

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Transportation Policy Alternatives Committee (TPAC) Workshop
Date: Wednesday, February 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	Chair Kloster
9:10 a.m.	Comments from the Chair and Committee Members <ul style="list-style-type: none">• Updates from committee members around the region (all) Public communications on agenda items	
9:17 a.m.	Consideration of TPAC workshop summary, Nov. 8, 2023 Edits/corrections sent to Marie Miller	Chair Kloster
9:20 a.m.	ODOT Funding Updates Purpose: To provide TPAC and interested parties with an update on ODOT allocation of funds through its various programs, such as Great Streets 2.0, ARTS, and others Links to programs: Connect Oregon: Connect Oregon Safe Routes to Schools: Safe Routes to Schools Oregon Community Paths: Oregon Community Paths	Chris Ford, ODOT
9:50 a.m.	2028-30 Regional Flexible Funds – Overview of Previously Funded Projects Purpose: Provide TPAC and interested parties with updates on the Outcomes on some regional programs and capital projects funded through the Regional Flexible Funds in previous cycles. This is the first of two presentations coming to the TPAC workshops.	Grace Cho, Metro Eryn Kehe, Metro Jon Williams, Metro Kelly Betteridge, Metro
10:45 a.m.	<i>5-minute meeting break</i>	
10:50 a.m.	Project Delivery Workshop – Kick off and Introduction Purpose: For the purpose of providing TPAC members an overview of the federal transportation project delivery process to help support local agencies complete their 2028-30 Regional Flexible Funds Allocation (RFFA) application.	Ken Lobeck, Metro Ted Leybold, Metro
12:00 p.m.	Adjournment	Chair Kloster

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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2024 TPAC Work Program

As of 2/7/2024

NOTE: Items in *italics* are tentative; **bold denotes required items**
All meetings are scheduled from 9am - noon

	<p><u>TPAC workshop meeting, February 14, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • ODOT Funding Updates (Ford, 30 min) • 2028-30 Regional Flexible Funds – Overview of previously funded projects (Cho/ Kehe/ Williams/ Betteridge; 55 min) • Project Delivery Workshop – Kick off and Introduction (Lobeck/Leybold, 70 min)
<p><u>TPAC meeting, March 1, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <i>Recommendation to JPACT</i> (Lobeck, 10 min) • Westside Multimodal Improvements Study (WMIS) (Kate Hawkins, Metro, 45 min) • 2024-25 Unified Planning Work Program (UPWP) (John Mermin, Metro, 30 min) 	
<p><u>TPAC meeting, April 5, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • 2027-30 STIP update (Neelam Dorman) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <i>Recommendation to JPACT</i> (Lobeck, 10 min) • 2024-25 Unified Planning Work Program (UPWP) Recommendation to JPACT (Mermin, 20 min) 	<p><u>TPAC workshop meeting, April 10, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Tracker – Introduction to the new Regional Database (informational) (Ted Leybold/Jodie Kotrlik, 45 min) • Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min) • TriMet and SMART – Budget Updates and Programming of Projects (TriMet and SMART Staff, 40 min) • ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min)

<p><u>TPAC meeting, May 3, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • 28-30 Regional Flexible Fund Program Direction 25-XXXX <u>Recommendation to JPACT</u> (Cho/Leybold, 45 min) • 27-30 MTIP Program Direction 25-XXXX <u>Recommendation to JPACT</u> (Cho/Leybold, 45 min) • Kick-off to the Transportation Demand Management and Regional Travel Options Strategy Update (Caleb Winter, Marne Duke, Noel Mickelberry, Grace Stainback, 45 min) 	
<p><u>TPAC meeting, June 7, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • 2027-30 STIP update (Neelam Dorman) • Fatal crashes update (Lake McTighe) • 28-30 RFFA – Step 2 - Updates <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Safe Streets for All Update (McTighe, 30 min) • Freight Study update (Tim Collins, 30 min) 	<p><u>TPAC workshop meeting June 12, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min) • 28-30 RFFA – Technical Evaluation Criteria – Discussion of Refinements and Inputs (Cho/Leybold, 60 min) • ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min)
<p><u>TPAC meeting, July 12, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Forward Together 2.0 Vision (Kate Lyman, TriMet; 45 min) • Connecting First and Last Mile Study Introduction (Ally Holmqvist, Metro; 45 min) 	

<p><u>TPAC meeting, August 2, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 28-30 RFFA – Step 2 - Updates <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) 	<p><u>TPAC workshop meeting August 14, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series (Leybold/Lobeck, 60 min) • 28-30 RFFA Proposers Workshop (Cho/Leybold/Lobeck, 120 min)
<p><u>TPAC meeting, September 6, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) • 28-30 RFFA Step 2 – Call for Projects <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) 	
<p><u>TPAC meeting, October 4, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Safe Streets for All Update (McTighe, 30 min) 	<p><u>TPAC workshop meeting October 9, 2024</u></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Project Delivery Training Series – Topic TBD (Leybold/Lobeck, 60 min) • ODOT Update on Funding Allocations for 28-30 (Leverage, ARTS, etc.) (Ford/Bolen, 30 min)
<p><u>TPAC meeting, November 1, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Forward Together 2.0 Implementation (Kate Lyman, TriMet; 45 min) 	<p><u>TPAC meeting, December 6, 2024</u></p> <p>Comments from the Chair:</p> <ul style="list-style-type: none"> • Committee member updates around the Region (Chair Kloster & all) • Monthly MTIP Amendments Update (Ken Lobeck) • Fatal crashes update (Lake McTighe) <p>Agenda Items:</p> <ul style="list-style-type: none"> • MTIP Formal Amendment 24-XXXX <u>Recommendation to JPACT</u> (Lobeck, 10 min) • Connecting First and Last Mile” Study (Ally Holmqvist, Metro; 45 min)

Parking Lot: Future Topics/Periodic Updates

- Columbia Connects Project
- 82nd Avenue Transit Project update (Elizabeth Mros-O'Hara & TBD, City of Portland)
- Best Practices and Data to Support Natural Resources Protection
- TV Highway Corridor plan updates
- High Speed Rails updates (Ally Holmqvist)
- MTIP Formal Amendment I-5 Rose Quarter discussion (Ken Lobeck)
- I-5 Rose Quarter Project Briefing (Megan Channell, ODOT)
- 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.

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Meeting minutes



Meeting: **Transportation Policy Alternatives Committee (TPAC) Workshop**
Date/time: Wednesday November 8, 2023 | 9:00 a.m. to 12:00 p.m.
Place: Virtual online meeting via Web/Conference call (Zoom)

Members Attending

Tom Kloster, Chair
Karen Buehrig
Allison Boyd
Dyami Valentine
Judith Perez Keniston
Jaimie Lorenzini
Jay Higgins
Mike McCarthy
Gerik Kransky
Lewis Lem
Bill Beamer
Sarah Iannarone
Danielle Maillard
Indi Namkoong

Affiliate

Metro
Clackamas County
Multnomah County
Washington County
SW Washington Regional Transportation Council
City of Happy Valley & Cities of Clackamas County
City of Gresham & Cities of Multnomah County
City of Tualatin & Cities of Washington County
Oregon Department of Environmental Quality
Port of Portland
Community Member at Large
The Street Trust
Oregon Walks
Verde

Alternates Attending

Sarah Paulus
Jennifer Campos
Adam Fiss
Mark Lear
Dayna Webb
Will Farley
Gregg Snyder
Neelam Dorman
Glen Bolen
Jason Gibbens

Affiliate

Multnomah County
SW Washington Regional Transportation Council
SW Washington Regional Transportation Council
City of Portland
City of Oregon City & Cities of Clackamas County
City of Lake Oswego & Cities of Clackamas County
City of Hillsboro & Cities of Washington County
Oregon Department of Transportation
Oregon Department of Transportation
WA State Department of Transportation

Members Excused

Eric Hesse
Tara O'Brien
Chris Ford
Laurie Lebowsky-Young
Ellie Gluhosky
Jasia Mosley
Jasmine Harris
Katherine Kelly
Steve Gallup

Affiliate

City of Portland
TriMet
Oregon Department of Transportation
Washington State Department of Transportation
OPAL Environmental Justice in Oregon Metro
Community Member at Large
Federal Highway Administration
City of Vancouver
Clark County

Shawn M. Donaghy
Ned Conroy

C-Tran System
Federal Transit Administration

Guests Attending

Camilla Dartnell
Chris Lamm
Dakota Meyer
Gabriela Giron
Jean Senechal Biggs
Jessica Engelmann
Laura Edmonds
Max Nonnamaker
Mike Mason
MJ Andersen
Robin Wilcox

Affiliate

Kittelson & Associates
Cambridge Systematics
City of Troutdale
PBOT
City of Beaverton
City of Beaverton
Clackamas County
Multnomah County Health Department
Oregon Department of Transportation
Multnomah County
Oregon Department of Transportation

Metro Staff Attending

Caleb Winter, Cindy Pederson, Eliot Rose, Grace Cho, Grace Stainback, Jake Lovell, John Mermin, Kim Ellis, Lake McTighe, Marie Miller, Marne Duke, Ted Leybold, Tim Collins, Tom Kloster

Call to Order and Introductions

Chair Kloster called the meeting to order at 9:00 a.m. Introductions were inadvertently missed. Reminders where Zoom features were found online was reviewed. The link for providing 'safe space' at the meeting was shared in the chat area.

Comments from the Chair and Committee Members

Federal Aid Urban Boundary (FAUB) Review (Chair Kloster) The opportunity for cities and counties to weigh in on the Federal Aid Urban Boundary (FAUB) on jurisdictional boundaries is now with the deadline Dec. 15. The importance of FAUB is that this is the boundary that defines areas eligible for Federal urban transportation funds. Next year the committee will hear more on the Federal Functional Classifications to the facilities that fall inside the FAUB. The link to the online tool that has built-in capability to directly submit comments for suggesting "smoothing" edits to the proposed Federal Aid Urban Boundary — one of the boundary updates triggered by the 2020 Census, and the boundary that establishes eligibility for urban federal transportation funds was shared:

<https://experience.arcgis.com/experience/a7c266e96058473d9e8423c7789f66e7>

Public Communications on Agenda Items – none received

Consideration of TPAC workshop summary, October 11, 2023 (Chair Kloster) Edits or corrections were asked to be sent to Marie Miller. No edits/corrections were received.

Regional Freight Delay and Commodities Movement Study Update (Tim Collins, Metro and Chris Lamm, Cambridge Systematics) The presentation featured details on Regional key findings on commodities movement, Mobility and Reliability Issues, Regional Freight Policy Questions and Lessons Learned, Freight Access Criteria, and Next Steps. The final report on the study will be completed by December 30. The outline for the report was given:

- Executive Summary
- 1. Introduction
- 2. Project Team and Stakeholder Participation

3. Regional Freight Policy Framework and Policy Questions
4. Commodities Movement by Trucks
5. Network Performance
6. Trends Impacting Current and Future Commodity Movements
7. Addressing Goods Movement Performance
8. Study Recommendations and Freight Policy
9. Next Steps and Further Research

Comments from the committee:

Karen Buehrig was interested in knowing how to access the final report and any sort of backup documentation. Previous discussions indicated expected growth areas on corridors with additional traffic on them. It wasn't clear in the presentation who that was folded into the overall findings. Maybe you can talk about how the new emerging areas are expecting more freight travel and reflected in these final recommendations.

Tim Collins noted we have the ability through our model to look at growth in truck traffic and overall traffic. We'll touch on that in the final report. We have really been focused on the new modeling tool and looking at the growth in commodities which dovetails into the growth in truck traffic, too. I think we can identify some of the growth areas, particularly the Rivergate area to I-5 with a lot of growth in the commodity value and tonnage. I-205 is another area that will have impact on Clackamas County looking at growth both of trucks and the commodities that they're carrying.

Mike McCarthy noted a couple of concerns. One was similar to Ms. Buehrig's about making sure that we set things up well for freight access to the more developing areas, where we see a lot of our developing employment coming. One of the other questions was about the delay reliability data. Using 2019 data is kind of old at this point because the worlds' changed a lot. When I saw that same data a few months ago I was hoping to see it updated using some of the newer sources available. I think in our region a lot of our capacity to understand issues have moved around.

Mr. Collins agreed. Part of the problem was the pandemic which takes 2020 and 2021 off the table because of the impacts of people staying home, the impacts on freight initially, but then the rebound. What I'm hoping is now that we have this tool we can revisit it and, as suggested, update it, maybe looking at 2022, 2023 for out of the national dataset. Datasets are always a year or two behind. So that's why we stuck with 2019 for now. This tool is good way for tracking changes over time. We don't have staffing right now, but potentially a follow-up freight study could do just that.

Dyami Valentine had a question; will there be any discussion, maybe under addressing system performance, or with there be recommendations out of this that kind of explores funding or revenue generation thinking about mitigating some of the impacts that are being identified? Especially from operations and maintenance standpoint? Mr. Collins noted unfortunately we didn't have the scope to look at developing projects or what funding mechanism might support these projects. But as we look at these areas that are very key to freight, it's good feedback for projects that we currently have in the 2023 RTP and developing projects for the next RTP to keep freight in mind.

Jason Gibbens noted the Urban Freight Lab at UW recently completed a white paper examining adoption of cargo e-bikes: <https://urbanfreightlab.com/wp-content/uploads/2023/10/Biking-the-Goods.pdf>

Sarah Iannarone noted the joint transportation subcommittee meeting on transportation planning in the Oregon legislature. There was an interesting presentation from the Urban Mobility Office with their consultants from WSP on congestion pricing in the region. One stat that stood out is that in our region 89% of passenger vehicle trips on our highways, I-5 and I-205 starting and ending in the region. But when you start to look at freight only 46% of freight trips on I-5 and I-205 start and end in the region according to the report.

<https://olis.oregonlegislature.gov/liz/202311/Downloads/CommitteeMeetingDocument/277660>

My question is how our pricing policies as we head down the stretch on the RTP could potentially affect this, especially congestion pricing for those 89% of passenger vehicle trips that are beginning/ending in the region, as well as some of our proposed investments in public and active transportation to even mitigate tolling. Any thoughts on how you are considering eliminating that congestion from the passenger vehicle and the impacts on the freight?

Chair Kloster noted the RTP policy says that we'll look at pricing anytime we add capacity to our freeway system. The Regional Mobility Pricing Study is going forward. It continues to be a tool that would come in corridor by corridor as we either add capacity or whether ODOT brings it in as a management tool. There are other things about pricing that we haven't necessarily looked at that I think we could probably learn more about. Some other metropolitan areas have used managed lanes as a way to not only manage for higher vehicle occupancy but also for freight with a fee for freight. For high price commodities there are some creative things out there that we probably need to learn more about from a policy level to decide if that's something we want to explore. Glen Bolen added if you look at the work ODOT did in responding to the auxiliary lanes policy I think we were clear on defining a shared vision of the need for the freeway system to handle long distance travel and commodity movement.

Regarding the presentation my first question was about the relationship between the speed threshold and the TTR. My second question is about deliveries. We're seeing cities like Portland doing an EV only location portion for downtown pilot. London does this with gas or truck car fees in certain areas. I've seen this with size limitations on vehicles, too. I'm wondering if you're seeing it with your research and any trends on what the freight interface in downtowns are starting to look like as we get these smaller higher value deliveries.

Chris Lamm noted on the first question there is a relationship as you observed in some cases. There are certainly some quarters, especially ones where we have congestion for 1-12 hours a day. The reliability index is pretty low. The travel time is pretty consistency slow throughout the day. But there are some other quarters it gets a little more interesting when you're in that 6,7,8 hours of delay which is still in the top tier as far as delay is concerned. You may have some more variability in your travel times in those other hours. The index maybe high, it may be low, it's all over the map when you're in that range. Then there are some quarters where we didn't have a high number of hours of congestion but there was some variability in reliability. That indicates that there's some periods of the day where travel times are reduced quite a bit.

On the second question we have cargo cycles operating in the Portland region. We don't have a lot of data on the actual number of parcels that are being delivered in the Portland region. There are some vendors that provide that data, but it's very expensive to get. That's certainly an area for future exploration as that data becomes more ubiquitous, hopefully its cost will come down. But other indicators support that what's happening nationwide is probably happening here, too. There's been a substantial increase in the number of parcels associated with e-commerce orders that are being

delivered. There are certainly impacts in terms of bringing that in by truck box, truck cargo van or whether people working part-time delivering for Amazon in their personal vehicle. Companies have been looking at alternate means be it cargo cycles, delivery robots or others. I think the challenges are going to be how can we make these last mile deliveries more efficient in terms of the number of trips that are generated as a result of them. Factors include end-to-cost to get to the consumer and positioning product close to consumer markets, vehicle types, conveyance systems and incentives to certain delivery dates.

Gregg Snyder noted the topic of freight mobility was front and center at a recent tour of the Hillsboro International Airport. There's a daily flight from Hillsboro to PDX with time sensitive high value products on it. The reason that it's a daily flight is that Highway 26 is so reliably congested they can't make the shelf life to market on time otherwise. The idea that any sort of high value, time sensitive freight would be relegated to a surface system seems a little bit anachronism especially given the hours of congestion we see. Are these high value commodity exports that we're producing in Washington Co., do they need to go to PDX at all. Can we fly them there? Or alternately, can we bring the consolidation center to Hillsboro and not force all the semiconductors and the cancer medicines over in PDX? There's a growing kind of focus on air travel as an alternate to the ground system because it's so congested. That really is not reflected in your study. The alternates that are proposed to get freight out of the surface system. It's kind of indicative of where we stand with freight mobility in the region.

Mike McCarthy noted we talk a lot about vehicle miles traveled and vehicle miles traveled per capita, and I'm wondering how the shift to more e-commerce has changed the VMT or VMT per capita. I hear some people say that they don't have any vehicle miles traveled because they just order and it shows up on their doorstep, but then how many truck miles are making up that? And then also what effect does it have on vehicle generated pollution?

Chris Lamm noted there are a lot research projects dedicated to answering this question. They come up with different answers because they use different data and different methodologies. The problem is we can't say conclusively that e-commerce is resulting in a net gain or a net decrease in VMT and emissions and everything associated with it, because a household ordering goods online, what are they ordering, how frequently? How many shopping trips is that replacing? They've done consumer surveys and household travel surveys but until we get more of these studies done that build a little more consensus on way or the other, we're just not there yet.

Regional Transportation Safety Performance Report (Lake McTighe, Metro) An update on traffic deaths and serious injuries in the region and feedback asked on the *DRAFT Safe Streets for All: Regional Transportation Safety Update* was presented. The Metro Council and JPACT adopted the 2018 Regional Transportation Safety Strategy with a goal of eliminating traffic deaths and life changing injuries by 2035. Using a data driven and Safe System approach, the Regional Safety Strategy provides strategies and actions to address serious traffic safety problems.

Metro has been awarded a federal Safe Streets for All grant (SS4A). The grant enables Metro to dedicate more resources and time to coordinate and support roadways safety efforts across the region. The *DRAFT Safe Streets for All: Regional Transportation Safety Update to JPACT and the Metro Council* provides an update on traffic fatalities and serious injuries and a framework to support discussions with Metro's technical and policy advisory committees and the Metro Council as Metro begins to coordinate efforts with government and community partners to implement the Safe Streets for All program. The report is addressed to JPACT and the Metro Council, the governing bodies responsible for regional transportation decisions. Metro is seeking feedback on the draft

report to accurately reflect regional coordination before it is presented to JPACT and the Metro Council.

As the SS4A program gets underway, Metro will be developing more in-depth and nuanced analysis. Using the *DRAFT Safe Streets for All: Regional Transportation Safety Update to JPACT and the Metro Council* as a starting place, Metro is seeking guidance and input from the Metro Council and Metro's technical and policy committees and other partners on what analysis and information will increase understanding of safety challenges and solutions, and what strategies should be pursued to effectively advance safety. Metro will put together a regional safety work group to guide the work plan and support coordination.

Comments from the committee:

Dyami Valentine noted a couple of suggestions, one being seeing a few emissions and will send Ms. McTighe those comments to her directly. I would encourage the report to acknowledge the other award partners for the Safe Streets for All Grant. I also noted there was an emission of Washington County's adopted Transportation Safety Action Plan which may have preceded in 2016. I think obviously the significant uptick in traffic deaths over the last two years is extremely concerning. I think the report does a nice job of identifying some of those key contributing factors and we look forward to looking into those in more depth over the next couple year as we're updating our transportation action plan, specifically some of the vehicle weight, speed and other variables in terms of its probability of survival. I would also encourage maybe highlighting a little bit more, or looking at areas in the region that have lower fatality rates to better understand what's working well.

Glen Bolen asked to have you considered adding OLCC enforcement for bars that serve impaired drivers? I was shocked by the amount of impaired driving in the charts and it made me think holistically about land use, locations of bars, how people get there and how long they're at bars. I can't think of any great strategies for that, but obviously one is regulations on serving requirements. Neighborhood complaints for bars include noise, parking and outdoor activities. There could be a strategy to add working with OLCC on server education.

Indi Namkoong noted to Mr. Bolen's point, how late transit runs and what options exist when buses are infrequent or done for the night are also factors on my mind. Sarah Iannarone noted Utah, unlike most states, reduced its legal BAC to .05, with positive results for safety. Seems like a LC that groups like LOC could get behind. <https://jalopnik.com/several-states-considering-lower-05-blood-alcohol-limits-1850237855#:~:text=Currently%2C%20almost%20every%20state%20in,.05.>

Dyami Valentine noted you may want to acknowledge the systemic impacts of the pandemic - e.g. a documented significant increase in alcohol use.

Glen Bolen wanted to remind people of the ODOT/DLCD Transportation Growth Management program. We provide grants for communities for integrated land use and transportation planning for walkable cities/neighborhoods and roadway design. I'm always looking for new projects, so please reach out to me if you want to talk over ideas. Here's a link <https://www.oregon.gov/lcd/tgm/pages/index.aspx>

Allison Boyd appreciated the leadership that's coming out of Metro on pulling this together with the support they are providing all the recipients of the grants and working on detailed analysis that we can use for each of our projects of our safety action planning. Some of these items that are in the actions like holding workshops on speed setting I think will be really helpful for us to be able to learn from others in the region and do more of that coordination work as we're working on our safety action plan.

I'm excited we are doing this as a region with the Safe Streets for All grants and that we have that kind of support system in place to help us work on that plan.

Sarah Iannarone noted from the Street Trust perspective this is core to our mission in terms of a safe system and we really appreciate your leadership on this in the regional coordination that Metro is bringing. It's such a critical aspect of the work. These intergovernmental relations are so challenging when it comes to that vehicle regulation, there's not really a lot that we're able to do, so the more we can help our state and our federal lawmakers work at that industry level is good.

One of the things I wanted to highlight is what Multnomah County has done in pairing the public health and epidemiological approach with technical and transportation planning expertise in a place where our region in particular could really get ahead by supporting county health departments in disaggregating data in looking at things in different ways, upstream interventions that we could do using the different methodologies that public health professionals use that are different than transportation planner and engineers. Here's the a news article about recent Multnomah County Report finding the "significant public health threat" posed by rising traffic fatalities:

<https://www.opb.org/article/2023/08/07/portland-traffic-deaths-multnomah-county/>

And then also thinking about the ways that we can support at the regional government when they think about the power of Metro and it's convening the way we can support our local partners and coming up with specific solutions that worked for them that might work well in one jurisdiction but not well in another. And then lifting that up so that we can really inform our partners across the state through our relationship to ODOT and the way they can then get that back out to local communities and places that don't have a powerhouse like Metro. I really think this is a place for leadership and innovation as well as data driven and best practices approach that you're taking, too.

Indi Namkoong noted some things that could be looked at further for tracking in the future. In addition to this report I know there was a federal rulemaking announced this year. Maybe you have updates on the federal standards for safety ratings, safety regulations for vehicles to include the safety of people outside the vehicle, just because that's not taken into account. Weh people are buying a safer car as we've noted, those rating really only account for the safety of people inside the vehicle. I'm interested to see who that pans out and how that may impact future results that we're seeing here should things go forward. There's a great report called something like Driven to Distraction specifically capturing the impacts of that in-car technology. The link was shared: The NHTSA docket on incorporating pedestrian protection into crashworthiness assessment of new cars is here:

<https://www.regulations.gov/docket/NHTSA-2023-0020>

5- minute break in the meeting taken

2027-30 State Transportation Improvement Program (STIP) – options being discussed at Oregon Transportation Commission (Neelam Dorman and Glen Bolen, ODOT, Grace Cho, Metro) An update on the 2027-2030 State Transportation Improvement Program (STIP) development process in anticipation of the decision before the Oregon Transportation Commission (OTC) on November 9, 2023 was presented. The OTC is set to make its first major decision for the 2027-2030 STIP development process at its November 2023 meeting. This decision is focused on forecasting revenues available in fiscal years 2028 through 2030 and "dividing up the money" among the ODOT funding categories as described in the presentation.

The estimated revenue total for the years 2027-2030 is \$2.94 billion statewide. However, after taking a conservative revenue forecasting approach, accounting for a dire revenue outlook for the

state highway trust fund, and accounting for funding restrictions pertaining to certain federal fund types or state legislative requirements, various required or negotiated pass through agreements, and debt service payments, ODOT staff estimates the remaining discretionary revenue available to allocate to ODOT funding programs is \$70 million statewide. Recommendation to OTC for the unallocated \$70 million includes:

- “Great Streets 2.0”
- Strategic funding to advance safety, climate and equity outcomes in a corridor or community
- Take a leverage approach to add funds to complementary investments such as ADA updates and ARTS investments

Following the decision by the OTC, ODOT staff will finalize the amount of revenues available for each of the individual ODOT funding programs. Once the distribution of revenues are finalized, the individual ODOT funding programs will begin their allocation processes for selecting transportation projects to receive funding. Throughout the allocation processes, ODOT will provide updates and gather feedback at TPAC to keep members informed of the processes as well as help preview those transportation projects and programs which ODOT will request inclusion in the 2027-2030 MTIP.

Comments from the committee:

Chair Kloster what the window of time for the ADA ramp program was and how many years left for funding that program. Glen Bolen noted in the chat Here's a post from last March on ADA. It looks like the target completion date is 2032:

<https://content.govdelivery.com/accounts/ORDOT/bulletins/3520d25> Neelam Dorman noted it looks like there will be some consideration for ADA program in the '30-34 STIP.

Jaimie Lorenzini asked would the ADA program affect beyond the 2030 STIP? I'm curious if ODOT has done any forecasting for how things may look after the ADA settlement when that revenue is circulated back into the overall budget. It sounds like maybe that hasn't happened yet in terms of forecasting and what the need is following the ADA settlement. My second question regards how ODOT's recommendation addresses the need to plan for unexpected revenue that may emerge beyond expected forecasts. Transportation is a strange thing and I don't think we can accurately forecast our plans for every scenario. So if revenues do come in, where will that money go? I think we need to plan in advance for that potentiality.

Neelam Dorman noted for the first part, all the work that we've been doing with the STIP is really focused on the 27-30 period. In July when Chris Ford shared the more comprehensive budgeting plan for that it was limited to that period. And that period does consider the amount of dollars needed for the ADA settlement. I don't know if there has been a forecast beyond that and certainly not through the STIP process.

On the other question, on revenues that we aren't accounting for, yes definitely, other revenues can come. We could have a much better federal grant program than we are expecting. But for the planning purposes of this it is planning conservatively to what we have to be able to provide. And we've cut quite a lot of programs. My thought with the programs we've cut I would assume the first step would be being able to provide those key services. As far as I know there isn't a second tier list of projects to fund should additional funding become available.

Ted Leybold noted it said you don't have a lot of details on what Great Streets 2.0 means yet. But I think maybe just some question or comments on that. One would be the current Great Streets is really targeted at essentially areas that are going through downtowns and those sorts of places where you

have your biggest potential impacts on equity, climate and safety. Is that the intention for 2.0 to your knowledge, that they would really be targeted towards those urban arterials, district highway types areas like the current programs?

Ms. Dorman noted I think the thing we are aware of with this 2.0 program is really just trying to leverage the dollars off of the work that is already direct programs into it. Looking at most our budget if it's going through the ADA program, the ADA program is looking at quite a lot of our highway corridors. Urban and rural. So it's kind of hard to say if it's going to be focused on urban areas. I think we're looking at leveraging that program. Also, where each of the corridors fall into that cycle because obviously the ADA program and improvements have been under construction for some time as well. So whatever corridors are left on that I think there could be a focus on those first.

Mark Lear appreciated the prioritization of the Great Streets program. I would be interested in any feedback or recommendation on that as well. I heard recently that Kelly Scanton Brooks from the Governor's Office they're going to do some outreach talking about statewide funding and the need for additional funding. I would encourage that as funding will potentially be in this STIP period, we continue to try to overlap the outreach related to those two conversations at the same time because I think there's a massive opportunity to show the value of these investments, especially in the Great Streets program, and be a missed opportunity to have those things be happening at the same time without a lot of coordination.

Sarah Iannarone noted as you know, the Street Trust has been championing Great Streets. We fought for the first \$50 million out of the IJA funding and then we fought for more money last session and only go a million toward that. We understand the importance of putting that first 15 million toward Outer Powell. And then we're glad to see the project selected this time around. Some of the things we like about the program as it exists are some of the public engagement and ways that the community has been involved in selecting the projects. I think ODOT needs to continue to strive to be more transparent and inclusive and particularly in democratic in terms of how it spends its money.

Some feedback that we got from lawmakers obviously was the need to be able to spend on recently ODOT facilities as well as current ODOT facilities. I know you heard from Rep. Nathanson in terms of facilities that had just been recently had jurisdictional transfers. As we're looking at a statewide investment strategy in 2025, I think we need to think about Great Streets because the program has its limits. I'm happy to see this prioritized in the STIP, but I think what we need to think about is leveraging.

We've got the 1.4 billion in ADA facilities. We've got Great Streets money and buckets that we can potentially fill out new revenue streams. We've got Safe Routes to School projects. All this should be data driven and based on priorities with regard to equity, safety, climate and frankly, fiscal stewardship. So if there's going to be some new ADA facilities put in and there are some high crash intersections and corridors, how can we leverage Great Streets money to support local jurisdictions? We can't just be fighting for Great Streets money to go into ODOT pots of money. And as you know, we go past this STIP and into 2025 when everyone is looking to find our silver bullets that are out there to solve all our funding problems. How do we take what we learned through the Great Streets pilot and really expand on that and think about a more integrated statewide investment strategy in which this is one piece that we can use as a connector and catalyst.

Here's The Street Trust written comment to OTC about 2027-30 STIP \$70M unallocated going toward Great Streets and Safe Routes... among other topics :)https://docs.google.com/document/d/1vAaT-qZPextVGcT08F_oePQWCc4Qnhr_nK6hpN4QMZE/edit?usp=sharing

Great Streets Program updates: Final project list (Robin Wilcox, ODOT) An update on Oregon Department of Transportation's (ODOT) Great Streets program selection of project awards was presented. The purpose and intention of the Great Streets program is to address the safety and multimodal gaps as well as the declining roadway conditions of the state highways that pass through communities which have historically focused on moving traffic.

Since its inception in Spring 2022, ODOT staff have undertaken an internal solicitation, prioritization, and selection process to identify those state-owned district highways to award Great Streets funding. The process has included a technical evaluation of applications, ODOT's internal scoping exercises, and a review committee to prioritize applications. The final projects to award Great Streets funding is anticipated to go before the Oregon Transportation Commission for approval at their November meeting.

Comments from the committee:

Ted Leybold noted I think one thing would be interesting is to hear just a little more detail on how ODOT took in the local support element. How do you gauge that and what can local jurisdictions do as projects are being considered at ODOT? Maybe with the 2.0 program, hot to influence that and provide more support and information to ODOT.

Robin Wilcox noted I think there's a few pieces on that one. One place early on when we were looking at it from a project identification standpoint was a clear tie to either kind of a recent planning effort or recent study effort addressing who did you talk to within the community, who was included in that engagement process, and how does this proposed area directly tie to that work. The other place that we looked at and considered leverage or considered that local support and engagement piece was around the commitment to, or potential for, kinds of partnerships. This intersection where there's a demonstrated opportunity to work with partners.

Mark Lear thanked Robin and ODOT for the investments in Great Streets and specifically the Denver Lombard project. I do think that's a great example of a project that has high community support. Unfortunately it has bad crash history in that area. But also a solvable problem. We fix a bike safety issue, or we have bike lane merging into traffic. We solve an issue of buses or getting bogged down in this intersection. And we also make it better for pedestrians with a shelter being developed at that intersection as well. I think this is really the right direction for the state and I appreciate ODOT's investment in continuing to more of these kinds of projects forward. The last thing I would add is I think it's really useful with these kinds of projects that we're identifying where we have asset conditions that we're trying to fix as a part of this. It's a shame when we go out and fix a signal, or pave a road and we don't do some of these other things that really need to be done.

Committee comments on creating a safe space at TPAC – none received

Adjournment

There being no further business, workshop meeting was adjourned by Chair Kloster at 11:52 a.m.

Respectfully submitted,
Marie Miller, TPAC Recorder

Attachments to the Public Record, TPAC workshop meeting, November 8, 2023

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1	Agenda	11/8/2023	11/8/2023 TPAC Workshop Agenda	110823T-01
2	2023 TPAC Work Program	10/26/2023	2023 TPAC Work Program as of 10/26/2023	110823T-02
3	Minutes	10/11/2023	Minutes for TPAC/MTAC workshop, 10/11/2023	110823T-03
4	Memo	11/1/2023	TO: TPAC, MTAC and interested parties From: Lake McTighe, Principal Planner RE: DRAFT SS4A Regional Transportation Safety Update to JPACT and the Metro Council	110823T-04
5	Report	October 2023	Safe Streets for All Regional transportation safety update to JPACT and the Metro Council	110823T-05
6	Memo	11/1/2023	TO: TPAC and interested parties From: Grace Cho, Senior Transportation Planner RE: 2027-2030 STIP Update – ODOT Staff Recommendation on the Distribution of Revenues to ODOT Programs for federal fiscal years 2028 through 2030	110823T-06
7	Memo	11/1/2023	TO: TPAC and interested parties From: Grace Cho, Senior Transportation Planner - Metro RE: ODOT's Great Streets Program Update and Final Awards	110823T-07
8	Presentation	11/8/2023	Regional Freight Delay and Commodities Movement Study	110823T-08
9	Presentation	11/8/2023	Draft Safe Streets for All: Regional transportation safety update to JPACT and the Metro Council	110823T-09
10	Presentation	11/08/2023	2027-2030 STIP Development	110823T-10
11	Presentation	11/08/2023	Great Streets	110823T-11

Memo

Date: Wednesday, February 7, 2024
To: Transportation Policy Alternatives Committee (TPAC) and Interested Parties
From: Grace Cho, Senior Transportation Planner
Subject: 2027-2030 STIP Update – ODOT Funding Allocations for federal fiscal years 2028-30

Purpose

Provide TPAC an update on the various funding allocations which will comprise the draft 2027-2030 State Transportation Improvement Program (STIP).

Background

At the November meeting of the Oregon Transportation Commission (OTC), members approved the allocation of an estimated \$2.94 billion anticipated for federal fiscal years 2028-30 across ODOT's funding categories and programs. (See Attachment 1) Broadly, ODOT's funding programs fall within the following funding categories framework: Fix-It, Safety, Public and Active Transportation, Americans with Disabilities Act (ADA), Local Programs, and Other.

The allocation of estimated revenues to ODOT's funding categories and programs is the first step in kicking off the selection process to determine individual projects and programs to receive funding for federal fiscal years 2028-30. Each of ODOT's individual funding programs has different policy objectives, eligibility requirements, and undergoes its own selection process. The selection process is anticipated for completion by autumn-winter 2025. Once projects and programs are selected for funding, those projects in the Portland metropolitan area seek inclusion in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).

Metro's Role in the 2027-2030 STIP

As the designated and federally recognized metropolitan planning organization (MPO) for the Portland region, JPACT and the Metro Council are responsible for approving the 2027-2030 Metropolitan Transportation Improvement Program (MTIP) – the regional, near-term investment strategy for fiscal years 2027-2030. The development of the MTIP utilizes the federal 3 "C's" process: comprehensive, cooperative, and continuous, with agencies in the region that allocate and utilize federal transportation funds, including ODOT as they consider allocating funds to projects within the metropolitan area. Successful coordination with the Commission is to ensure the selection of projects within the metropolitan area that will utilize ODOT administered funds and propose inclusion in the MTIP, reflect shared goals by the region and the state. Once the MTIP is approved by JPACT and the Metro Council, it is to be included without change into the STIP.

2027-2030 STIP Update – ODOT Staff Recommendation and Program Updates

ODOT staff will provide an update on one or more of its funding allocation programs. TPAC members have the opportunity to ask questions and provide feedback on the allocation processes.

Next Steps

Throughout the allocation processes, ODOT will provide updates and gather feedback at TPAC to keep members informed of the processes as well as help preview those transportation projects and programs which ODOT will request inclusion in the 2027-2030 MTIP. Guidance from TPAC on when to bring forward informational presentations on ODOT funding allocation to JPACT is welcome.

ATTACHMENT 1 - ODOT Funding Programs Allocations

Programs	FHWA Federal Amounts	FTA Federal Amounts	State Amount	HB Amount	2028-2030 Totals	2028-2030 Program Totals
Total Funding Available	1,801,104,997	461,515,976	98,013,332	585,800,000	2,946,434,306	
Dedicated Programs	1,737,780,783	461,515,976	90,765,593	585,800,000	2,875,862,352	
Flexible Programs	63,324,215	-	7,247,740	-	70,571,954	
<u>Dedicated Programs</u>						<u>640,053,025</u>
<u>Fix -it</u>						
HB - Bridge/Seismic	105,000,000	-	-	275,400,000	380,400,000	
HB - Preservation/Culverts	-	-	-	130,400,000	130,400,000	
PROTECT Program - Projects *	47,783,940	-	5,469,086	-	53,253,025	
Fix-it Operations	68,194,800	-	7,805,200	-	76,000,000	
<u>Safety</u>						<u>177,472,200</u>
ARTS	138,409,022	-	-	7,689,390	146,098,413	
Rail Crossing	8,156,860	-	906,318	-	9,063,178	
HB - Safety	-	-	-	22,310,610	22,310,610	
<u>Public and Active Transportation</u>						<u>583,824,096</u>
Community Paths (TAP)	31,308,120	-	-	-	31,308,120	
Rec Trails	4,500,000	-	-	-	4,500,000	
HB - SRTS	-	-	-	45,000,000	45,000,000	
1% Bike Ped	-	-	25,000,000	-	25,000,000	
SRTS Education	4,000,000	-	-	-	4,000,000	
Transportation Options (TO)	7,500,000	-	-	-	7,500,000	
E&D Transit	5,000,000	-	-	-	5,000,000	
FTA Funding	-	461,515,976	-	-	461,515,976	
<u>ADA</u>						<u>625,000,000</u>
Garvee Bond Repayment (ADA)	310,000,000	-	-	-	310,000,000	
ADA Curb Ramps	219,838,500	-	25,161,500	-	245,000,000	
ADA Push Button	62,811,000	-	7,189,000	-	70,000,000	
<u>Local Program</u>						<u>461,898,337</u>
CMAQ	60,543,269	-	-	-	60,543,269	
MPO PL	15,506,895	-	3,876,724	-	19,383,619	
STBG to TMA	131,711,744	-	-	-	131,711,744	
TAP to TMA	20,209,693	-	-	-	20,209,693	
STBG via AOC/LOC	-	-	-	105,000,000	105,000,000	
Carbon Reduction Program - TMA	15,529,299	-	-	-	15,529,299	
Local Bridge Formula	94,520,713	-	-	-	94,520,713	
Transportation Growth Mgmt (TGM)	15,000,000	-	-	-	15,000,000	
<u>Other Functions</u>						<u>387,614,693</u>
SPR	75,000,000	-	10,227,273	-	85,227,273	
Carbon Reduction Program - ODOT	40,261,237	-	4,608,079	-	44,869,316	
PROTECT Program - Planning	975,182	-	111,614	-	1,086,796	
82nd Avenue	30,000,000	-	-	-	30,000,000	
State Bridge Inspection/Load Rating	24,000,000	-	-	-	24,000,000	
O&M Federalization	-	-	-	-	-	
O&M Federalization (See below)	75,000,000	-	-	-	75,000,000	
ICAP - Dedicated Programs	118,431,308	-	-	-	118,431,308	
Workforce Development	5,000,000	-	-	-	5,000,000	
Climate Planning	3,589,200	-	410,800	-	4,000,000	
<u>Dedicated Program Totals</u>	<u>1,737,780,783</u>	<u>461,515,976</u>	<u>90,765,593</u>	<u>585,800,000</u>	<u>2,875,862,352</u>	
	(1,737,780,783)					
<u>Flexible Funding</u>						
Unallocated	63,324,215	-	7,247,740	-	70,571,954	
	-		-	-	-	
<u>Flexible Funding Program Totals</u>	<u>63,324,215</u>	<u>-</u>	<u>7,247,740</u>	<u>-</u>	<u>70,571,954</u>	
<u>Flexible Funding Program Totals</u>	<u>1,801,104,997</u>	<u>461,515,976</u>	<u>98,013,332</u>	<u>585,800,000</u>	<u>2,946,434,306</u>	
<u>O&M Federalization Totals</u>						
TOC/IR	37,138,260					
Low Volume Paving	15,000,000					
Workforce	3,600,000					
Site Mitigation	1,000,000					
CCD Station Paving	7,000,000					
Additional Federalization	11,261,740					
<u>Total Federalization</u>	<u>75,000,000</u>					

**2028-2030 STIP Funding Development
Federal Amounts**

Programs	FHWA	FTA	State Amount	HB Amount	2028-2030	2028-2030
	Federal Amounts	Federal Amounts			Totals	Program Totals
Total Funding Available	1,801,104,997	461,515,976	98,013,332	585,800,000	2,946,434,306	
Dedicated Programs	1,737,780,783	461,515,976	90,765,593	585,800,000	2,875,862,352	
Flexible Programs	63,324,215	-	7,247,740	-	70,571,954	
Dedicated Programs						
Fix -it						640,053,025
HB - Bridge/Seismic	105,000,000	-	-	275,400,000	380,400,000	
HB - Preservation/Culverts	-	-	-	130,400,000	130,400,000	
PROTECT Program - Projects *	47,783,940	-	5,469,086	-	53,253,025	
Fix-it Operations	68,194,800	-	7,805,200	-	76,000,000	
Safety						177,472,200
ARTS	138,409,022	-	-	7,689,390	146,098,413	
Rail Crossing	8,156,860	-	906,318	-	9,063,178	
HB - Safety	-	-	-	22,310,610	22,310,610	
Public and Active Transportation						583,824,096
Community Paths (TAP)	31,308,120	-	-	-	31,308,120	
Rec Trails	4,500,000	-	-	-	4,500,000	
HB - SRTS	-	-	-	45,000,000	45,000,000	
1% Bike Ped	-	-	25,000,000	-	25,000,000	
SRTS Education	4,000,000	-	-	-	4,000,000	
Transportation Options (TO)	7,500,000	-	-	-	7,500,000	
E&D Transit	5,000,000	-	-	-	5,000,000	
FTA Funding	-	461,515,976	-	-	461,515,976	
ADA						625,000,000
Garvee Bond Repayment (ADA)	310,000,000	-	-	-	310,000,000	
ADA Curb Ramps	219,838,500	-	25,161,500	-	245,000,000	
ADA Push Button	62,811,000	-	7,189,000	-	70,000,000	
Local Program						461,898,337
CMAQ	60,543,269	-	-	-	60,543,269	
MPO PL	15,506,895	-	3,876,724	-	19,383,619	
STBG to TMA	131,711,744	-	-	-	131,711,744	
TAP to TMA	20,209,693	-	-	-	20,209,693	
STBG via AOC/LOC	-	-	-	105,000,000	105,000,000	
Carbon Reduction Program - TMA	15,529,299	-	-	-	15,529,299	
Local Bridge Formula	94,520,713	-	-	-	94,520,713	
Transportation Growth Mgmt (TGM)	15,000,000	-	-	-	15,000,000	
Other Functions						387,614,693
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82nd Avenue	30,000,000	-	-	-	30,000,000	
State Bridge Inspection/Load Rating	24,000,000	-	-	-	24,000,000	
O&M Federalization	-	-	-	-	-	
O&M Federalization (See below)	75,000,000	-	-	-	75,000,000	
ICAP - Dedicated Programs	118,431,308	-	-	-	118,431,308	
Workforce Development	5,000,000	-	-	-	5,000,000	
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Dedicated Program Totals	1,737,780,783	461,515,976	90,765,593	585,800,000	2,875,862,352	
	(1,737,780,783)					
Flexible Funding						
Unallocated	63,324,215	-	7,247,740	-	70,571,954	
	-	-	-	-	-	
Flexible Funding Program Totals	63,324,215	-	7,247,740	-	70,571,954	
Flexible Funding Program Totals	1,801,104,997	461,515,976	98,013,332	585,800,000	2,946,434,306	

O&M Federalization Totals

TOC/IR	37,138,260
Low Volume Paving	15,000,000
Workforce	3,600,000
Site Mitigation	1,000,000
CCD Station Paving	7,000,000
Additional Federalization	11,261,740
Total Federalization	75,000,000



Memo

Date: Wednesday, February 7, 2024
To: Transportation Policy Alternatives Committee and Interested Parties
From: Grace Cho, Senior Transportation Planner
Ted Leybold, Resource Development Section Manager
Subject: 2028-2030 Regional Flexible Fund Allocation (RFFA) – Step 1

Purpose

To provide TPAC an overview of the Step 1 region-wide programs in efforts to help inform discussion on the 2028-2030 Regional Flexible Funds Allocation (RFFA) program direction.

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 This allocation process is known as the Regional Flexible Funds allocation (RFFA). Kick off of this process begins at the February 2nd TPAC meeting and runs through the summer of 2025. The drafted Regional Flexible Fund Allocation schedule calls for JPACT and Council to act at two key times: 1) for the adoption of the program direction, which is anticipated for late spring or early summer 2024; 2) for the adoption a RFFA investment package anticipated in summer 2025.

2028-2030 RFFA Program Direction – Step 1 and Step 2 Framework

The RFFA process is conducted in two steps; Step 1 is the formation of the Program Direction, which documents how the flexible funds are to be spent to carry out the policy objectives of the adopted RTP. Step 2 is the solicitation for capital project applications and the competitive selection process.

Step 1 is comprised of ongoing funding commitments to bond repayments the region made in previous RFFA cycles, as well as providing continued investment in RTP-identified activities and programmatic investments that advance federal, state, and regional requirements to build a multi-modal transportation system. RTP activities identified are three region-wide programs and providing capacity to lead regional planning initiatives. Lastly, regional funds support essential and required MPO functions. Step 1 programs descriptions:

- **Bond Repayment** – Regional flexible funds used to help construct the region’s high-capacity transit system and provide initial project development funding for other projects. Since 1998, TriMet has issued bonds to pay for project development and capital construction costs of high-capacity transit line construction, based on a regional commitment of flexible funds to repay the bonded debt. This bond obligation covers investments in Green, Orange, and Southwest Corridor MAX lines, Division Transit Project, and the Eastside Streetcar Loop. In the 2019-2021 RFFA process, JPACT and Metro Council

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.

also directed regional funding be used on project development for a select package of projects.

- **Region-wide investments** – Three region-wide programs defined over time by their regional scope, program administration, and policy coordination. These factors have encouraged the region provide a consistent allocation of regional flexible funds to support them. The three programs are:
 - Regional Travel Options/Safe Routes to School (RTO/SRTS) – Grant program that supports local jurisdictional and non-governmental organization partners’ outreach and encouragement work that helps people of all ages reduce automobile use and increase travel by transit, ridesharing, bicycling, and walking. Funding also supports research, evaluation and partner coordination activities.
 - Transit Oriented Development (TOD) – Grant program to help stimulate private development of higher-density, affordable and mixed-use projects near transit, invest into urban living infrastructure - such as early childhood learning centers, grocery stores, community cultural spaces, and employment resource centers – that benefit low-income community members and people of color, and to acquire land for future affordable housing development all within proximity to frequent service transit to increase the use of the region’s transit system and advance the Region 2040 Growth Concept.
 - Transportation System Management and Operations (TSMO) – Funding focused on projects and coordination activities to improve the region’s transportation data, traffic signals, traveler information and other technological solutions to help move people and goods more safely, reliably, and efficiently.
- **MPO, and Corridor and System Planning** – Regional funds used to support planning, analysis and management work required or undertaken by the metropolitan planning organization.² JPACT and Metro Council have directed flexible funds to be spent instead of collecting dues from each partner jurisdiction in the region as was done prior to 1992. Regional funds have also been directed towards continued planning work to further develop regional corridors, transit and freight networks, and to better understand the economic impacts of regional transportation investments.

Step 1 Region-wide Programs Overview

TPAC will receive a presentation from the Transit-Oriented Development (TOD) program and the Corridors & System Planning group. As part of the presentations, each will discuss the background efforts as to how they implement the policy objectives of the 2023 Regional Transportation Plan (RTP), recent accomplishments, and upcoming work.

Upcoming Activities

The following table outlines upcoming RFFA activities. The table is not comprehensive.

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

Activity	Date	Where
Project delivery training series – kick off/overview	February 14	TPAC workshop

² Federal requirements define the minimum work plan for the metropolitan planning organization, but additional work program items carried out is identified through the development and update of each Regional Transportation Plan. Chapter 8 of the most recently adopted RTP outlines the work plan items the region desires to accomplish between RTP updates.

Overview of region-wide programs and select capital projects funded through previous RFFA cycles	February 14 & April 10	TPAC workshop
28-30 RFFA – Kick off, introduction, and initial input	February 15	JPACT
Summary of previous RFFA cycle program direction and summary of initial feedback to date; collect input	March 1	TPAC meeting
Briefings with interested parties (requested)	On-going	TBD



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Memo

Date: February 6, 2024
To: TPAC Members and Interested Parties
From: Ken Lobeck, Funding Programs Lead
Subject: Proposed Project Delivery Training Sessions as Part of the 2024 TPAC Workshops

PURPOSE STATEMENT

FOR THE PURPOSE OF PROVIDING TPAC MEMBERS AN OVERVIEW OF THE FEDERAL TRANSPORTATION PROJECT DELIVERY PROCESS TO HELP SUPPORT LOCAL AGENCIES COMPLETE THEIR 2028-30 REGIONAL FLEXIBLE ALLOCATION (RFFA) APPLICATION

BACKGROUND

Metro and ODOT staff propose to conduct multiple 1-hour training sessions during CY 2024 TPAC Workshops for members of the Transportation Policy Alternatives Committee (TPAC)s and other agency staff involved in the federal transportation project delivery process. The purpose of the project delivery training sessions is to provide tips, reminders, and other lessons learned from previously federally funded transportation projects and the issues and delivery barriers they may have faced.

Dates of the proposed TPAC workshops are as follows with the project delivery taking session proposed to occur normally during the last hour of the TPAC workshop:

1. Wednesday, February 14, 2024: 9:00 am to 12:00 pm.
2. Wednesday, April 10, 2024: 9:00 am to 12:00 pm.
3. Wednesday, July 12, 2024: 9:00 am to 12:00 pm.
4. Wednesday, August 14, 2024: 9:00 am to 12:00 pm.
5. Wednesday, October 9, 2024: 9:00 am to 12:00 pm.

PROJECT DELIVERY TRAINING SESSIONS OVERVIEW

The project delivery training sessions are intended to help support later development of an agency's 2028-30 RFFA application. The topics also may help as reminders when pursuing other federal funds in support of transportation projects. The training focus will be on the Federal Highway Administration (FHWA) project delivery requirements and not the Federal Transit Agency (FTA) process. With only an hour available with each training session, the emphasis will be on providing key reminders and tips to help with the RFFA application, and subsequent required follow-on materials required by ODOT (e.g. the Technical Scoping Sheet). This is to help ensure a project leads and project managers (PL/PMs) understand the core requirements to implement and delivery a federally funded transportation project. PL/PMs are strongly encouraged to meet with their ODOT Local Agency Liaison (LAL) to discuss delivery requirements in greater detail.

Project Delivery Trainind Session Topical Areas Overview:

Training Session #1:

Setting the Table – An Overview of Federal Transportation Project Delivery Process.

- **Date: Wednesday, February 14, 2024:**
- Allotted time: 1 hour.
- Presentation type: virtual via TEAMS or ZOOM.
- Purpose:
 - Provide an introduction and basic description of the federal transportation project delivery process to include basic roles and responsibilities.
 - Participants and Goals:
 - The workshop is intended to be open agency staff involved in the receipt, obligation, and expenditure, and delivery of federally funded transportation projects.
 - Participant goals. By attending the training, participants will:
 - Gain a better understanding of the complexity and requirements in using federal funds.
 - Understand the types of federal funds the agency can receive to support their transportation improvement project.
 - Understand their basic roles and responsibilities upon receiving federal funds and the requirements to “start” the project with ODOT and development of the Intergovernmental Agreement (IGA)

Remaining Proposed Training Sessions:

Note: The follow-on training sessions are contingent upon ODOT staff being able to conduct the training sessions.

Training Session #2:

Completing Required Project Scoping Actions.

- **Date: Wednesday, April 10, 2024**
- Allocated time: 1 hour.
- Presentation type: Virtual with a possible hybrid format being examined as well.
- Purpose:
 - Discuss and cover all elements needed to properly scope a federally funded project prior to completion of the TSS and development of the IGA.
 - Participants and Goals:
 - Open workshop to all interested participants
 - Participant goals:
 - Goal: Understand the requirements to develop a well-defined project description, location/limits, budget, and delivery schedule for a federally funded project.
 - Understand why project scoping will impact the completion of the Environmental Prospectus and Technical Scoping Sheet

Training Session #3:**Project Cost Estimating Reminders.**

- **Date: Wednesday, June 12, 2024**
- Allocated time: 1 hour.
- Presentation type: Virtual with a possible hybrid format being examined as well.
- Purpose:
 - Convey the requirements and associated issues to determine the project costs and developing a proper project budget.
 - Participants and Goals:
 - Open workshop to all interested participants
 - Participant goals:
 - Goal: Understand the logic and steps to determine the estimated costs of the project elements, ensuring the budget also includes administrative costs and contingency funding
 - Understand required project administrative costs and contingency funding needs.

Training Session #4:**Project Cost Estimating Reminders.**

- **Date: Wednesday, August 14, 2024**
- Allocated time: 1 hour.
- Presentation type: Virtual with a possible hybrid format being examined as well.
- Purpose:
 - Cover and provide tips on including needed project details as part of your RFFA application.
 - Participants and Goals:
 - Open workshop to all interested participants
 - Participant goals:
 - Goal: Understand how the RFFA application will be reviewed and can impact and delay the start of the project in the OODT process if key project details are missing.
 - Tie together prior discussions on scoping and cost estimating/project development upon the RFFA application.

Training Session #5:**Post Award: Moving forward to implement the federally funded project.**

- **Date: Wednesday, October 9, 2024**
- Allocated time: 1 hour.
- Presentation type: Virtual with a possible hybrid format being examined as well.
- Purpose:
 - Convey the requirements and associated issues upon the project delivery schedule, IGA development, completing the TSS, Environmental Prospectus, entering NEPA along with Project Specification & Estimates (PS&E)
 - Participants and Goals:
 - Open workshop to all interested participants
 - Participant goals:

- Goal: Understand the complexity in developing a proper project delivery schedule and other required items to move the project forward.
- Comprehend how your completion of the Environmental Prospectus and TSS can and will impact completion of the IGA, the start of NEPA, project design, and delay phase obligations and ultimately blow apart your project delivery schedule.
- Tie it all back together with your RFFA application: The level of detail you provide in your RFFA application can and will impact how the project starts and moves forward through the delivery process.

CONCLUSION

Please note that the four subsequent training sessions after the February 14th overview are tentative. Proposed topics may be adjusted and updated as deemed necessary. The challenge we face is that we have “days” worth of federal procedures, requirements, tasks, and processes to explain, but only a total of four 1-hour training sessions to cover them. Our overall goal is to help you understand that the project details matter and this all starts with how you express them in your RFFA application.

No attachments

Materials following this page were distributed at the meeting.



ODOT FUNDING UPDATES

Presentation to TPAC

February 14, 2024

CONNECT OREGON



- Current competitive grant opportunity is open now until Feb. 29
- Established by the 2005 state legislature to invest in non-highway modes of transportation
- About \$46 million is available for eligible aviation, marine and rail transportation projects
- Considerations include reduced transportation costs or improved access to jobs/labor, economic benefits to Oregon, critical linkage and readiness

SAFE ROUTES TO SCHOOLS

- Applications will be accepted February 12 through March 25
- This program helps communities better address barriers to students walking and rolling to school
- Two grant types – education (\$2m) and construction (\$26m)
- Construction programs focus on investments in crossings, sidewalks and bike lanes, flashing beacons, etc.



OREGON COMMUNITY PATHS



- Helps communities create and maintain connections through multiuse paths
- Invests in facilities that are not primarily on or along a roadway
- Eligible applicants include cities, counties, Tribes, school districts, and non-profits that meet certain criteria
- ODOT will publish solicitation and guidance materials in the coming months on the OCP website
- Pre-applications will be in August and September, OTC approval will ultimately be in May 2025

2027-30 STIP and Great Streets 2.0

Statewide Transportation Improvement Program (STIP)

What is the STIP? Capital Program Funds

Federal (FHWA & FTA) & State Funds

Construction Projects on State & Local Roads

Public & Active Transportation Programs & Projects

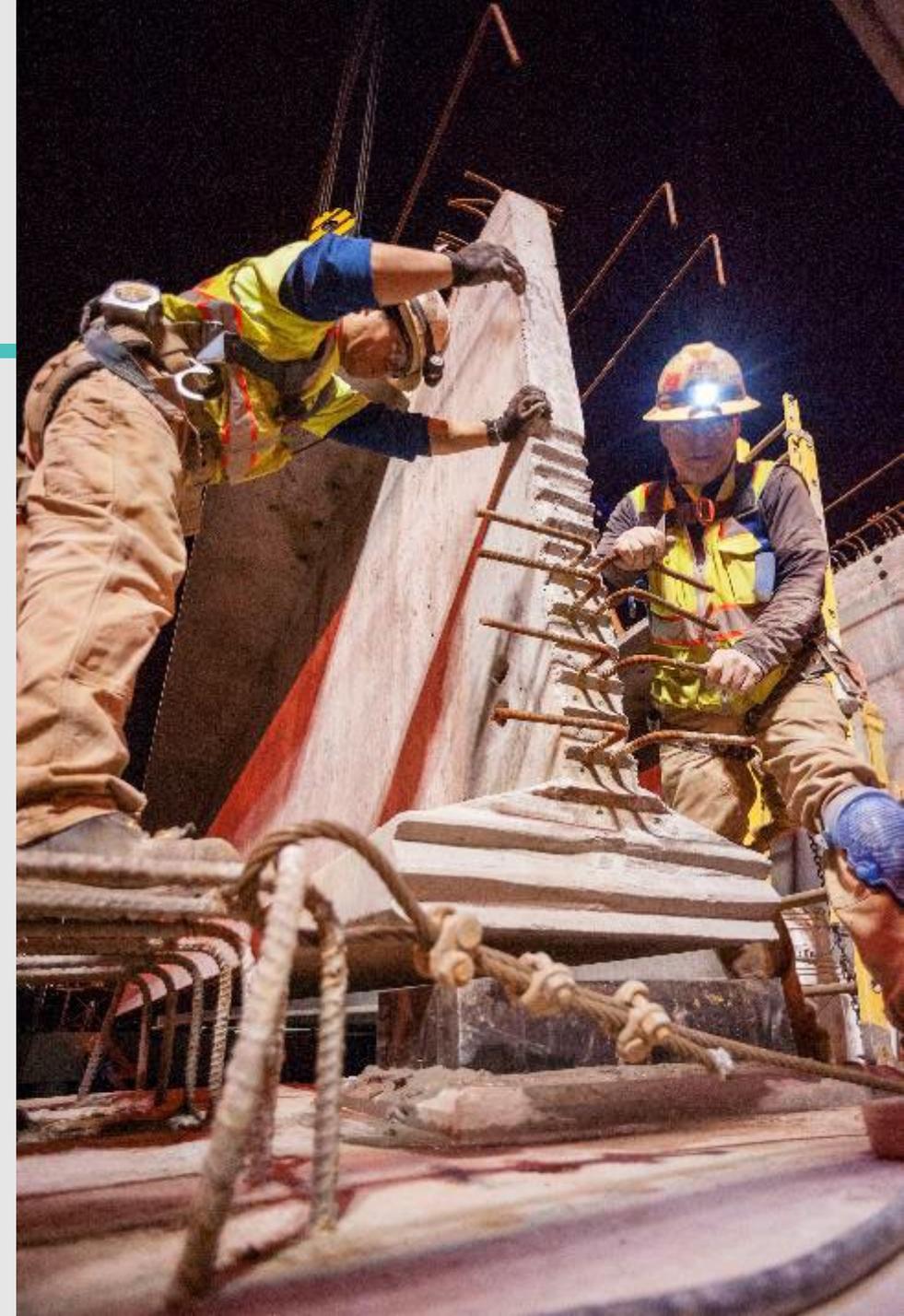
What is NOT in the STIP?

Maintaining & Operating State Highways

State Highway Fund to Cities & Counties

Revenue & Administrative Functions

State-Funded Multimodal Grant Programs: STIF/CO



STIP Funding Categories

FIX-IT

Projects that preserve or fix the state highway system (pavement, bridges, culverts, etc.)

SAFETY

Projects focused on reducing fatal and serious injury crashes

PUBLIC AND ACTIVE TRANSPORTATION

Bicycle, pedestrian, public transportation and transportation options

LOCAL GOVERNMENT PROGRAMS

Funding to cities, counties, and others for priority projects

ADA CURB RAMP DELIVERY PROGRAM

Curb ramp construction for accessible sidewalks

OTHER FUNCTIONS

Workforce development, planning, data collection and other programs using federal money

UNALLOCATED / FLEXIBLE

Discretionary funds approved by the OTC

Public Feedback to Inform Allocation



- Strong support for Fix-It investments statewide, especially in rural areas
- Strong support for Public and Active Transportation investments, especially in urban areas
- Positive feedback on Great Streets to address multiple, community or corridor needs at once
- Support for comprehensive safety improvements
- Interest in investing in climate and environmental projects
- Concern about ensuring a fair regional distribution of funds and a desire to invest in regional and local priorities

OTC Allocation

Category	2021-2024 STIP	2024-2027 STIP	2027-2030 STIP
Fix-it	1,024,937,739	1,004,248,351	640,053,025
Public and Active Trans. (PAT)	750,000,000	800,000,000	583,824,096
ADA	90,500,000	310,660,686	625,000,000
Local	534,583,562	535,732,694	461,898,337
Safety	174,207,738	189,728,305	177,472,200
Enhance	711,580,261	200,000,000	-
Other	274,800,989	317,290,521	387,614,693
Unallocated	Distributed above	Distributed above	70,571,954
Total	3,560,610,289	3,357,660,557	2,946,434,305

Major Changes in the 2027-2030 STIP

- 40% reduction in Fix-It finding
- Doubling of ADA funding, but reduction of nearly 30% of PAT funding
- Zeroed out historic discretionary programs like Enhance and Mass Transit
- Reduced other historic discretionary programs like Elderly and Disabled
- Even with these major reductions, only able to maximize \$70M in unallocated funds

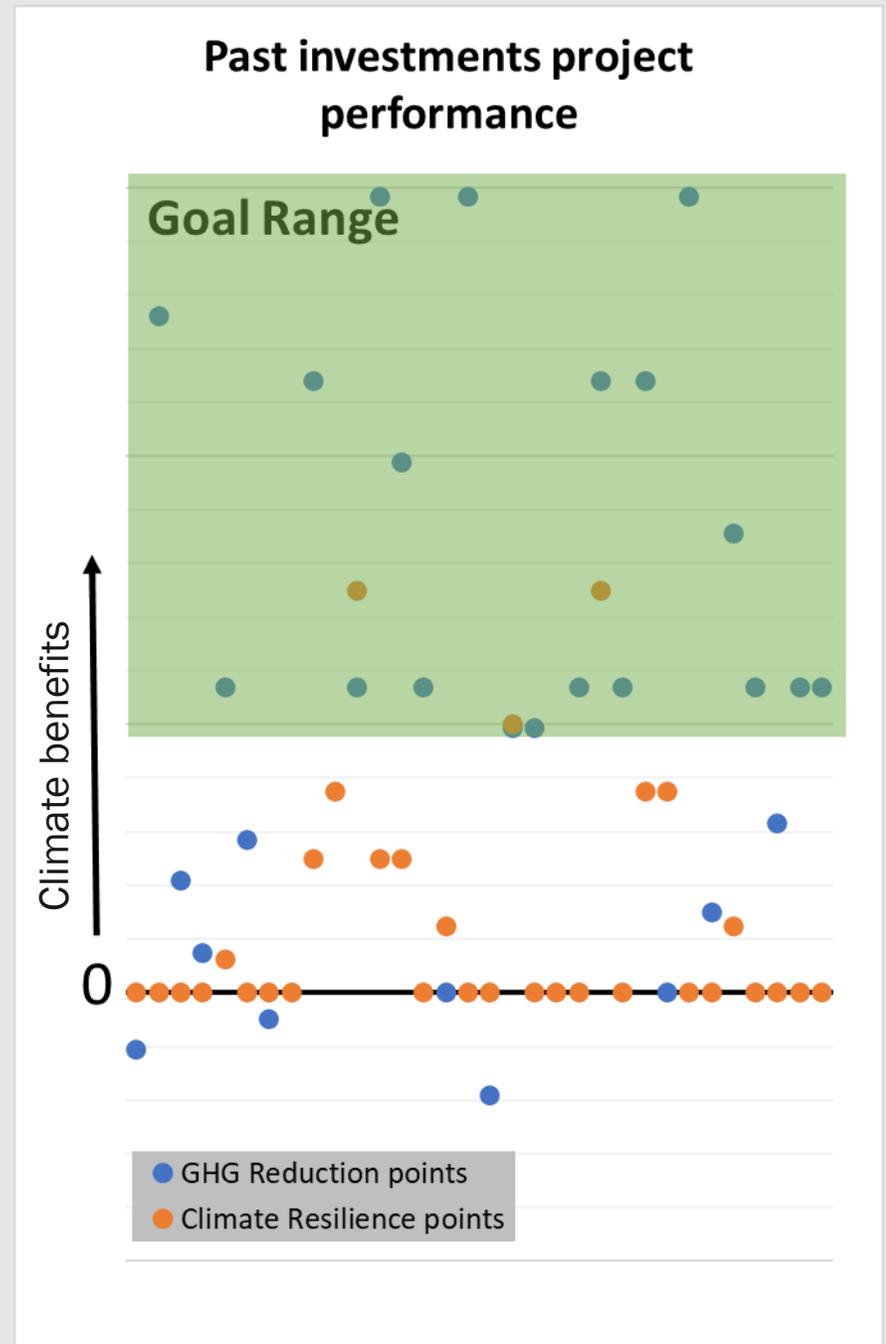
Projected Outcomes of 27-30 Funds

- Only paving interstates in this timeframe
- More bridges will be load rated
- Unable to address remaining bike/walk gaps
- Significant reduction in asset maintenance and preservation across all modes
- Reactive vs proactive investments



27-30 STIP: Work to Further Key Outcomes

- Ensuring climate, safety and equity lenses are applied
 - Creating processes and measuring to assure accountability to these outcomes
 - Reducing GHG emissions
 - Using cleaner materials and fuels in construction
 - Addressing the most unsafe locations
 - Supporting access to low cost transportation options, jobs, and services



Unallocated: \$70M for "Great Streets 2.0"

Strategic funding to advance safety, climate and equity outcomes in a corridor or community

- **Builds** from past programs like STIP Leverage and evolves Great Streets to maximize dollars and support communities and holistic needs.
- **Opportunity** for complementary investments and save on overall costs
 - ADA updates
 - ARTS investments



Great Streets 2.0 Program Principles

- Identify where top priorities overlap across different program areas
- Advance safety, equity and/or climate outcomes
- Identify investment opportunities in urban and rural areas
- Recognize funding is limited and final projects selected may not cover all areas
- Leverage investments by addressing multiple needs at once, leading to efficiency and cost savings



Investment Considerations

Eligibility

- Is an identified “hot spot” area
- Leverages other dollars

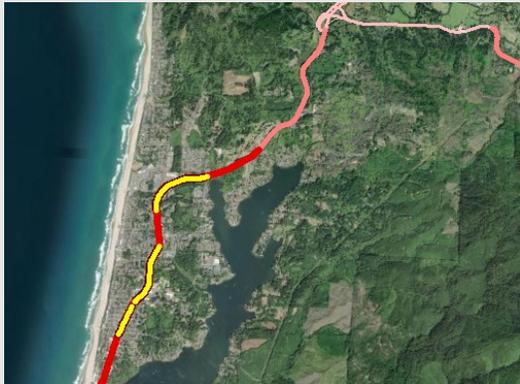
Potential Criteria

- Advances one or more: safety, equity, climate
- Has community support
- Meets project readiness threshold
- Is within cost limits
- Other potential project benefits

For example, while adding a curb ramp, may:

- Add an enhanced pedestrian crossing
- Restripe for safety or bikeways
- Fill in missing sidewalks

Next Steps



Hot spot mapping

Overlay multiple management systems to identify top priorities



Review and refine

Review 'hottest' locations to ensure correct sites were identified and iterate as needed



Narrow projects

Review hot spot opportunities with partners; apply criteria for GS 2.0 and reduce project list



Scope & select

Conduct desk and field scoping to refine criteria scores; prioritize; and select



TOD Program RFFA Update

February 14, 2024

Agenda

- TOD program history and governance
- Role in advancing RTP goals
- What's new
- Discussion

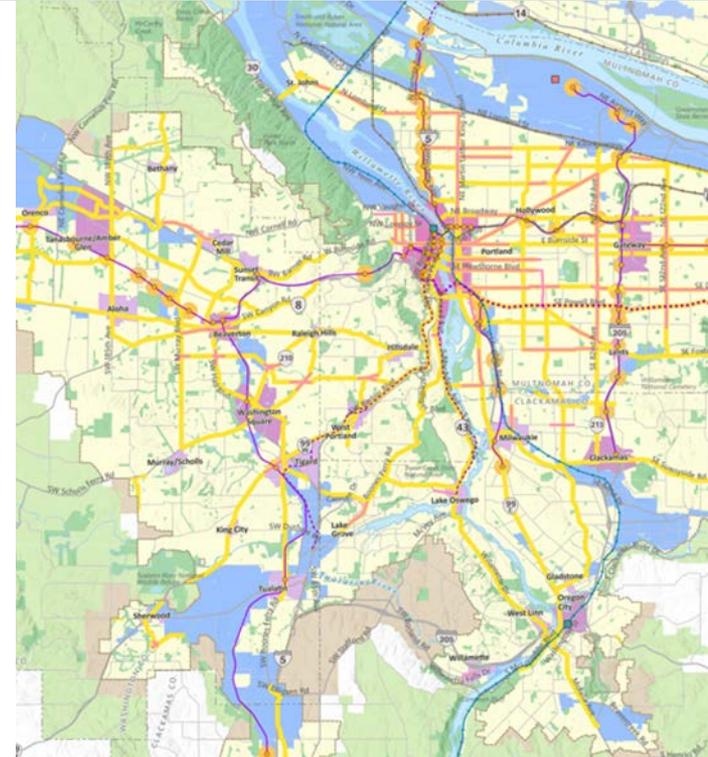
Mission

Metro's TOD program makes catalytic investments to build climate-friendly communities near transit that prioritize the needs of low-income households and people of color.

Origin

Established 1998

- Support efficient land use along transit network and in centers
- Promote access to and use of transit system



Mechanics

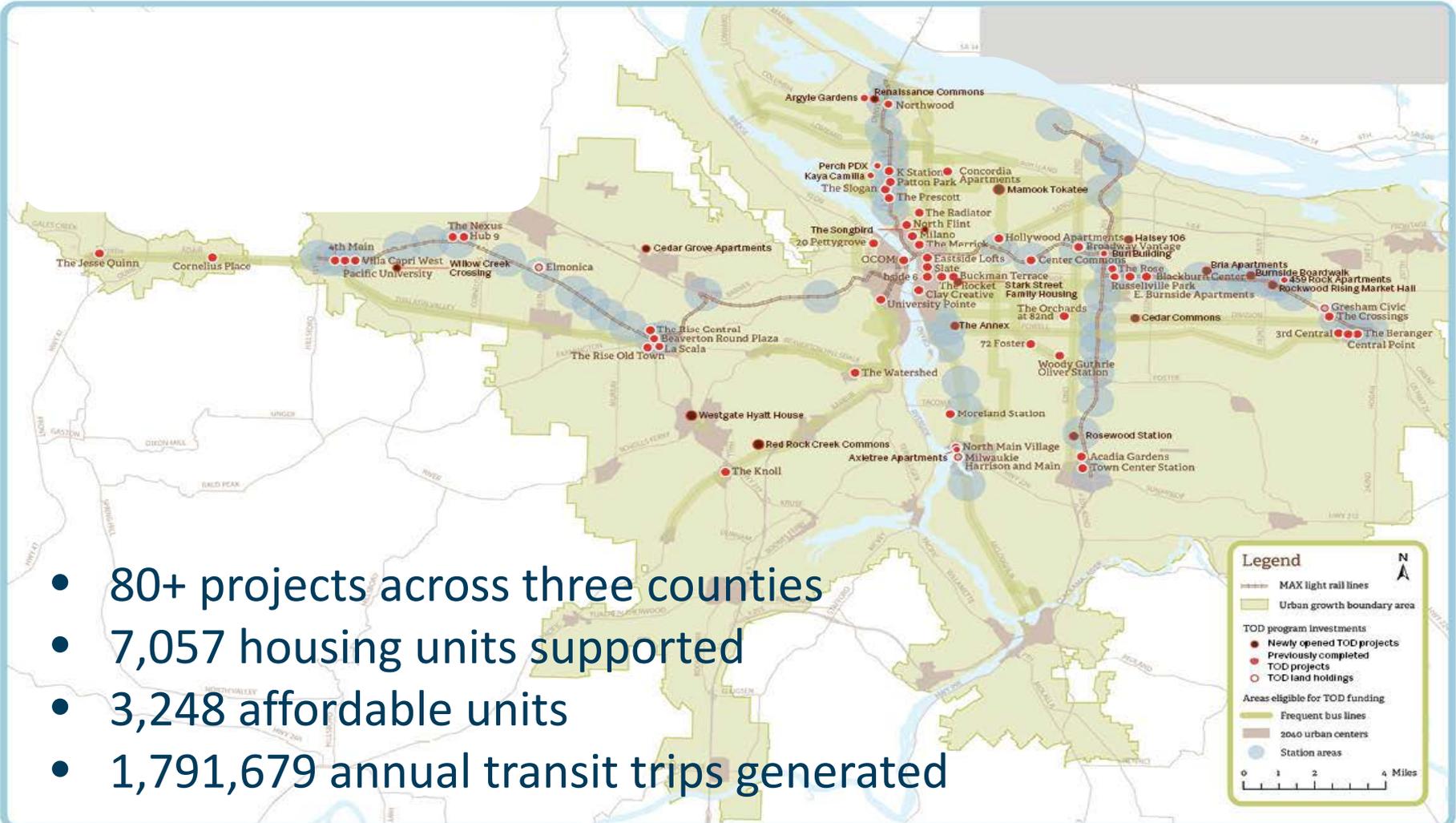
Approximately \$3.4 million in RFFA funds per year

- Gap financing
- Land acquisition
- Community supportive ground floor uses

TOD Steering Committee recommends projects to our Chief Operating Officer and Metro Council

2023 Strategic Plan Update

- Requirements for affordability, equitable contracting, max vehicle parking, and energy efficiency
- Bonuses for innovation in workforce diversity, climate mitigation, and climate friendly materials



- 80+ projects across three counties
- 7,057 housing units supported
- 3,248 affordable units
- 1,791,679 annual transit trips generated

Implementation of RTP Priorities



Equitable Transportation

Grants and site acquisition create affordable homes near transit.

TOD Program Funded Units by Affordability



Mobility Options

Buildings that support multimodal choices

- Pedestrian access
- Bike storage
- Parking maximums
- Regional Transportation Options partnership



Thriving Economy

\$44 million in grants
leveraged into \$1.75
billion in total real
estate investment

Activated corridors and
station areas



Safe system

1.79 million additional riders annually

7,000+ housing units along transit network

Improved sidewalks and streetscapes



Climate action and resilience

Reduced Vehicle Miles Traveled

New program focus on energy efficiency and mitigating urban heat islands



Elmonica Station, Beaverton

- 81 affordable units
- Festival street and play area
- Sidewalk extension to MAX station
- September 2024 construction start



Glisan Landing, Portland

- 137 affordable units
- Ground floor café with workforce training
- IRCO-run preschool
- Landscaped plaza
- No surface parking



Implementing our Strategic Plan

Leveraging RFFA funds for greater impact:

- Revolving acquisition fund
- Federal grants to improve climate performance of buildings
- State funds for targeted acquisitions
- Collaboration with other Metro programs

oregonmetro.gov





February 14, 2024, TPAC Workshop Project Delivery Training Sessions “Setting the Table”

Overview:

- 1 of 5 planned project delivery training sessions
- Highlight federal delivery requirements, issues, and barriers
- Help you with developing the best possible RFFA application

February 14, 2024

Supporting the 2028-30 Regional
Flexible Funding Allocation (RFFA)
project funding call

Ken Lobeck, Metro
Casey Gillespie, ODOT

TPAC Workshops – Project Delivery Training

Introduction

- 1 of 5 planned training sessions to provide a summary level of tips and reminders
- Provide an overview of the federal transportation project delivery process
- Today = Summary overview
- Future training sessions
 - Project scoping tips and reminders
 - Cost estimating tips and reminders
 - Completing the Technical Scoping Sheet & Environmental Prospectus
 - Tying all together in support of your RFFA application

TPAC Workshops – Project Delivery Training

Intro: Topics

- **Workshop #1:**
Setting the Table
An Overview of Federal Transportation
Project Delivery Process
 - Presented by Ken Lobeck, Metro
 - Transportation Project Delivery: A Humbling Experience
 - Reminders when seeking federal funds (Spoiler alert: The money is not free)
 - Contact your LAL – and why its important!
 - Programming in the MTIP & STIP and what we need.

TPAC Workshops – Project Delivery Training

Intro : Topics

- Workshop #1:
Setting the Table
An Overview of Federal Transportation
Project Delivery Process
 - Certified, Non-certified, or Direct Recipient for the project delivery approach
 - Kick-off meetings
 - Wrap it up: Where is your new project? Ready to start PE or is more project development work needed? What can you start doing now?

TPAC Workshops – Project Delivery Training

Intro: Future Project Delivery Training Sessions

- Host 4 additional Project Delivery Training Sessions
- Emphasis will be on the FHWA delivery process
- Proposed dates and topics:
 - April 10, 2024: Scoping your project
 - July 12, 2024: Cost estimating/project budgets
 - August 14, 2024: Overlap with RFFA application roll-out (application reminders – various topics)
 - October 9, 2024: Post award/project implementation requirements

Note: The follow-on training sessions are tentative and subject to the availability of ODOT staff.

TPAC Workshops – Project Delivery Training

Topic: Training Session Facilitator

- Ken Lobeck, Metro Funding Programs lead
- Core job duties: MTIP Amendments and Metro funded project delivery support to ODOT
- 17 plus years experience working with federal project delivery plus the MTIP and STIP
 - 3 years arterial improvement project compliance and contract reviews (CVAG. Palm Desert California)
 - 8 years project delivery support and TIP programming, Riverside County Transportation Commission (RCTC)
 - 8 years project delivery support and MTIP programming with Metro

TPAC Workshops – Project Delivery Training

Topic: A Humbling Experience

- Federal transportation project delivery process is complicated and will humble you quickly
- However, you all are well trained professionals
- You will rise above the delivery muck...because you are a well-trained transportation professional
- Transportation project delivery and surfing – the similarities.

TPAC Workshops – Project Delivery Training

Topic: Federal Transportation Project Delivery: A Humbling Experience



You

- As a transportation project manager:
- Project delivery bumps: No problem!
 - Because you are a well-trained transportation professional
 - All is under control

TPAC Workshops – Project Delivery Training

Topic: Federal Transportation Project Delivery

A Humbling Experience



Houston, we may have a project delivery problem. All is not under control

TPAC Workshops – Project Delivery Training

Topic: Federal Transportation Project Delivery

A Humbling Experience



At some point, it will all come down crashing on you

TPAC Workshops – Project Delivery Training

Topic: Transportation Project Delivery - A Humbling Experience



The point:

- Lots of hands in your federal funded transportation project.
- The federal transportation delivery process can seem confusing and overwhelming, and unforgiving.
- If you have 10 days or 10 years of experience, you will still need help.

Project Delivery: Federal Funds Overview

Topic Seeking Federal Funds

Tips and Reminders



Project Delivery: Federal Funds Overview

Topic Seeking Federal Funds

Considerations when pursuing federal discretionary grants / earmarks:



Budget for Non-Federal Match



Prepare for different funding scenarios



Understand deadlines for obligation and expenditures



Clearly define project scope, schedule, and budget



Understand NEPA and Other Federal Requirements

Project Delivery: Federal Funds Overview

Topic Seeking Federal Funds

Considerations once funds have been secured



Ensure Your Project Is in the TIP/STIP



Draft and execute formal agreements

Project Delivery: Federal Funds Overview

Topic Seeking Federal Funds – Guidance



Project Readiness Checklist for DOT Discretionary Grant Applicants

Introduction

Some U.S. Department of Transportation (DOT) discretionary grant programs review and score grant applications on “project readiness,” a term that refers to how ready an applicant is to deliver a project. Each program’s Notice of Funding Opportunity (NOFO) will state whether DOT intends to review or score the application for project readiness. Sometimes “project implementation” or “project planning” may be used to indicate the same concept.

This checklist provides generalized background and guidance on factors to consider for project readiness. It does not constitute a standard, specification, or regulation or create requirements other than those stipulated in statute and regulation.

[Why is Project Readiness an Important Consideration?](#)



Federal Transportation Funding: Discretionary Grant Preparation Checklist for Prospective Applicants

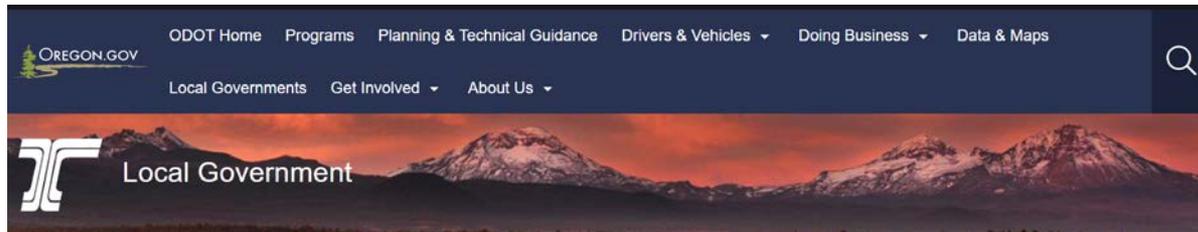
Each year, the US Department of Transportation awards billions of dollars in competitive grant funding to provide competitive grant funding to local governments, metropolitan planning organizations, transit agencies, Tribal governments, U.S. territories, and state departments of transportation.

Some grant programs created in the [Bipartisan Infrastructure Law \(BIL\)](#) are also available to non-profit organizations, academic institutions, and private businesses that are doing work to advance community infrastructure projects, improve safety and economic development, or help to transition to a clean energy and more climate resilient future.

The checklist was created by DOT to help local governments prepare for the year ahead and chart a strategic pathway to take advantage of these historic infrastructure investments to build good projects well.

Project Delivery: Federal Funds Overview

Topic Contact Your Local Agency Liaison (LAL)!



Region 1: Portland Metro



Contact	Job Title	Phone
✉ Duane Anderson	Construction Liaison (Small Contracting Program, Small City Allotment, Funding Exchange & ConnectOregon)	📞 503-731-8513
✉ Chris Ford	Policy & Development Manager & Grant Opportunities "Letter of Support" Contact	📞 971-263.3435
✉ Katie Gillespie	Transportation Project Manager - Local Agency Liaison (Washington County Cities/Agencies)	📞 503-731-3016
✉ Mark Hardeman	Transportation Project Manager - Local Agency Liaison (City of Portland & Agencies within city limits)	📞 503-731-8486
✉ Mahasti Hastings	Transportation Project Manager - Local Agency Liaison (Clackamas County Cities/Agencies; N. Clackamas Park &	📞 503-731-8595

Project Delivery: Federal Funds Overview

Topic Contact Your Local Agency Liaison!

- There is no federal agency that manages federal discretionary or Congressionally Directed Spending (earmark) awards
- ODOT and the MPOs are not notified of your award
- You are on the obligation clock, eligibility conditions may exist, other restrictions may be present
- We are relying on the awarded agency to notify us

Project Delivery: Federal Funds Overview

Topic Contact Your Local Agency Liaison (LAL)!

MPO Boundary Area LAL Contacts

Name	Covers	Telephone	Email
Kattie Gillespie	Washington County	971-264-4290 (Cell)	Katie.J.GILLESPIE@odot.oregon.gov
Mark Hardeman	Portland	503-731-8486	Mark.HARDEMAN@odot.oregon.gov
Mahasti Hastings	Clackamas County and Clackamas County cities	971-264-8253 (Cell)	Mahasti.V.Hastings@odot.oregon.gov
Matt Novak	Gresham, Multnomah County, and Portland	503-731-3145	Matthew.C.NOVAK@odot.oregon.gov

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – What we need to know ASAP!

- Immediately notify your LAL of the award
- Don't wait. The funding clock is already ticking
- What do we need to know?
 - Federal award amount
 - Federal grant program
 - Who is the grantor? – FHWA, or other?
 - Grant type: Discretionary, earmark (CDS), or other
 - How were you notified?
 - Do you have a grant award contact?

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Why we need to know it!

- Determine programming and delivery requirements
- Confirm proof of funding for fiscal constraint
- Obtain funding award guidance
- Obtain funding details (e.g. Fund code, fund type code, obligation and expenditure shelf-life, etc.)
- Verify the required match
- Determine phase and activity eligibility requirements and restrictions
- Obtain the Notice of Funding Opportunity and other supporting program documents

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Searching for the Answers

Consolidated Appropriations Act, 2023 (Public Law 117-328) Division L, Title I, Highway Infrastructure Programs					
State	Demo ID	Project Description in Explanatory Statement Accompanying Pub. L. No. 117-328	Designated Amounts in Explanatory Statement Accompanying Pub. L. No. 117-328	Amount available under P.L. 117-328	
				Project	State Total
OR	OR216	OR141: Hall Boulevard Pedestrian Safety Improvements at Hemlock & Spruce	3,200,000	3,200,000	
OR	OR217	OR-18/OR-99W Corridor Safety and Intersection Improvements	4,000,000	4,000,000	
OR	OR218	River Road—Santa Clara Pedestrian and Bicycle Bridge	6,000,000	6,000,000	
OR	OR219	Coos County Libby Lane Paving Project (MP 3.33 to MP 5.62)	608,000	608,000	
OR	OR220	US-101 Sidewalk Infill	2,800,000	2,800,000	
Oregon					41,380,686
PA	PA746	SR 590 Paving Project	2,400,000	2,400,000	
PA	PA747	Cross County Trail (CCT) Bridge & Trail	2,500,000	2,500,000	
PA	PA748	Pittsburgh City Steps	7,000,000	7,000,000	
PA	PA749	Karns Crossing Bridge	6,000,000	6,000,000	
PA	PA750	US 422 Bypass Phase 2	2,500,000	2,500,000	
PA	PA751	East Washington Street Bridge	3,000,000	3,000,000	
PA	PA752	Kittanning Pike Flood Control	1,000,000	1,000,000	
PA	PA753	Market Place District Transportation Improvements	3,500,000	3,500,000	
PA	PA754	Rodi Road Streetscape Phase 1	800,000	800,000	
PA	PA755	Sweet Valley Road Improvements, Ross Township	1,550,000	1,550,000	
PA	PA756	Crawford Avenue Bridge Rehabilitation	7,000,000	7,000,000	
PA	PA757	Rostraver Township Pedestrian Bridge Improvements	1,800,000	1,800,000	
PA	PA758	Waynesburg Betterment—Intersections and Intersection Approaches	7,000,000	7,000,000	
PA	PA759	Westmoreland County Bridge Preservation Project	1,600,000	1,600,000	

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Searching for the Answers

U.S. Department of Transportation
Federal Highway Administration

About **Programs** Resources Briefing Room

Federal-aid Programs and Special Funding

Federal-aid Programs Special Funding

Home / Programs / Federal-aid Programs and Special Funding

Federal-aid Programs and Special Funding

Federal-aid Programs

- [National Highway Performance Program \(NHPP\)](#)
- [Surface Transportation Block Grant Program \(STBG\)](#)
- [Puerto Rico Highway Program \(PRHP\)](#)
- [Territorial Highway Program \(THP\)](#)
- [Construction of Ferry Boats and Ferry Terminal Facilities Formula Program \(FBP\)](#)
- [Emergency Relief \(ER\) Program](#)
- [Appalachian Development Highway System \(ADHS\)](#)
- [Other Federal-aid Highway Programs](#)

Special Federal-aid Funding

- **Congressionally Designated Projects (Earmark Projects)**
 - [Congressionally Directed Spending](#)
 - [High Priority Projects](#)
 - [Transportation Improvement Projects](#)
- **Discretionary Programs (EBD and IMD)**
 - [Ferry Boat Discretionary \(EBD\) Program](#)
 - [Interstate Maintenance Discretionary \(IMD\) Program](#)
 - [Other Discretionary Programs](#)

Memos

- [Implementation Guidance for the Ferry Boat Program \(FBP\) as Revised by the Bipartisan Infrastructure Law **NEW!**](#)
- [Implementation Guidance for the National Highway Performance Program \(NHPP\) as Revised by the Bipartisan Infrastructure Law](#)
- [Implementation Guidance for the Surface Transportation Block Grant Program \(STBG\) as Revised by the Bipartisan Infrastructure Law](#)
- [Highway Infrastructure Programs - Coronavirus Response and Relief Supplemental Appropriations Act, 2021 \(HIP-CRRSAA\) Implementation Guidance](#)
- [FAST Act § 1440 At-Risk Project Pre-Agreement Authority for Preliminary Engineering](#)
- [Territorial Highway Program \(THP\) Implementation Guidance as Revised by The FAST Act \(02/25/16\)](#)
- [Puerto Rico Highway Program \(PRHP\) Implementation Guidance as Revised by the FAST Act \(02/24/16\)](#)
- [Guidance on Preliminary Engineering Authorizations in FMIS \(03/11/2015\)](#)
- [Increased Federal Share under 23 U.S.C. 120\(c\)\(1\) \(11/25/2014\)](#)
- [Project Funds Management Guide for State Grants \(05/23/2018\)](#)
- [State Administration of the Federal-Aid Program \(Direct Versus Indirect Costs\) \(09/22/2011\)](#)
- [Q&As on Obligation of Earmarked Funds for Federal-Aid Projects \(02/15/2011\)](#)

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Searching for the Answers

BIPARTISAN INFRASTRUCTURE LAW

WA Home / Bipartisan Infrastructure Law / Competitive Grant Programs

Home

Overview

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Assistance / Local Support

Fact Sheets

Guidance



COMPETITIVE GRANT PROGRAMS

Competitive Grant Funding Matrix

The United States Department of Transportation (USDOT) and FHWA have a variety of competitive grant programs used to fund various types of transportation projects and activities. The matrix illustrates these programs broadly, organized by applicant type. Per column in the matrix. The matrix lists grant programs (rows), which can be matched with the potential applicant (columns) the program can fund. Potential applicants should review program specific guidance to make informed decisions about each program.

The FHWA will continue to add additional programs/information to this page over the weeks, months, and years to come.

Grant Program	Program Description	State Highway agency	Metropolitan Planning Organization (MPO)	Local Government or agency	Federally-recognized Indian Tribe	Federal Lands Management Agency (FLMA)	Puerto Rico	Territories	Other*	Additional
ADCMS – Advanced Digital Construction Management Systems	A program to promote, implement, deploy, demonstrate, showcase, support and document the application of advanced digital construction management systems, practices, performances, and benefits.	Yes	Yes (In partnership with State DOT)	Yes (In partnership with State DOT)	Yes (In partnership with State DOT)		Yes			Ex
Advanced Transportation Technologies and Innovative Mobility Deployment (also known as Advanced Transportation Technology and Innovation (ATTAIN) Program)	Provides grants to deploy, install, and operate advanced transportation technologies to improve safety, mobility, efficiency, system performance, intermodal connectivity, and infrastructure return on investment.	Yes	Yes	Yes			Yes		Yes	E
AID - Accelerated Innovation Deployment Demonstration Program	Provides grants to support the pilot/demonstration of innovations on projects, in areas such as planning, financing, operations, pavements, structures, materials, environment, and construction.	Yes	Yes (population over 200,000 - must apply through the State DOT as a subrecipient)	Yes (must apply through the State DOT as a subrecipient)	Yes	Yes	Yes		Yes (must apply through the State DOT as a subrecipient)	Prog



Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Searching for the Answers

Discretionary Programs

The FHWA administers discretionary programs through its various offices. These discretionary programs represent special funding categories where FHWA solicits for projects for funding based on applications received. Each program has its own eligibility and selection criteria that are established by law, by regulation, or administrative

- [Bridge](#)
- [Corridor Planning and Development and Border Infrastructure \(Corridors & Borders\)](#)
- [Delta Region Transportation Development Program](#)
- [Ferry Boats](#)
- [Highways for LIFE](#)
- Innovative Bridge Research and Construction
- Innovative Bridge Research and Deployment Program
- [Interstate Maintenance](#)
- [National Historic Covered Bridge Program](#)
- [Public Lands Highways](#)
- [Scenic Byways](#)
- [Transportation and Community and System Preservation Program](#)
- [Transportation Infrastructure Finance and Innovation Act \(TIFIA\)](#)
- [Truck Parking](#)
- [Value Pricing Pilot Program](#)

Previous Solicitations

- [2012 Solicitation](#)
 - [U.S. Transportation Secretary Ray LaHood Announces More Than \\$363 Million in Grants for State Highway Projects, 8/2/2012](#)
 - [Fiscal Year 2012 Discretionary Grants by Program](#)
-

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Stuff we need ASAP



Memorandum

authority, provided in FY 2023. This funding is not subject to any obligation limitation that applies to Federal-aid contract authority.

With this memorandum, we are requesting the Budget Execution Team in the Office of Budget to allocate in the Fiscal Management Information System (FMIS) **\$1,851,971,613** for **557** projects to the States, as indicated in the attachment to this memorandum (**FMIS program code Y926; DELPHI fund value 1530569B50.**)

These funds remain available for obligation through September 30, 2026. Any such amounts not obligated on or before September 30, 2026, shall expire. Once the period for obligation

totaling \$10,840,000. These funds are in addition to any other funds, including contract authority, provided in FY 2023. This funding is not subject to any obligation limitation that applies to Federal-aid contract authority.

With this memorandum, we are requesting the Budget Execution Team in the Office of Budget to allocate in the Fiscal Management Information System (FMIS) **\$1,851,971,613** for **557** projects to the States, as indicated in the attachment to this memorandum (**FMIS program code Y926; DELPHI fund value 1530569B50.**)

These funds remain available for obligation through September 30, 2026. Any such amounts not obligated on or before September 30, 2026, shall expire. Once the period for obligation

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Why it's important

FFY 2023 Congressional Direct Spending (CDS) awards (earmarks) and regular assumptions:

- Funding is normally assumed for construction
- Project should be shovel-ready
- Are approved by Congress...but
May or may not have received funding authorization
- Include obligation shelf-life and expenditure deadlines
- No notification and virtually no guidance

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – The Delivery Clock is Ticking

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL

Example: The FFY 2023 CDS awards

DEPARTMENT OF TRANSPORTATION—Continued
[Community Project Funding/Congressionally Directed Spending]

Agency	Account	Project	State	Amount	Requestor(s)		Origination
					House	Senate	
Department of Transportation	Highway Infrastructure Programs	Construction of Arterial Road between Highway 11 and Highway 30	OR	1,500,000		Merkley, Wyden	S
Department of Transportation	Highway Infrastructure Programs	City of Carlton—West Main Street Revitalization	OR	1,500,000		Merkley, Wyden	S
Department of Transportation	Highway Infrastructure Programs	82nd Ave MAX Station Improvement Project — Portland, OR	OR	3,000,000	Blumenauer		H
Department of Transportation	Highway Infrastructure Programs	NE Halsey Safety and Access to Transit Project — Portland, OR	OR	1,000,000	Blumenauer	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	Jordan Road to Sandy River Delta Multi-use Path, Columbia River Gorge National Scenic Area — Multnomah County, OR	OR	2,332,000	Blumenauer	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	181st Ave Safety Improvements Project — Gresham, OR	OR	3,178,686	Blumenauer	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	Earthquake Ready Burnside Bridge (EQRB) Design Phase — Multnomah County, OR	OR	2,000,000	Blumenauer	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	Main Avenue/OR 104 Pedestrian Route	OR	1,360,000	Bonamici		H
Department of Transportation	Highway Infrastructure Programs	Beaverton Downtown Loop	OR	4,000,000	Bonamici	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	OR141: Hall Boulevard Pedestrian Safety Improvements at Hemlock & Spruce	OR	3,200,000	Bonamici	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	OR-18/OR-99W Corridor Safety and Intersection Improvements	OR	4,000,000	Bonamici	Merkley, Wyden	H
Department of Transportation	Highway Infrastructure Programs	River Road—Santa Clara Pedestrian and Bicycle Bridge	OR	6,000,000	DeFazio		H

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Playing Beat the Delivery Clock

Department of Transportation	Highway Infrastructure Programs	Jordan Road to Sandy River Delta Multi-use Path, Columbia River Gorge National Scenic Area — Multnomah County, OR	OR	2,332,000
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FFY 2023 CDS Awards Timeline

Action	Date	Issues and Challenges
MTIP/STIP programming authorized	As of October 2022 (Beginning of FFY 2023)	All funds must be obligated by 9/30/2026
Metro and ODOT obtain CDS award list	December 2022	No guidance, not details, no clue...
Verification CDS awards are authorized to be programmed	FHWA guidance issues March 21, 2023	We didn't find it until the end of May 2023
Programming delayed until October 2023	October 2023	2024-27 MTIP and STIP had been locked down as of May 2023.

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Playing Beat the Delivery Clock

FFY 2023 CDS Awards Timeline		
Action	Date	Issues and Challenges
Start of IGAs for the new CDS projects	Start once Key number is assigned (October 2023)	MTIP and STIP programming completed by January 2024
IGA executed. PE obligation authorized	June 2024	Assumes the project is properly scoped to start PE
PE phase normally 2 years to complete	PE to June 2026	Deadline to obligated all funds 9/30/2026
Move on to ROW and UR phases	1-2 years to complete Best case = June, 2027)	Hello construction phase?

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL –Standard Delivery Timing

- Programming and kickoff
- 6-12 months to complete IGA
- 2 years to complete Preliminary Engineering (NEPA and final design)
- Up to 2 years to complete Right-of-Way and Utility Relocation requirements
- Earliest construction begins is in year 5 of the life of the project from the time funding is obligated to start PE.
- Many projects with federal funds don't make construction until well into year 6 or later.

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL – Why it's important

- Once the grant award is official, you are on the delivery clock
- Many grant awards target funds for ROW and construction
- The project probably has not been scoped. No project study report or project development activities have occurred.
- The obligation clock often is set with a 3 to 4-year shelf-life. Expenditure expirations may exist as well
- Time is working against you and your project.

Project Delivery: Federal Funds Overview

Topic: Contact Your LAL

Final note about earmarks ...The “Pleases”

- The Pleases:
 - Please notify your LAL you are pursuing an earmark
 - Please consider selecting an existing project already programmed and in progress
 - Please check and verify your project is in the constrained Regional Transportation Plan (RTP)
 - Please consider the federal requirements that apply
 - Please provide your LAL with projects details
 - Please complete some level of project scoping to help move forward with IGA development once the earmark is awarded.
 - Please remember time is not on your side

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming



ACTIVE 2024-2027 STIP
STATEWIDE TRANSPORTATION IMPROVEMENT
PROGRAM

ACTIVE STIP



2024-2027 ADOPTION DRAFT

Metropolitan Transportation
Improvement Program

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming

What We Need

- Reminder most FHWA based federal transportation funds will obligate (approval to start expending) through FHWA's Financial Management Information System (FMIS)
- Programming in the MTIP and STIP is mandatory

Run Date: 10/23/2023	U.S. DEPARTMENT OF TRANSPORTATION			Report: FMISD05A		
Run Time: 16:53:22	FEDERAL HIGHWAY ADMINISTRATION			Page 1 of 1		
				FEDERAL-AID PROJECT AGREEMENT		
RECIPIENT: 41-Oregon	FEDERAL PROJECT NO: 5900335					
UEI (SAM): XKMMGCKGMQC8	RECIPIENT PROJ. NO(S): 21629					
<p>1. The State through its department of transportation, or other recipient, has complied, or hereby agrees to comply, with the applicable terms and conditions set forth in (a) Title 23, U.S. Code, highways; (b) The regulations issued pursuant thereto, and the policies and procedures promulgated by the Federal Highway Administration; and (c) All other applicable federal laws and regulations. 2. The State, or other recipient, stipulates that as a condition to payment of the Federal funds obligated, it accepts and will comply with the provisions set forth in 23 CFR 630.112. These provisions incorporate by reference all other federal laws and regulations pertaining to the project or the activity for which the funds are obligated. Solely for the purposes of emphasis, such applicable provisions include, but are not limited to, the requirements of Appendix A to 2 CFR Part 170—Award terms for Reporting subaward and executive compensation information, and 2 CFR 200, including for those funds for which such amount will be subawarded to a subrecipient, 2 CFR 200.331.3. Relative to the above designated project, the FHWA has authorized certain work to proceed as evidenced by the date entered opposite the specific item of work. For such authorized work, the federal funds obligated or advance-construction authorized, are not to exceed the amount shown herein. The balance of the estimated total project cost is an obligation of the State or other direct recipient. 4. Such authorization of Federal funds extends only to project costs incurred by the State, or other recipient, following Federal Highway Administration's authorization to proceed with the project.</p>						
PROJECT TITLE:	SE Division St: 148th Ave - 174th Ave (Portland)					
PROJECT DESCRIPTION:	Convert existing two-way left turn lane to a raised median to improve safety on this section.					
DUNS#:						
SUBRECIPIENT PROJECT:	No					
SUBRECIPIENT UEI (SAM):						
SUBRECIPIENT NAME:						
PROJECT END DATE:	09/30/2033					
			CLASSIFICATION OF PHASE OF WORK TO BE PUT UNDER AGREEMENT	EFFECTIVE DATE OF AUTHORIZATION		
			HIGHWAY PLANNING & RESEARCH			
			PRELIMINARY ENGINEERING	10/23/2023		
			RIGHT-OF-WAY			
			CONSTRUCTION			
			OTHER			
PROGRAM CODE	FAIN	URBAN/ WITH	TOTAL COST	FEDERAL SHARE	FEDERAL FUNDS UNDER AGREEMENT	ADVANCED CONST. FUNDS
YS70			\$482,415.00	0.00%	\$0.00	\$434,173.50
TOTAL			\$482,415.00		\$0.00	\$434,173.50

Sample FHWA FMIS Obligation Mod Report

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming

Cost of Not Programming

- Applies to projects where ODOT has oversight
- Applies to CDS awards, discretionary awards, and basically any funding required to be obligated through FMIS
- Impacts of not programming:
 - If not programmed: No ODOT key number can be assigned to the project
 - Project will not be included into the approved STIP
 - No Key number = Can't start the IGA
- Projects following direct recipient delivery rules may differ

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming

What We Need

- Grant award notification and program identification
- Copy of the submitted grant application and/or request for funding award
- Project name, description, and limits
- Major project scope activities
- Project location map
- Budget/budget table indicating what phases are required (PE, ROW, UR, Construction, and Other)
- How much \$\$\$ is required in each phase
- Split between federal, local match, and overmatch if it applies
- Total estimate project cost

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming

The Programming Process

- Programming actions (for new projects):
 - Your LAL will review the project details to determine if the project is ready to be programmed
 - Region 1 STIP Coordinator and Metro will begin completing programming actions for the MTIP and STIP
 - The project must successfully pass all required fiscal constraint verification and RTP consistency check requirements
 - The formal/full amendment then can move forward to add the project to the MTIP and STIP
 - The process can take 3 to 6 months to complete.

MPO CFR Compliance Requirements

MTIP Amendment Review Factors

CFR = Code of Federal Regulations

- ✓ Project must be included in and consistent with the current constrained Regional Transportation Plan
- ✓ Passes fiscal constraint review and proof of funding verification
- ✓ Passes RTP consistency review:
 - Reviewed for possible air quality impacts
 - Verified as a Regionally Significant project status
 - Verified RTP and MTIP project costs consistent
 - Satisfies RTP goals and strategies
- ✓ MTIP & STIP programming consistency is maintained against obligations.
- ✓ Passes MPO responsibilities verification
- ✓ Completed public notification requirement
- ✓ Examined how performance measurements may apply and if initial impact assessments are required

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP and Programming

Key Consistency Checks

- Two key “checks” that must be successfully completed
- Fiscal constraint demonstration:
MTIP fiscal constraint demonstration requires proof-of-funding verification. Prove you have the funds
- RTP Project Consistency:
The project must be included in the RTP constrained list of projects
- Yes, there are exception to the above consistency checks

Project Delivery: Federal Funds Overview

Topic: MTIP and STIP Programming

Completed MTIP and STIP Programming

2024-2027 Active STIP		CLACKAMAS		2024-2027 Active STIP			
Name: S Holly Lane: Abernethy Creek Bridge			Key: 23083				
Description: Replace the existing bridge with a new single-span bridge to ensure continued connectivity.					Region: 1		
MPO: Portland Metro MPO		Work Type: BRIDGE					
Applicant: CLACKAMAS COUNTY		Status: PROJECT SCHEDULED FOR CONSTRUCTION					
Location(s)-							
Mileposts	Length	Route	Highway	ACT	County(s)		
				REGION 1 ACT	CLACKAMAS		
Current Project Estimate							
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2025	2025	2025	2027		
Total		\$1,145,200.00	\$126,700.00	\$12,700.00	\$8,112,900.00		\$9,397,500.00
Fund 1		Y240 \$1,027,587.96	Y240 \$113,687.91	Y240 \$11,395.71	Y240 \$7,279,705.17		
Match		\$117,612.04	\$13,012.09	\$1,304.29	\$833,194.83		
Footnote: \$8,432,376.75 in federal funds.							

2024-2027 Metropolitan Transportation Improvement Program (MTIP)							Metro
Current Approved Project List with Approved Amendments							
LEAD AGENCY		Clackamas County					
PROJECT NAME		S Holly Lane: Abernethy Creek Bridge					
Project IDs		Project Description				Project Type	
ODOT KEY	23083	Replace the existing bridge with a new single-span bridge to ensure continued connectivity.				Roads and Bridges	
MTIP ID	71369						
RTP ID	12092						
Phase	Year	Fund Type	Federal Amount	Minimum Local Match	Other Amount	Total Amount	
Purchase right of way	2025	STBG State (IIJA)	\$113,688	\$13,012	\$0	\$126,700	
Preliminary engineering	2025	STBG State (IIJA)	\$1,027,588	\$117,612	\$0	\$1,145,200	
Other	2025	STBG State (IIJA)	\$11,396	\$1,304	\$0	\$12,700	
Construction	2027	STBG State (IIJA)	\$7,279,705	\$833,195	\$0	\$8,112,900	
FY 24-29 Totals			\$8,432,377	\$965,123	\$0	\$9,397,500	
Estimated Project Cost (YOES)			\$8,432,377	\$965,123	\$0	\$9,397,500	

Project Delivery: Federal Funds Overview

Topic: Delivery – Certified, Non-certified, or Direct Recipient



Companion Guide to Video August 2012

U.S. Department of Transportation Federal Highway Administration

Check out the video

Federal-Aid Program Overview Stewardship and Oversight

www.fhwa.dot.gov/federal-aidessentials

Federal-aid stewardship and oversight are vital to maintaining public trust of LPA-administered projects

Federal-aid Essentials for Local Public Agencies

Local Agency Certification Program

STEWARDSHIP AND OVERSIGHT AGREEMENT ON PROJECT ASSUMPTION AND PROGRAM OVERSIGHT

AGREEMENT BETWEEN THE U.S. DEPARTMENT OF TRANSPORTATION, OREGON DIVISION AND THE OREGON DEPARTMENT OF TRANSPORTATION

Program is a... Agencies, or

Production is a federally-assisted project... to deliver the FAHP... as amended, Congress... responsibilities... a risk-based approach... This Stewart... in the FHWA Oregon Di...

Operational Notice Number	Original Effective Date	Revised Effective Date	Review or Revised	Approving Authority
No. 25	8/18/2012		6/18/2012	Executive Project Delivery Manager

Operational Notice Title: Project Delivery QA/QC Program

Topic or Program: Project Delivery QA/QC Program

Purpose
Set policies and requirements for quality management in project delivery for the Oregon Department of Transportation (ODOT) defined projects in all phases of the transportation system project lifecycle from design through construction, from start to finish.

Overview
The mission of the Project Delivery quality assurance activities (QA/QC) Program is to instill a culture of quality into every aspect of project delivery, and develop and maintain the statewide project delivery quality management practices to facilitate a continuous quality improvement in each discipline and phase of project delivery. The Project Delivery QA/QC Program leads the development, management, communication, and implementation of quality management for ODOT project delivery.

Background and Rationale
The Oregon Department of Transportation's mission is to provide a safe and reliable multimodal transportation system that connects people and helps Oregon's communities and economy thrive. Project Delivery's part in that is to deliver high-quality, successful projects, to meet the needs for Oregon's transportation system.

In early 2012, ODOT Internal Audit Services completed an audit of ODOT project delivery which found that each of the three regions had a different approach to considering and documenting design quality control (DQC). The audit recommended that:

- Engineering and Technical Services (ETS) should ensure that region DQC practices align to the ODOT plan and that there is a uniform consistency across regions.

Contact

Tiffany Hamilton
Certification Program Manager
503-986-3649
ODOT Certification

United States Department of Transportation

U.S. Department of Transportation Federal Highway Administration

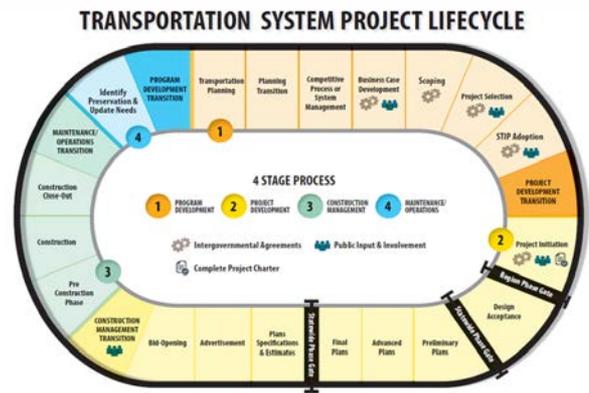
Home / Federal-aid Program Overview

Federal-aid Essentials for Local Public Agencies

About Videos

General Information: Stewardship and Oversight

Federal-aid stewardship and oversight are vital to maintain LPA-administered projects



Project Delivery: Federal Funds Overview

Topic: Delivery - Certified, Non-Certified, & Direct Recipient

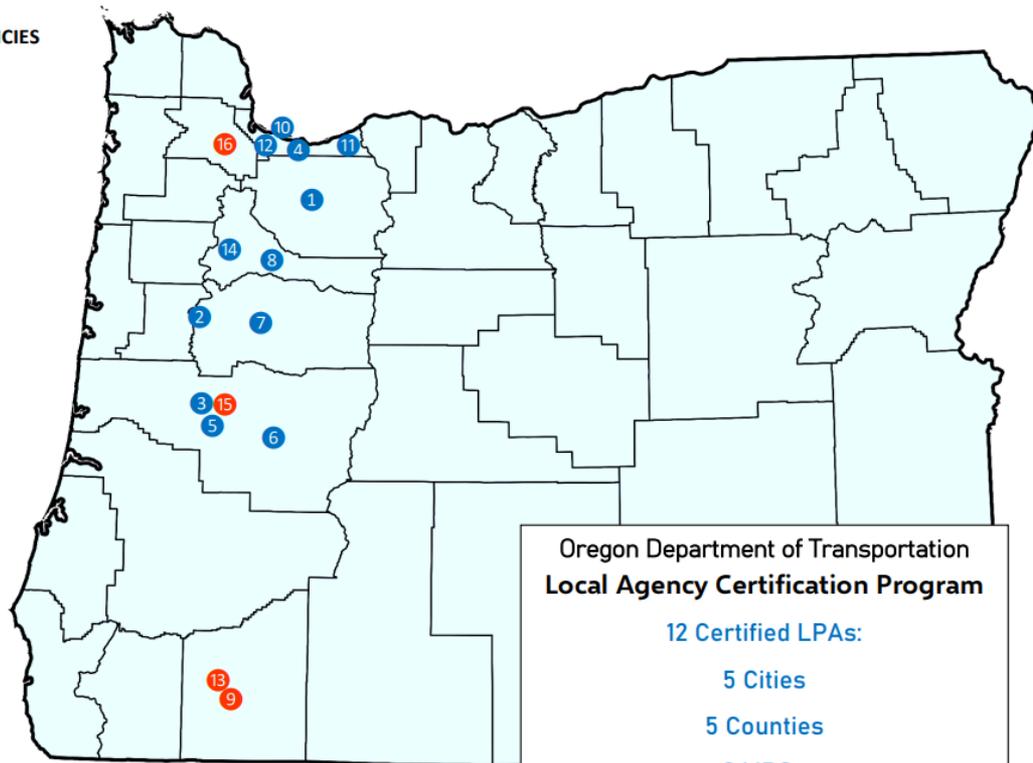
- Certified Agency:
 - Streamline the delivery of local projects funded by the Federal Highway Administration, or FHWA
 - Certifies highly qualified LPAs to ensure FHWA delivery requirements are met.
 - The Certification Program Office establishes policies and procedures to oversee certified LPAs and their federally funded projects through collaboration with local, state and federal partners
 - Local agency has delivery control...to a point.

Project Delivery: Federal Funds Overview

Topic: Delivery - Certified, Non-Certified, & Direct Recipient

PARTICIPATING LOCAL AGENCIES

1. Clackamas County (P)
2. Corvallis (P)
3. Eugene (P)
4. Gresham (P)
5. Lane COG (C)
6. Lane County (P)
7. Linn County (PB)
8. Marion County (P)
9. Medford
10. Metro MPO (C)
11. Multnomah County (P)
12. Portland (PB)
13. Rogue Valley COG
14. Salem (P)
15. Springfield
16. Washington County



Oregon Department of Transportation
Local Agency Certification Program

12 Certified LPAs:
5 Cities
5 Counties
2 MPOs

4 Pending Certification

CERTIFICATION TYPE:

- (P) Project Delivery
- (PB) Project Delivery plus Bridge Design
- (C) Consultant Selection for Planning Services only



Project Delivery: Federal Funds Overview

Topic: Delivery - Certified, Non-Certified, & Direct Recipient

- **Non-Certified Agency:**
 - ODOT holds and manages the project delivery contract and all delivery processes
 - Local agency has very little control and input to the delivery process
 - The ODOT LAL provides oversight and management of the federal delivery process.

Project Delivery: Federal Funds Overview

Topic: Delivery - Certified, Non-Certified, & Direct Recipient

- Direct Recipient:
 - ODOT Local agency delivers the project outside and without the normal ODOT oversight and management delivery responsibilities
 - Local agency usually works directly with FHWA to complete project delivery requirements
 - Example: RAISE grant awardees have the option to delivery their project as a Direct Recipient
 - The Direct Recipient delivery approach has flaws

Project Delivery: Federal Funds Overview

Topic: Project Kick-off Meetings



Project Delivery: Federal Funds Overview

Topic: Project Kick-off Meeting

- RFFA Funded:
 - Hand-off Metro award to ODOT to move forward with project delivery actions
 - Ensure everyone involved knows what the project is, the delivery objectives, and the next steps to implement the project
- Other types: Similar function.
- Helps evaluate where we are with the project and what specific next steps are required.

Project Delivery: Federal Funds Overview

Topic: Project Kick-off Meeting

- Kick-off meeting topics, goals, and objectives:
 - Meet the people involved in the delivery process
 - Provide an overview of funding award
 - Evaluate the proposed funding plan
 - Discuss project scope and delivery goals
 - Discuss delivery steps and potential issues through NEPA, final design, and implementation phases.
 - Identify specific next steps and actions to complete (e.g. completion of the Technical Scoping Sheet (TSS), Environmental Prospectus, etc.)

Project Delivery: Federal Funds Overview

Topic: Project Kick-off Meeting

- What do you need to do:
 - Ensure the project has an assigned project manager responsible for the project delivery process
 - Identify other agency staff who will be involved and should attend the kick-off meeting.
 - Be prepared to discuss the delivery objectives of the project

Project Delivery: Federal Funds Overview

Topic: Wrap It Up



Project Delivery: Federal Funds Overview

Topic: Wrap It Up – The Summary

- Take a step backwards and understand what you are getting into when seeking federal funds
- Evaluate if you can complete any scoping actions. Complete the Scoping Checklist
- Communicate early. Contact your LAL about your funding award
- Congratulations, you are a winner! Now, tell us about the grant!
- Provide details: Project name, description, scope, limits, funding, etc. The details matter!
- Evaluate how strong is your funding plan
- Start working on the Technical Scoping Sheet and Environmental Prospectus

Project Delivery: Federal Funds Overview

Topic: Wrap It Up – Some Tools You Can Use



LOCAL PUBLIC AGENCY (LPA) FEDERAL AID PROJECT SCOPING CHECKLIST (FOR USE IN SCOPING FEDERALLY FUNDED LOCAL PROJECTS)

TABLE OF CONTENTS

- I. Form Information and Resources
- II. Project Location and Agency Information
- III. Project Purpose and Scoping Summary
- IV. Scoping Elements

PART I. FORM INFORMATION AND RESOURCES

Purpose of Form:



The purpose of this **optional** form is to provide a checklist and guidance that outlines the significant project development and delivery risks, requirements, and processes on federal-aid projects. It is intended to assist Local Public Agencies (LPAs) and the agency or agencies awarding project funding to evaluate project readiness to deliver within a defined scope of work, proposed schedule, and estimated budget.

The checklist has been set up by topic with a place to make notes that guide the LPA to document key project scope information and project risks and opportunities for consideration prior to and during project development. Once the checklist has been completed, users can review and analyze the checklist to help:

- Determine project readiness by evaluating the number of unknowns.
- Identify processes that need to be taken into account in developing the project schedule.
- Identify processes that may impact costs and need to be taken into account developing the project budget.
- Identify other project risks and opportunities that will need to be managed throughout the project.

When to scope and why:



Project Delivery: Federal Funds Overview

Topic: Wrap It Up – Some Tools You Can Use



LOCAL AGENCY TECHNICAL SCOPE SHEET Part 1 of 2: Project Request

FORM OVERVIEW

Sections 1-4 of this form replace Prospectus Part 1.

PROJECT STIP NAME						KEY NUMBER	JURISDICTION		1
ROAD/STREET NAME						REGION	DISTRICT		
BRIDGE NO.	CITY	MPO	UGB	COUNTY	FROM MP	TO MP			
HIGHWAY NUMBER	HIGHWAY NAME					URBAN/RURAL			
ROUTE NUMBER	NHS	HPMS	FC	APPLICANT (IF OTHER THAN STATE)	US REP	OR SEN	OR REP		
COST ESTIMATES (X \$1,000)			PROJECT COMPONENTS			RIGHT OF WAY			2
Preliminary Engineering						Files (number)			
Right of Way						Acres (number)			
Utility Reimbursement						Acquisitions (number)			
Planning						Easements (number)			
Other						RELOCATIONS			
CONSTRUCTION						Business (number)			
Roadway						Residential (number)			
Structures						ACCESS CONTROL			
Signals						CURRENT	PROPOSED		
Environmental Classification (1,2,3,PCE)									

Project Delivery: Federal Funds Overview

Topic: Wrap It Up – Some Tools You Can Use



[LINK TO GUIDANCE](#)

[SHOW SUMMARY](#)

PRELIM. NEPA CLASS

ODOT ENVIRONMENTAL PROSPECTUS

PROJECT NAME			REGION	KEY NUMBER	FEDERAL AID NUMBER
<input type="text"/>			<input type="text"/>	<input type="text"/>	<input type="text"/>
CITY	COUNTY	FHWA NEXUS	PROJECT SPONSOR		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
HIGHWAY NAME				BEGIN MP	END MP
<input type="text"/>				<input type="text"/>	<input type="text"/>
LATITUDE	LONGITUDE	TOWNSHIP	RANGE	SECTION	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
PROJECT DESCRIPTION (FIELD WILL EXPAND AS YOU TYPE. CLICK TAB TO SEE TEXT IN EXPANDED FIELD.)					
<input type="text"/>					

Checklist questions marked with an asterisk (*) indicate that the question is related to the qualifying thresholds ("kickouts") identified in the 2015 PCE Agreement.

Estimated Right of Way Impacts

Right of Way

1. * Will the project involve temporary or permanent acquisition of right-of-way?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unknown
2. * Will the project result in the temporary or permanent displacement of persons or businesses?.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unknown

Railroads

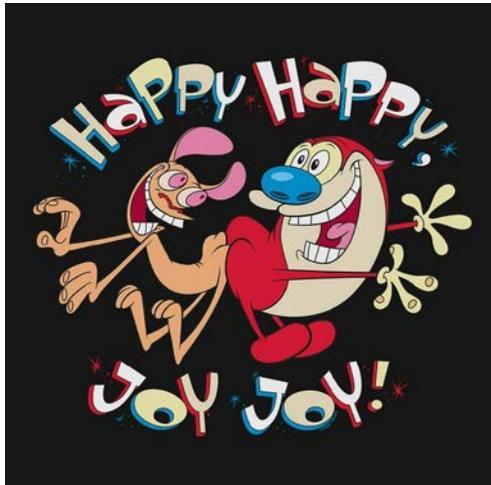
3. Will the project involve work on or adjacent to railroad-owned property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unknown
---	------------------------------	-----------------------------	----------------------------------

Utilities

Project Delivery: Federal Funds Overview

In Summary....

- Future training sessions will cover scoping, developing an adequate project budget, and the forms
- Two choices for your project: Dance to the Happy, Happy, Joy, Joy song, or be gobbled- up



Oh Yeah!. Project delivered on target, on schedule, on scope and on budget...



Really, the project stopped because of....a FLY!!!!

Project Delivery: Federal Funds Overview

Topic: Finally, The End, or Just End of the Beginning?

Questions
and/or
Discussion



Federal Transportation Funding: Discretionary Grant Preparation Checklist for Prospective Applicants

Each year, the US Department of Transportation awards billions of dollars in competitive grant funding to provide competitive grant funding to local governments, metropolitan planning organizations, transit agencies, Tribal governments, U.S. territories, and state departments of transportation.

Some grant programs created in the [Bipartisan Infrastructure Law \(BIL\)](#) are also available to non-profit organizations, academic institutions, and private businesses that are doing work to advance community infrastructure projects, improve safety and economic development, or help to transition to a clean energy and more climate resilient future.

The checklist was created by DOT to help local governments prepare for the year ahead and chart a strategic pathway to take advantage of these historic infrastructure investments to build good projects well.

Except for any statutes and regulations cited, the contents of this document do not have the force and effect of law and are not meant to bind prospective applicants or the public in any way. This document is intended only to provide clarity regarding existing requirements under the law or agency policies.

Preparation Tips for DOT Grant Application Success

The following checklist provides preparation tips for DOT grant application success:

1. Coordinate Between Agencies and Stakeholders

Within your local government, ensure that finance, procurement, planning, and public works departments are working in alignment to submit grant applications, successfully execute grant agreements, and deliver projects. This requires early and continuous coordination between local government and community stakeholders and with regional and state or other third-party implementation partners to ensure that projects are set up for success.

2. Get Familiar with the DOT Calendar of Funding Opportunities

Get familiar with the [DOT Calendar of Funding Opportunities](#) to see when different programs will be open and closed for applications.

Review NOFOs carefully. Each program's Notice of Funding Opportunity (NOFO) typically provides additional resources, webinars, and frequently asked questions specific to that program to provide information on program eligibility, grant application requirements, and other useful information. The program page may also contain information on past grant recipients to help better understand the types of projects and applications selected for funding in previous years.

Prioritize and align projects and applications. It may not serve your community well to submit multiple applications for a single Notice of Funding Opportunity such that you are competing against yourself. Think about which projects may be the readiest for funding, which may be the highest priority based on locally defined needs, or which may be the best fit for Federal funding versus other types of local or state funding.

Check out the [Rural Grant Applicant Toolkit for Competitive Federal Transportation Funding](#). Created for rural applicants, this toolkit is useful to any organization unfamiliar with the DOT grant process.

3. Budget for and Secure Your Non-Federal Match

In preparing and finalizing city or agency budgets, think about the needs that may arise during the coming year. Sponsors should develop a budget that demonstrates how the budget will be funded in full.

As a condition for receiving funding, most DOT programs require a 10 percent or 20 percent [non-Federal match](#). Where may this match funding come from? What processes and timing are needed to confirm financial commitments as part of grant applications or if selected for a grant award? What steps can be taken in advance to ensure this process goes smoothly and your community doesn't miss out on the chance to apply or find itself unable to finalize a grant award? These are questions that cities or agencies should consider when trying to secure a non-Federal match.

The DOT Navigator provides additional information to help [understand non-Federal match requirements](#) and those programs that provide match flexibility:

- [Justice40 non-Federal match flexibility](#)
- [Tribal government cost share flexibility](#)
- [Rural cost share analysis](#)

Look at program-specific NOFOs. Each program's NOFO describes its specific match requirements, including the percentage required, what can be considered as non-Federal match, and if there are any waivers. If the current fiscal year's NOFO is not yet out for the program that you may be interested in applying to, check the previous year's NOFO, as it may likely be similar since Congress often dictates these requirements.

Consider strategies that may make communities in your region more competitive for funding. Some metropolitan areas, for instance, have begun to create pooled funding sources that localities can tap when a city applies for a project that supports broader regional goals.

4. Ensure Your Project Is on the TIP/STIP

Federally funded transportation projects are typically included in [metropolitan](#) and/or [statewide transportation improvement programs](#) (TIPs/STIPs). TIPs/STIPs usually cover a 4-year period of upcoming projects and are developed by the MPO and state DOT, respectively. These also can include planning or engineering studies or other pre-application technical analysis, such as a [benefit-cost analysis](#) that may be required to prepare a project for construction. If these studies are not included in

the TIP/STIP, identify how they may be locally funded so that projects have the required documents to be competitive for Federal grants.

[Contact your metropolitan planning organization and state department of transportation](#) to explore how and when your project can be included in the TIP/STIP. This will often entail a TIP/STIP amendment. Even if not a DOT program requirement to access the funds, your project's inclusion in the TIP/STIP and other comprehensive transportation documents facilitates better outcomes for your community.

5. Get Ready to Apply for and Administer Federal Funding

Get [ready to apply for and administer Federal funding](#).

Ensure that your organization is [registered with Grants.gov](#) and the System for Award Management (SAM) and has an active Unique Entity Identifier (UEI) number. Is the information provided to Sam.gov current? If there have been personnel changes in your agency, be sure that the staff contact, phone number, and email are up to date. Start the registration process early, as the SAM.gov process can take many weeks.

If you receive funding, be familiar with the Federal [2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements](#) that govern all DOT awards. This includes specifics for reporting, tracking, and monitoring financial systems and grant activities that differ from state or local requirements.

Be prepared for additional requirements. DOT grants are generally reimbursable funding, so plan and budget accordingly. Each program may have additional restrictions on eligible and allowable costs and activities. Lobbying is not an allowable cost, nor can DOT funds typically be used as a non-Federal match for other programs.

Involve [small and disadvantaged business enterprises](#) in projects and applications. Are there opportunities to strengthen the participation of these types of firms in your grant application to help build community wealth? Are you familiar with your [state's DBE resources](#)? Do these types of businesses need additional support within your community to have the capacity necessary to administer or receive Federal funding, i.e., they are also subject to 2 CFR 200?

6. Know Your Justice40 Designated Census Tracts

Know your [Justice40 designated Census Tracts](#), as many discretionary grant programs give additional consideration to projects that benefit J40 census tracts.

Find out [which areas in your community qualify as J40 census tracts](#) according to Federal disadvantaged community tools, and which of the [40 DOT J40-covered programs](#) may be especially beneficial to your community.

7. Prepare Your Capital Project's Benefit-Cost Analysis

The DOT Navigator provides [guidance on how to conduct benefit-cost analyses](#) (BCA) and a list of the DOT capital grant programs for which they are required. The BCA is a systematic process for identifying, quantifying, and comparing expected benefits and costs of a capital investment. Are there BCAs you

should be funding and executing in the current fiscal year to prepare a construction project for next year's application?

8. Budget for Meaningful Public Involvement

DOT is looking for grant proposals informed by [meaningful public involvement](#), in addition to a commitment to meaningful public involvement in the project delivery phase. DOT grant funds can be used to support a range of public involvement activities to ensure that the community is fully represented in the planning and project delivery process.

[DOT created this FAQ](#) to provide more information about eligible and allowable activities that can be worked into grant applications.

9. Build a Strong Workforce Development and Labor Plan

Establish a strong workforce development and labor plan and then highlight these efforts in your grant applications. Most DOT discretionary grants include selection criteria associated with creating good jobs and expanding workforce opportunities.

DOT created a [workforce and labor plan checklist](#) that provides a number of suggestions for how to strengthen these provisions. DOT has also created a report on [Creating a Local Construction Workforce](#), with examples of local hiring practices.

10. Understand NEPA and Other Federal Requirements as You Consider Whether to Seek Funding

DOT grant recipients must comply with a number of important civil rights and labor requirements, such as [Title VI](#), the [Americans with Disabilities Act](#), and, for capital projects, the [Davis Bacon Act](#) and [Buy America](#) are especially important provisions that may have different standards than state or local wage or procurement requirements.

Any transportation project that receives Federal funding must comply with the [National Environmental Policy Act of 1969 \(NEPA\)](#). This process involves several environmental planning policies and regulations that must be followed before the purchase of any right of way or other real estate.

For highway projects, contact your state department of transportation, and for transit projects, your [Federal Transit Administration's Regional Office](#), as they are important NEPA implementation partners and may be able to advise on whether the project should be state sponsored.

Reach out to [DOT staff in regional or division offices](#), if needed, or visit the DOT Navigator for NEPA technical resources such as:

- [NEPA | Environmental Review Toolkit](#)
- [Real Estate Acquisition Guide for Local Public Agencies](#)
- [Federal-Aid Essentials for Local Public Agencies: Right-of-Way](#)



Project Readiness Checklist for DOT Discretionary Grant Applicants

Introduction

Some U.S. Department of Transportation (DOT) discretionary grant programs review and score grant applications on “project readiness,” a term that refers to how ready an applicant is to deliver a project. Each program’s Notice of Funding Opportunity (NOFO) will state whether DOT intends to review or score the application for project readiness. Sometimes “project implementation” or “project planning” may be used to indicate the same concept.

This checklist provides generalized background and guidance on factors to consider for project readiness. It does not constitute a standard, specification, or regulation or create requirements other than those stipulated in statute and regulation.

Why is Project Readiness an Important Consideration?

For many grant programs, Congress identifies in statute the deadline by which grant funds must be committed. This is known as the *obligation date* and is always included in the NOFO. DOT NOFOs may also prioritize projects that can be obligated quickly. Many programs also have a date by which all federal grant funds must be *expended*. In most cases, any work performed after the expenditure deadline is not federally reimbursable, even if grant funds remain unspent.

A high level of “project readiness” can help ensure the project sponsor is able to meet both deadlines and that federal funds are used efficiently. Therefore, applicants should consider whether to defer applying to a program until they are sufficiently ready. This is especially important for construction projects that have additional steps that must be completed to be “project ready.”

Although the stages may vary depending on the type of contracting method used, in general the stages for construction projects include:

- Planning/Scoping Complete
- Preliminary Design Complete (~35% designed)
- Final Design Complete, Ready to Advertise (100% designed)
- Advertisement/Selection Complete, Ready to Award Contract
- Notice to Proceed Issued – Construction Begins



Project Readiness Checklist

- ☑ Complete the transportation planning process to set your project up for success.

A well-thought-out project includes stakeholder engagement and alignment with regional and/or state transportation plans, local land use and comprehensive plans, and necessary engineering and design plans. Planning efforts that may factor into project readiness include:

- Complete [meaningful public involvement activities](#)¹ and develop a plan for ongoing engagement throughout the life of the project.
- Complete the necessary project concept and scoping activities.
- Develop at least a baseline or preliminary project delivery schedule and cost estimate to complete the project.
- Ensure you have met or are able to meet federal transportation planning regulations, such as metropolitan transportation planning requirements set forth in [49 USC 5303](#) and [23 USC 134](#) and nonmetropolitan and statewide transportation requirements set forth in [49 USC 5304](#) and [23 USC 135](#).
- Coordinate at the state and/or regional level with your Metropolitan Planning Organization (MPO) if in an urban area and with the State Department of Transportation (DOT) if in a rural or urban area to ensure the project is included, or can be included within the next 12 months, on the [metropolitan](#)² and/or [statewide transportation improvement programs](#)³ (TIP/STIP).
- Engage and coordinate formal agreements, if necessary, with other relevant transportation partners such as freight rail carriers, airport or port authorities, county transportation departments, or others whose involvement or approvals may be necessary to advance your project.
- If you *will not be the direct recipient of the funds*, contact the entity that will be the direct recipient to coordinate on their environmental/National Environmental Policy Act (NEPA) compliance procedures. For instance, if the funds flow through the State DOT, MPO, or transit agency before received at the local level the entity that received the funds directly from DOT is the direct recipient.
- If you *will be the direct recipient of the funds*, you will need to identify and coordinate with the entity responsible for environmental/NEPA compliance, referred to as the NEPA lead agency. The



¹ USDOT Volpe Center, Project Delivery Center of Excellence Project Delivery Toolbox, “Public Engagement”, <https://www.volpe.dot.gov/project-delivery/toolbox/public-engagement>.

² USDOT Federal Transit Administration, “Transportation Improvement Program (TIP)”, <https://www.transit.dot.gov/regulations-and-guidance/transportation-planning/transportation-improvement-program-tip>.

³ USDOT Federal Transit Administration, “Statewide Transportation Improvement Program (STIP)”, <https://www.transit.dot.gov/regulations-and-guidance/transportation-planning/statewide-transportation-improvement-program-stip>.

NEPA lead agency will generally be the federal agency (identified in the NOFO) distributing the funds. Most State DOTs and some transit agencies lead the process for projects that qualify for a Categorical Exclusion (CE).

Plan for completion of environmental review and permitting requirements.

Any construction project that receives federal funding must comply with federal environmental laws, including but not limited to the [National Environmental Policy Act of 1969 \(NEPA\)](#)⁴. These often entail different requirements from those at the state level. Applicants should be aware, for example, that in most cases they must complete NEPA before they can proceed to final design and acquire real property.

For planning projects, check the program NOFO to see what types of planning activities the discretionary grant can fund, including for NEPA and other environmental planning activities.

Below are some tips for navigating federal environmental review and permitting requirements:

- The NOFO will indicate if the costs associated with planning and NEPA compliance are reimbursable, may be covered by advanced payment, or are an ineligible grant expense. If they are eligible expenses, determine if you will use grant funds for this purpose and indicate that in the grant application as part of the project budget.
- Walk the site and create a map of your project that includes any buildings and historic or environmental resources that you are aware of as a starting point. When you consult with your environmental lead agency for the project, they may ask for such a map to help determine what level of documentation will be required.

NEPA Class of Action

Compliance with NEPA will require preparation of one of three types of documents, referred to as 'Class of Action.' They are a Categorical Exclusion (CE), an Environmental Assessment (EA), and an Environmental Impact Statement (EIS).

- CE is a category of actions that, based on federal experience with similar actions, do not involve significant environmental impacts. Different operating administrations within DOT have different types of CEs. See, for example [CE guidance for projects funded by the Federal Transit Administration](#) versus [CE guidance for projects funded by the Federal Highway Administration](#).
- An EA determines whether a federal action has the potential to cause significant environmental effects while an EIS is required for projects that significantly affect the quality of the human environment and require the most analysis and documentation to demonstrate compliance with applicable environmental laws and executive orders.
- Some projects, for example those that fall within the operational right-of-way of an existing transportation facility and/or those do not require ground disturbing activities, may only require a simple CE to comply with NEPA/environmental requirements.
- Projects that require relocations or impacts to historic or environmental resources may require more extensive environmental analysis and documentation. In these cases, consider hiring a consultant to help with the process. If you intend to hire a consultant to assist with preliminary design, environmental compliance may be included in their scope of work.

⁴ USDOT, "NEPA Resources", <https://www.transportation.gov/tiger/nepa-resources>.

- Consider the environmental review and approval timeline in the context of grant obligation requirements – can your project be reasonably expected to receive necessary approvals in advance of the NOFO’s published obligation deadline? Ideally, you will be able to indicate which agency is the lead agency for NEPA/environmental process and the appropriate Class of Action for your project when you complete the grant application. Determine where your project is in the [environmental review and approval process](#)⁵; if applicable, document receipt of environmental permits and approvals (including Federal, state, and local authorizations).
- Develop a clear schedule for the completion of any outstanding environmental reviews/authorizations, if applicable. For example, document timelines for public engagement, submission of applications to authorizing federal agencies, and expected timelines for decisions from agencies. For projects that require an EA or EIS, applicants should start or complete the NEPA process before applying.

Consider your project’s civil rights compliance and equity considerations and outcomes.

Federal public involvement and [equity requirements](#)⁶ can help an individual project contribute to a more equitable overall transportation system. Consider, for example:

- Does your project comply with [Civil Rights \(Title VI\)](#)⁷ requirements, including specifically to prohibit discrimination in the workplace?
- Does your project comply with [Americans with Disabilities Act \(ADA\)](#)⁸ requirements? Find more information about incorporating accessibility in transportation projects in [this FAQ](#)⁹.
- Does your project comply with [Build America Buy America](#)¹⁰ requirements? Different operating administrations have different requirements and waivers for types of products. Check to see what information may be available for your specific program or its sponsoring agency.
- Do you have a [workforce development plan](#)¹¹ or other provisions that can help to create job and job training or apprenticeship opportunities associated with delivering the project?



⁵ USDOT Volpe Center, Project Delivery Center of Excellence Project Delivery Toolbox, “Environment”, <https://www.volpe.dot.gov/project-delivery/toolbox/environment>.

⁶ USDOT Volpe Center, Project Delivery Center of Excellence Project Delivery Toolbox, “Equity”, <https://www.volpe.dot.gov/project-delivery/toolbox/equity>.

⁷ Department of Justice, Civil Rights Division, “Title VI Of The Civil Rights Act Of 1964 42 U.S.C. § 2000d Et Seq.”, <https://www.justice.gov/crt/fcs/TitleVI-Overview>.

⁸ Federal Highway Administration, “Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973 (504)”, <https://highways.dot.gov/civil-rights/programs/americans-disabilities-act-ada-and-section-504-rehabilitation-act-1973-504>.

⁹ USDOT Navigator, “Frequently Asked Questions on Incorporating Accessibility in Transportation Projects”, <https://www.transportation.gov/grants/dot-navigator/frequently-asked-questions-incorporating-accessibility-transportation-projects>.

¹⁰ Office of Acquisition Management, “Build America Buy America”, <https://www.commerce.gov/oam/build-america-buy-america>.

¹¹ USDOT Navigator, “Grant Application Checklist for a Strong Transportation Workforce and Labor Plan”, <https://www.transportation.gov/grants/dot-navigator/grant-application-checklist-for-strong-workforce-and-labor-plan>.

Ensure you have the ability to secure the [non-federal share](#)¹² according to the program’s requirements identified in the NOFO.

DOT understands that projects may not have their non-federal match requirement secured before knowing if their project has been selected for a grant award. Significant delays in finalizing these resources, however, can slow down grant agreement approvals.

[Familiarize yourself with non-federal match requirements](#)¹³ generally, and specifically to your program’s requirements as there are differences in terms of what is required, what can be counted as match, and how to calculate match.

Keep project partners informed about the status of your application, working with them to secure non-federal match funds if selected for award.

Ensure your organization has sound project management systems and sufficient staffing.

In addition to project readiness, consider the readiness of your organization to manage the project and meet federal grant requirements. Soon after your grant award is announced, you will receive an initial communication from DOT or one of its operating administrations (FHWA, FRA, FTA, FAA, OST, MARAD, FMCSA, NHTSA, PHMSA) with a “point of contact” for your grant. For grant programs that require an executed grant agreement for funds to be obligated, you will also receive a copy of the grant agreement or grant agreement template. Some grant programs, like [RAISE](#)¹⁴, have published grant agreements from past grant years on the DOT website, so you can check to see the type of provisions and requirements included.

Grant recipients must comply with financial and permitting requirements and all applicable federal laws. DOT and its operating administrations provide technical assistance resources to help navigate and meet these requirements, but preparing your organization for success can help expedite the grant agreement process considerably.

Trained, coordinated staff and efficient [project management systems](#)¹⁵ will help ensure you can move your project quickly from award to obligation. Communities have different levels of capacity depending on their size and financial resources or experience with administering federal grants. There is no one-size-fits-all approach and sometimes other partner organizations can help to provide, supplement, or grow your organization’s capacity. DOT staff can also assist you in working through the process. The following may be useful to consider:

- Identify a lead project manager and/or point of contact for your organization that will be dedicated to seeing the project through the process.

¹² USDOT Navigator, “Understanding Non-Federal Match Requirements”, <https://www.transportation.gov/grants/dot-navigator/understanding-non-federal-match-requirements>.

¹³ Ibid.

¹⁴ USDOT, “RAISE Grant Agreements”, <https://www.transportation.gov/policy-initiatives/raise/raise-grant-agreements>.

¹⁵ USDOT Volpe Center, Project Delivery Center of Excellence Project Delivery Toolbox, “Project Management”, <https://www.volpe.dot.gov/project-delivery/toolbox/project-management>.

- Identify which external entities or departments within your organization need to approve your project or have a material stake in the project. Have your project manager initiate regular communications and/or meetings with those entities.
- Consider creating a project team that may be comprised of representatives within your organization and representatives of key external entities.
- Develop a project activity work plan, schedule, and process that includes all major project milestones achieved and outstanding.
- Identify and discuss potential risks to the successful delivery of the project and plan for how you may address risks as they arise. Build potential risks and delays into your project schedule.

Develop a clear plan for project financing and management of the grant.

Receiving a grant from DOT is only one piece of the [federal grant financing process](#)¹⁶. Federal grants must comply with [Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards \(2 CFR 200\)](#)¹⁷. To help determine your readiness, consider:

- Does your organization have the financial capacity and expertise to implement a federal grant? Have you managed other DOT grants and do you have familiarity with the [grant management requirements and necessary reporting systems](#)¹⁸?
- Do you want to consider having your State DOT play an administrative support role (see step 4 on the ["Is Federal Funding the Right Fit for my Organization?" webpage](#)¹⁹)? If you do, you will need a formal agreement with them and should include funding for this in your grant proposal budget.
- Can you demonstrate that you will be able to obligate funds by the statutory deadline, if applicable, even if delays occur?
- Do you have systems in place to track and monitor the budget and report on project progress?



Being selected to receive a federal discretionary grant for your project is a major accomplishment! DOT is committed to ensuring that every community can access historic [Bipartisan Infrastructure Law \(BIL\)](#)²⁰ funding and to working with grantees to ensure successful delivery of projects to improve mobility and access for all.

¹⁶ USDOT Volpe Center, Project Delivery Center of Excellence Project Delivery Toolbox, “Financing”, <https://www.volpe.dot.gov/project-delivery/toolbox/financing>.

¹⁷ Code of Federal Regulations, “Part 200—Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards”, <https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200>.

¹⁸ Federal Highway Administration, Local Aid Support, “Bipartisan Infrastructure Law (BIL) and Federal Requirements - Guidance for Local & Tribal Agencies”, https://www.fhwa.dot.gov/clas/training_tools/bil_fed_requirements_guidance.aspx.

¹⁹ USDOT Navigator, “Is Federal Funding the Right Fit for My Organization?”, <https://www.transportation.gov/grants/dot-navigator/federal-funding-right-fit-my-organization>.

²⁰ USDOT, “Bipartisan Infrastructure Law”, <https://www.transportation.gov/bipartisan-infrastructure-law>.

Additional Resources

The resources below are intended to help DOT funding applicants get “project ready.” This list is not exhaustive.

General Resources

- **Project Delivery Center of Excellence’s Project Delivery Toolbox and helpful links**
 - <https://www.volpe.dot.gov/project-delivery-toolbox>
 - <https://www.volpe.dot.gov/project-delivery/about/helpfullinks>
- **Is Federal Funding the Right Fit for My Organization? (DOT Navigator):** <https://www.transportation.gov/grants/dot-navigator/federal-funding-right-fit-my-organization>
- **Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200):** <https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200>
- **Bipartisan Infrastructure Law (BIL) and Federal Requirements - Guidance for Local & Tribal Agencies:** https://www.fhwa.dot.gov/clas/training_tools/bil_fed_requirements_guidance.aspx
- **ROUTES Grant Application Toolkit:** <https://www.transportation.gov/rural/grant-toolkit>

Environmental Resources

- **CE Guidance for Projects Funded by FTA:** <https://www.transit.dot.gov/regulations-and-programs/environmental-programs/preparing-environmental-documents#Categorical-Exclusion-CE>
- **CE Guidance for Projects Funded by FHWA:** https://www.environment.fhwa.dot.gov/nepa/programmatic_ce.aspx
- **Companion Resource for NEPA Compliance and Class of Actions (FHWA):** <https://www.fhwa.dot.gov/federal-aidessentials/companionresources/36nepacompliance.pdf>
- **Preparing Environmental Documents (FTA):** <https://www.transit.dot.gov/regulations-and-programs/environmental-programs/preparing-environmental-documents>
- **FHWA’s Programmatic Mitigation Planning Guidebook:** https://www.environment.fhwa.dot.gov/pubs_resources_tools/publications/case_studies/ProgMitPlanningGuidebook_10-4-2023.pdf
- **Federal Infrastructure Permitting Dashboard:** <https://www.permits.performance.gov/>

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