Agenda

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC) Workshop
Date: Wednesday, August 14, 2024
Time: 9:00 a.m. to 12:00 p.m.
Place: Virtual meeting held via Zoom
video recording is available online within a week of meeting
Connect with Zoom
Passcode: 077990
Phone: 888-475-4499 (toll free)

9:00 a.m.	**Call meeting to order and Introductions**	Vice Chair Leybold
9:10 a.m.	**Comments from the Chair and Committee Members** • Updates from committee members around the region (all)	
	Public communications on agenda items	
	Consideration of TPAC workshop summary, June 12, 2024 Edits/corrections sent to Marie Miller	Vice Chair Leybold
9:15 a.m.	**2028-30 Regional Flexible Funds Allocation (RFFA) Proposers Workshop Part 1** Purpose: To provide TPAC an overview of the pre-application process and the final evaluation criteria for the Step 2 allocation.	Grace Cho, Metro Ted Leybold, Metro
10:55 a.m.	*5-minute meeting break*	
11:00 a.m.	**2028-30 Regional Flexible Funds Allocation (RFFA) Proposers Workshop Part I – continued** Purpose: To provide TPAC an overview of the pre-application process and the final evaluation criteria for the Step 2 allocation.	Grace Cho, Metro Ted Leybold, Metro
12:00 p.m.	**Adjournment**	Vice Chair Leybold

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964, Title II of the Americans with Disabilities Act , Section 504 of the Rehabilitation Act and other statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit oregonmetro.gov/civilrights or call 503-797-1890. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1890 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. Individuals with service animals are welcome at Metro facilities, even where pets are generally prohibited. For up-to-date public transportation information, visit TriMet's website at trimet.org

Thông báo về sự Metro không kỳ thị của

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong www.oregonmetro.gov/civilrights. Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт www.oregonmetro.gov/civilrights. або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

Metro 的不歧視公告

尊重民權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站www.oregonmetro.gov/civilrights。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamtaa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo www.oregonmetro.gov/civilrights. Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullan dadweyne, wac 503-797-1700 (8 gallinka hore illaa 5 gallinka dambe maalmaha shaqada) shan maalmo shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수www.oregonmetro.gov/civilrights. 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

Metroの差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、www.oregonmetro.gov/civilrights。までお電話ください公開会議で言語通訳を必要とされる方は、Metroがご要請に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

إشعار بعدم التمييز من Metro

تحترم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يُرجى زيارة الموقع الإلكتروني www.oregonmetro.gov/civilrights. إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 503-797-1700 (من الساعة 8 صباحاً حتى الساعة 5 مساءاً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang www.oregonmetro.gov/civilrights. Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a www.oregonmetro.gov/civilrights . Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте www.oregonmetro.gov/civilrights. Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

Avizul Metro privind nediscriminarea

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați www.oregonmetro.gov/civilrights. Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib www.oregonmetro.gov/civilrights. Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntxov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwm ua ntej ntawm lub rooj sib tham.

2024 TPAC Work Program

As of 8/6/2024

NOTE: *Items in* ***italics*** *are tentative;* ***bold*** *denotes required items*

All meetings are scheduled from 9am - noon

TPAC meeting, August 2, 2024	**TPAC workshop meeting August 14, 2024**
MEETING CANCELED	**Agenda Items:** • 2028-30 RFFA Proposers Workshop Part 1 (Cho/Leybold, 160 min)
TPAC meeting, September 6, 2024 Comments from the Chair: • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • Transit Minute (Ally Holmqvist) • 28-30 RFFA Step 2 – Call for Projects (Grace Cho) • 2024-25 Unified Planning Work Program (UPWP) Administrative Amendment for minor budget changes (John Mermin) **Agenda Items:** • 2023 Regional Transportation Plan Implementation & Local TSP Support Update (Kim Ellis and André Lightsey-Walker, Metro, 45 min.) • Regional Rail Futures Study (Elizabeth Mros-O'Hara, Metro, 15 min) • Forward Together 2.0 Vision (Kate Lyman, TriMet; 30 min)	

TPAC meeting, Oct. 4, 2024 **hybrid meeting; in-person, MRC Council Chamber & online via Zoom**

Comments from the Chair:

- Committee member updates around the Region (Chair Kloster & all)
- Monthly MTIP Amendments Update (Ken Lobeck)
- Fatal crashes update (Lake McTighe)
- Transit Minute (Ally Holmqvist)

Agenda Items:

- **MTIP Formal Amendment 24-XXXX** Recommendation to JPACT (Lobeck, 10 min)
- **Regional Rail Futures Study Resolution 24-XXXX** Recommendation to JPACT (Elizabeth Mros-O'Hara, 10 min)
- Metro FFY 2024 Obligation Targets Performance Summary (Ken Lobeck, Metro; 15 min)
- EPA Climate Pollution Reduction Grant (Rose, 20-30 min)
- Connecting First and Last Mile Study Introduction (Ally Holmqvist, Metro; 30 min)
- Kick-off to the Transportation Demand Management and Regional Travel Options Strategy Update (Caleb Winter, Marne Duke, Noel Mickelberry, Grace Stainback, 45 min)
- 2023 Regional Transportation Plan Implementation and Local TSP Support Update (Kim Ellis and André Lightsey-Walker, 45 min.)

TPAC workshop meeting October 9, 2024

Agenda Items:

- ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min)
- Project Delivery Training Series – Cost Estimating Overview (Ken Lobeck, Metro, Justin Bernt & Tiffany Hamilton, ODOT, 60 min)

TPAC meeting, November 1, 2024

Comments from the Chair:

- Committee member updates around the Region (Chair Kloster & all)
- Monthly MTIP Amendments Update (Ken Lobeck)
- Fatal crashes update (Lake McTighe)
- Transit Minute (Ally Holmqvist)
- 2028-30 RFFA – Update on Step 2 Applications

Agenda Items:

- **MTIP Formal Amendment 24-XXXX** Recommendation to JPACT (Lobeck, 10 min)
- Cascadia HSR Program Update (Ally Holmqvist, Metro; ODOT; WSDOT; 45 min)
- Freight Study update (Tim Collins, 30 min)
- Forward Together 2.0 Implementation (Kate Lyman, TriMet; 45 min)
- TriMet FX Plan – Program Update (Jonathan Plowman, TriMet, 30 min)

TPAC meeting, December 6, 2024

Comments from the Chair:

- Committee member updates around the Region (Chair Kloster & all)
- Monthly MTIP Amendments Update (Ken Lobeck)
- Fatal crashes update (Lake McTighe)
- Transit Minute (Ally Holmqvist)

Agenda Items:

- **MTIP Formal Amendment 24-XXXX** Recommendation to JPACT (Lobeck, 10 min)
- 2028-30 RFFA Step 2 – Summary of Applications Received and Process Steps (Informational, Cho 20 min)
- Safe Streets for All Update (McTighe, 45 min)
- Regional Emergency Transportation Routes Phase 2: tiering methodology (John Mermin, Metro, Carol Chang, RDPO, 90 min)

Parking Lot: Future Topics/Periodic Updates

- 82nd Avenue Transit Project update (Elizabeth Mros-O'Hara & TBD, City of Portland)
- TV Highway Corridor plan updates
- High Speed Rails updates (Ally Holmqvist)
- I-5 Interstate Bridge Replacement program update
- Ride Connection Program Report (Julie Wilcke)
- Get There Oregon Program Update (Marne Duke)
- RTO Updates

Agenda and schedule information E-mail: marie.miller@oregonmetro.gov or call 503-797-1766.
To check on closure or cancellations during inclement weather please call 503-797-1700.

Meeting minutes

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Meeting:	**Transportation Policy Alternatives Committee (TPAC) Workshop**
Date/time:	Wednesday, June 12, 2024 | 9:00 a.m. to 12:00 p.m.
Place:	Virtual online meeting via Web/Conference call (Zoom)

Members Attending	**Affiliate**
Tom Kloster, Chair	Metro
Allison Boyd	Multnomah County
Dyami Valentine	Washington County
Judith Perez Keniston	SW Washington Regional Transportation Council
Eric Hesse	City of Portland
Jaimie Lorenzini	City of Happy Valley & Cities of Clackamas County
Jay Higgins	City of Gresham & Cities of Multnomah County
Mike McCarthy	City of Tualatin & Cities of Washington County
Tara O'Brien	TriMet
Chris Ford	Oregon Department of Transportation
Gerik Kransky	Oregon Department of Environmental Quality
Laurie Lebowsky-Young	Washington State Department of Transportation
Lewis Lem	Port of Portland
Bill Beamer	Community Member at Large
Marianne Brisson	OPAL Environmental Justice Oregon
Sarah Iannarone	The Street Trust
Jasia Mosley	Community Member
Indi Namkoong	Verde
Ashley Bryers	Federal Highway Administration
Katherine Kelly	City of Vancouver

Alternates Attending	**Affiliate**
Jamie Stasny	Clackamas County
Sarah Paulus	Multnomah County
Mark Lear	City of Portland
Dayna Webb	City of Oregon City & Cities of Clackamas County
Will Farley	City of Lake Oswego & Cities of Clackamas County
Gregg Snyder	City of Hillsboro & Cities of Washington County
Neelam Dorman	Oregon Department of Transportation
Glen Bolen	Oregon Department of Transportation

Members Excused	**Affiliate**
Karen Buehrig	Clackamas County
Sara Westersund	Oregon Walks
Steve Gallup	Clark County
Shawn M. Donaghy	C-Tran System
Danielle Casey	Federal Transit Administration

Shauna Hanisch-Kirkbride	Washington Department of Ecology

Guests Attending	**Affiliate**
Adam Torres	Clackamas County
Amy Fandrich	TriMet
Andrew Mortensen	David Evans & Associates
Arini Farrell	Multnomah County
Dan Randol	Oregon Department of Transportation
Dennis Gelfand	
Henry Miller	City of Tigard
Ian Matthews	Oregon Department of Transportation
Jan Black	TriMet
Jenn Glueck	City of Gresham
Justin Bernt	Oregon Department of Transportation
Kathryn Doherty-Chapman	Portland Bureau of Transportation
Katie Gillespie	Oregon Department of Transportation
Liz Rickles	Portland Bureau of Transportation
Mark Hardeman	Oregon Department of Transportation
Matt Novak	Oregon Department of Transportation
Michael Weston	City of King City
Nick Fortey	Federal Highway Administration
Peter Swinton	Tualatin Hills Park & Recreation District
Randall Olsen	Community Action of Washington County
Rob Wattman	Oregon Department of Transportation
Scott Hoelscher	Clackamas County
Tiffany Hamilton	Oregon Department of Transportation
Trevor Sleeman	Oregon Department of Transportation

Metro Staff Attending
Blake Perez, Caleb Winter, Eliot Rose, Grace Cho, Grace Stainback, John Mermin, Ken Lobeck, Kim Ellis, Lake McTighe, Marie Miller, Matthew Hampton, Noel Mickelberry, Ted Leybold, Tom Kloster

Call to Order and Introductions
Chair Kloster called the meeting to order at 9:00 a.m. Introductions were made. Reminders where Zoom features were found online was reviewed.

Comments from the Chair and Committee Members - none received

Public Communications on Agenda Items - none received

Consideration of TPAC workshop summary, April 10, 2024 (Chair Kloster) The committee was asked to send edits to Marie Miller. With none received the summary as approved as written.

ODOT Update on Funding Allocations for 2028-30 (Leverage, ARTS, etc.) and preview of forthcoming ODOT MTIP amendments (Chris Ford, ODOT) It was reported there are no new updates at this time with the funding allocations for 2028-30 STIP. More may be offered later this year. The second part of the agenda addressed the 2024-27 STIP upcoming amendments. The TIP amendments were described as (1) Rebalancing / cashflow and delivery relating to largely administrative amendments and slips in schedules, and (2) Construction "bucket" allocations with funding handling through OTC annual

amendment. Examples of the construction bucket allocations were given. Two others of note were given: an amended project with additional funds added to the project, and a new project for safety improvements funded from Region 1 Safety reserve.

Ken Lobeck added these are primarily ODOT managed and funded projects. This will not impact any of the regional flexible fund allocation projects. We will be doing a separate review of those as part of the end of the year review about projects as part of the slips. We may be doing things parallel to that, but these are ODOT reviews of their projects that will go forward. Mr. Ford noted the amount of detail and partnerships to make these things happen. It's complex at times with a lot of documentation, so I'm grateful for all the work.

2028-30 RFFA – Step 2 Evaluation Performance Measures Evaluation Criteria: Discussion of Refinements and Inputs (Grace Cho & Ted Leybold, Metro) The 2028-2030 Regional Flexible Funds Allocation Step 2 overview was presented. The main objective is to advance the goals of the Regional Transportation Plan (RTP). Other cycle objectives include:

- Federal eligibility and/or state requirements
- E.g. No sub-allocation, CMAQ eligible projects, air quality
- Federal aid process and project delivery considerations
- Efficiently and cost-effectively navigate federal funds
- Multiple objectives

Step 2 evaluation criteria, performance measures and methods was presented. Next Steps in the Step 2 RFFA Process was reviewed.

Comments from the committee:
Henry Miller with the City of Tigard asked how will RFFA recommendations from prior years be advanced or evaluated through the next RFFA process? Ms. Cho noted that as part of the program direction for this cycle, what's been acted on by TPAC but not yet acted on by JPACT or adopted, is that projects that received construction funding in the 2025-27 allocation are ineligible to apply. Redistribution is kind of an open opportunity to address any cost overruns that we're starting to see or recognizing that there's been a theme on any project these days within transportation, outside transportation, project development. If you're awarded project development funding last cycle you can apply again, in a sense, seeking to move forward the next phase of work. They will get evaluated through the same process that's been outlined. It's not taking scores from the last cycle. We're applying an updated lens. It will need to go through that full evaluation.

Jaimie Lorenzini noted looking at the RTP goal for mobility options and it seems heavily weighted down toward adding things to the corridor. I'm curious if there might be space for us to also include optimizing the existing system to reflect projects that have intelligent transportation system components or transportation demand management components or want to some kind of traffic calming as part of their construction project. I don't know if that would be something that we could incorporate or would be useful. Ms. Cho noted some of those elements are better reflected in the climate goal area. This is part of where I've struggled thinking through some of the performance measures, of duplication of measures, which you'll see in some cases are consistent or are the same measure maybe in each goal, like a land use component. I'm open to feedback on that.

Eric Hesse noted reflecting on that question, which I appreciate trying to make sure those types of approaches are generally supported within mobility options. I do see both Complete Streets Design and technology strategies increase transit reliability. Maybe they need to be TSP related, but one could

imagine other signal improvements that could do that as well as freight barrier removal and other pieces. From my perspective you might be able to fit some of those strategies in that category as well as drafted. As you noted, there are a lot of geographic and other types of quantitative sort of threshold types of issues that we say are above the regional average or other things. For example, pointing to the economic value atlas. I guess you wanted to clarity Metro's intent around being able to provide maps or other resources. You are offering more technical assistance this time around. If there's more you could say around how you're planning to approach supporting local jurisdiction's ability to readily understand how to apply those criteria would be helpful for us looking ahead.

Ms. Cho noted missing a whole point that was meant to be made in the presentation about noting that a number of these performance measures are coming from a starting point of the last cycle in Step 2. That's the base and there's been some revisions that have happened along the way. Similar to last cycle we'll be providing an application and applicant handbook to walk you through the process. We are looking at past resource lists and what can be updated. Several of the geographic ones Metro will be doing verification work in terms of equity focus areas. We are well aware we need to ensure that we provide a number of resources to be able to support responding to these applications because this is what we're evaluating.

Mike McCarthy wanted to support something heard earlier about making sure that we give adequate recognition for projects that increase the efficiency of the existing system that helps us get the most out of what's already there. Or maybe small improvements that can make things better for the whole, like a big stretch of a corridor. Along with adding new some of the things like optimizing signal performance. The other point was I saw a fair amount about equity focus areas, and a lot of measures prioritizing investments specifically in the equity focus areas. But I'd also like to see those recognized projects or give points for serving the equity focus areas when it's a prime connection. For example, between the equity focus neighborhood and nearby jobs, stores and transit, and things that make those connections for people to get to what they really need.

Jay Higgins noted remembering the process being smooth last time, and referring to Mr. Hesse's questions around resources, those were much appreciated because as you're trying to find specific answers to where the criteria are that was super helpful. For the next RFFA I feel we've gotten so complicated. Everything has so many measures. I'm wondering how comfortable you are when we have a high scoring project. Is it really projects that are scoring high across all the criteria, because we're meeting all five goals? We want things that compound on each other and really meet all the goals for the region. Or is it that we're seeing that you could score high in two categories and that's enough to get you over the threshold line, but you've not done much in the other categories. It makes me wonder have we gotten so complex and there's so many criteria that we're starting to lose our connection to those five goals in some way. It seems like maybe we should find a way to simplify.

Ted Leybold noted in previous cycles there was discussion about how to deal with projects that maybe focused on a particular outcome or two relative to across the whole spectrum of what we're trying to achieve. I think the policy in the past from the RTP that we've carried forward in the RFFA process has been to try to achieve multiple objectives with all our investments. I think we've taken that as guidance. In the process we've also left the door open to projects that perform extremely well in one or two categories but maybe don't have a large impact on other categories as still being able to compete. I think we've tried to achieve that kind of a balance, but we'll definitely look at that and think about that as we're doing the evaluation. Generally I would say the existing policy is to try to achieve results across all the RTP goal areas. Mr. Higgins agreed that's exactly what we want. And I think this does achieve

that. It just seems like maybe in places where you could hit one criteria and it might help you and it follow the effect of doing three other things. So you don't need to measure all five of those criteria.

Jaimie Lorenzini noted she wanted to see every project in our region be successful. I know RFFA can't fund all possible projects. I wonder if under the design category if there might be a nexus for us to start including a little blurb about how our transportation projects relate to housing as a potential nexus for the next time the governor wants to invest in housing because that's her priority. We can trot out some of these projects that have high housing impacts and seek leverage funding and it almost creates a pseudo pipeline potential. Just how we talk about our projects within the framework of housing to chase after additional funding.

Eric Hesse appreciated the interest in being able to tell the housing story where appropriate and helping us achieve those important goals the governor has identified. I see in the criteria maybe some opportunity to start lifting this up that people may need to be valuing in the broad category of equitable transportation and then in the areas with lack of access to vehicle, high housing and transportation burden. Some of that is the geography of location in terms of where those places exist. Maybe there's some opportunity there to be acknowledging how those travel options in those areas are maybe helping unlock housing. I'd be interested in making sure that if all the signs are going in the right direction in the way the measures are intended.

For example, one dynamic I could imagine we're struggling with is the way in which it may be that we recognize combined housing and transportation burdens that are equitably distributed. But also know often the sort of being pushed to drive until you qualify dynamic might mean lower than regional average housing costs because centrality often leads to higher housing costs in some cases but the transportation cost swamps that step so the overall burden of housing plus transportation goes up. I'm wondering in part if we're actually wanting to set parity out of the housing and transportation cost burdens or have different modalities within that. In the description of the second column it was suggested to make a better understand about how those will be evaluated.

Ms. Cho noted she believed that measure, if recalled was the data set referred to, was the housing and transportation calculator that's identified through the region. I think this discussion is starting to raise some good questions around maybe rethinking a couple of these performance measures or maybe thinking a little more explicitly and digging deeper into the land use measures that have been identified. Because the land use measures are fairly simple.

Mr. Hesse added that I think if it is coming from the H & T index that might account for some of those dynamics that I was describing already and likely does identify the areas that we are thinking about here. That might address that question. Maybe recognizing there's a description of the vehicle access intensity, for lack of a term, to make sound theory. I wonder if there might also be an associated measure in that area that might define some of those geographies. I can't recall if it was the actual measure. I think in the box just above there is actually the access. I wonder if that just wanted to move down into the next row. If so, the project increases or improves travel options in areas of lower than regional average vehicle access. I think that might want to be in the second row.

Allison Boyd had a question about the specifics of the criteria and a process timeline question. I was remembering the other day that earlier in the year we had also talked about the carbon reduction funds and how those might also either be described as part of the RFFA program direction or something else that would be distributed in the future. I can't remember where that left off and if that is something that is going to be simultaneous to the RFFA allocation process. I'm wondering because I

think there's some overlapping criteria between those two sources and might affect what projects get applied for and each area. I wanted to find out if there was any information about where that falls in the timeline and what the story is on carbon reduction funds.

Ms. Cho noted no details to share. We introduced some of the knowing that we are trying to operate under an assumption that there is a likely second cycle coming. I think right now we can't speak to any details or timeline but clearly that we would be as federal funds need to seek action through TPAC and JPACT for the allocation of those funds. We'll be coming to TPAC when ready to do so. Ms. Boyd noted it sounds like maybe at this point we won't know. That'll be a separate process and it might happen after RFFA at some point? I was just trying to figure out if there would be something where if one project met the carbon reduction criteria, if it'd be moved over to that funding source. But it sounds like the timing of knowing the funding will be too far off, correct?

Mr. Leybold agreed. I think soon after we get this process in place we'll probably have more of a description of the timing of that process. We decided not to join it, if you recall, for a couple of reasons. One is more uncertainty around that funding source relative to the RFFA process. And two, because it comes with its own set of more narrow federal guidance on eligible projects and the purpose of those funds. So it wouldn't fit as neatly in the broader eligibility. Most of our RFFA funds have CMAC funds which constitute about a third of these RFFA funds. It does have a narrower field but not as narrow as carbon. Carbon is obviously carbon reduction and emission reductions is clearly one of our goals in terms of addressing climate for the RFFA funds. So projects will compete well here. But if they don't end up being funded and maybe they're more narrowly targeted type of a project they can come back and apply for or be considered for the carbon reduction funds when we're ready to run that process.

Gregg Snyder noted I'm thinking about most of the RFFA projects in the spirit of this workshop. Maybe this question is a little elementary but thinking about these RFFA projects which are usually standalone, discreet things. But what about if we brought in a project that already has federal aid and local money attached to it and we only need a piece, not the entirety of the thing. We only need like 20% of the funding, maybe $2 million in a $10 million funding mix. If we brought in a project in like that as the last funding piece, how would it be treated if it's not a discreet thing? Or is it possible to bring in a highly leveraged project into RFFA of Step 2 for competition. How would that fare in the scoring?

Ms. Cho noted I can think of that kind of fit that have been awarded previously. I want to mention specifically we called out in the program direction projects to receive funding through construction phases in the last cycle, 2025-27, are ineligible to apply for this cycle. There's a different source of funds that those projects that may be running into cost issues, can go to. Not to imply that the project you're speaking to is dealing with cost issues but the example I'm thinking about is Council Creek Regional Trail. It requested project development funding in one cycle. Used that funding but needed more. They were able to take the commitment and support, parlay that into a RAISE grant, but didn't quite completely finish the funding. There was a strong desire to continue the process. The application that came in a following cycle for Capital Creek Trail came in still as a discreet project, but recognizing it was leveraging across the rest of the highly funding projects. I think there is still that opportunity, and nothing currently put in the Step 2 process that would prohibit a project that's highly leveraged to apply. I think it's the shape of that project scope is really critical in terms of defining it well and explicitly as to where the funds would be applied to within that specific portion.

Mr. Leybold added we don't have a lot of those kinds of projects. It certainly would be an eligible activity and we would again, rate the project relative to the scope that's defined for what the RFFA portion would implement. If that can't be teased apart separately as a project element, I think we

would look at trying to judge the project as a whole if that's what seems appropriate. We've had to look and see how you describe that scope. But it's certainly something that can be done and applied for.

Mr. Snyder appreciated the information. One follow on question, maybe just an observation. I think that in this cycle we ought to have something we can point to that's an actual GHG carbon reduction project. I'm thinking about what we could do on a corridor level that we can show we are going to reduce, or try to reduce GHG if it's technology, if it's transit, or something. I like the idea of having a demonstration project for GHG reduction on a corridor basis so that it may only solve one thing in the Metro pantheon of goals, the five goals. But I think there is a project value in doing something in one of those, if we do something bold in one of those, I think that reasonably could be also scored highly. In other words, you don't have to meet everything, but if you do one thing super well you might be able to have a project success. Just something to think about there.

Ken Lobeck added another example of last gap funding where three different types of federal funds on the project with our RFFA funds, and it was scored as a complete project just as a standalone. It didn't seem to have any impact because the Tiger grant was there. I don't see an issue with last gap logic that's coming in for the project.

Five-minute break was taken in the meeting.

Project Delivery Training Series – Scoping for Local Agency Federal-Aid Projects (Ken Lobeck, Metro, Justin Bernt & Tiffany Hamilton, ODOT) The presentation began with on overview of objectives for planning for successful federal-aid project delivery. Information on when and where to start project scoping was provided. Project development was detailed. General scoping elements covered schedule, budget, problems and proposed solutions, and estimating. The Local Public Agency Federal Aid Project Scoping Checklist and Local Agency Technical Scope Sheet was provided. Details on risk management were covered. Delivery methods and preferred practices were described. ODOT and resources were shared. The full presentation was included in the workshop packet and recording online.

More links for information were provided:
https://www.oregon.gov/odot/Business/Pages/AW-Estimation.aspx
https://www.oregon.gov/odot/LocalGov/Pages/Forms-Apps.aspx?wp6889=se:%22scop%22,so:[[43808,1]]
Local Government page: https://www.oregon.gov/odot/LocalGov/Pages/index.aspx
https://www.oregon.gov/odot/LocalGov/Documents/LPA_CertificationStatus.pdf
https://www.oregon.gov/odot/LocalGov/Pages/Certification-User-Group.aspx

Adjournment
There being no further business, workshop meeting was adjourned by Chair Kloster at 11:36 a.m.
Respectfully submitted,
Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC workshop meeting, June 12, 2024

Item	Document Type	Document Date	Document Description	Document No.
1	Agenda	6/12/2024	6/12/2024 TPAC Workshop Agenda	061224T-01
2	2024 TPAC Work Program	6/6/2024	2024 TPAC Work Program as of 6/6/2024	061224T-02
3	Minutes	4/10/2024	Minutes for TPAC workshop, 4/10/2024	061224T-03
4	Memo	6/4/2024	TO: TPAC and interested parties From: Ken Lobeck, Funding Programs Lead RE: Proposed Project Delivery Training Session #2 – Project Scoping	061224T-04
5	Memo	6/5/2024	To: TPAC and interested parties From: Grace Cho, Senior Transportation Planner, Metro RE: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Step 2 Evaluation – Draft Performance Measures	061224T-05
6	Presentation	6/12/2024	SCOPING FOR LOCAL AGENCY FEDERAL AID PROJECTS	061224T-06
7	Presentation	6/12/2024	24-27 STIP / upcoming amendments	061224T-07
8	Presentation	6/12/2024	2028-30 Regional Flexible Funds Allocation (RFFA) – Step 2 – Draft Evaluation Performance Measures	061224T-08

Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: Thursday, August 8, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Principal Transportation Planner
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Step 2 – Pre-Application & Application Assistance Instructions

Purpose
To provide information to potential applicants on the pre-application process and how to apply for application assistance for the 2028-2030 Regional Flexible Fund Step 2 allocation. *These are the same instructions to be made available and posted on the Metro website on Monday August 12th with the opening of the 2028-2030 RFFA Step 2 pre-application period.*

Background
The Regional Flexible Funds are one source of the region's transportation funding, though they represent a small (~5%) percentage of the total funding spent on transportation across the region. Comprised of federal surface transportation funds provided by the federal government, the allocation of the Regional Flexible funds is one of Metro's requirements as a federally designated metropolitan planning organization (MPO) to carry out the metropolitan planning process. In July 2024, the Metro Council adopted the JPACT recommended 2028-2030 RFFA Program Direction, establishing the key objectives and framework for the allocation process. With the key objectives of the allocation process established, the Step 2 competitive allocation to local transportation projects may begin.

Step 2 Allocation
As described materials from the July 12 TPAC meeting, the Step 2 allocation process largely follows the same process utilized in the 2025-2027 RFFA cycle with the exception of a new pre-application process and application assistance as described in the following sections. The follow are the instructions for the pre-application process and application assistance, if electing to participate. For the remaining details regarding the 2028-2030 RFFA Step 2 competitive allocation process, please refer to the July 12 TPAC materials in the meantime. A planned release of the Step 2 Application Handbook is anticipated for release at the September 4 proposers' workshop. The remainder of the memo focuses on the specific instructions, eligibility, and templates for the pre-application process and requesting application assistance. Additionally, Table 2 outlines the key dates for the 2028-2030 RFFA Step 2 competitive allocation process.

Instructions – Step 2 Pre-Application & Application Assistance
Candidate projects for the Step 2 allocation must meet the minimum requirements as described in the following sections. If an applicant is unsure as to whether their agency and/or their project can meet the minimum requirements, contact Metro staff with questions.

Minimum Qualifications to Apply – Eligible Applicants
Eligible entities to submit project nominations for the Regional Flexible Fund Step 2 competitive allocation to local transportation projects include those public agencies located within the region's Metropolitan Planning Organization (MPO) boundary. These public agencies include Washington County and its cities, Clackamas County and its cities, Multnomah County and its eastern cities, the City of Portland, Port of Portland, local jurisdiction parks departments (e.g. Portland Parks and Recreation), parks districts (e.g. North Clackamas Parks and Recreation District, Tualatin Hills

Parks and Recreation District), TriMet, SMART, the Oregon Department of Transportation, the Oregon Department of Environmental Quality, and Metro. Agencies without a transportation or public works arm may be eligible entities to apply, but encouraged to review the remaining instructions and contact Metro staff for consultation.

Minimum Qualifications to Apply – Local Agency Certification/Project Delivery
As the Regional Flexible Funds are federal transportation dollars, applicants will need to plan for project delivery under the federal aid process. Applicants that are certified agencies by ODOT for parts of or all project delivery phases in the federal aid process may lead the delivery for the tasks they are certified to lead. If the applicant is not a certified agency they will need to arrange for a certified local agency or for ODOT to lead delivery of the project. The project budget should account for the costs of project delivery administration by the certified agency or ODOT and recognize the delivery agency may implement federal guidance in a manner that is more expensive than a nominator previously presumed with local funds.

Minimum Requirements for Step 2 Projects
Per the Program Direction, Step 2 candidate projects must meet the following minimum requirements.

All candidate projects must be consistent with the Interim Strategic Regional Funding Approach. This includes consistency with Regional Flexible Funds eligibility for project types.

- All candidate projects must be included in the financially constrained Regional Transportation Plan (RTP). Planning activities proposed for a project development-only funding request which are not reflected in the financially constrained RTP may be considered. Please contact Metro staff to discuss.
- All candidate projects must meet the minimum cost thresholds (including the minimum local match) as shown below:
    - Construction - $4,000,000
    - Project Development - $700,000
- All candidate projects must meet a minimum local match of 10.27%.
- All candidate projects must meet necessary federal eligibility requirements.
- The applicant must participate in the RFFA pre-application by submitting a letter of intent to apply.

<u>*Pre-Application*</u>
The pre-application period is Monday, August 12 through Friday August 23, 2024. Interested local jurisdictions and agencies are asked to submit a letter of intent to apply during the pre-application period. All letters of intent are due no later than **Friday, August 23, 2024**.

The pre-application purpose is twofold:

- for gathering early information on potential Step 2 applications, and
- to provide applicants the opportunity to request consideration for application assistance. (See below for eligibility criteria.)

Participation in the pre-application is a requirement for applications to be accepted in the Step 2 call for projects.

Letter of Intent Components
Nominating jurisdictions need only submit one letter of intent, which may include multiple projects. As part of the letter, applicants are to include the following details for each candidate project:

- Project title.
- Short project description.
- A draft project cost estimate.
- Estimated funding request from the Regional Flexible Funds.
- Indication as to whether the project seeks full funding through construction or project development funding only.
- A request for consideration for application assistance, optional (see following sections).
- A lead contact from the applicant.

The letter of intent should be approved/signed by the applicant's senior leadership, but the signatory does not have to be the chief executive or the elected governing body/governing board.

A letter of intent template is provided to illustrate the details being asked for submission. Applicants are requested to use the template format (applied to the applicant's jurisdiction or agency letterhead) for the purpose of submitting their letter of intent.

There are no penalties if an applicant decides not to submit a full project application for a project identified in the letter of intent. Similarly, there are no penalties if a project application is received during the call for projects for a project not listed in the letter of intent. For transparency, it is recommended to err on the side of identifying more projects than less in the letter of intent recognizing there are not penalties.

Letter of Intent - Submission
To submit a letter of intent, please email the letter to rffa@oregonmetro.gov. Please include in the subject line of the email: 28-30 RFFA – Step 2 – Letter of Intent. The clear subject line is to direct the submission in the appropriate category.

Proposers' Workshops
Metro plans to hold a series of proposers' workshops in efforts to support applicants in the Step 2 competitive allocation of Regional Flexible Funds. Each of the workshops will focus on different topics relevant to the Step 2 allocation, meaning the workshops are somewhat individualized and content will not be the same at each. For the purpose of the pre-application, a proposers' workshop is scheduled for August 14 during the regular TPAC workshop. This workshop will cover:

- Step 2 pre-application and application assistance
- Step 2 application evaluation criteria
- Project delivery training on cost estimating (tentative)

Information shared through these instructions will also be shared at the August 14 proposers' workshop. While the proposers' workshops are not mandatory, they are highly encouraged for prospective applicants. Applicants are encouraged to have their staff involved in their Step 2 application(s) attend. The desired outcome is to ensure applicants are versed in the different components of the Step 2 application process and understand how their projects are evaluated in the outcomes evaluation and the project delivery risk assessment.

Pre-Application Follow Up
Once the pre-application period closes, Metro staff will develop a summary of all the letters of intent received and the potential project applications for Step 2. The summary will be made available at the September 6, 2024 TPAC meeting as information. If an eligible jurisdiction and/or agency is not listed in the summary, but submitted a letter of intent, the eligible jurisdiction and/or agency is asked to contact Metro staff to clarify the status of their intent to apply and for which application.

Application Assistance

With the adoption of the 2028-2030 RFFA Program Direction and the allocation of federal transportation Redistribution Funds to projects and programs, Metro is able to offer application assistance for the Step 2 competitive allocation. This assistance is to support applicants in completing thorough applications for the Step 2 process.

Application assistance will be provided through a consultant team (Kittelson and Associates) with a wide variety of expertise and experience with designing transportation projects, project delivery, and navigating the federal aid process. The consultant team is also familiar with the RFFA Step 2 process.

Requesting Application Assistance

Eligible applicants for funding in Step 2 are to indicate interest and request application assistance as part of their letter of intent submission during the pre-application window. The letter of intent template provides placeholder language to request assistance that can be used by applicants.

Application assistance is provided to a specific proposed project and not to an applicant for discretionary use. Therefore, the applicant will need to specify in the letter of intent for which application they are requesting assistance. Actions taken by an applicant which misuses the application assistance resources will result in having the consultant support withdrawn.

Application assistance is provided based on a tiered approach. The tiers are as follows:

- Tier I – Review of project application scope, budget/cost estimate, and implementation schedule/timeline. Through the review, the consultant will identify areas of the project scope lacking detail, are underestimated for time or budget or have been overlooked, and will provide the applicant with insights on how to make adjustments before submission of the application.
- Tier II – A more iterative and flexible process determined between the applicant and the consultant team for the identified application. Assistance tasks may include:
    - Helping the applicant develop project definitions and descriptions for the application.
    - Conveying and educating the applicant on federal and state project development process requirements and providing direction on integration with the local project development process.
    - Helping the applicant in providing a description of the current state of project development status and how needed future project development tasks (survey, environmental scoping, etc.) and process (community involvement, design development work, design approval steps, etc.) may impact the overall project scope, schedule, and budget.
    - Providing advice to applicants on project scope and design to be responsive to the Step 2 evaluation criteria and eligibility requirements.
    - Conveying the necessary requirements if the project is awarded funding, including project cost overruns being the responsibility of the applicant.
    - Supporting the development of the cost estimates for the project application.
    - Facilitating coordination between the applicant and facility owners and/or operators as well as with ODOT local liaisons.

All eligible applicants for Step 2 (see previous section *Minimum Qualifications to Apply – Eligible Applicants)* may request application assistance, but jurisdictions and agencies are divided between

two tiers of assistance. Table 1 lists which jurisdictions and agencies fall within the tiers of available application assistance.

Table 1. Application Assistance by Tier & Eligible Applicants

Application Assistance Type	**Eligible Applicants**
Tier I – Reviewing Assistance	Portland, Gresham, Hillsboro, Beaverton, Multnomah County, Washington County, Clackamas County
Tier II – Application Support	All cities, counties, parks districts, and eligible applicants not listed in Tier I

Notice of Application Assistance
Following the pre-application period close, Metro will develop a summary of the letters of intent received and identify the jurisdictions and applications seeking application assistance. Depending on the number of requests received by the applicant's assigned tier, a selection process may take place to determine which applicants and their individual application will receive assistance. The selection process will be randomized according to sub-region (e.g. Clackamas County eligible regional partners, Washington County eligible regional partners) to distribute application assistance resources in a fair manner in the event assistance requests are over-subscribed. Specific numbers for application assistance by sub-region will not be pre-determined, rather resource allocation of application assistance will be informed by the interest of applicants requesting assistance. The intention – as outlined in the Program Direction – is to provide Regional Flexible Funds, including the application assistance resources, throughout the region without the use of sub-allocation.

Notifications to applicants on the status of assistance requests will be communicated starting August 30, 2024. Applicants receiving assistance will need to sign an agreement form outlining the expectations and description of the support services provided through the consultant. Application assistance will not begin until a signed agreement form is received.

Key Dates for the RFFA Step 2 Allocation

Table 2. 2028-2030 RFFA Step 2 – Key Dates

Activity	**Date**
Pre-application window opens • letters of intent template available • call for application assistance forms available	August 12, 2024
Proposers' workshop (regular TPAC workshop) • Step 2 evaluation criteria	August 14, 2024
Pre-application window closes • Letters of intent due • Application assistance forms due	August 23, 2024
Application assistance notifications • Regional partners notified of approval or denial of assistance request based on requests received	August 30, 2024
Proposers' workshop • Step 2 evaluation criteria continued • Applicant handbook • Application submission tool	September 4, 2024
Step 2 call for projects opens	September 6, 2024

Activity	Date
Proposers' workshop – Designing Livable Streets and Trails guidebook refresher	September 11, 2024
Step 2 call for projects closes	November 15, 2024
Step 2 – summary of received applications (TPAC and JPACT)	December 2 & 18, 2024
Step 2 evaluation • Outcomes evaluation • Project delivery risk assessment	November 2024 – January 2025
Step 2 preliminary evaluation results • Project delivery risk assessment refinement opportunity open	February 7, 2025
Step 2 Project delivery risk assessment follow ups for refinement due	February 21, 2025
Step 2 evaluation – finalized results (TPAC and JPACT)	March 7 & 20, 2025
2028-2030 RFFA public comment opens	March 24, 2025
2028-2030 RFFA public hearing/testimony	April 17, 2025
2028-2030 RFFA public comment closes	April 28, 2025
Summary of 2028-2030 RFFA public comments with responses and draft/tentative staff recommendations for refinements to TPAC	May 2, 2025
Summary of 2028-2030 RFFA public comments with responses and staff recommendations for refinements to JPACT	May 15, 2025
Coordinating committee priorities submitted (if electing to submit priorities)	May 2025
TPAC and JPACT opportunity to deliberate input received on Step 2 candidate projects	June 2025
TPAC and JPACT action on 2028-2030 RFFA	July 2025

Date

Address

Re: 2028-2030 Regional Flexible Fund – Step 2 Allocation

To Metro Staff:

Please find the draft list of projects in which the (insert the applicant's jurisdiction or agency name here) intends to apply for the 2028-2030 Regional Flexible Fund – Step 2 Allocation.

Project Title	Project Description	Estimated Project Cost	Estimated RFFA Step 2 Requested Amount	Project Development Request Only (Y/N)

In addition, the (insert applicant's jurisdiction or agency name here) requests consideration for application assistance. The specific application to apply the application assistance is for (insert which of the listed applications. List even if only one application is being listed on the Letter of Intent). (Delete if not requesting)

For any follow up inquiries please contact (insert staff contact email and phone number).

Sincerely,

Regional Partner Senior Leadership Name and Title

Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: Thursday, August 8, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Principal Transportation Planner, Metro
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Step 2 Evaluation Criteria and Performance Measures

Purpose
To provide TPAC an overview of the evaluation criteria and performance measures for reviewing Step 2 candidate applications for 2028-2030 Regional Flexible Funds Allocation (RFFA).

Background
The Regional Flexible Funds are federal surface transportation funds provided by the federal government to states, metropolitan planning organizations (MPOs), and local governments. Comprised primarily of two federal funding types – the Surface Transportation Block Grant (STBG) and Congestion Mitigation and Air Quality (CMAQ) – these federal transportation funds are typically distributed through funding formulas. As an MPO, Metro has funding authority to allocate federal transportation funds which it receives through funding formulas.[1]

As part of the approval and adoption of the 2028-2030 RFFA Program Direction in July 2024, the region affirmed the two step framework and overarching policy direction for allocating Regional Flexible Funds. The focus of this memorandum is to provide an update on the final draft performance measures to use as part of the outcomes evaluation in the Step 2 competitive allocation to local transportation projects. An overview of the evaluation criteria – as adopted through the Program Direction – and the draft performance measures were shared with TPAC at the June 12th TPAC workshop.

Step 2 – Evaluation Criteria, Performance Measures, and Final Draft Evaluation Methods
As the blueprint for the regional transportation system for the next 25 years, the 2023 Regional Transportation Plan (RTP) identifies on five interconnected goals – equitable transportation, climate action and resilience, safe system, mobility options, and thriving economy – as well as 17 supporting objectives and 16 performance measures and targets to define and measures progress towards the region's aspirational system. The 2023 RTP goals, objectives, and performance measures in combination with federal requirements provide the policy directives for the 2028-2030 RFFA in shaping the process, setting key objectives for the allocation, establishing project eligibility and selection criteria. The aim for the 2028-2030 RFFA Step 2 process, is to have the allocation reflect a direct link to advancing progress towards the 2023 RTP goals.

The 2028-2030 RFFA Program Direction specified evaluation criteria derived from the 2023 RTP goals appropriate for application as part of the Step 2 allocation. The evaluation criteria identified in the Program Direction are reflected in Table 1.

[1] This is to distinguish that Metro does not receive federal transportation funding unless the funds are awarded to Metro through the Regional Flexible Fund allocation process, discretionary funding program or through another allocation of federal funds through a partner agency.

Table 1. 2028-2030 RFFA Step 2 Evaluation Criteria

RTP Goal Area*	28-30 RFFA Evaluation Criteria
Equitable Transportation – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.	• Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community
Safe System – Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.	• Reduced fatal and serious injury crashes for all modes of travel
Climate Action and Resilience – People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.	• Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases stability of existing critical transportation infrastructure
Mobility Options – People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming	• Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips
Thriving Economy – Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.	• Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities
Design* - Supporting the implementation of livable streets and trails that advance the region towards the 2040 Growth Concept vision and regional transportation system vision.	• Design clearly demonstrates prioritized values/objectives of the project appropriate to context and facility/design classification • Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design

**Indicates the evaluation criteria is not specifically a goal area identified by the 2023 Regional Transportation Plan.*

Step 2 – Evaluation Framework & Outcomes Evaluation

The evaluation of the applications received for the Step 2 process will undergo two separate evaluations concurrently. The outcomes evaluation focuses on how well project applications advance the six evaluation criteria identified in the 2028-2030 RFFA Program Direction. The readiness and risk assessment evaluates how well project applications are prepared to be delivered through the federal aid process. The readiness and risk assessment largely flags potential project delivery risks if the project is awarded Regional Flexible Funds and may lead to adjustments in the amount of Regional Flexible Funds requested. The outcomes evaluation provides a technical review of the candidate project's performance in advancing RTP priorities and serves as one of several components to inform the Step 2 allocation recommendation.

In efforts to support applicants understanding of how Step 2 project applications will be evaluated as part of the outcomes evaluation, Metro staff seek to share with applicants prior to the call for projects the performance measures and their final draft evaluation method in the evaluation of Step 2 applications. Table 2 outlines the performance measures and the final draft evaluation method for the measure. The evaluation performance measures look to balance data resource considerations for applicants, ability to measure at the project scale, guidance and directives from modal and regional planning documents, and recognizing the context of different land use environments for building transportation projects.

The evaluation performance measures start from those utilized in the 2025-2027 Regional Flexible Fund Allocation Step 2 evaluation. New performance measures are included to reflect the 2028-2030 Regional Flexible Fund Allocation Program Direction aligning to the 2023 RTP goal areas. Some modifications were also made to individual performance measures for the purpose of 2023 RTP alignment, but also to address input provided by regional partners to address concerns on the evaluations from the previous cycle.

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
RTP Goal: Equitable Transportation • Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community	Project makes improvements in an Equity Focus Area (EFA)	Project is located in a regional equity focus area Equity focus area includes greater than regional average numbers of: people of color, households with lower-incomes, people who do not speak English well
	Improves access to community places for Black, Indigenous, and People of Color (BIPOC), and underserved communities	Closes active transportation gaps/completing the system or substandard facilities along frequent transit lines and stations in EFAs Addresses active transportation gaps or substandard facilities in areas with higher than average Community Service accessibility score
	Makes active transportation improvements in area with poor community health outcomes	Project is in an area with below regional average life expectancy Project is in an area with higher than regional average diesel particulate matter concentration Project is in an area with higher than regional average level of air toxics Project is located on high injury corridors within an Equity Focus Area.
	Improves access to low and middle wage jobs	Project is in an area with an above regional average number of low and middle-wage jobs within 30 minutes (by all modes)

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
	Removes, reduces disparities and barriers (jobs, transit, services for equity communities)	Description of the barrier and disparity being addressed Project increases or improves travel options in areas with lower than regional average vehicle access
	Improves access in area with high lack of access to vehicle/high housing + transportation burden	Improves access to travel options (or provides a new travel option) in an area with below regional averages in housing and transportation costs.
	Demonstrated transportation project was/is identified by community as a priority	Description of how public input informed the project's prioritization to seek out funding opportunities. Description of communities engaged, particularly engagement with marginalized communities, and how community input informed the design and prioritization of the project to seek funding opportunities.
RTP Goal: Safe System • Reduced fatal and serious injury crashes for all modes of travel	Project location is designated as a priority for safety improvements	Project area/roadway is identified and documented as a safety priority through a state, regional or local process (e.g. transportation safety plan or transportation safety action plan). Project addresses a specific area or roadway with historically high numbers of serious injury crashes.

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
	Design elements prioritize pedestrian safety	Project scope describes the design elements and how they will improve pedestrian safety. Project does not include any designs that will degrade pedestrian safety.
	Fills (completely, partially) an active transportation or trails network gap	Project closes active transportation gap or upgrades a substandard facility on/within a high injury corridor.
	Project addresses active transportation safety within a walk-zone of a school	Project contains elements and features that increases active transportation access within a school walk zone. Higher priority for K-12 schools walk zone. Bonus if elements and features address and are within a school identified safety hazard area.
RTP Goal: Climate Action and Resilience • Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases seismic stability of existing critical transportation infrastructure	Provides/increases transit option, biking/walking (Climate Smart Strategy rating = 5 stars)	Project adds or improves an identified connection to transit. Project improves transit operations (stop or intersection enhancement).
	Provides/increases active transportation (e.g. walking, bicycling) (Climate Smart Strategy rating = 3 stars)	Project adds active transportation infrastructure. Project addresses an active transportation network gap or substandard facility.
	Improves system management via technology (TSMO) (Climate Smart Strategy rating = 2 stars)	Project is on a prioritized TSMO strategy corridor Project includes specific TSMO elements in scope that substantially improves efficiency and safety for all modes of travel.

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
	Improves/adds street connectivity (Climate Smart Strategy rating = 1 star)	Project encourages local and collector street circulation to minimize local traffic on regional arterial streets. Project included on regional bicycle/pedestrian networks.
	Integrates transportation demand management strategies (outside of TSMO) as part of the project (Climate Smart Strategy rating = 3 stars)	Project scope includes Transportation Demand Management strategies to support and compliment the infrastructure project.
	Supports development patterns of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern of the designated priority 2040 land use.
	Increases tree canopy, green infrastructure and decreases impervious surfaces to mitigate for climate change	Project is located in an urban heat island and adds street trees or other green infrastructure to reduce heat island. Project is located in a high environmental hazard potential risk area and project scope includes mitigation elements such as green infrastructure to manage stormwater. Project is in an area with lower tree canopy coverage.
	Addresses an Emergency Transportation Route	Project is on an Emergency Transportation Route AND project scope elements look to increase the resilience of infrastructure (e.g. seismic, flooding, wildfires) or add mobility options.

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
	Decreases impervious surface	Project scope includes elements to manage stormwater. Project scope looks to maintain or decrease impervious surfaces by integrating surface water management strategies.
RTP Goal: Mobility Options • Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips	Increases reliability and efficiency for all travel modes	Project includes treatments to increase reliability and efficiency for all modes, considering roadway/street functional classification and design classification. Examples include bicycle signals to support the "green wave", signal timing, travel time messages, and leading pedestrian intervals.
	Project area has a high number of crashes (all severities)	Project addresses safety issue and mitigates for potential traffic congestion occurred through incident management in an area identified as a high crash location.
	Improves transit reliability	Project elements includes infrastructure or technology strategies which increases transit reliability. Project addresses an identified transit delay or reliability location in the transit network. Bonus if elements address an identified transit delay on a transit route with high ridership.
	Increases reliability by removing a barrier on regional freight system	Project scope elements addresses removing a freight barrier and supports multimodal travel.

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
	Improves/adds street connectivity	Project increases street connectivity to support direct and multiple route options AND provides shorter trips for people walking, bicycle, and/or accessing transit.
	Provides/increases transportation option	Project fills a gap or addresses a deficiency/substandard facility in the regional transit, bicycle, or active transportation network.
RTP Goal: Thriving Economy • Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities	Supports/increases industrial/commercial developability (see Economic Value Atlas)	Project improves access to a tract/area with the number of developable acres that is greater than the regional average.
	In/supports development patterns of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern of the designated priority 2040 land use.
	Provides/increases access to Target Industries (see Economic Value Atlas)	Project improves access to a tract with a number of target industries that is greater than the regional average.
	Increases multimodal mobility and access to industrial and transport facilities	Project is on the regional freight network. Project scope includes elements to increase access industrial and transport facilities (e.g. creates a new connection and/or multimodal connection). Project scope fills a gap or addresses a substandard active transportation facility and/or

Table 2. 2028-2030 RFFA Step 2 – Evaluation Performance Measures and Methods for Measurement

2023 RTP Goal & 28-30 RFFA Evaluation Criteria	Performance Measures	Potential Ways of Measurement
		increases access to transit infrastructure on a regional freight facility.
	Increases access to jobs	Project is in an area with an above regional average number of jobs accessible within 30 minutes (by all modes).
Design • Design clearly demonstrates prioritized values/objectives of the project appropriate to context and facility/design classification • Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design	In/supports future desired development of a designated 2040 priority Land Use center or corridor	Project is located in a designated priority 2040 land use area. Project elements support the development pattern of the designated priority 2040 land use.
	Design elements prioritize pedestrian and bicycle access, mobility, safety, and other functions based on the project facility's designated regional and local design classification. Note: local design classifications are consistent with regional design classifications but may use different terms and provide more detailed design guidance	Design elements prioritize the functions identified by the project that are appropriate for the project area/roadway design classification (see Table 6, prioritizing functions by regional design classification).
	Project design represents the best possible improvement in project area, based on functional and design classification and contextual constraints.	Project design approach and elements are context sensitive and respond to identified constraints (geographic, right-of-way, financial, etc.) with the highest level of design possible consistent with the functional and design classifications.

Next Steps/Upcoming Activities

The following table outlines upcoming Regional Flexible Fund Allocation activities for Step 2. The table is not comprehensive. For a more detailed schedule, please refer to the materials and schedule provided at the July 12th TPAC meeting.

2028-2030 Regional Flexible Fund Allocation – Schedule of Near-Term Activities

Activity	Date	Where
Step 2 pre-application window	August 12 – 23, 2024	N/A
Step 2 – pre-application and Step 2 outcomes evaluation details	August 14	TPAC workshop
Step 2 – applicants workshop – applicant handbook and application tool	September 4, 2024	Proposer's workshop
Designing Livable Streets and Trails	September 11, 2024	Design workshop
Step 2 call for projects opens	September 6, 2024	TPAC meeting
Step 2 call for projects closes	November 15, 2024	N/A

Question for TPAC

1) What clarifications are needed for regional partners on the performance measures and/or evaluation methods in effort to support the development of Step 2 project applications?

Materials following this page were distributed at the meeting.

2028-2030 Regional Flexible Fund Allocation (RFFA) Step 2 – Pre-Application & Evaluation

TPAC Workshop

August 14, 2024

Metro

What are Regional Flexible Funds?

- Federal transportation dollars allocated to each Metropolitan Planning Organization (MPO)
- Comprised of Surface Transportation Block Grant (STBG), Congestion Mitigation & Air Quality (CMAQ)
- ~5% of all transportation funding in region

2028-2030 Regional Flexible Fund Allocation (RFFA) Program Direction

- Direction on the allocation framework and objectives to target Regional Flexible Funds
  - Sets the process for allocation
  - Outlines evaluation criteria
  - Defines Step 1 & 2

2028-2030 Regional Flexible Fund – Allocation Structure

Step 1A & B

Step 1A.1

- Project bonds repayment
  - New project bond consideration (Step 1A.1)
- Regionwide program investments
- MPO, Corridor & System planning

Step 2

- Advance 2023 RTP Goals
- Topical & geographic investments
- Regional scale impact, readiness, leverage funds

2028-2030 RFFA Step 2
Pre-Application Process

28-30 RFFA Step 2 – Schedule

Project Solicitation

- Pre-application: August 2024
- Project call: September 2024
- Proposer's workshop: August - September 2024
- Proposals due: November 2024

Evaluation & Input

- Outcome Evaluation, Risk Assessment: November 2024 – early March 2025
- Public Comment: March - April 2025

Deliberation & Decision

- Coordinating committee priorities: May 2025
- TPAC, JPACT: May – July 2025
- Metro Council to adopt separately: July 2025

Step 2: Call for Projects – soon!

Call for Projects Opens: **September 6**

Applicant workshops:

- August 14 (today)
- September 4, 1 – 3pm on Zoom
- September 11

Proposals due: **November 15**

New to Step 2: Pre-Application Letter of Intent

Pre-Application period open: August 12 – 23, 2024

- Letter of Intent to Apply required for Step 2
  - General information on who's applying
  - Non-binding list of project applications for submission
  - Template Letter of Intent available
- Pre-application instructions: https://www.oregonmetro.gov/public-projects/2028-30-regional-flexible-funding-allocation

New to Step 2: Pre-Application Letter of Intent

Letter of Intent to include:

- Candidate project(s) name
  - OK – Multiple projects on the Letter of Intent
  - No penalties for including more projects than submitted
- Estimated amount & requested Regional Flexible Funds
- Project development only OR construction funding
- Application assistance consideration (if requesting)

Summary of Letter(s) of Intent received by September 6th

New to Step 2: Application Assistance

Consultant support for reviewing and developing Step 2 project applications.

- Request application assistance through Letter of Intent during pre-application period
  - Letter of Intent template includes assistance placeholder
- All agencies eligible for application support

Notifications sent by August 30th

New to Step 2: Application Assistance

Assistance available by tiers:

- Tier I & Tier II
  - Tier I – Application review
  - Tier II – Application development and support
- Eligible applicants divided by tiers
  - Based on size, staff capacity, federal aid expertise

Selection process if requests exceed resources

2028-2030 RFFA Step 2 Project Application Basics & Considerations

Step 2: Projected Available Funding

RFFA Step 2:

$47-$60 million

Step 2: Funding Details

Regional Flexible Funds		
Source:	Federal	
Delivery agency:	Certified Agency or ODOT (if local agency not certified)	
Match:	10.27% (minimum required)	
Other:	• Consistency • Constrained RTP	Emissions analysis

Step 2: Funding Requests

	Minimum Thresholds	Typical
Project development	$700,000	Up to $1M
Right-of-Way/Construction	$4M	$2-6M

Step 2: Eligible Project Types

Project Types	Eligible
On-street bike, pedestrian facilities	Yes
Off-street paved trails	Yes
Natural surface trails	No
Transit access (e.g. stop access, etc.) & expansion	Yes

Step 2: Eligible Project Types

Project Types	Eligible
System management and operations	Yes^
Transportation demand management	Yes
Arterial Expansion, Improvements, and Reconstruction	Yes*

^ consult Metro staff

* Limited arterial freight facilities for intelligent transportation systems, small capital, and project development

Step 2: Other Factors

Other considerations: Cycle Objectives

- Federal eligibility and/or state requirements
  - E.g. No sub-allocation, CMAQ eligible projects, air quality
- Federal aid process and project delivery considerations
  - Efficiently and cost-effectively navigate federal funds
- Multiple objectives

Step 2: Questions to Consider

Is your project a good fit for Regional Flexible Funds Step 2?

- Advances the RTP goals & meets criteria
  - Review criteria and measures
- Meets minimum eligibility requirements
- Can navigate federal aid process successfully
- Is ready to obligate in FFYs 2028-2030

2028-2030 RFFA Step 2 - Evaluation Process

Step 2: Four Components to Inform Allocation Recommendation

Outcomes evaluation: technical analysis of project outcomes relative to criteria and RTP goals/investment priorities

Risk assessment: identifying any potential changes to scope, timeline or budget

Public comment: gathering public input and opinions

Coordinating committees: indicating which projects are their priorities

Step 2: Two Part Evaluation

Outcomes Evaluation

- Focuses on 5 RTP goals + Design
  - Follows Metro's Designing Livable Streets and Trails guidance
- Candidate projects advancement towards regional aspirations

Risk Assessment

- Assessing candidate projects ability to navigate federal aid process
  - Other implications (i.e. obligation targets, redistribution funding)
- Ratings and flags for project delivery risks & readiness
- Recommendations for project scope if awarded funds

Step 2: Outcomes Evaluation

Projects evaluated for five RTP goal areas

- All equally weighted
- Performance measures in each goal areas
- Design only applicable to construction projects

Mix of performance measures

- Quantitative (e.g. measuring/filling a gap); Qualitative (e.g. community input)

Step 2: Outcomes Evaluation

- Geospatial analysis
  - Geographic-related questions assessed by Metro
    - E.g. equity focus area, TSMO strategy corridor
- Performance measures not 1-to-1
  - Normalized score for each goal area
- Strong project descriptions of scope and location information are key!

Step 2: Summary of Outcomes Evaluation Performance Measures & Methods

5 goal areas, 18 criteria, 35 measures & 53 methods

Goal	Criteria	Performance Measures	Methods
Equitable Transportation	3	7	12
Safe System	1	6	5
Climate Action & Resilience	4	10	17
Mobility Options	4	4	7
Thriving Economy	3	5	8
Design	3	3	4

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Equitable Transportation	• Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community	• Project makes improvements in an Equity Focus Area (GIS) • Improves access to community places for Black, Indigenous, and People of Color (BIPOC), and underserved communities (GIS/Quantitative) • Makes active transportation improvements in area with poor community health outcomes (GIS) • Improves access to low and middle wage jobs (GIS/Quantitative) • Removes, reduces disparities and barriers (jobs, transit, services for equity communities) (Qualitative) • Improves access in area with high lack of access to vehicle/high housing + transportation burden (GIS) • Demonstrated transportation project was/is identified by community as a priority (Qualitative)

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Safe System	• Reduced fatal and serious injury crashes for all modes of travel	• Project location is designated as a priority for safety improvements (Qualitative/GIS) • Design elements prioritize pedestrian safety (Qualitative) • Fills (completely, partially) an active transportation or trails network gap (Quantitative/GIS) • Project addresses active transportation safety within a walk-zone of a school (Qualitative/GIS)

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Climate Action & Resiliency	• Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases stability of existing critical transportation infrastructure	• Provides/increases transit option, biking/walking (Quantitative/Qualitative/GIS) • Provides/increases active transportation (Quantitative/GIS) • Improves system management via technology (TSMO) (Qualitative/GIS) • Improves/adds street connectivity (Quantitative/GIS) • Integrates transportation demand management strategies (outside of TSMO) (Qualitative) • Supports development patterns of a designated 2040 priority Land Use center or corridor (Qualitative/GIS) • Increases tree canopy, green infrastructure and decreases impervious surfaces (Qualitative/GIS) • Addresses an Emergency Transportation Route (Qualitative/GIS) • Decreases impervious surface (Qualitative)

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Mobility Options	• Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips	• Increases reliability and efficiency for all travel modes (Qualitative) • Project area has a high number of crashes (Quantitative/GIS/Qualitative) • Improves transit reliability (Qualitative/GIS) • Increases reliability by removing a barrier on regional freight system (Qualitative) • Improves/adds street connectivity (Qualitative) • Provides/increases transportation option (Quantitative/GIS)

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Thriving Economy	• Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities	• Supports/increases industrial/commercial developability (GIS/Qualitative) • In/supports development patterns of a designated 2040 priority Land Use center or corridor (GIS/Qualitative) • Provides/increases access to Target Industries (GIS/Qualitative) • Increases multimodal mobility and access to industrial and transport facilities (GIS/Quantitative/Qualitative) • Increases access to jobs (GIS)

Step 2: Outcomes Evaluation

RTP Goal	Evaluation Criteria	Performance Measure & Method
Design	• Design clearly demonstrates prioritized values/objectives of the project appropriate to context and facility/design classification • Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design	• In/supports future desired development of a designated 2040 priority Land Use center or corridor (GIS/Qualitative) • Design elements prioritize pedestrian and bicycle access, mobility, safety, and other functions based on the project facility's designated regional and local design classification. (GIS/Qualitative) • Project design represents the best possible improvement in project area, based on functional and design classification and contextual constraints. (GIS/Quantitative/Qualitative)

Step 2: Outcomes Evaluation Report

Projects outcomes displayed in two ways:

- Overall score or rating
- How well they performed in each RTP goal areas + design

Purpose is to illustrate the technical attributes of the projects

- Objective comparison of projects to advance regional priorities

Step 2: Risk Assessment

Analysis of project scope, budget, timeline

Purpose is to identify up front any issues that may delay project, impact the design, lead to cost overruns

- Opportunity to clarify/refine from initial risk assessment results

Not intended to be punitive

Step 2: Outcomes Evaluation & Risk Assessment Key Dates

Step 2 Call Closes: November 15, 2024

Evaluation: November 2024 – January 2025

Draft Results: February 7, 2025

- Risk Assessment Refinement: February 7 – 21

Final Results: March 7, 2025

Questions? Comments

Contact: Grace Cho
grace.cho@oregonmetro.gov

oregonmetro.gov/rffa