grant awards announced
July 1, 2023	Grant funding available

## **REGIONAL TRAVEL OPTIONS PROGRAM**

Metro's Regional Travel Options (RTO) program supports the region's goals of creating safe, vibrant, and livable communities by investing in efforts that increase access to travel options. In doing so, the program helps advance regional transportation goals including managing congestion, maintaining air quality, making the most of our transportation investments, and providing travel options equitably to communities throughout greater Portland. In addition to administering RTO grants, the RTO program provides policy guidance, research, regional coordination, technical assistance, and direct program administration.

The 2018 Regional Transportation Plan (RTP) articulates how the RTO program helps meet regional transportation goals. The program is further guided by the RTO Strategy and supported by program analyses and plans including the RTO Racial Equity Strategy, and RTO Commute Program Action Plan, and RTO Evaluation. See Appendix A for a breakdown of relevant plans and resources that guide the RTO program and will help inform successful grant applications. The RTO Program centers its activities and resources on three key Program Areas: Commute, Safe Routes to School (SRTS), and Community:

### **Commute**

Commute trip reduction programming is an important component of reducing greenhouse gas emissions and managing congestion during peak travel times. These programs focus on reducing single occupancy vehicle (SOV) trips to work and colleges or universities, with a particular emphasis on increasing economic opportunities to underserved communities. In the Metro region, that programming is delivered by a variety of transit providers, local jurisdictions, transportation management agencies (TMAs), non-profit organizations, and "in-house" transportation coordinators. Collectively, their work aims to ensure employers and schools are aware of the many commute benefits available to offer, and commuters are encouraged to use non-SOV modes.

### **Safe Routes to School (SRTS)**

SRTS is a national effort to encourage students and families to walk and roll to school – whether by bike, bus, scooter, or mobility device. SRTS programs provide education and encouragement activities to help children and parents travel safely to and from school using these modes. They are a proven way to change travel behaviors and help people use active transportation options. SRTS programs can increase physical activity, reduce congestion, boost academic performance, improve health, save families money, and provide environmental benefits in an equitable way.

### **Community**

Providing support for residents and families for trips outside of work and school is the core component of community-based travel options. Examples of programming to support these trips comes in the form of community walking and rolling events or campaigns, trip and route planning to-and-from key destinations, and increasing access to active transportation investments with

outreach, engagement, and supportive infrastructure. This program area prioritizes addressing community-identified needs and barriers to travel options.

## RTO GRANT REQUIREMENTS AND ELIGIBILITY

### Who Can Apply

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 grant funding.

*This section describes minimum requirements for all applicants, proposals, and expenses. Review this section to ensure your proposal is eligible for funding. Contact RTO staff if you have questions about these requirements.*

### RTO Grant Requirements

#### All projects/programs must:

- Increase access to, and use of, travel options (biking, walking, shared mobility, public transit, telecommuting, carpool, and vanpool).
- Fit within either the Commute, Safe Routes to School or Community program area.
- Occur within the [Portland Metropolitan Planning Area](#).
- Align with goals and objectives identified in the [2018 RTO Strategy](#) and the [2018 Regional Transportation Plan](#).

#### All applicants must:

- Enter into a contractual agreement with Metro that specifies legal and contractual obligations. Once all parties sign the contract, funds become available for reimbursement.
- Deliver projects or programs within the agreed-upon scope of work (SOW), timeline, and budget.
- Provide a minimum match of 10.27% of the total project amount. 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. Funds from other Metro grants or federal sources cannot be applied towards the minimum match requirement.
- 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.

- As RTO grants are reimbursement only, applicants must have up-front funding available and sufficient to cover the costs associated with delivering their grant. Metro cannot advance grant funds prior to work being done or other costs incurred.
- Submit invoices with supporting documentation each quarter for reimbursement (Exception: Small Grants Track submits one invoice for reimbursement).
- Submit progress reports using consistent agreed-upon reporting methods each quarter. Submit a separate final report at the end of the grant that summarizes the grant activity, results, and lessons learned. (Exception: Small Grants Track submits only one (final) report).

*Due to the nature of federal funding, RTO grants are reimbursement-based. Reimbursement is provided each quarter of the grant agreement.*

### **RTO Grant Eligibility Guidelines**

The RTO program funding is shaped by guidelines given to Metro by the Federal Transit Administration, and through the RTO Program Strategy created in collaboration with regional stakeholders and approved by Metro Council. Metro staff and managers interpret this guidance on how funds may be used.

### **RTO grant funds are primarily intended for the following purposes:**

- Staff salaries for eligible programs (with the exception of grant categories in the Small Grants application track, which does not fund staff time).
- Non-capital materials and services directly related to and necessary for the RTO grant-funded program work. This includes consulting services, marketing and outreach materials, and incentives (see FAQ below for definition of eligible incentives).
- Planning efforts to inform TDM programs and plans.
- Agency capacity building to develop new RTO program efforts at the local or community level.
- Participation in RTO-led initiatives and RTO stakeholder collaboration.
- Data collection and evaluation of RTO-funded program activities.

### **RTO grant funds cannot be used for any of the following:**

- Projects or programs held outside the Metro boundary.
- Salaries, materials, or other costs not directly related to or included in the scope of work.
- Costs incurred in preparing this or other grant applications.
- General organizational support or operating costs. (Grantees may include overhead costs in their invoices, at agreed-upon rates, with prior approval from Metro.)
- Annual appeals, or fundraisers.

- Incentives/gifts used as a contribution to or for joining an organization.
- Direct grants or loans that primarily benefit specific individuals or businesses.
- With limited exceptions, purchases of food are not eligible for reimbursement. Eligible food items are light snacks and refreshments to support a public outreach event. Contact your Metro grant manager if you have any questions.

Examples of **ineligible** items include:

- Purchases of sandwiches, pizza, or other types of meal items for any purpose
- Purchases of food for staff meetings, such as coffee, pastries, etc.

Examples of **eligible** items include:

- Snacks at a community engagement event like fruit, granola bars, etc.
- Treats for participation in an event, such as a school walk & roll event with popsicles or cupcakes
- Infrastructure projects that build bicycle, pedestrian, or transit infrastructure such as sidewalks, crosswalks, bicycle lanes, signals, warning signage, transit stop enhancements, etc. Examples of infrastructure projects that are **not eligible** include, but are not limited to, the following:
  - Construction of sidewalks or trails
  - Bicycle lanes, cycle tracks, etc.
  - Enhanced crossings (painted crosswalks, flashing beacons, warning signage, etc.)
  - Transit stop amenities or shelters
  - Maintenance of existing infrastructure
- The purchase of bicycles for use in a shared system – ‘bike-share’, or for individual use. Bicycle parts are also ineligible.
- The purchase of adult electric scooters for use in a shared system - ‘scooter share’ - or for individual use.
- Any transit or shuttle operational costs or the costs associated with establishing a new service. This includes but is not limited to fare-payment systems, real-time transit tracking, on-board displays, and any other cost related to directly providing service. Costs associated with promoting or encouraging people to use these services are eligible for RTO grant funding.
- Any attempt to directly influence policymakers, legislation, or public funding decisions, 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 to cause improper private benefit to occur.
- Work to support, inform or influence a public planning process, such as project-based infrastructure planning and engagement activities, transit system and service plans or transportation system plan updates.



- 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.
- Any other cost not addressed above, not included in the grant scope of work, or not previously approved by Metro.

### Frequently asked questions:

The following list describes situations or questions that occur regularly in the delivery of RTO grants. This guidance is intended to help potential grantees avoid situations where they have incurred ineligible costs or planned for work that RTO grant funds cannot cover. This list is not exhaustive. If you have a question about eligibility that is not covered here, please contact RTO staff prior to applying to discuss your ideas.

- Bicycles and scooters for an educational fleet are eligible purchases (the only eligible bike purchase). An “educational fleet” is a set of bikes or scooters for limited use during educational or outreach events. Grantee must maintain possession of the fleet when not being used directly for educational purposes.
  - If you are interested in purchasing children’s kick-scooters, or a scooter or bike fleet for educational or other purposes, contact Noel Mickelberry (School & Community Travel Options Coordinator) to discuss your options at [noel.mickelberry@oregonmetro.gov](mailto:noel.mickelberry@oregonmetro.gov).
- If an item is required for your grant project but was not included in the scope of work and budget, contact your Metro grant manager to discuss eligibility and applicability.
- **Engagement items, incentives, and stipends:** This guidance is to provide consistency in how items in this category of spending are provided and recognizes that funding these activities needs to be scaled appropriately. Purchase of items in this category must be associated with increasing awareness of travel options programs, improving safety while using travel options, and/or changing behavior to reduce single occupancy vehicle trips. The cost should be reasonable and prioritize new participants or expanded use of travel options by existing participants.
  - **Engagement items** are safety or program awareness/marketing items that are handed out at engagement events or as a thank you for participation (stickers, lights, etc.). These items do not need to be tracked, but receipts will need to be provided to Metro along with how they were used for engagement. Gift cards do not fall under engagement items.
    - Cost range: under \$5 per item.
  - **Incentives** may be funded **only** if they are used for the direct purpose of encouraging people to participate in a program intended to increase their use of travel options and reduce single-occupancy vehicle trips. Items should ideally be related to improving a travel options trip (bike locks, transit fare) or improving

safety (reflective items, helmets, etc.), but do not have to be (a gift card for coffee/local restaurant). Incentives cannot go toward the purchase of items for single-occupancy vehicle trips (gas gift cards, parking payments if not associated with carpooling). Incentives and recipients must be tracked using a Metro-provided template and cannot be provided to paid staff supporting an event.

- Cost range: \$5-25 for items such as helmets, reflective items, bike locks, gift cards, etc.
  - Random drawings of items above \$25 should be coordinated with Metro RTO staff before purchasing.
  - If a program intends to purchase children’s kick-scooters as an incentive, there is a cap of \$500 for the purchase of scooters for a single program/year and they must be used as an incentive for participation in a travel options program.
- **Stipends** may be used in regional travel options projects in several ways. This includes compensating individuals for their time assisting in the administration of events or ongoing activities. In addition, stipends can be used to compensate individuals for their participation in surveys, focus groups, community walks, or other substantial community engagement activities. Gift cards may be used as a stand-in for stipends if necessary. Payment amounts should be commensurate with the activity occurring and it is recommended that you review your proposed payment structure with Metro staff before implementing. All stipends/gift cards and recipients must be tracked using a Metro-provided template, and the recipient will be responsible for any taxes if the total compensation received exceeds \$600 (IRS guidelines).
  - Any eligible infrastructure paid for with RTO grant dollars must be publicly available. This means infrastructure in the public right of way or on public property, which may include public colleges and universities, or publicly funded housing communities and is available to guests.

For more information or individual assistance with the minimum grant requirements, contact RTO staff (see the Contact Information section).

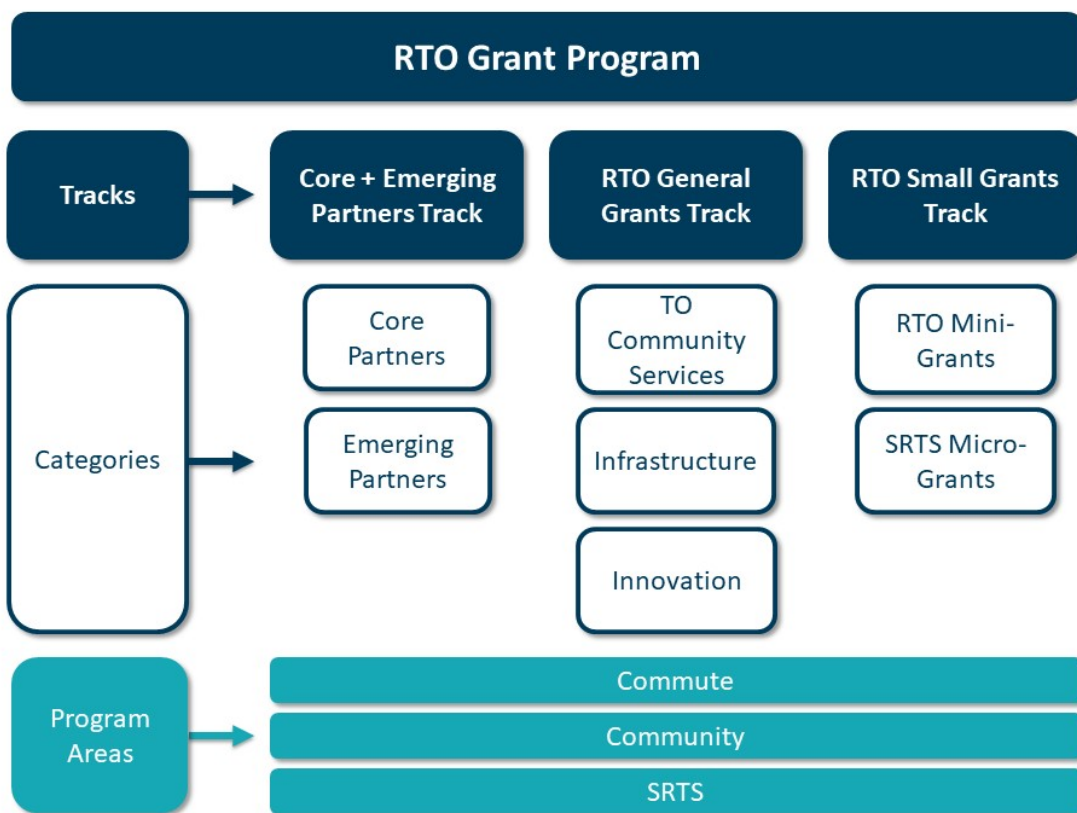
## RTO GRANT PROGRAM FRAMEWORK AND APPLICATION PROCESS

The RTO Grant Program has several updates in this cycle, aimed at increasing efficiency and clarity across categories, collecting more consistent data, improving access to the program for new partners, and fostering collaboration between RTO staff and partners.

The RTO Grant Program is divided into three overall “tracks” with grant categories contained within (Figure 1). The following sections describe each track in more detail. Please refer to the relevant section for a breakdown of category descriptions, application instructions and deadlines. Applicants are welcome to submit multiple applications for RTO grants. Partners who are unsure of which category to apply for are encouraged to reach out to RTO staff for advice.

Moving forward, the RTO Grant Program will center its activities, resources, and data collection around three Program Areas: Commute, Community, and Safe Routes to School. Eligible activities that support any of these three RTO Program Areas can be funded within all RTO grant categories.

Figure 1. RTO Grant Program Framework



## CORE & EMERGING PARTNERS TRACK

The Core & Emerging Partners track represents the RTO program's strategy to support established travel options programs and services over time. The Core & Emerging Partners track is intended for organizations that already have, or are working towards, a long-standing commitment to delivering travel options work as a key organizational function. Core & Emerging Partners will work collaboratively with RTO staff to establish a work program and budget that aligns with regional travel options goals.

Core & Emerging Partners will have an existing relationship with the Metro RTO Program and **will be invited by RTO staff to apply within this track**. All other applicants should apply for grant funds through the RTO General Grants track or Small Grants track (covered in subsequent sections).

Core Partners & Emerging Partners are, at a minimum, required to:

- Work with Metro staff to develop a work plan, performance measures, goals, and budget for RTO funds that is reflective of the mission and goals of Metro and the RTO Program.
- Use Metro and RTO plans, resources, and data to inform work plan objectives and tasks.
- Thoughtfully consider and incorporate equity into the program.
- Report on progress towards identified goals and outcomes consistently every quarter.
- Submit a final grant report that summarizes results, goals reached, and lessons learned.

All Core & Emerging Partners must submit separate applications if they intend to apply for work in more than one of the three distinct RTO Program Areas of Commute, Community, and SRTS. This allows for more precise and relevant application questions, reporting, and internal Metro record-keeping. If you have questions or are unsure about if your work falls into separate categories, please contact RTO staff.

**Funding and award schedule:** An estimated \$7,000,000 is available, with grant awards starting at \$50,000. Up to \$6 million will be awarded during the first round of funding in 2023, with the remaining funds to be awarded in the Emerging Partner category in subsequent fiscal years. Core Partners will be invited to apply once in 2023 and will enter into a 3-year grant agreement with Metro (7/1/2023 to 6/30/2026). Emerging Partners who are invited to apply in 2023 will also enter into a 3-year agreement with Metro. Additional Emerging Partners may be invited to apply in subsequent years in the grant cycle and will enter into an agreement with Metro for the remainder of the grant cycle. Organizations who are interested in participating in this track as an Emerging Partner in the future are encouraged to reach out to RTO staff to discuss eligibility. See the Important Dates section for a detailed breakdown of funding availability and due dates.

### Core Partners

*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, are previous recipients of multiple RTO funding awards, and have maintained an

organizational commitment to continuing travel options work. Core Partners are committed to working collaboratively with Metro RTO staff to develop programs that are responsive to meeting goals set out in the RTO Strategy. Any organizations who wish to be considered for Core Partner funding in future cycles are **encouraged to talk with RTO staff about an Emerging Partner application first.**

## **Emerging Partners**

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

Emerging Partners are defined as organizations that identify travel options work as a key organizational function and wish to expand their efforts into full-time, ongoing work, or have been working as a Core Partner but have made significant changes to their programming or staffing. This funding is intended to encourage and assist partners with advancing towards Core Partner status, with the acknowledgment that the process may encompass multiple grant cycles. Emerging Partner funding is primarily for planning, program development, and capacity building<sup>1</sup>. Upon successful completion of the grant, Emerging Partners will be considered for Core Partner funding in the next grant cycle.

Applicants should use the RTO grant as a commitment to advance travel options work within their organization, with stakeholders, and the community. Funding in this category may include staff time, consultant fees, and materials and services. Work may include developing a planning document that defines and establishes the applicant's commitment to and framework for conducting travel options work, adding a detailed travel options section to a local plan, or building upon existing planning guidance found in a transportation system plan or similar. A Travel Options plan should include, at a minimum:

- The specific group(s) 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 areas or groups.
- 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.

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<sup>1</sup> In limited situations, funding may be used for pilot projects intended to take initial steps in community engagement, only after a sufficient level of program development has taken place.

## RTO GENERAL GRANTS TRACK

The General Grants track is intended to fund a variety of travel options initiatives and projects, including funding for organizations that do not necessarily have a transportation focus. The General Grants track is open to all applicants eligible for RTO funding. This track is intended to be more flexible, project-based, and self-directed than the Core & Emerging Partners track. While Core & Emerging Partners are also eligible to apply for funding in this track, the General Grants track will seek to prioritize new applicants with the intention to expand partnerships and distribute RTO funding more equitably throughout the region.

**Funding and award schedule:** An estimated \$2,140,000 is available. Up to \$1 million will be awarded during the first round of funding in 2023, with the remaining funds to be awarded in subsequent fiscal years. All categories within the RTO General Grants application track will be open once per year starting in January 2023, and grants will be awarded in a 1–3-year grant agreement. See the Important Dates Section for a detailed breakdown of funding availability and due dates.

### Travel Options (TO) Community Services

*Grants to help community organizations provide travel options services.*

The TO Community Services category is intended specifically to fund organizations that don't necessarily focus on travel options as an organizational mission but are seeking to support travel options on behalf of the communities they serve. This category seeks to diversify access to RTO funds to different types of organizations, and to increase connections between partners that provide travel options services and the organizations and communities that need them. RTO staff will work closely with these grant recipients to support project development and execution, to ensure they have access to the resources needed to be successful in their project implementation through the RTO program and its partners.

Examples of eligible activities in this funding category include, but are not limited to, the following:

- Providing organizations with specific travel options services based on community-identified need
- Enhancing access to travel options at on-site locations (i.e., affordable housing sites, community service centers)

### Infrastructure

*Grants for installing supportive infrastructure to help people use active transportation modes.*

RTO funds can be used on a limited number of small project types intended to add supportive elements to existing infrastructure that improve the user experience or improve access for people using travel options. Examples of eligible infrastructure projects include, but are not limited to, the following:

- Publicly available amenities including bicycle parking or lockers, bike repair or water refill stations, bike stair rails, and E-bike charging stations
- Wayfinding devices, such as signage or sharrows
- Bicycle or pedestrian counters
- Temporary public demonstration projects or events, such as Better Block or Open Streets

In general, RTO funds are not intended for infrastructure projects such as bike lanes, sidewalks, crossing improvements, bus shelters and other projects that create the infrastructure necessary to enable people to use non-auto travel modes. Other funding sources are available for these needs.

**See the RTO Grant Eligibility Guidelines section above for more examples and clarifications on allowable expenses.**

**Infrastructure grant agreements are for one year only.** Proposed infrastructure projects should be shovel-ready, have the necessary approvals (or be close to obtaining the necessary approvals), and should be installed or on track for installation by the end of the 1-year grant period.

## **Innovation**

*Grants to test new approaches or reach new audiences to improve access to travel options.*

Projects in this category should focus on executing new ideas, reaching new audiences, or testing out new approaches and/or emerging technologies that encourage or assist people with using non-single occupancy vehicle modes. Examples of eligible activities include, but are not limited to, the following:

- 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.
- Reaching new communities of color, low-income households, and other historically marginalized communities with travel options resources, training, or information.

The Innovation category is intended to be flexible and accommodate a wide variety of ideas. Potential applicants who are unsure if or where an idea may fit into the RTO Program are encouraged to reach out to RTO staff to determine if the Innovation category is an appropriate fit.

## APPLICATION PROCESS: CORE & EMERGING PARTNERS TRACK AND RTO GENERAL GRANTS TRACK

### 2023 application timeline at-a-glance:

January 3, 2023	Application available in ZoomGrants
January 18, 10:00 a.m. - 12:00 p.m.	Optional information session for the Core & Emerging Partners application track ( <a href="#">registration link</a> )
January 24, 2:00 – 4:00 p.m.	Optional information session for the General Grants and Small Grants application tracks ( <a href="#">registration link</a> )
<b>February 3, 5:00 p.m.</b>	<b>Core + Emerging Partners application track - Letters of Interest due in ZoomGrants</b>
<b>March 10, 5:00 p.m.</b>	<b>General Grants application track - Letters of Interest due in ZoomGrants</b>
<b>March 31, 5:00 p.m.</b>	<b>Full grant applications (all application tracks) due in ZoomGrants</b>

See the Important Dates Section for a detailed breakdown of funding availability and due dates.

**Accessing the application:** All applications must be submitted using the online software ZoomGrants. If an applicant receives grant funds, grantees will also be required to use ZoomGrants throughout the grant cycle to submit quarterly reports and invoices. For tips and FAQ on using ZoomGrants, see Appendix B.

- Core & Emerging Track application link:  
<https://www.zoomgrants.com/gprop.asp?donorid=2199&limited=4146>
- General Grants Track application link:  
<https://www.zoomgrants.com/gprop.asp?donorid=2199&limited=4399>

**Letter of Interest (LOI):** The first step in the grant application process is submission of a Letter of Interest (LOI) on ZoomGrants. 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 do not advocate for any applicants during review and award but can provide any needed assistance to help create strong grant applications during the application process. Core & Emerging applicants must complete the Letter of Interest by February 3, 2023, and General Grants by March 10, 2023, or sooner. Letters of Interest may take up to 15 business days for Core & Emerging Partners and 10 business days for General Grants to be reviewed, answered, and approved.



Core & Emerging Partners have an accelerated LOI timeline to allow time for collaboration on the final scope of work and budget. Core & Emerging Partners must also review and submit responses to the RTO Travel Options Capability Self-Assessment and the RTO Racial Equity Self-Assessment as part of the LOI process. In addition, Core & Emerging Partners submitting an LOI within the Commute Program Area must submit responses to the Commute Program Services Matrix. These are all short questionnaires that will be accessible in the Library tab of the Core & Emerging Partners application on ZoomGrants. Responses will be used for informational purposes, to allow RTO staff to provide recommendations for applicants on their final application, and to support Metro and partners' ongoing collaboration. Responses to these questionnaires do not impact eligibility for RTO funding.

**Full application:** Once the applicant's Letter of Interest has been approved, the rest of the online grant application will open for completion. In addition to the application questions, applicants must upload a completed RTO Scope of Work template and RTO Budget template document into ZoomGrants. Both templates are required to submit an RTO application and are available for download at the RTO Grant Program website ([oregonmetro.gov/rto/grants](https://oregonmetro.gov/rto/grants)) as well as on ZoomGrants. Each

*Use of the RTO Scope of Work template and RTO Budget template is required to apply. Both templates are available for download at the [RTO Grant Program website](https://oregonmetro.gov/rto/grants) as well as on ZoomGrants.*

template includes guidance to clarify frequently asked questions. Both templates will assist applicants in completing the application questions on ZoomGrants- applicants are encouraged to develop a scope of work and budget using the templates provided before answering the application questions. For additional support completing the Scope of Work template, contact Grace Stainback at [grace.stainback@oregonmetro.gov](mailto:grace.stainback@oregonmetro.gov) as well as the relevant Program Area lead (See the Contact section for help determining who to contact). For additional support completing the RTO Budget Template, [view this guidance video first](#); with remaining questions contact Mary Anderson at [mary.anderson@oregonmetro.gov](mailto:mary.anderson@oregonmetro.gov).

Notes on measurement/evaluation: The RTO Scope of Work template as well as the grant application will ask applicants about their plan for measurement and evaluation. All data collected is used not only for federal compliance, but also to support regional policy and planning, promote RTO partners, and reinforce the effectiveness of providing travel options programs in the region. Applicants are expected to describe the methodology for data collection, measurement, and reporting, and awarded grantees are expected to complete these items as laid out in the scope of work, partnership requirements, and grant agreement.

Organizations should select data to collect from the Multiple Account Evaluation (MAE) Framework (Appendix C). The MAE Framework illustrates how RTO staff use the data collected from grant program activity to articulate the RTO Program's overall benefits and outcomes. Partners are not expected to report on every account. Rather, the **MAE is a menu of options** to help partners identify which data (active trips, participation, demographics, etc) make the most sense to collect as a measurement indicator for their project or program. Applicants are also welcome to identify additional data that they plan to collect as is relevant. RTO staff will work with awarded grantees to develop a system for collecting and tracking data.

Commute Program Core grantees will be required to align their reporting for relevant programming with the Commute Program Services Matrix submitted in the LOI phase. Reporting for work falling outside of these core services may be selected from measurement indicators from the MAE.

**Review and award:** RTO Grant Review Committees are comprised of non-RTO Metro staff and other regional partners and organizations with experience in the particular area of focus. Proposals will be reviewed based on the following areas:

### **Travel Options Strategy**

- Application clearly describes how project/program outcomes will promote and increase the use of travel options in the Metro region.

### **Goals and Outcomes**

Application demonstrates all of the following:

- Clearly identifies goals and outcomes for the project/program, and links them to goals identified in Metro's RTO Strategy, Regional Transportation Plan, and Climate Smart Strategy.
- Clearly links goals and outcomes to tasks identified in the scope of work.

### **Scope of Work and Applicant Capacity\***

Application demonstrates all of the following:

- Provides a thorough and complete description of the scope of work, and the activities seem well thought out to achieve desired outcomes.
- Applicant has the capacity to successfully complete the project, including identification of key people and partnerships, and descriptions of their time commitment (FTE), roles and qualifications.

### **Audience and Equity\***

Application demonstrates one or both of the following:

- How the activity will directly engage and benefit communities, in particular people of color or other historically marginalized communities.
- Applicant is currently demonstrating a commitment to equity through its workplace practices or community impact, or applicant has identified specific actions it will take during the grant term to build its capacity to advance equity.

*Continued on next page*

### **Project Budget**

- Budget is complete, reasonable, and clearly demonstrates how the grant funds will be used to complete all of the tasks identified in the scope of work.

### **Evaluation of outcomes**

Application demonstrates all of the following:

- Clearly describes how progress and outcomes will be measured.
- Describes how the evaluation strategy will help measure progress towards the goals and outcomes of the project/program.

*\*Indicates this criterion will be weighted higher than other criteria during the review process.*

The review process may include follow-up communication or requests for refinement of the application. Awards will be announced in late May, and funding will be available on July 1, 2023. 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 review committee.

The application process will open again in January 2024 and January 2025 for all categories in the General Grants track (and for Emerging Partners on an invite-only basis). See the Important Dates section for a detailed breakdown of funding availability and due dates.

## **RTO SMALL GRANTS TRACK**

*This track encompasses the category formerly called RTO Sponsorships.*

The RTO Small Grants Track is comprised of small awards at or under \$5,000 intended to fund specific, one-time purchases of **materials and services only** to support events, education, and outreach activities. The RTO Program's funding priority in the Small Grants track is for materials & services that support **transportation-focused** events, education & outreach activities. For non-transportation specific events, we prioritize local, community-based, and culturally specific events that incorporate travel options outreach and engagement to their attendees.

No match is required for Small Grants funding. This track includes two categories of funding:

**RTO Mini-Grants:** open to all applicants eligible for RTO funding

**SRTS Micro-Grants:** open to individual schools or nonprofit school PTOs. There are 25 SRTS Micro-Grants available each fiscal year and fund up to \$500 per request. Schools may only receive one micro-grant per school year. Applications for SRTS Micro-Grants will close for the fiscal year when all 25 have been requested.

**Funding and award schedule:** An estimated \$172,500 is available over the 3-year grant cycle. Individual grant awards are limited to \$5,000 (with SRTS Micro-Grants limited to \$500). Applicants may submit more than one application within the Small Grants Track; however, applicants are advised to a limit of one application per fiscal year per category. Approximately \$57,000 will be

available from July 1st, 2023 – June 30th, 2024, with the remaining funds to be awarded in subsequent fiscal years.

**Application process:** Applications can be submitted at any time throughout the grant cycle through an [online form](#) (separate from ZoomGrants) and are awarded on a rolling basis. Small Grants applications are scored in the order received until all funds for the fiscal year are awarded.

**Eligible expenses:**

Common eligible uses of Small Grants funds include materials and services to support one-time events or initiatives and may include:

- outreach materials
- engagement items or incentives such as bike locks, helmets, etc.
- vendor provided services such as bike tune-ups at events (see additional requirement for documentation of these services below)
- temporary signage to support an event
- eligible snacks or refreshments

*RTO Small Grants awards are ongoing and have no specific application deadline. Apply for Small Grants funding using this online form:  
<https://oregonmetro.wufoo.com/forms/metro-rto-small-grants-application>*

**See the RTO Grant Eligibility Guidelines section above for more information on allowable expenses, including clarifications on incentives and food.**

**Documentation of eligible purchases are required when submitting invoices for Small Grants funds.** Furthermore, the documentation of payment for services- such as bike tune-ups at an outreach event- must include the standard fee/rate offered for the service by the vendor, and the names/hours of staff from the vendor who provided the services for the event/activity on the corresponding invoice submitted for reimbursement. If you have any questions about necessary documentation for services, please reach out to RTO staff to clarify before the event.

Activities and items that are **not** eligible in the Small Grant category include:

- Labor or personnel time (Small Grants are for materials and services only).
- Installation of permanent infrastructure (these types of services must be funded through the Infrastructure grant category).
- Ongoing purchases longer than one calendar year.

## IMPORTANT DATES FOR THE 2023-2026 RTO GRANT CYCLE

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. Funding amounts are subject to change.

Grant Track Estimated Funding Grant Category	Core & Emerging Partners ~\$7,000,000		RTO General Grants ~\$2,140,000			RTO Small Grants ~\$172,500	
	Core Partner	Emerging Partner	TO Community Services	Infrastructure	Innovation		
Type	Competitive, Invite-only	Competitive, Invite- only	Competitive	Competitive	Competitive	On-Demand, Rolling	
<b>January 3, 2023</b>	OPEN	OPEN	OPEN	OPEN	OPEN	OPEN, \$57,000 available	
<b>Feb 3, 2023</b>	LOI DUE 5:00 pm	LOI DUE 5:00 pm					
<b>March 10, 2023</b>			LOI DUE 5:00 pm	LOI DUE 5:00 pm	LOI DUE 5:00 pm		
<b>March 31, 2023</b>	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm		
<b>April-May 2023</b>	SCORE, AWARD ~\$6,000,000		SCORE, AWARD ~\$1,000,000				
<b>July 1, 2023</b>	Grant-funded activity begins		Grant-funded activity begins				
<b>January 2, 2024</b>	+ \$1,000,000 available, open on an invite-only basis each January, CLOSED when all funds awarded		OPEN	OPEN	OPEN		
<b>March 8, 2024</b>			LOI DUE 5:00 pm	LOI DUE 5:00 pm	LOI DUE 5:00 pm		
<b>March 29, 2024</b>			APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm		
<b>April-June 2024</b>			SCORE, AWARD ~\$570,000			+ \$57,000 available	
<b>January 1, 2025</b>			OPEN	OPEN	OPEN		
<b>7March 7, 2025</b>			LOI DUE 5:00 pm	LOI DUE 5:00 pm	LOI DUE 5:00 pm		
<b>March 31, 2025</b>			APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm	APPLICATION DUE 5:00 pm		
<b>April-June 2024</b>			SCORE, AWARD ~\$570,000			+ \$57,000 available. CLOSED when all funds awarded	
<b>June 30, 2026</b>		Grant-funded activity ends					
<b>July 31, 2026</b>		Final reports and invoices due					

## CONTACT INFORMATION

If you are not sure who to contact, please visit the RTO Grants website or reach out to the general RTO staff at [rto@oregonmetro.gov](mailto:rto@oregonmetro.gov) or 503-797-1757.

**Contact this RTO staff member specifically for the following:**

RTO Grant Program general questions, application process, reporting: **Grace Stainback**  
[Grace.Stainback@oregonmetro.gov](mailto:Grace.Stainback@oregonmetro.gov)

RTO Commute Program grants, Commute Program Action Plan, Get There: **Marne Duke**  
[Marne.Duke@oregonmetro.gov](mailto:Marne.Duke@oregonmetro.gov)

RTO Community & SRTS Program grants, RTO Racial Equity Strategy: **Noel Mickelberry**  
[Noel.Mickelberry@oregonmetro.gov](mailto:Noel.Mickelberry@oregonmetro.gov)

RTO Grant Program invoicing, budgeting, and federal requirements: **Mary Anderson**  
[Mary.Anderson@oregonmetro.gov](mailto:Mary.Anderson@oregonmetro.gov)

General RTO Program inquiries: **Summer Blackhorse** [Summer.Blackhorse@oregonmetro.gov](mailto:Summer.Blackhorse@oregonmetro.gov)

RTO Program Manager: **Daniel Kaempff** [Daniel.Kaempff@oregonmetro.gov](mailto:Daniel.Kaempff@oregonmetro.gov)

## **APPENDIX A: GLOSSARY OF RELEVANT PLANS AND RESOURCES**

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.

### **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.

### **2018 Regional Travel Options (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 RTO strategy is the RTO Program's 10-year strategic plan and informs all RTO Program activities.

### **2022 RTO Racial Equity Strategy**

Metro's Regional Travel Options (RTO) program has committed to advance racial equity in travel options to ensure that all residents in the Portland Metro region can get to where they need to go safely, affordably, and efficiently. In 2021, the RTO program conducted a year-long strategy and action plan development process. The [Metro RTO Racial Equity Strategy](#) was completed in 2022 and serves as an addendum to the 2018 RTO Strategy, incorporating policy guidance from Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion and the Planning & Development Department's Racial Equity Action Plan

### **2022 RTO Commute Program Action Plan**

[The Commute Program Action Plan](#) was created in partnership with program stakeholders and provides a framework to support the growth of commuter programming in the region. It outlines goals and provides recommendations to help ensure future programming is effective, addresses equity, and meets the needs of commuters in the region. A detailed action item list guides Metro staff and partners on creating a comprehensive and coordinated approach to programming. Grantees are expected to consider the goals and objectives stated in the plan and assume coordination with Metro on moving them forward.

## Regional SRTS Walkshed Analysis

Metro’s Regional Safe Routes to School Walkshed Analysis aims to better understand the safety and equity needs of schools across the region. This analysis uses a ‘walkshed’, which includes all the streets and trails within one mile of an individual school, as the basis for this analysis; along with school-based demographics. This analysis looks at eight variables for each school – Absenteeism, BIPOC students, Students with disabilities, Ever English Learners, Low-income students, Barrier Streets, Crashes, and Sidewalk presence. Metro developed an interactive map tool for programs and jurisdictions across the region to view this analysis and apply to their RTO grant applications as well as other SRTS programmatic or infrastructure work in their community. [Visit the interactive map tool](https://gis.oregonmetro.gov/schoolwalksheds/) to learn more: <https://gis.oregonmetro.gov/schoolwalksheds/>

## RTO Research

The RTO team regularly conducts research to support the RTO program and regional efforts to reduce drive-alone trips and change travel behavior. These resources are available from [oregonmetro.gov/travel-options-research](https://oregonmetro.gov/travel-options-research) and currently include:

2019 RTO Evaluation: RTO requires an evaluation of each grant cycle to understand whether funding is delivering projects that provide measurable benefit to the region and align with regional and state goals to achieve more sustainable and equitable transportation outcomes. The upcoming 2023 RTO Evaluation will continue to build on the findings from the 2019 Evaluation.

2019 RTO Survey and Focus Groups: The RTO Survey is an important measurement tool and is conducted every few years to provide insight into current regional trends in transportation choices and focus RTO program efforts to maximize return on investment. The focus of the 2019 RTO Survey (and associated focus groups) was to make comparisons between low-income and high-income residents, white residents and residents of color, and gain insights into the TDM strategies residents find the most motivating.

2019 TDM Inventory and TDM Needs & Opportunities Assessment: In 2018 and 2019, Metro worked with a consultant to develop a regional TDM inventory. This involved defining strategies, collecting data on active programs within the Metro jurisdiction, and mapping them. The purpose of the TDM Inventory is to help develop a better picture of how programs and services are distributed across the region. The information assembled was used by Metro staff to build a TDM Inventory Storymap, an open and interactive resource, to share information about activities and inform a regional TDM assessment. The TDM Needs & Opportunities Assessment builds on the work of the TDM Inventory by synthesizing information about the spatial distribution of programs and services, infrastructure, new mobility options, and strategic partners in the region. The findings of this assessment can be used to compare geographic areas of relative need and opportunity with respect to future TDM programs.



## APPENDIX B: ZOOMGRANTS APPLICATION TIPS

To submit a ZoomGrants application, follow the steps below:

- Core & Emerging Track application link:  
<https://www.zoomgrants.com/gprop.asp?donorid=2199&limited=4146>
- General Grants Track application link:  
<https://www.zoomgrants.com/gprop.asp?donorid=2199&limited=4399>
- Complete the Application Summary Tab and Submit a Letter of Interest first; once RTO staff approves the Letter of Interest, you can access and submit the full application
- Instructions for completing each step of the application are located in the Instructions tab of each step.
- For technical support, use the Help button at the top of the ZoomGrants page, visit [help.ZoomGrants.com](http://help.ZoomGrants.com) or ZoomGrants [Applicant FAQ](#), or contact the ZoomGrants Help Desk at [Questions@ZoomGrants.com](mailto:Questions@ZoomGrants.com).

### Additional Tips for Working in ZoomGrants

- You will need to have a [ZoomGrants account](#) in order to be able to submit an application. If you already have a ZoomGrants account from another Metro grant program, you do not need a new account. Metro staff cannot reset passwords or maintain accounts on behalf of an organization or individual.
- The user who starts an application in ZoomGrants can invite others to contribute to the application by inviting them to be collaborators in ZoomGrants. Note, only the primary applicant can submit the application; the submit button does not appear for those working as collaborators.
- If you have an RTO application already and would like to start another, log in to ZoomGrants, click Open Programs and Apply Again. If the Open Programs button is not shown, the account being used is likely a collaborator account.
- Each answer has a character limit, which includes spaces. For example, 3,000 characters is approximately one page.
- Responses are saved automatically in ZoomGrants when you click outside the response field.
- If you cut and paste answers into ZoomGrants from another program such as Word, be sure to remove all formatting (e.g., bullets, superscript, etc.) by pasting text only. You will receive an error message when attempting to submit your application, and you will have to locate and remove the formatting to successfully submit.
- For technical support, use the Help button at the top of the ZoomGrants page, visit [help.ZoomGrants.com](http://help.ZoomGrants.com) or ZoomGrants [Applicant FAQ](#), or contact the ZoomGrants Help Desk at [Questions@ZoomGrants.com](mailto:Questions@ZoomGrants.com).

## **Direct Links to Frequently Asked ZoomGrants Questions**

<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/>







## APPENDIX C: MULTIPLE ACCOUNT EVALUATION (MAE) FRAMEWORK

The Multiple Account Evaluation (MAE) Framework illustrates how RTO staff use the data collected from grant program activity to articulate the RTO Program’s overall benefits and outcomes.



Partners are not expected to report on every account. Rather, the **MAE is a menu of options** to help partners identify which data (auto trips reduced, active trips, participation, demographics, etc) make the most sense to collect as a measurement indicator for their project or program. In the RTO Scope of Work template and grant application, identify the appropriate data you plan to collect and describe the methodology for data collection.

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*

*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.*

	Partner capability	Partner capability	Building RTO partner capability through grants and support	Average capability	Baseline to be established in 2019-2023 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