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# Regional Flexible Fund Allocation

Project nomination process for  
allocation of 2014-15 funds

April 4, 2011



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Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

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## About the Joint Policy Advisory Committee on Transportation (JPACT)

The Joint Policy Advisory Committee on Transportation is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs in this region. [www.oregonmetro.gov/JPACT](http://www.oregonmetro.gov/JPACT)

### JPACT Members

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## ABOUT THE REGIONAL FLEXIBLE FUND ALLOCATION

The Regional Flexible Fund Allocation is the regional process to identify which transportation projects and programs will receive regional flexible funds. Metro anticipates allocating approximately \$70 million of Surface Transportation Program (STP) and Congestion Mitigation/Air Quality (CMAQ) grant funds.

Every two years the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council decide how to spend federal transportation money known locally as the Regional Flexible Funds. This process allocate money to both regional programs such as the Transit Oriented Development program and to individual projects planned and built by local transportation agencies. In this cycle, JPACT and the Metro Council decided that money for individual projects should be more coordinated and focused. To achieve this Metro has initiated the development of a new collaborative process for project nomination and involved greater policy development early in the process to give specific direction on the types of projects that can be funded. JPACT and a special task force developed the approach for spending the funds and the criteria for developing and prioritizing projects.

This document explains the policies and framework for the process and the project nomination guidelines.

### 2012-15 Program Schedule

<b>April</b>	Sub-regional workshops
<b>April - August</b>	Local agency development of project nominations
<b>June</b>	Develop project summaries
<b>July</b>	Metro staff, TPAC and RFF Task Force review and comment on project summaries
<b>August</b>	Policy Coordinating Committees action to nominate projects
<b>September</b>	JPACT release of project nominations for public comment
<b>September - October</b>	Regional public comment period
<b>November - December</b>	Action of regional flexible fund allocation (TPAC/JPACT/Council)

### Summary of Transportation Spending

Regional flexible funds represent approximately 14 percent of the on-going state and federal transportation funds that come into the regional annually. Additional state and federal revenues enter the region through one-time program allocations. These include the OTIA programs (\$638 million), Connect Oregon programs (\$89 million) federal economic stimulus (\$153 million), state Jobs & Transportation Act (\$252 million), and federal transit New Starts grants (\$683 million for I-205/Mall, WES & Eastside Streetcar, approximately \$650 million anticipated for Milwaukie LRT). Also, there are locally generated sources of revenue such as the employer tax and farebox for

transit operations and local fees such as parking revenues, and local gas tax and vehicle registration fees.

Regional flexible funds receive a relatively high degree of attention and scrutiny, because unlike most sources of transportation revenue that are limited to specific purposes, regional flexible funds may be spent on a wide variety of transportation projects or programs.

### **2014-15 Regional Flexible Fund Allocation**

The amount of regional flexible funds available to be allocated is determined through the Congressional authorization and appropriation process. Because there is currently no authorization bill, let alone an appropriations bill, for the years 2014 and 2015, a forecast is made to estimate how much funding may be available for projects and programs in this time period. The forecast utilizes an estimated increase of 3 percent annually to the 2009 funding level. The 3 percent escalation rate is based on the historical pattern of funding levels over the life of the past two authorization bills.

Approximately \$70.7 million dollars is currently forecast to be available to the Portland metropolitan region from these two programs during the years 2014 and 2015. Should actual funding levels from federal fiscal year 2011 forward differ from this or previous forecasts, adjustments to the project allocations may need to be made. Changes would be made through programming adjustments (delaying implementation of one or more projects selected to receive funds) or through a comprehensive allocation and project adjustment decision by JPACT and the Metro Council.

### **Type of funding available**

Regional flexible funds come from two sources; Surface Transportation Program (STP) and Congestion Mitigation / Air Quality (CMAQ) funding programs. Each program's funding comes with unique restrictions.

**Surface Transportation Program** funds may be used for virtually any transportation project or program except for construction of local streets. STP grant funds represent approximately 60% of the funds available.

**Congestion Mitigation / Air Quality program** funds cannot be used for construction of new lanes for automobile travel. Additionally, projects that use these funds must demonstrate that some improvement of air quality will result from building or operating the project or program. CMAQ grant funds represent approximately 40 percent of the funds available.

As in previous allocations, the region expects to select a variety of projects so that funding conditions may be met by assigning projects to appropriate funding sources after the selection of candidate projects. Applicants do not need to identify from which program they wish to receive funding.

### **Eligible applicants**

Project nominations may be submitted on behalf of eligible sponsors located within the region's Metropolitan Planning Organization (MPO) boundary, including: Washington County and its cities, Clackamas County and its cities, Multnomah County and its eastern cities, and City of Portland, Oregon DEQ, TriMet, ODOT, Port of Portland and Parks and Recreation Districts.

## **POLICY FRAMEWORK**

The following policies have been adopted for the 2014-15 allocation of regional flexible funds.

### **Recurring process and administrative policies**

These policies define how the allocation process should be conducted and what outcomes be achieved with the overall allocation process.

1. Select projects from throughout the region, however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring air quality Transportation Control Measures for pedestrian and bicycle improvements are met and that an adequate pool of CMAQ eligible projects are available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage the application of projects that efficiently and to cost effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an area's stage of development (developed, developing, undeveloped) consistent with RTP Table 2.2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.
9. Ensure agencies have qualifications for leading federal aid transportation projects.
10. Identify opportunities for leveraging, coordinating, and collaboration.

### **JPACT and Metro Council adopted policy framework**

This policy framework affirms the two-step allocation process, establishes new project focus areas, sets funding targets, and directs the development of a new collaborative process for nominating projects for funding. The policy was adopted by Metro Resolution No. 10-4160.

#### **Two-step process**

The allocation process involves two steps for allocating the funding. Step 1 is the process to set funding levels for regional programs. Step 2 is the process to allocate the remaining available funds to locally generated projects. The two-step process was used in the previous funding cycle and was approved by JPACT for use in allocating 2014-15 funds as well. The benefit for using this approach

is that it provides more certainty for Step 2 funding levels as funds for the regional programs are “set aside” at the beginning of the process, allowing for a dollar target for Step 2 for local agencies to work with in nominating projects. The following are the amounts set for each step. Please note that both steps will be available for review and comment during the public comment phase of the process and the final decision for both will be made in fall of 2011.

**Step 1: Provide for existing regional programs - \$47.778 million**

- Transit Oriented Development – \$5.95 million
- High capacity transit bond - \$26 million
- High capacity transit development - \$4 million
- TSMO/ITS - \$3 million
- Regional Travel Options - \$4.539 million
- Regional Planning - \$2.244 million
- Corridor & Systems Planning - \$1 million
- Establish Metropolitan Mobility Funding Preparedness - \$1 million - Prepare consensus regional strategy and applications for state and federal funding targeted to mobility in metropolitan areas as a Step 1 activity.

**Step 2: Allocate remaining funds - \$23 million**

- Vehicle electrification*: One time set aside of \$500,000 for electric vehicle acquisition and infrastructure development.
- Active Transportation/Complete Streets target*: 75% - This project focus area prioritizes infrastructure support for non-auto trips and ensuring safe streets that are designed for all users.
- Green Economy/Freight Initiatives target*: 25 % - This project focus area supports the development of the region’s economy through investment in green infrastructure and key freight projects or programs.
- Collaborative Process* - Develop the project proposals for new focus areas through a collaborative process involving impacted stakeholders. A joint task force will be created to advise JPACT and TPAC on project focus area needs, priorities and project prioritization factors during the stakeholder engagement process.

**Regional Flexible Fund Task Force Report**

A task force was created to provide specific policy direction for the allocation of the funds in the focus areas developed by JPACT. The task force developed a strategic approach for each focus area and criteria for use in developing and assessing projects. The task force charge and membership can be found in Appendix D. The report was adopted by Metro Resolution No. 11-4231.

## ACTIVE TRANSPORTATION & COMPLETE STREETS

### Recommended approach for developing projects

For this project focus area, the task force recommended an approach of selecting travel corridor/areas and identifying project elements that would address the most critical barriers to completing non-auto trips in the corridor/area or a concentrated portion of the corridor/area. Examples of barriers could be the lack of direct pedestrian or bicycle facilities to key destinations in the corridor, inability to safely cross streets to access destinations, or lack of access to transit stop improvements.

To implement this approach with available funding, the following parameters will be utilized:

- improvements will be concentrated geographically in a travel corridor/area or portion thereof,
- improvements will be limited to a few travel corridor/areas within the region,
- potentially merge portions of several planned projects and several project types (bicycle, trail, pedestrian, transit stops) into a unified corridor/area wide project,
- project development will be allowed as an eligible activity for funding to address project readiness issues or as part of a strategy to phase implementation of projects.

### Recommended criteria for scoping and prioritization of projects

Relative priority	Criteria
High	Improves access to and from priority destinations: <ul style="list-style-type: none"> <li>o Mixed-use centers</li> <li>o Large employment areas (# of jobs)</li> <li>o Schools</li> <li>o Essential services for EJ/underserved communities</li> </ul>
	Improves safety <ul style="list-style-type: none"> <li>o addresses site issue(s) documented in pedestrian/bike crash data</li> </ul> separates pedestrian/bike traffic from freight and/or vehicular conflicts
	Serves underserved communities (to be further defined through analysis with help of EJ/underserved working group)
	Improves safety by removing conflicts with freight and/or provides safety mitigation for any potential freight conflicts
Medium	Completes the "last mile"
Medium	Increase in use/ridership by providing a good user experience (refer to Active Transportation design elements)
Medium	Serves high density or projected high growth areas
Low	Includes outreach/education/engagement component
Low	Can leverage funds



Low Reduces need for highway expansion

## GREEN ECONOMY & FREIGHT INITIATIVES

### Recommended approach for developing projects

For this project focus area, the task force recommended an approach of allocating funds for two components: construction type projects and planning/strategy development type projects. Eligible project types and criteria that could be utilized to scope and prioritize potential projects are described below.

#### Construction focus

Capital improvements will focus on:

- System management, such as Intelligent Transportation Systems (ITS), on arterial freight routes. This could include upgrading traffic signal equipment and timing or providing travel information to inform freight trip decisions.
- Small capital projects (e.g. spot widening or installation of mountable curbs to accommodate large truck turning movements). Projects should be assessed for regional impacts such as improving access to regionally significant industrial land or safe movements to/on the regional freight network to ensure a regional interest is served by the project.

#### Planning/strategy development focus

Project development for specific arterial freight routes would evaluate key barriers to the development of a green economy and freight movement and recommend operations and design improvements to address the barrier.

Funds may also be set aside to develop regional strategies for the following topics. These are areas that need further analysis and a policy development process to achieve a regional consensus on how to move forward on the issue. Potential topics include a strategy for how to pursue and accommodate higher speed inter-city passenger rail and improved freight rail facilities, and a strategy for the routing of hazardous materials in the region.

### Recommended criteria for scoping and prioritization of projects

Relative priority	Criteria
High	Reduces freight vehicle delay
High	Project increases freight access to: <ul style="list-style-type: none"><li>o Industrial lands</li><li>o Employment centers &amp; local businesses</li><li>o Rail facilities for regional shippers</li></ul>
High	Projects that help green the economy and offer economic opportunities for EJ/underserved communities
Medium	Improves safety by removing conflicts with active transportation and/or provides adequate mitigation for any potential conflicts

Medium	Reduces air toxics or particulate matter
Medium	Reduces impacts to EJ communities e.g., reduced noise, land use conflict, emissions
Medium	Increases freight reliability
Low	May not get funding otherwise
Low	Can leverage (or prepare for) future funds
Low	Reduces need for highway expansion
Low	Multi-modal component

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## Nomination framework

This framework provides the direction for Metro to initiate the collaborative project nomination process and lays out the steps that will be taken to get to the decision process. It also provides the criteria developed by the task force and explains how the criteria will be applied. The framework was adopted by Metro Resolution No. 11-4232.

### Regional kick-off meeting

- Process description & instructions
  - i. Sub-regional allocation target at 100% of available funds
  - ii. Project scope direction (see Task Force approach to project focus area)
  - iii. Project cost minimum/maximums
  - iv. Direction on number of construction or PE only applications
  - v. Nomination materials and schedule
    - Data addressing criteria objectives
    - Identification of any areas that cross sub-regional boundaries that should be considered in sub-regional workshops
    - Illustrative project and project development process description

### Sub-regional workshops

- Mapping exercise to identify priority corridors/areas
- Identification of topics for intra-agency or intra-bureau coordination during project development (project scope, lead agency, etc.)

### Project nomination material

- Local/Sub-regional public process to aid in identification of projects to nominate
- Application that solicits information on how the nominated project addresses criteria and process directions
- Assessment of project nomination relative to project criteria (Regional Freight TAC to assist with assessment of Green Economy & Freight Initiatives)
- Lead agency presentation of project nominations to Task Force & TPAC for comment

### **Project nomination**

- Action by Transportation County Policy Coordinating Committees and Portland City Council to nominate project(s) consistent with nomination process instructions
- Action from lead agency Council or board on project nominations

### **Public comment process (on scope and scale of nominated projects)**

- Metro to provide summary of comments
- Applicants to provide response to comment summary issues

### **Decision process**

- TPAC recommendation
- JPACT action
- Metro Council adoption

## **ACTIVE TRANSPORTATION & COMPLETE STREETS**

### **Criteria to guide scope development and for identifying priority locations for projects - pre nomination**

Data will be provided to nominating agencies that exemplify the criteria. This information will be made available and discussed at Metro sponsored workshops to aid in the identification of locations that:

- Improve access to and from priority destinations:
  - Mixed-use centers
  - Large employment areas (# of jobs)
  - Schools
  - Essential services for EJ/underserved communities
- Improve safety
  - addresses site issue(s) documented in pedestrian/bike crash data
  - separates pedestrian/bike traffic from freight and/or vehicular conflicts
- Serve underserved communities

### **Criteria for assessing projects**

Once priority locations have been selected based on the pre-nomination criteria; the following criteria should be used to help define specific projects details.

A well-defined project:

- Improves access to and from priority destinations
- Improves safety
- Serves underserved communities
- Removes conflicts with freight and/or provides safety mitigation for any potential freight and/or vehicular conflicts
- Completes the “last mile”
- Increases use/ridership
- Serves high density or projected high growth areas
- Includes outreach/education/engagement component

- Reduces need for highway expansion

## **GREEN ECONOMY & FREIGHT INITIATIVES**

### **Criteria to guide scope development and for identifying priority locations for projects - pre nomination**

Data will be provided to nominating agencies that exemplify the criteria. This information will be made available and discussed Metro sponsored workshops to aid in the identification of where:

- Project increases freight access to:
  - Industrial lands
  - Employment centers & local businesses
  - Rail facilities for regional shippers

### **Criteria for assessing projects**

Once priority locations have been selected based on the pre-nomination criteria, the following criteria should be used to help define specific projects details.

A well-defined project:

- Reduces freight vehicle delay
- Helps green the economy and offers economic opportunities for EJ/underserved populations
- Improves safety by removing conflicts with active transportation and/or provides adequate mitigation for any potential conflicts
- Reduces air toxics or particulate matter
- Reduces impacts to EJ communities e.g., reduced noise, land use conflict, emissions
- Increases freight reliability
- May not get funding otherwise
- Can leverage (or prepare for) future funds
- Reduces need for highway expansion
- Has multi-modal components

## PROJECT NOMINATION GUIDELINES

The following guidelines must be used for determining the cost and number of projects each sub-region is eligible for nominating.

### Active Transportation and Complete Streets

#### Sub-regional cost targets by percent of population

	Region	City of Portland	Clackamas County	Multnomah County	Washington County
% of Population <sup>(1)</sup>	100%	39.25%	17.6%	9.89%	33.26%
Fund Target - 75% of available revenues <sup>(2)</sup> (millions)	\$16.875	\$6.623	\$2.969	\$1.669	\$5.612

<sup>(1)</sup> 2010 population data.

<sup>(2)</sup> Available revenues are a forecast of revenues from the FFY 2014 and 2015 federal urban STP and CMAQ funds after allocation to existing Step 1 programs. The current forecast is for \$22.5 million. This may be adjusted if new information concerning authorization, appropriations or other forecasting factors is made available. Minor changes (< \$2 M) may be made to this forecast up to March 30, 2011. Changes after that date will be accommodated through programming adjustments (delaying implementation of one or more projects selected to receive funds to FFY 2016) or through a comprehensive allocation and project adjustment by JPACT and the Metro Council.

#### Construction project cost minimum

\$3 million total project cost or total sub-region target (less eligible project development nomination), whichever is less.

#### Project development cost minimum

\$200,000, but appropriate to project scope (PE phase will be more expensive than planning level work). Scope and budget must be reviewed for feasibility with Metro and ODOT staff prior to final nomination.

#### Number of nominations

Meet target and construction project cost minimums, and may nominate one project development phase. Project development may include anything from a planning level "alternatives analysis" to preliminary engineering.

## Green Economy & Freight Initiatives

### Sub-regional cost targets, by weighted regional freight system (route miles) and Title 4 land (acres)

	Region	City of Portland	Clackamas County	Multnomah County	Washington County
Allocation % based on freight network miles and industrial land factors (1)	100%	46%	15%	13%	28%
Fund Target - 25% of available revenues (2) (millions)	\$5.125	\$2.363	\$ .790	\$ .659	\$1.312
Potential allocation of unused regional strategy funds based on maximum of \$500,000		\$ .231	\$ .077	\$ .064	\$ .128

(1) Average of Freight System and Land Use Factors as follows

Weighted Route Miles of Regional Freight System

- Local components of roadway (i.e., connectors only) –including proposed connectors (weighting factor of 67%, based on year 2000 percent tonnage moved by truck, per 2035 RTP)
- Main + branch rail lines (weighting factor of 33%)
- Straight Average of Acres of Title 4 Land
- Industrial land (50%)
- Regionally significant industrial land (50%).

(2) Available revenues are a forecast of revenues from the FFY 2014 and 2015 federal urban STP and CMAQ funds after allocation to existing Step 1 programs. The current forecast is for \$22.5 million. This may be adjusted if new information concerning authorization, appropriations or other forecasting factors is made available. Minor changes (< \$2 M) may be made to this forecast up to March 30, 2011. Changes after that date will be accommodated through programming adjustments (delaying implementation of one or more projects selected to receive funds into FFY 2016) or through a comprehensive allocation/project adjustment by JPACT and the Metro Council.

#### Construction project cost minimum

\$1 million or total sub-region target, whichever is less.

#### Project development cost minimum

\$200,000 but appropriate to project scope (PE phase will be more expensive than planning level work). Scope and budget must be reviewed for feasibility with Metro and ODOT staff prior to final nomination.

#### Number of nominations

Meet target and construction project cost minimums, and may nominate one project development phase. Project development may include anything from a planning level "alternatives analysis" to preliminary engineering.

## DATA AND INFORMATION

### Kick-off meeting

Metro will host a kick-off meeting with local agency staff to describe the policy framework for the allocation process, review the data available to aid in project location and definition, and to discuss the project nomination guidelines, sub-regional workshops and decision process.

### Sub-regional workshops

Following the kick-off meeting, Metro will be sponsoring sub-regional workshops to begin the collaborative project nomination process. Metro staff will analyze the regional data and provide findings about potential opportunity areas for projects. The workshops are intended to get the conversation started about potential project nominations.

### Regional data

In order to aid project nominating agencies in identifying locations and define projects that meet the policy direction and criteria, Metro will provide data and findings relative to the project criteria. The following data will be provided through Metro's FTP site for use with GIS software, unless otherwise noted:

-Transportation Equity:

*Populations:* Environmental Justice and underserved communities

*Essential Services:* services necessary for daily living

*Non-auto mobility:* bike & pedestrian infrastructure, transit access

-Elderly and disabled mobility: transit stops with frequent ramp deployment, LIFT service

-Employment: number of employees

-Safety: bike/pedestrian crash locations

-Sidewalk gaps, pedestrian crossings and barriers

-School locations

-2040 centers, industrial and employment land

-Mobility Atlas excerpts for truck travel, volume to capacity ratios and motor vehicle level of service (Metro web site)

-Container transfer facilities and large distribution centers (table and PDF)

-Previous regional flexible fund project allocations: bike, pedestrian, trail, transit, freight

-RTP projects: bike, pedestrian, trail, freight

**THE FTP ADDRESS IS:** <ftp.oregonmetro.gov/pub/tran/rffa>

### Local data

The regional data available is intended to get the conversation started about where projects can be developed and defined to meet the criteria however, there may be local sources of data that can help "ground truth" the regional data and provide additional information for aiding the nomination

process. We encourage the use of additional data in this process.



## LOCAL PROCESS FOR NOMINATING PROJECTS

This involves completing two forms for use in different stages of the process, a short project summary and a longer, detailed project narrative. The summary form is a simplified narrative that is due in June for review by Metro staff, TPAC, and the RFF task force. It may also be utilized in local narrowing efforts if desired. The longer project nomination narrative is for use in nominating projects for funding consideration and for public comments. The following explains the process and timeline for nominating projects:

1. Attend a sub-regional workshop - **April 4-14**
2. Access data on Metro's FTP site for use in identifying project locations that meet the criteria - **April**
3. Commence local process for identifying projects to nominate. See [Appendix A](#) for minimum public involvement requirements. - **Starts in April**

***\*Local process concludes with submission of project nomination narratives in August.***

4. Complete project summary form for all projects to be reviewed by Metro Staff, TPAC & RFF Task Force:
  - Download separately <http://www.oregonmetro.gov/regionalflexiblefund>.
  - Submit to Amy Rose via email at [amy.rose@oregonmetro.gov](mailto:amy.rose@oregonmetro.gov)

***\*Project summaries DUE June 17***

5. Feedback on summaries made available to coordinating committees & City of Portland prior to nomination of projects. - **Available by July 5**
6. Select projects to nominate for funding consideration- **July-August**
  - Follow nomination guidelines for construction cost minimums, project development cost minimums, and number of nominations (page 13).
7. Complete the project nomination narrative for projects being put forth for consideration.
  - Download form separately <http://www.oregonmetro.gov/regionalflexiblefund>.
  - Develop project shapefiles - use the guidelines in [Appendix B](#).
  - Submit letter from lead agency Council or board approving project for nomination.
  - Submit application materials to Amy Rose via email at [amy.rose@oregonmetro.gov](mailto:amy.rose@oregonmetro.gov).

***\*Narrative & shapefiles - DUE August 29, 5:00 PM***

## REGIONAL PUBLIC COMMENT & DECISION PROCESS

Following the nomination of projects, the public will be able to provide comments on whether the projects as defined meet community needs or need refinement. Lead agencies will be able to receive comments and make refinements to their projects prior to the allocation decision process. The following explains the timeline for public comments and the decision process.

1. JPACT to release project narratives for public comment period -**September 8**
2. Regional public comment period - **September 9 to October 10**  
-Online comment tool
3. Metro staff summary of public comments for use by lead agencies to make final project refinements - **Available October 14**
4. Lead agencies to provide explanation of refinements to project as a result of public comments (if applicable)  
-Submit to Amy Rose via email at [amy.rose@oregonmetro.gov](mailto:amy.rose@oregonmetro.gov)

### **\*Project refinement summary DUE November 4**

5. Metro staff to develop conditions of project approval.
6. TPAC consideration of projects and conditions of funding approval - **November 18**
7. JPACT action on regional flexible fund allocation - **December 8**
8. Metro Council action on regional flexible fund allocation - **December 15**

## PROJECT SUMMARY & NOMINATION NARRATIVE INSTRUCTIONS

### **Project Summary**

Project summaries will be used for review by Metro staff, TPAC and the RFF task force. The feedback received on these summaries can be used to help prioritize which project(s) to nominate if desired. The table below has the maximum number of summaries that can be submitted. A sub-region may want to submit extra summaries if the local narrowing process could benefit from Metro staff, TPAC and task force comments, but are not required to submit extra summaries and may choose to submit projects totaling their target amount instead. The summary form is available at <http://www.oregonmetro.gov/regionalflexiblefund> and includes the following:

1. Project sponsor agency
2. Project extent or area description and how you identified the location as a priority.
3. Purpose and need statement (highlight most relevant criteria).
4. Description of project design elements
5. Map of project area

**\* PROJECT SUMMARIES SHOULD BE LIMITED TO TWO PAGES OF NARRATIVE + ONE MAP PER PROJECT**

**Maximum number of project summaries per sub-region**

City of Portland	Clackamas County	Multnomah County	Washington County
7	6	5	6

**Project nomination narrative**

Project nomination narratives provide in depth process, location and project definition details and serves as the nomination form for project funding consideration. The following is identical to the form available on Metro’s website and includes instructions and information for answering the questions. The narrative form is available at: <http://www.oregonmetro.gov/regionalflexiblefund>.

**\*PROJECT NARRATIVES SHOULD BE KEPT TO 12 PAGES TOTAL PER PROJECT**

**Active Transportation & Complete Streets projects**

**Process**

1. Describe the process used to narrow potential project nominations to select the project(s) being put forward for funding consideration. *(Answer should demonstrate that the process met minimum public involvement requirements per Appendix A)*
2. Describe how you coordinated with regional or other transportation agencies (e.g. Transit, Port, ODOT, Metro, Freight Rail operators, ODOT Region 1, Regional Safety Committee, and Utilities if critical to use of right-of-way) and how it impacted the project location and design.
3. Provide a list of stakeholders consulted or targeted during your local process and provide a summary of comments received at your public meeting or other public engagement activities. Please include contact information.

**Location**

1. Describe how you identified the travel corridor/area for the project and how regional and local data relevant to the project criteria support this location as your top priority(s). *(See page 11 for criteria relevant to prioritizing project location)*

**Project definition**

Base project information

1. Corresponding RTP project number(s) for the nominated project (if applicable).

2. Project sponsor agency
3. Contact information for: Application lead staff, Project Manager (or assigning manager), Project Engineer (or assigning manager).
4. Description of project extent, design elements and how measurement of project effectiveness after construction is to be completed. *(Metro staff is available to help design measurement methodologies for post-construction project criteria performance)*
5. Please provide a purpose and need statement for the project you're nominating. *(The purpose and need statement should address the criteria as they apply to the project area -e.g. increase non-auto trip access to essential services in the X town center, particularly for the high concentration of Y and Z populations in the project area)*

Highest Priority Criteria

6. Describe how the project improves access to priority destinations mixed-use centers, large employment areas, schools, and essential services for EJ/underserved communities. *(See maps/data on Metro FTP site)*
7. Identify the safety issues in the project area. How does the project design address safety in the area? *(See bike/pedestrian crash map/data on Metro FTP site)*
8. How does the project serve traditionally underserved (minority, low-income, limited English speaking, youth, elderly, disabled) communities? Explain how your project responds to data identifying concentrations of underserved communities and what project elements address the transportation needs of these communities. *(See Transportation Equity maps/data on Metro FTP site for help identifying concentrations of EJ and underserved communities and how well they are served/not served)*

High Priority Criteria

9. Describe any outreach that has been conducted with EJ/underserved communities to date. *(Targeted outreach to these communities may be facilitated by Metro during the regional public comment period for comments on project scope. Additional outreach during project development phases (final design, preliminary engineering, etc.) may be a condition of funding approval)*
10. Describe any conflicts with freight/active transportation you've identified in your project area. How does the project design address or provide mitigation to these conflicts?

11. Does the project design include “last mile” connections? Please explain. *(Last mile connections create safe and comfortable biking and walking routes that directly connect transit stops to nearby origins and destinations, and can include the provision of secure and convenient bicycle parking at stations)*
12. Describe how the project will lead to an increase in non-auto trips through improvements in the user experience. *(See Appendix C for design elements that improve the user experience)*
13. Does the project serve a high density or projected high growth area? Please explain. *(For high growth areas, explain how the project is coordinated with growth plans to focus or orient future development to maximize use of the project)*

#### Priority Criteria

14. Please describe the outreach/education/engagement element of the project nomination. *(Metro Regional Travel Options staff is available to help design an effective and appropriate level of education and marketing for your project nomination)*
  15. Are there opportunities to leverage other funds or investments with this project? Describe any opportunities you have identified and how you plan to coordinate with other project(s) or leverage other funds.
  16. Describe how the project may help reduce the need for road and highway expansion.
- 

### **Green Economy & Freight Initiatives projects**

#### ***Process***

1. Describe the process used to narrow potential project nominations to select the project(s) being put forward for funding consideration. *( Answer should demonstrate that the process met minimum public involvement requirements per Appendix A)*
2. Describe how you coordinated with regional agencies (e.g. Transit, Port, ODOT, Metro, Freight Rail operators, ODOT Region 1, Regional Safety Committee, and Utilities if critical to use of right-of-way) and how it impacted the project location and design.
3. Provide a list of stakeholders consulted or targeted during your local process and provide a summary of comments received at your public meeting or other public engagement activities. Please include contact information.

## **Location**

1. Describe how you identified the location for the project and how the criteria and regional and local data support this location as your top priority. *(See page 12 for criteria relevant to prioritizing project location)*

## **Project definition**

### Base project information

1. Corresponding RTP project number(s) for the nominated project
2. Project sponsor agency
3. Contact information for: Application lead staff, Project Manager (or assigning manager), Project Engineer (or assigning manager)
4. Description of project extent, design elements and how measurement of project effectiveness after construction is to be completed. *(Metro staff is available to help design measurement methodologies for post-construction project criteria performance)*
5. Please provide a purpose and need statement for the project you're nominating. *(The purpose and need statement should address the criteria as they apply to the project area - e.g. reduce freight vehicle delay from and increase freight access to X industrial area or employment center, and helps green the economy by doing Y in the project area)*

### Highest Priority Criteria

6. Describe how the project will reduce freight delay.
7. Describe how the project increases freight access to industrial lands, employment centers & local businesses, and/or rail facilities for regional shippers.
8. Describe how the project contributes to "greening the economy" and how the project helps expand economic opportunities to Environmental Justice/underserved communities. *(For the purposes of this allocation we are defining "greening the economy" to be initiatives that contribute to creating a low carbon, resource efficient, and socially inclusive economy)*

### High Priority Criteria

9. Describe any conflicts with freight/active transportation you've identified in your project area. How does the project design mitigate these conflicts?
10. Does the project help reduce air toxics or particulate matter? Please explain.
11. Does the project help reduce impacts, such as noise, land use conflicts, emissions, etc. to Environmental Justice communities? Please explain.

12. Describe how the project increases freight reliability.

Priority Criteria

13. Is the project of an innovative or unique nature such that it is not eligible or typically funded with large, traditional transportation funding sources such as state trust fund pass through to local agencies, local bridge program, or large state funding programs (Modernization, Bridge, Preservation, etc.) or have any other significant sources of funds? Please explain.
14. Will this nomination leverage other funds or prepare a project to compete for discretionary funding that may otherwise not come to the region? Describe any opportunities you have identified.
15. Describe how the project may help reduce the need for highway expansion.
16. Describe any multi-modal elements included in the design of your project.

## APPENDIX A

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### ***MINIMUM REQUIREMENTS FOR LOCAL PUBLIC PROCESS***

- Sub-regional county coordinating committees and Portland to hold at least one public meeting on projects that could be nominated.
- All sub-regions to document how they notified the public and stakeholder groups about the meeting. Contact information for those groups should be forwarded to Metro for use in the subsequent regional public comment period.
- All sub-regions to document the comments received at public meeting(s) and other times during the nomination process.
- Sub-regions to use outreach methods they determine to be appropriate and successful within their communities to publicize the meeting(s) and gather input.



## APPENDIX B

### **GIS SHAPEFILE GUIDELINES**

All applicants should submit project information in shapefile format, clearly identified using the project name, and conform to the following specifications:

**A. Linear projects:** Projects on roads, sidewalks, or other continuous paths associated with roadways should consist of RLIS street segments. Please use the most current RLIS street centerline file, select the links that make-up the project and export the shapefile titled with the project name. \*

**B. Point projects:** Projects that are in discreet locations (intersection improvements, signal timing, etc.) should be created as a “point shapefile” and snapped to the nearest intersection.

**C. Area projects:** Transportation projects that do not conform to lines or points can be represented with a polygon. These include region-wide projects, or projects that are programmatic in nature. In these cases please submit a polygon of the project extent.

If more than one project is contained within a shapefile, please provide the project name for each object in the attribute table.

All project submittals should use the following coordinate system:

**Projected Coordinate System:**

NAD\_1983\_HARN\_StatePlane\_Oregon\_North\_FIPS\_3601

Projection: Lambert\_Conformal\_Conic

False\_Easting: 8202099.73753281

False\_Northing: 0.00000000

Central\_Meridian: -120.50000000

Standard\_Parallel\_1: 44.33333333

Standard\_Parallel\_2: 46.00000000

Latitude\_Of\_Origin: 43.66666667

Linear Unit: Foot

Geographic Coordinate System: GCS\_North\_American\_1983\_HARN

Datum: D\_North\_American\_1983\_HARN

Prime Meridian: Greenwich

Angular Unit: Degree

\*If you have any questions about the requirements or need any help with this process, please call Matthew Hampton, 503-797-1748, or email [matthew.hampton@oregonmetro.gov](mailto:matthew.hampton@oregonmetro.gov)

## APPENDIX C

### *DESIGN ELEMENTS OF ACTIVE TRANSPORTATION PROJECTS THAT IMPROVE USER EXPERIENCE*

- Provides “green” elements (trees/landscaping for on-street routes, off-street trail with views of water/access to nature)
- Provides buffer from noise if needed
- Avoids steep terrain if possible
- Minimizes interaction with traffic (refuge islands, high visibility crosswalks and signals, utilize lower traffic streets if possible or provide physical buffer along high-traffic streets)
- Provides the most direct route possible (avoids unnecessary meandering)
- Provides bicycle storage facilities at transit stops
- Provides way-finding and signage

## **APPENDIX D**

### ***ABOUT THE REGIONAL FLEXIBLE FUNDS TASK FORCE***

#### **Charge of the Regional Flexible Fund Task Force**

The Regional Flexible Funds Task Force was charged with developing a recommendation to the Joint Policy Advisory Committee on Transportation (JPACT) on the needs, priorities, implementation strategies for investing Regional Flexible Funds in the active transportation/complete streets and green economy/freight initiatives focus areas. Staff will conduct a project nomination and evaluation process using those needs and strategies to recommend projects for funding. The Task Force may then advise JPACT and Metro Council on the project list.

The task force addressed the following questions:

1. From a user/practitioner perspective, what are the transportation needs in the region for active transportation/complete streets & green economy/freight initiatives?
2. What are the priorities for meeting regional transportation needs with the limited flexible funds available?
3. What strategies should be employed to further the development of active transportation/complete streets & green economy/freight initiatives in the region?
4. What are potential opportunities for collaboration between active transportation/complete streets & green economy/freight initiatives?

#### **Task Force Members**

Carlotta Collette, Task Force Chair

Scott Bricker, America Walks

Gary Cardwell, Northwest Container Services

Jill Fuglister, Coalition for a Livable Future

Steve Ganiere, Alliance Packaging

Alison Graves, Community Cycling Center

Matt Hoffman, Fred Meyer

Chips Janger, Clackamas County Urban Green

John MacArthur, OTREC/Portland State University

Alejandro Qeral, Multnomah County Health Dept.

Phil Selinger, Willamette Pedestrian Coalition

Joseph Santos-Lyons, OPAL - Environmental Justice Oregon

Stephen Gomez, Bicycle Transportation Alliance

Ron Russ, Portland & Western Railroad

John Willis, CH2MHill

Philip Wu, MD, Kaiser Permanente

Jeff Marson, Marson Trucking

Pete Lehmann, Oracle Americas

Greg Osnes, SolarWorld

Jim Petsche, Nike

Sheila Martin, Portland State University