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**28-30 Regional Flexible Fund - New Project Bond
Development Process, Updates, and Input**
Work Session Topic

Metro Council Work Session
Tuesday, January 14, 2025

COUNCIL DIRECTION ON THE 2028-2030 REGIONAL FLEXIBLE FUNDS ALLOCATION

Date: December 30, 2024
Department: Planning & Development
Meeting Date: January 14, 2025

Prepared by: Grace Cho,
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Presenter(s): Catherine Ciarlo, Ted
Leybold, Grace Cho
Length: 45 minutes

ISSUE STATEMENT

In Metro role as the federally designated Metropolitan Planning Organization (MPO) – must conduct the activities associated with selecting regional transportation investments funded with the region’s allotment of federal funds, commonly known as Regional Flexible Funds. As a relatively small (~5%), but important piece of the region’s total funding spent on transportation, historically, the region strategically invested Regional Flexible Funds in transportation programs and capital projects critical to advancing the Regional Transportation Plan (RTP) that otherwise would not get implemented or implementation would be significantly delayed. The investment mechanism employed in the past is to bond Regional Flexible Funds as matching funds to leverage significant federal discretionary funding for the region’s high capacity transit system.

Since kicking off the process for the 2028-2030 Regional Flexible Fund Allocation (RFFA) in February 2024, the Metro Council adopted Resolution 24-5415, the 2028-2030 Regional Flexible Fund Allocation (RFFA) Program Direction in July 2024. As part of the adopting action, regional leadership agreed to move forward with developing a new project bond proposal (also referred to as Step 1A.1) for consideration by the region. The development of the bond commitment proposal is concurrent to the Step 2 allocation of Regional Flexible Funds to local transportation projects. The funding available in the Step 2 allocation in the current cycle and future cycles are directly affected by the decision on the Step 1A.1 new project bond proposal.

Under the direction of the bond purpose and principles adopted in the Program Direction, the focus of the new project bond proposal is on regional and corridor scale transit. The Program Direction includes other key objectives for the bond development process and final proposal. Additional factors including partner and public input, technical analyses, and bonding mechanism requirements are to influence the bond proposal. After a nomination period held in summer 2024 and an eligibility screening undertaken in early fall 2024, nine (9) candidate projects are in consideration (Attachment 1) reflecting different categories of transit projects, reflecting the three different transit categories – large transit capital, safe access to transit, and transit vehicle priority – in which projects can be nominated. A portion of the technical analyses – a candidate project evaluation – was completed in December 2024, with the results shared with regional partners on how well projects performed towards advancing the Program Direction objectives specified for the bond.

Using the technical information as one input, now regional partners are asked to give input towards concepts/themes to direct staff in the development of bond scenarios. The input is to prioritize up to five bond scenarios, which will then get assessed for the financial implications to the Regional Flexible Funds program.

At the outset of the 2028-2030 Regional Flexible Fund Allocation cycle, Metro staff briefed Councilors on the schedule and solicited input on key outcomes they wish to see result from cycle. Input on the general Regional Flexible Fund Allocation program and Step 2 was provided. Emphasis of input was placed on the development of the bond proposal. This included a desire to see a bond proposal developed in consideration of federal discretionary leveraging opportunities, strategically investment of regional dollars to garner large greater impact towards the region's goals, maintaining a fiscally responsible level of debt that does not harm other allocations part of the Regional Flexible Fund, and ensuring region-wide investment.

Based on Council input as well as input from TPAC, JPACT, and regional partners, this staff report updates on the Step 1A.1 process to date and solicits further input on bond investment packages (also known as scenarios). The Council input on bond scenarios will then lead into the financial analysis of scenarios to further understand whether Council objectives identified at the beginning of the process are being met.

Council will be requested to take action on a resolution to adopt the final selection of investments and projects to be funded through the bond (Step 1A.1) and Step 2. This is scheduled to occur in July 2025.

ACTION REQUESTED

Staff requests input on utilizing an approach that balances performance across all of the identified objectives to help shape bond scenarios to undergo further financial analysis.

IDENTIFIED POLICY OUTCOMES

The 2023 RTP identifies five goal areas for transportation investments. These are:

- a. **Equitable Transportation** – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.
- b. **Safe System** – Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.
- c. **Climate Action and Resiliency** – People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.
- d. **Mobility Options** – People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming

- e. **Thriving Economy** – Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.

In their 2023 direction, Metro Council determined these goals should be emphasized in the upcoming RFFA process.

The adopted Program Direction included as a bond principle, the identified projects within the preferred bond investment package, “significantly and comprehensively advance the RTP goals of safe system, equitable transportation, mobility options, thriving economy, and climate action and resilience.” As a result, the Step 1A.1 development process incorporated a technical evaluation to assess how each candidate project advances the implementation of the 2023 RTP and progresses towards the region’s five goals. The technical evaluation resulted in showing all nine candidates advance the region towards the 2023 RTP goals. Candidate projects associated with large transit capital infrastructure tended to perform best at advancing the RTP goals as compared to the other categories, but projects within the same categories performed similarly. (Further detail on the technical analysis can be found in Attachment 3.)

POLICY QUESTION(S)

Regional Flexible Fund investments fulfill the region’s various responsibilities as a Metropolitan Planning Organization (MPO), and to meet state requirements and investment agreements related to air quality, greenhouse gas emissions, and mobility options. Knowing that, a main objective of the Regional Flexible Funds Allocation process is to strategically direct these dollars to fulfill critical parts of RTP policy and meet multiple mandates. Since these funds may be used on a wide variety of transportation system needs, these funds have been used on important system investments where other funding sources are limited or unavailable.¹ In particular, bonding Regional Flexible Funds has advanced the implementation of the region’s high capacity network, which implements multiple RTP policies and fulfills key portions of the strategies to meet state requirements. As a calculated financing tactic, bonding Regional Flexible Funds resulted in leveraging over \$2.2 billion in matching federal discretionary dollars.

As the region considers bonding Regional Flexible Funds once again in order to advance regional and corridor scale transit projects, staff seeks Council input on:

1. Utilizing an approach that balances maximizing acceptable performance across all the bond themes of: RTP outcomes performance, leveraging of other funds, inclusion of all transit category types, corridor scale projects, project readiness, and geographical representation, to develop bond package scenarios to undergo further financial analysis and inform the selection of a preferred bond package.
2. Any other input to the Step 1A.1 new project bond proposal development process that may better reflect regional priorities.

¹ To the degree of flexibility federal transportation funding can provide.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

The next step in the development of the new project bond proposal is to create scenario/investment packages to evaluate the financial implications. To support the development of the bond scenarios, the technical evaluation results and the input received from regional and county coordinating committees on themes and concepts are the basis for beginning scenario development. The following bullets outline a summary of the major themes heard through the committees and discussions with the JPACT Metro Councilors.

- Maximize advancing the RTP goals and outcomes, with particular emphasis on equity, safety, and climate.
- Ensure the costs of bonding creates positive value and therefore:
 - Emphasize discretionary funding leverage
 - Take into account project readiness for implementation
- Represent a mix of transit investment types by having the three transit project categories represented
 - Honor the deliberation by JPACT to expand bonding for other types of transit projects beyond high capacity transit.
- Emphasize regional and corridor-scale projects meeting regional needs.
- Ensure all Program Direction objectives are met, including having regional flexible funds invested throughout the region
 - To create public support and unified lobbying power for federal discretionary dollars.

Metro staff aims to have a limited and manageable number of bond scenarios taken through the detailed financial assessment to understand the overall commitment, tradeoffs, and costs for advancing revenues. In addition, Metro plans to provide reference scenarios, such as a No Bonding scenario, to provide context for a bonding recommendation. As previously stated, the preferred bond scenario acted upon by TPAC and JPACT will need to meet all the objectives outlined by the 2028-30 RFFA Program Direction.

Based on the inputs available to date, Metro staff developed an initial draft set of scenarios which focuses on maximizing an individual theme. Table 1. outlines the draft scenarios according to the theme and input received. The theme of funding projects throughout the region (geographic representation) is not an individual project performance theme, but rather assessed on the package of projects identified. It may be utilized, along with other bond packaging considerations, such as the financial analysis, as a factor in selecting projects to include in a proposed bond package.

Table 1. Bond Scenarios to Maximize Individual Themes

Scenario	<i>Maximized RTP Outcomes</i>	<i>Leverage</i>	<i>Categorical Representation</i>	<i>Regional/Corridor Scale</i>	<i>Readiness</i>
Projects	82 nd Avenue Transit Project	82 nd Avenue Transit Project	82 nd Avenue Transit Project	82 nd Avenue Transit Project	82 nd Avenue Transit Project
	TV Highway Transit Project	TV Highway Transit Project	TV Highway Transit Project	TV Highway Transit Project	TV Highway Transit Project

	Montgomery Park Streetcar Extension	Montgomery Park Streetcar Extension	Better Bus Program	Sunrise Gateway Corridor Project	Montgomery Park Streetcar Extension
	Transit Access and Vehicle Priority – Burnside Bridge	Transit Access and Vehicle Priority – Burnside Bridge	Sunrise Gateway Corridor Project	Transit Access and Vehicle Priority – Burnside Bridge	Transit Access and Vehicle Priority – Burnside Bridge
	OR99E (McLoughlin Boulevard)	185 th MAX Overcrossing			
Other Themes Achieved					
Readiness	high	medium-high	medium-low	medium	high
Leverage	high-medium	high	medium-low	medium	high
RTP Outcomes	high-medium	medium-high	medium	medium-high	high
Category Representation	high	medium	high	high	medium
Corridor/Regional Scale	medium	medium	medium-high	high	medium-high
Geographic Representation	high	low	high	high	low

These draft bond scenario concepts try to maximize performance according to an individual theme. *As identified in the “other themes achieved”* section of the table, maximizing performance under one theme can conflict with other themes. For example, themes which aim to maximize funding leverage opportunities, readiness, and RTP goals advancement contrasts against Program Direction objectives to represent investments across the region or regional partner input on priorities that recognize the different state of transit system development in differing parts of the Metro region by investing in different types of transit projects with bond proceeds.

Based on the initial exercise in shaping bond scenarios, Metro staff propose approaching the bond scenario development with the aim to achieve a balance of maximizing acceptable performance across all the bond themes rather than prioritizing a single theme or input. The development of these scenarios will be informed by the input and performance analysis to date. These scenarios will be utilized, along with financial analysis of bond funding capacity and costs and program direction objectives, to frame the development of a preferred bond proposal.

Metro staff is seeking any Council guidance on this approach or input on balancing the Program Direction themes and objectives.

Financial assessment has not begun on the bond scenarios, so at this time it is still undetermined as to whether the scenario as an investment package can meet certain key bond principles as outlined in the Program Direction. Lastly, at this time, a bond mechanism remains unselected, but Metro staff has worked to identify the two most likely bond mechanisms to utilize. Working under an assumption with the two most likely bond mechanisms, Metro staff has calculated the available bond proceeds ranges between \$70 million at the low end to \$84 million at the highest end. In exchange for the proceeds, the ultimate cost of bonding, in year of expenditure, is estimated to be \$109 million at the low end and \$127 million at the high end.

STAFF RECOMMENDATIONS

None at this time.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

One of Metro's duties as a Metropolitan Planning Organization (MPO) in carrying out the metropolitan planning process is to allocate federal funds. Every three years, Metro begins a process to allocate funding in three-year timeframes. Regional Flexible Funds are allocated to programs and capital projects. The RFFA process generally takes 18-22 months to complete. Capital projects selected in the RFFA process are to be ready for funding obligation during federal fiscal years 2028-2030 and will be included in the 2027-2030 Metropolitan Transportation Improvement Program (MTIP).

As a component of the State Transportation Improvement Program (STIP), the MTIP development timeline is driven largely by the Oregon Department of Transportation (ODOT) timeline for adopting the 2027-2030 STIP. This schedule calls for the draft STIP to be made available for public comment in early 2026. To conform to this timeline, the 2028-2030 RFFA must be finalized by summer 2025 in order to incorporate the awarded projects into the draft 2027-2030 MTIP document. This means a Program Direction must be adopted by late spring or early summer 2024 in effort to conduct the Step 2 allocation process. Staff drafted a schedule which calls for JPACT and Council to take action on the entire 2028-2030 RFFA investment package in summer 2025. Adhering to this timeline for the RFFA decision is critical to meet the MTIP and STIP development schedule.

RFFA Program Direction and Development of New Project Bond (Step 1A.1)

The RFFA Program Direction documents how the regional flexible funds are to be spent to carry out the policy objectives and investment priorities of the adopted RTP. In July 2024, Metro Council adopted Resolution 24-5415, the 2028-2030 RFFA Program Direction which defined four parts of the Regional Flexible Fund program and guided by the goals and policies set by the Regional Transportation Plan (RTP). These four parts are:

- Step 1A – Existing debt service repayments for existing project bonds
- Step 1A.1 – New project bond proposal
- Step 1B – Regional Programs (e.g. Regional Travel Options, Transit-Oriented Development)
- Step 2 – Competitive allocation to local projects

As part of the adoption action, the region agreed to move forward to develop a new project bond (known as Step 1A.1) for regional consideration. If adopted, the Step 1A.1 will get incorporated into Step 1A.

At an estimated amount of available Regional Flexible Funds for the 2028-2030 cycle is \$153 million dollars. With the adoption of the Program Direction in July, the Step 1A and the Step 1B allocations are set. These are:

- Step 1A – \$51.78 million
- Step 1B – \$40,580,629

Without consideration of a new project bond or expansion of a Step 1B regional program, the remaining balance of Regional Flexible Funds would make up the amount available for Step 2. Step 2 funding for local capital projects on the regional transportation system is a critical funding source for local agencies at a time when transportation funding for local capital projects is highly limited. Until the decision on the new project bond (Step 1A.1) action is taken, the amount of available funding to allocate for Step 2 remains as a general range knowing future Regional Flexible Funds bond obligation payments (Step 1A) would receive priority. Therefore the decision to proceed with a new bond commitment presents a risk of potential reductions to remaining Step 1B region-wide programs and planning and to Step 2 funding.

Part of the impetus for pursuing a new project bond proposal for the 2028-2030 timeframe is because region's scheduled bond repayments decrease by approximately \$13.5 million, creating newly available unencumbered Regional Flexible Funds. The region's history to strategically utilize project bonding to build out regional transportation projects resulted in the region securing over \$2 billion dollars in federal grants and other state and local funding to projects awarded previous bond funding, including the MAX light rail system and Division Transit Project.² At this time, Metro is involved with two high capacity transit projects preparing to enter the Federal Transit Administration Capital Investment Grant (CIG) process, where the projects would become eligible for upwards of \$150 million in federal discretionary matching funds. Bond proceeds for these two candidate projects would further position and make the two high capacity transit projects more competitive in the CIG process.

The Program Direction directs Metro staff to develop a new project bond proposal utilizing a portion or approximately the \$13.5 million in capacity created by the cost reduction of dedicated payments to existing bond commitments in the 2028-2030 cycle. In developing the proposal for consideration, the Program Direction outlines explicit objectives the final bond proposal must accomplish, as described in the following sections.

New Project Bond Purpose

As adopted in the Program Direction, the new Regional Flexible Fund project bond would serve the following purposes, consistent with previous project bond commitments undertaken with Regional Flexible Funds:

² Does not include funds leveraged by the Better Bus program, active transportation projects which received bond proceeds and three major arterial projects – OR 217, Rose Quarter, and I-205.

- A method to utilize regional revenues on regional or corridor scale projects.
- Advance the ability to construct projects earlier than would otherwise be possible.
- Leverage significant discretionary federal revenue that will otherwise be allocated to other metropolitan areas.
- Continuing the past practice to use bonded RFFA revenues to advance transportation projects that improve equitable access to jobs and services, reduce climate impacts, and improve safe travel on the transportation system.

New Project Bond Principles

Based on partner input, experience with previous bonding, and identified good administrative practices, a new bond proposal should address and balance the following principles:

- The allocation of bond proceeds is made in consideration of other transportation spending in the region by other agencies and of the Metro allocation of Carbon Reduction Program funds.
- The new project bond size and scale are to be a reasonable balance between the overall objectives of the Regional Flexible Fund, which includes:
 - Contribute toward regional-scale projects of high impact on priority regional outcomes
 - On-going support for programmatic regional transportation investments
 - Support for smaller capital projects that are impactful on regional outcomes
- Attempts to maintain prior funding levels of Existing Step 1 programmatic allocations and Step 2 capital project funding (with the previously established 3% annual growth rate) for forecasted revenues in 2028-2030.
- Keeps a debt payment to forecasted revenue ratio at a level that minimizes the risks of severe reductions to other Step 1 programs and Step 2 capital projects in the case of revenues being less than forecasted in all future years.
- Is a reasonable trade-off between the advantages of funding priority projects earlier than would otherwise be possible with the reduction in purchasing authority for future allocation cycles.
- Is made available for public comment during the 2028-2030 RFFA cycle comment and decision period.
- Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Improvement Grant projects.
- Attempts to contain extension of bond commitment beyond the next four RFFA cycles (through the year 2039) to preserve the ability of future JPACT and Metro Council bodies the ability to direct spending to priority projects and to minimize risk to the agency guaranteeing the bonding of these revenues.

New Project Bond Development Process to Date

Following the adoption of the 2028-2030 Regional Flexible Fund Program Direction, where regional leadership agreed to move forward in the development of a new project bond proposal for consideration, Metro held a project nomination period in late summer 2024.

Following a six week nomination period where Metro staff were available for consultation to discuss different project ideas, a total of 10 project nominations were received for the new project bond. Subsequently in early fall 2024, an eligibility screening was conducted where one nomination was deemed ineligible to proceed due to the nominated project not being included in the financially constrained Regional Transportation Plan (RTP). Once the screening was finalized, a total of nine (9) bond nominations underwent a candidate project evaluation. The candidate project consists of three separate evaluations which assesses 1) the consistency towards the bond purpose and principles; 2) the performance towards Regional Transportation Plan outcomes; and 3) project delivery risks outstanding. The technical information provided is one of many inputs and to assist decisionmakers in shaping different bond scenarios and the eventual selection of a preferred bond scenario for regional consideration.

Metro staff conducted the first two evaluations. For the bond purpose and principles evaluation and the RTP goals advancement, each project was evaluated based on the objectives as identified in Program Direction. The third evaluation focused on project delivery, where Metro utilized an external firm to assess the delivery challenges of each individual project in need of addressing. The analysis of the individual projects lead to the following summary of results and findings. Further detail of the methodology and results can be found in Attachment 3.

Table 2. Candidate Project Evaluation Results

2028-3030 Regional Flexible Fund Allocation: Step 1A.1 Candidate Project Performance Evaluation Results Summary												
Evaluation Section	Measure	Capital Investment Grant (CIG)/Large Transit Projects			First/Last Mile & Access to Transit Projects				Transit Vehicle Priority			
		Montgomery Park	82nd Ave	TV Highway	Sunrise	Burnside Bridge	OR99E	72nd Ave	185th Overcross	Better Bus	Burnside Bridge	
Bond Purpose & Principles Consistency	Use regional revenues on regional or corridor scale projects											
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.											
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro											
	Leverage significant discretionary federal, state and/or local funding											
RTP Goals & Outcomes Advancement	Improves transit service for residents in an Equity Focus Area											
	Increases speed, frequency and reliability of high capacity transit											
	Provides safer and more convenient access to transit											
	Improves access to jobs and essential services by transit											
	Identified by communities who face disparities in the transportation system as a priority											
Project Delivery Assessment	Number of mitigations	3	2	2	3	1	1	1		2	2	1
	Level of mitigation effort	Med/Med/Low	Low/Low	Low/Med	Low/Low /Med	Low	Med	Low		Low/Low	Low/Low	Low

The following are findings from the technical evaluation.

- Candidates which comprehensively packaged elements from more than one transit project category (e.g. major transit capital infrastructure, pedestrian transit access,

and signal priority) performed best in advancing RTP outcomes. The comprehensive packaging and the scale of the capital project better advance regional goals.

- Nonetheless, all the candidate projects demonstrated RTP goals advancement. Some candidate projects tended to show greater local impact in advancing RTP outcomes. Candidate projects within the same categories (e.g. transit vehicle priority) tended to perform similarly in advancing RTP goals.
- Candidates which have a funding strategy that matches the program direction performed best in the bond purpose and principles consistency assessment.
 - Articulation specifically on the role the bond proceeds play in leveraging other funding and targeting different discretionary opportunities and local commitment of funding effected the different ratings for the candidate projects.
- While each project is in different stages of development, the project delivery assessment identified at least one or more areas of project delivery challenges for each candidate, with mitigations needed for project delivery.
 - The nominating agencies demonstrated an awareness of the project delivery challenges the candidate project faces and seek to address those challenges through their development processes. This led to no one candidate project receiving a high mitigation effort rating.
 - Project development only candidates tend to show ability to deliver the project development work as proposed with the bond proceeds, but additional project delivery mitigations will be needed in progressing the project into construction.
 - The major transit capital candidates were assessed under additional criteria specific to the Federal Transit Administration (FTA) Capital Investment Grant (CIG) process. The results highlight the additional rigor required of those candidate projects to meet project delivery milestones in efforts to meet the CIG program requirements.

BACKGROUND

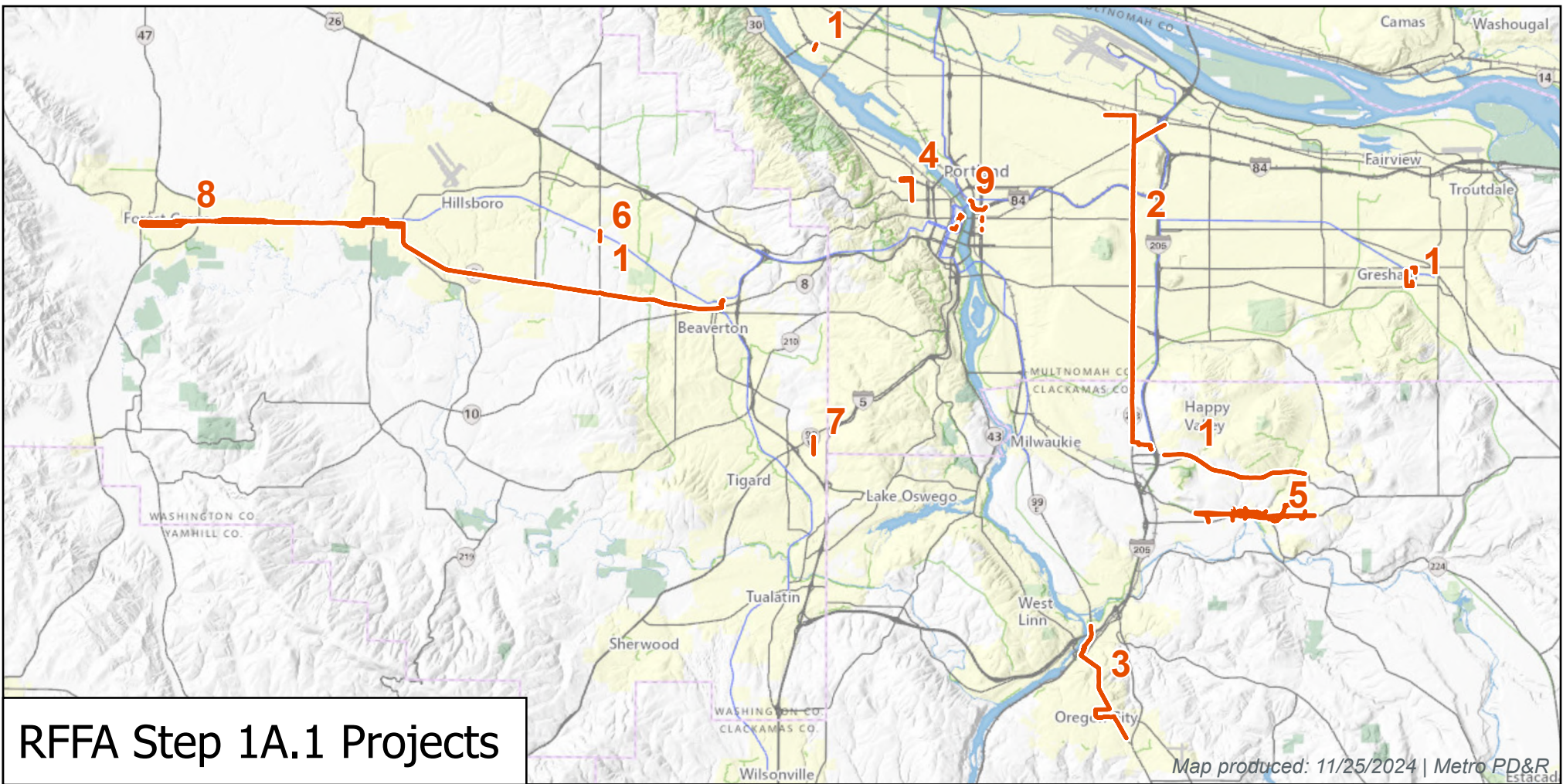
See Attachment 4 which provides an overview of the 2028-2030 Regional Flexible Fund Allocation Step 1A.1 schedule.

ATTACHMENTS

- Attachment 1 – Summary of Candidate Projects in Consideration for the 2028-2030 Regional Flexible Fund Step 1A.1 New Project Bond
- Attachment 2 – Resolution 24-5415, Exhibit A – 2028-2030 Regional Flexible Fund Allocation Program Direction
- Attachment 3 – Memo on the Technical Evaluation Results for the New Project Bond Candidate Projects
- Attachment 4 – 2028-2030 Regional Flexible Fund Step 1A.1 Next Steps

[For work session:]

- Is legislation required for Council action? Yes No



RFFA Step 1A.1 Projects

Map produced: 11/25/2024 | Metro PD&R

Map Label	Project Name	Applicant	Application Category	Funding Request
1	Better Bus Program [Representative projects]	Metro	Transit Vehicle Priority	\$11,000,000.00
2	82nd Avenue Transit Project	TriMet	CIG	\$30,000,000.00
3	OR99E First and Last Mile and Safe Access to Transit Streetscape Enhancements	City of Oregon City	First-Last Mile/Safe Access	\$9,000,000.00
4	Portland Streetcar: Montgomery Park Extension	City of Portland	CIG	\$20,000,000.00
5	Sunrise Gateway Corridor/Hwy 212	Clackamas County	First-Last Mile/Safe Access	\$15,000,000.00
6	SW 185th Avenue MAX Overcrossing Project	City of Hillsboro	Transit Vehicle Priority	\$12,618,499.00
7	72nd Ave. Phase 1 Tigard Triangle Corridor Improvements	City of Tigard	First-Last Mile/Safe Access	\$15,904,000.00
8	Tualatin Valley Highway Transit Project	TriMet	CIG	\$30,000,000.00
9	Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project	Multnomah County	Combined First-Last Mile and Transit	\$25,000,000.00



2028-30 Regional Flexible Funds Allocation

Step 1A.1 – New Project Bond Nominations

Table of Contents

1. **City of Portland** - Portland Streetcar: Montgomery Park Extension
2. **Clackamas County** - Sunrise Gateway Corridor/ Hwy 212
3. **Hillsboro** - SW 185th Avenue MAX Overcrossing Project
4. **Metro** - Better Bus Program
5. **Multnomah County** - Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project
6. **Oregon City** - OR99E (McLoughlin Boulevard) First and Last Mile and Safe Access to Transit Streetscape Enhancements
7. **Tigard** - 72nd Ave. Phase 1 Tigard Triangle Corridor Improvements
8. **TriMet** - Tualatin Valley Highway Transit Project
9. **TriMet** - 82nd Avenue Transit Project



Portland Streetcar: Montgomery Park Extension

City of Portland - PBOT

Application Category

- Capital Investment Grant

Draft Cost Estimate

- \$120 Million

Funding Request

- \$20 Million

Timeline

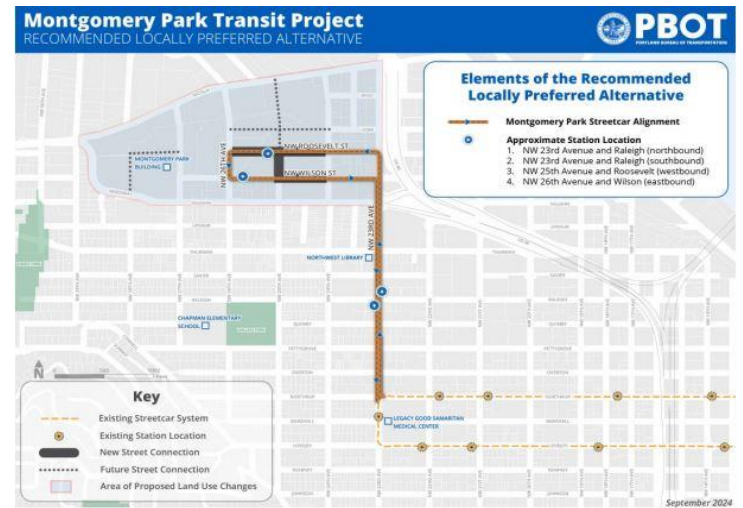
Construction from 2028 - 2030

Description and Purpose

The Portland Streetcar Montgomery Park Extension will extend the Portland Streetcar North-South Line from its existing terminus at NW 23rd Avenue and NW Northrup Street to a new terminus at NW 26th Avenue and NW Wilson Street near Montgomery Park in Northwest Portland. The Project will support a new transit-oriented mixed-use district west of Highway 30 between NW Nicolai and NW Vaughn streets, where underutilized industrial land is proposed to undergo land use changes to employment- and housing-supportive mixed uses.

Project Components

- Construct two-way streetcar tracks on NW 23rd Avenue (NW Wilson to NW Northrup) for future transit demand.
- Build one-way couplet tracks on NW Roosevelt St. (westbound) and NW Wilson St. (eastbound) and connect NW 26th Avenue (southbound).
- Extend NW Roosevelt and NW Wilson Streets to improve streetcar access, safety, and local connectivity.
- Add protected/buffered bike lanes on NW Roosevelt and NW Wilson Streets for safer cycling.
- Install four new streetcar stops, including a charging station at NW Wilson for off-wire streetcars.
- Rehabilitate NW 23rd Avenue (NW Vaughn to NW Lovejoy) with utility, stormwater, and accessibility upgrades.
- Repair/add sidewalks and ramps to enhance pedestrian safety and ADA compliance.
- Introduce wide furnishing zones with large trees to boost canopy and resilience.
- Upgrade or add signalized intersections for improved transit and multimodal safety.



Montgomery Street: Vicinity Map 1

Project Outcomes Advancing Regional Goals

Mobility Options

- Enhance multimodal travel and transit-oriented development to reduce vehicle miles traveled and improve connectivity.

Safe System

- Implement complete streets for safety and repair NW 23rd Avenue to improve conditions.

Equitable Transportation

- Expand equitable access to transit, jobs, and housing, supporting middle-wage job creation and industrial job access.

Thriving Economy

- Promote economic growth with neighborhood investment, freight connectivity, and integrated housing and job opportunities.

Climate Action and Resilience

- Support climate goals with green infrastructure, reduced urban heat, and a walkable, transit-focused community.



Sunrise Gateway Corridor / Hwy 212

Clackamas County

Application Category

- First-Last Mile and/or Safe Access to Transit

Draft Cost Estimate

- \$142.7-162.3 Million

Funding Request

- \$15 Million

Timeline

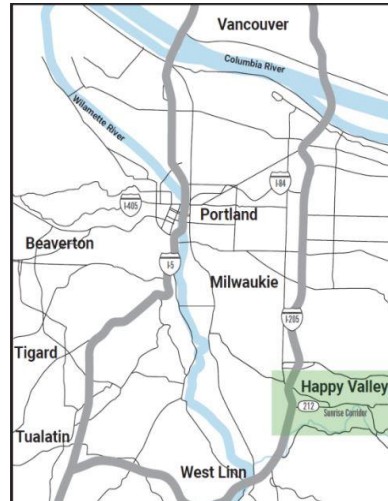
- Construction from 2029-2031

Description and Purpose

The project will complete the next critical steps of project development necessary to make significant progress toward supporting overall transit access and first/last mile connections to the Clackamas Industrial area. The future improvements will provide key regional connections to support the implementation of the Clackamas to Columbia (C2C) corridor, design solutions to address the gaps in the pedestrian and bikeway facilities along Highway 212/224, and complete 100% design for the supporting infrastructure needed to address the safety and congestion problems created by the existing intersections along Hwy 212/224 between 135th and 152nd Ave.

Project Components

- Complete NEPA re-evaluation for the Sunrise Gateway Concept.
- Complete 100% design (PS&E) for the Safety and Local Connections elements of the Sunrise Gateway Corridor/Hwy 212 Phase 2, including LIDAR data collection. Key components:
 - Add urban arterials with Complete Streets elements on Hwy 212/224
 - Construct a roundabout, mobile home park access upgrades, and a south-side multi-use path.
 - Design transit readiness features, including a mobility hub for connections to TriMet and ClackCo Industrial Shuttle.
 - Add a grade-separated intersection at 142nd for congestion relief and safer pedestrian/bike crossings, simplifying 135th signal operations.
 - Develop 10% concept plans for Phase 2 for future ROW needs and project completion.
 - Initiate the right-of-way acquisition process.



Vicinity Map: Sunrise Gateway Corridor

Project Outcomes Advancing Regional Goals

Mobility Options

- Expand travel options by improving walking, biking, and transit access, filling network gaps, and increasing the efficiency of transit lines, boosting regional mobility as part of the Sunrise Community Vision.

Safe System

- Supports Vision Zero by addressing high-crash areas on Highway 212, incorporating safety measures, redesigning the corridor as a Complete Street, and enhancing pedestrian, bike, and transit facilities to reduce crashes.

Equitable Transportation

- Will improve access for underserved communities, create safer connections, provide alternative travel options like a multi-use path, and connect residents to jobs, schools, transit, and essential services.

Thriving Economy

- Improving regional connectivity, enhancing freight movement, increasing access to jobs, and promoting transportation and housing affordability through multimodal improvements and better access to key employment centers.

Climate Action and Resilience

- Promote a climate-friendly community, reduce drive-alone trips, enhance multimodal transit connections, and improve transportation infrastructure to withstand weather events and disasters while strengthening key seismic routes for emergency access.



SW 185th Avenue MAX Overcrossing Project Hillsboro

Application Category

- Transit Vehicle Priority

Draft Cost Estimate

- \$15,012,722

Funding Request

- \$12,618,499

Timeline

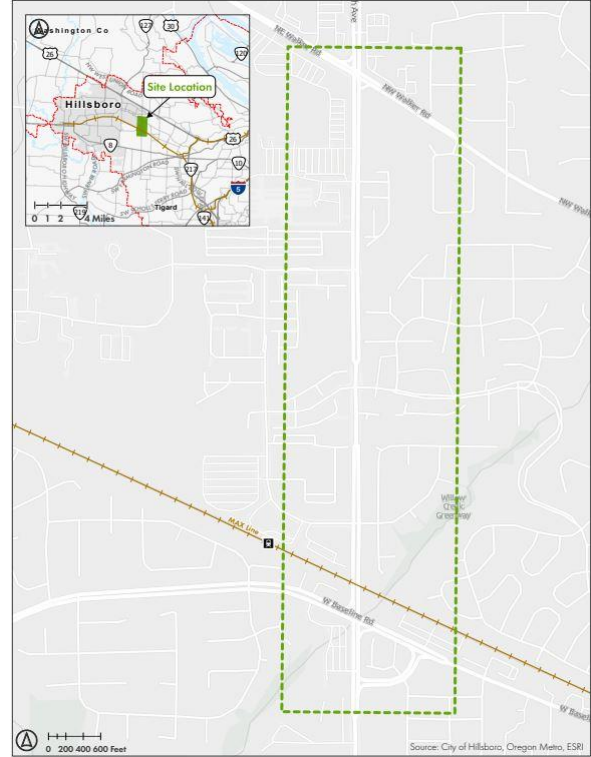
- Construction from 20XX-20XX

Description and Purpose

The SW 185th Avenue MAX Overcrossing project will elevate MAX light rail trains over SW 185th Avenue to eliminate conflicts with vehicles, pedestrians, and bicyclists at this busy intersection. Identified in the 1994 Environmental Impact Statement and reaffirmed through updates in 2019 and 2022, the project addresses long-standing traffic challenges since the Westside MAX line opened. Led by the City of Hillsboro with Washington County and TriMet, the design is 15% complete, featuring a cost-effective solution included in regional transportation plans and supported by detailed risk assessments.

Project Components

- Will raise the MAX light rail trains above SW 185th Avenue to prevent conflicts with vehicles, pedestrians, and cyclists at this busy intersection.
- The project development phase consists of completing environmental work related to the National Environmental Policy Act (NEPA), preliminary engineering to 30% design, cost estimating and risk assessment, procurement strategy, and stakeholder agreements.
- The final design phase is engineering to 100%, final budget and schedule documents, refined project management plan, right-of-way preparations, and the final procurement plan.



SW 185th Avenue MAX Overcrossing: Vicinity Map

Project Outcomes Advancing Regional Goals

Mobility Options

- Eliminating delays and conflicts caused by train preemption, improving travel time reliability, and reducing delays by up to 75% for bicyclists and 67% for trucks, buses, and transit passengers by 2040

Safe System

- Reduce overall delays in the system, which would address behaviors such as jaywalking, bike lane violations, and gate-strike incidents.

Equitable Transportation

- Improves mobility for all modes of transportation, benefits the transit network, and addresses equity barriers in a historically disadvantaged community, enhancing access and reducing delays for underserved populations.

Thriving Economy

- Will enhance economic growth by improving reliable transportation for Hillsboro's industrial and technology hubs, saving \$5.7 million in rush-hour delays and \$65.5 million annually across all transportation modes.

Climate Action and Resilience

- Grade-separating the MAX tracks will reduce greenhouse gas emissions in the corridor by 41% during peak periods, cutting daily rush-hour pollutants by 18 kg of CO₂, 4 kg of NO_x, and 4 kg of VOCs, as calculated using VISSIM travel simulation software and MOVES2014a.



Better Bus Program

Metro

Application Category

- Transit Vehicle Priority

Draft Cost Estimate

- Program

Funding Request

- \$11 Million

Timeline

- Construction from 2026-2029

Description and Purpose

The program consists of initial planning work, program administration, project development, and design and delivery of a select number of Better Bus projects.

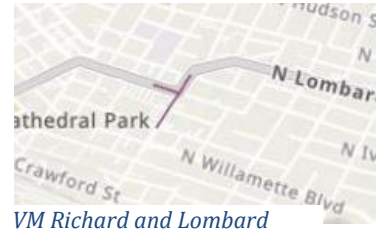
Investment will be focused on projects that help transit services operate more quickly and reliably. Projects that would advance through this grant could include those identified through the Better Bus program, FX planning, or other efforts.

Project Components

- 185th/Baseline
 - Convert a southbound right-turn lane into a Business Access Transit (BAT) lane to reduce bus delays by up to 44 seconds per trip while reconstructing a pedestrian island and upgrading ADA ramps for improved safety and mobility.
- Richmond and Lombard
 - Add a northbound bus-only left turn lane and adjust pavement markings and signal configurations to streamline bus access, saving up to 10 seconds per trip with minimal impact on vehicle traffic.
- Sunnyside Road
 - Implement transit signal priority at SE 101st St and SE 169th Ave, relocate bus stops to far-side locations, and improve efficiency at intersections including SE 105th, 117th, 132nd, 140th, 147th, 157th, 162nd, and Sunnybrook, reducing bus travel and wait times.
- Gresham Transit Center Circulation
 - Add a northbound left-turn lane, reconfigure traffic signals at Powell Blvd intersections, and explore rerouting Line 20, reducing bus delays by up to two minutes per trip with minimal vehicle impact.



VM: 185th/Baseline



VM Richard and Lombard



VM: Sunnyside Road



VM: Gresham Transit Center Circulation

Project Outcomes Advancing Regional Goals

Mobility Options

- Reduce transit delays and save time for riders while enhancing access through improved crossings and bike facilities.

Safe System

- Enhances transit safety and accessibility by improving speed, adding crosswalks, bike lanes, safer intersections, and features like right-turn restrictions and dedicated bike signals.

Equitable Transportation

- Focuses on Metro Equity Focus Areas, with 82% of initial projects benefiting 23% people of color and 28% low-income while improving travel times and reliability for all riders.

Thriving Economy

- Improving job access, reducing transit delays, and ensuring timely arrivals for workers reliant on transit.

Climate Action and Resilience

- Cut emissions by speeding transit, encouraging mode shift, and supporting CO2 reductions with improved biking and walking options.



Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project

Multnomah County

Application Category

- Combined First-Last Mile and Transit Vehicle Priority

Draft Cost Estimate

- \$447 Million

Funding Request

- \$25 Million

Timeline

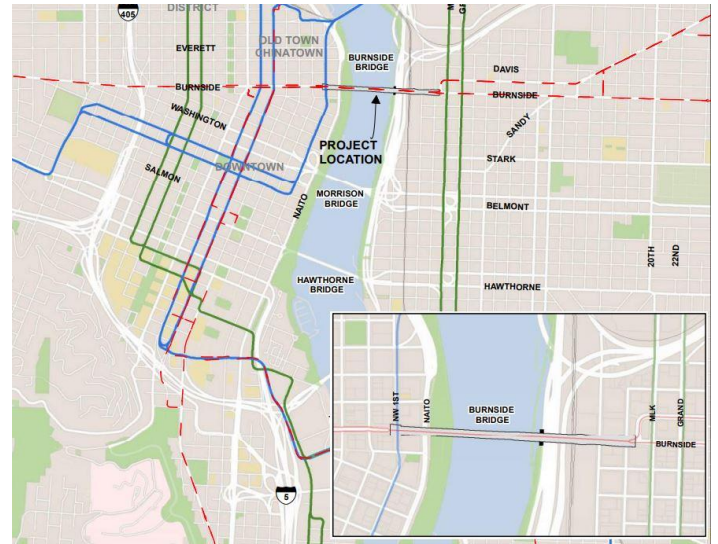
- Construction 2026-2031

Description and Purpose

The project will replace the existing Burnside Bridge with a seismically resilient structure, enhancing transit, pedestrian, and bicycle access. The project includes permanent transit improvements, such as new bus stops, protected bike lanes, and traffic calming measures. Future phases will accommodate high-capacity transit, including provisions for an eastbound bus-only lane, future streetcar alignment, and upgraded streetscapes around bus stops. These upgrades align with regional transportation plans and ensure the long-term functionality of Burnside Street as a key emergency route and transportation corridor.

Project Components

- Safe access to transit
 - Will reconstruct sidewalks and transit stops, install protected bike lanes, modify traffic signals, add pedestrian refuge islands, replace inaccessible infrastructure with ramps, and upgrade safety features on key routes and detour pathways to improve accessibility, safety, and reliability for pedestrians, cyclists, and transit users.
- Transit Vehicle Priority
 - Widening the Burnside Bridge for an eastbound bus-only lane, creating new bus-only lanes on key streets with signage and striping, modifying signals to prioritize bus turns, reconstructing a bus dwell area near NW 2nd Ave, and redesigning the NE Couch St curve to support future streetcar operations and improve cyclist safety



Vicinity Map: Burnside Bridge

Project Outcomes Advancing Regional Goals

Mobility Options

- Upgrade walking, biking, and transit access, complete regional networks, support future transit expansions, and ensure reliable mobility for people and goods, benefiting disadvantaged communities.

Safe System

- Improve safety by reducing crashes, enhancing pedestrian and bike access, speeding emergency responses, and replacing the aging bridge with a seismically resilient structure for the next 100 years.

Equitable Transportation

- Increase access, safety, and reliability for underserved communities by enhancing walking, biking, and transit facilities while supporting future transit expansions.

Thriving Economy

- Improves economic connectivity, job access, and resilience by enhancing transportation infrastructure, supporting workforce diversity, and ensuring disaster preparedness.

Climate Action and Resilience

- Reduces emissions, enhances transit, and improves resilience by replacing the aging Bridge with a seismically resilient structure.



OR99E (McLoughlin Boulevard) First and Last Mile and Safe Access to Transit Streetscape Enhancements

Oregon City

Application Category

- Combined First-Last Mile and Transit Vehicle Priority

Draft Cost Estimate

- TBD

Funding Request

- \$9 Million

Timeline

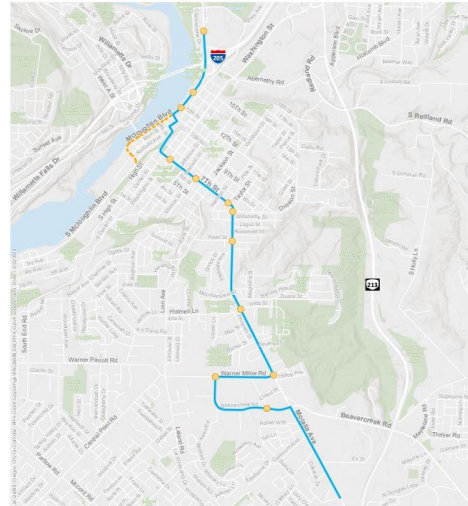
- Construction 2027-2028

Description and Purpose

This project aims to develop a shared-use path along McLoughlin Boulevard (OR99E), completing the third and final phase of the McLoughlin Boulevard Enhancement Plan. To provide safe and accessible connections for people walking, biking, and rolling, closing a critical gap in the region's active transportation network. The path will improve access to key destinations such as the future Willamette Falls Riverwalk and Tumwata Village, eliminating the need to mix with traffic. Additionally, the project includes streetscape enhancements along OR99E to encourage waterfront activity, support travel to downtown Oregon City, and strengthen the area's sense of place and community identity.

Project Components

- Transit Access:
 - It will enhance the new Line 33 route by reconstructing sidewalks and curb ramps, upgrading pedestrian crossings, and adding transit amenities like benches, lighting, and shelters to improve safety, accessibility, and user comfort.
- Streetscape enhancements:
 - It will improve pedestrian comfort and safety by reconstructing sidewalks, upgrading pedestrian crossings with better visibility and signal timing, constructing curb extensions, and improving sight distance at key driveway accesses along OR99E.
- Streetscape Enhancements (Refinement Stage)
 - It will transform parking areas into open spaces for pedestrian comfort and placemaking hubs along OR99E, including areas between 6th and 8th Streets and under the Historic Arch Bridge at 7th Street. These improvements may include landscaping, trees, and stormwater systems.



Vicinity Map: OR99E (McLoughlin Boulevard) First and Last Mile and Safe Access to Transit Streetscape Enhancements

Project Outcomes Advancing Regional Goals

Oregon City Transportation System Plan (2013)

- Links to the Oregon Transportation Plan through the improvements and transit signal priority on OR99E.

Clackamas County Transit Development Plan (2021)

- This plan outlines 20-year transit needs and recommends expanding service with upgrades to line 33 supporting this expansion

Metro Regional Transit Strategy (2023)

- Enhance transit access, frequency, and affordability through Oregon City High-Capacity Transit extension and OR99E streetscapes improvements, enhancing first/last-mile connectivity and supporting TriMet service upgrades.

Metro High-Capacity Transit (HCT) Strategy

- OR99E is a priority corridor in the Metro HCT Strategy, backed by strong community support.

Metro Get Moving 2020

- Three projects in this investment package aligned with First and Last Mile and Safe Access to Transit Streetscape Enhancements.

Metro Regional Transportation Safety Strategy (2018)

- OR99E enhancements improving safety on a high-injury corridor and prioritizing vulnerable users and safe speeds

Oregon Safety Action Plan (2021)

- This plan is aligned to the OR99E First and Last Mile and Safe Access to Transit Streetscape Enhancements package Policy 2.3



72nd Ave. Phase 1 Tigard Triangle Corridor Improvements

Tigard

Application Category

- First-Last Mile/ Safe Access

Draft Cost Estimate

- \$19.88 Million

Funding Request

- \$15.904 Million

Timeline

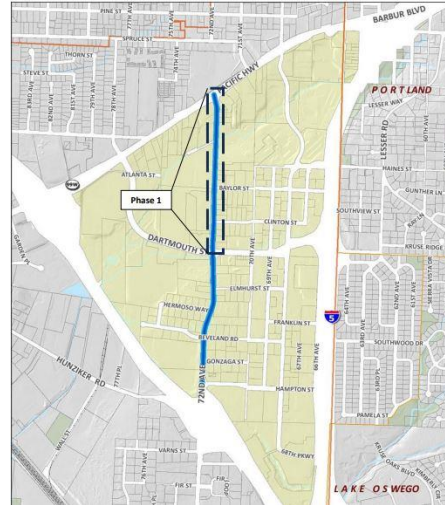
- Construction 2028-2029

Description and Purpose

This project will upgrade Tigard's 72nd Avenue into a complete street with separated cycle tracks, sidewalks, landscaped buffers, enhanced pedestrian crossings, integrated transit stops, and a new bridge over Red Rock Creek. Key features include protected intersections, on-street parking doubling as bus pull-outs, and stormwater management using Low Impact Design. These improvements enhance multimodal safety, connectivity, and accessibility while supporting active transportation and sustainable urban infrastructure.

Project Components

- Build a complete street on 72nd Avenue with separated cycle tracks, sidewalks, on-street parking, pedestrian crossings, curb extensions, and transit stops
- Construct a new bridge/culvert over Red Rock Creek and an enhanced crossing for the future Red Rock Creek Trail.
- Coordinate transit stops with pedestrian crossings for safe, continuous routes.
- Add a center turn lane, cycle tracks, sidewalks, street lighting, and on-street parking between Dartmouth and Baylor Streets.
- Widen the road from Red Rock Creek to Pacific Highway to continue cycle tracks, sidewalks, and pedestrian amenities.
- Install landscaping with street trees and stormwater management facilities (LIDA planters)
- Create a protected intersection at SW Dartmouth and SW 72nd Avenue for improved safety



VM: 72nd Ave. Phase 1 Tigard Triangle Corridor Improvements

Project Outcomes Alignment to RTP Goals

Mobility Options

- Improve pedestrian and bike facilities, better transit access, and transit priority tools for enhanced reliability.

Safe System

- Enhances safety for pedestrians and cyclists by implementing protected bike lanes, sidewalks, and crossings, aligning with Tigard's Complete Streets and Safe Systems initiatives to reduce traffic-related injuries and fatalities.

Equitable Transportation

- Improving mobility, access, and safety in Tigard's Historically Disadvantaged Community and reducing transportation-related pollution.

Thriving Economy

- Improves infrastructure, enhances walkability, and promotes affordable housing while leveraging urban renewal and development incentives to attract investment and create job opportunities.

Climate Action and Resilience

- Reduce pollution, support active transportation, and incorporate sustainable stormwater management to benefit underserved communities



Tualatin Valley Highway Transit Project

TriMet

Application Category

- Capital Investment Grant

Draft Cost Estimate

- \$300 Million

Funding Request

- \$30 Million

Timeline

- Construction 2028-2031

Description and Purpose

The TV Highway Safety and Transit Project aims to improve speed, reliability, accessibility, and safety for transit riders on TV Highway, particularly for communities of color and low-income communities. The project is expected to improve pedestrian safety when accessing transit and enhance the transit rider experience through improved bus speed and amenities like bus shelters and lighting. This would result in a new Frequent Express (FX) bus line between Beaverton and Forest Grove, replacing Line 57. The FX line would come every 12 minutes most of the day, have ADA-accessible stations with shelters, lighting, and seating, and have safer access to all stations with a signal or enhanced crosswalk.

Project Components

- Introduce a new Frequent Express (FX) bus line replacing Line 57 between Beaverton and Forest Grove.
- Construct ADA-accessible stations equipped with:
 - Shelters for weather protection.
 - Lighting for safety and visibility
 - Seating for rider comfort
- Improve pedestrian safety with enhanced crosswalks or traffic signals at all station access points.
- Enhance transit rider experience by:
 - Increasing bus speed and reliability.
 - Improving amenities at stops, including better access and safer waiting areas.
- Focus improvements on benefiting communities of color and low-income populations along the TV Highway corridor.



Vicinity Map: Tualatin Valley Highway Transit Project

Project Outcomes Advancing Regional Goals

Tualatin Valley Highway Transit Project was identified as a priority corridor for high-capacity transit (HCT) in the 2010 HCT System Plan. It was further emphasized in the 2018 Regional Transit Strategy and 2018 Regional Transportation Plan (RTP), which included an “enhanced transit concept” for the corridor. This approach focuses on improving transit speed and reliability through cost-effective, context-sensitive improvements. Subsequent planning was completed through Washington County’s 2019 Moving Forward TV Highway Enhanced Transit and Access Plan and the 2020 regional transportation funding measure, with current efforts building on these previous analyses.



82nd Avenue Transit Project

TriMet

Application Category

- Capital Investment Grant

Draft Cost Estimate

- \$300 Million

Funding Request

- \$30 Million

Timeline

- Construction 2027-2029

Description and Purpose

The 82nd Avenue Transit Project aims to improve transit service and access along the corridor, enhancing the movement of people and goods between key destinations in Clackamas County and Portland. The corridor, which serves TriMet's highest ridership bus line (Line 72), is vital for many residents, particularly those from BIPOC, limited English proficiency, low-income communities, zero-car households, or those with disabilities.

Project Components

- A 10-mile BRT route along 82nd Avenue between Clackamas Town Center and a northern terminus at Cully Triangle (preferred) or Parkrose Transit Center.
- About 65 new stations, spaced roughly every 1/3 mile, featuring shelters, real-time info, and FX branding.
- Purchase up to 15 FX-branded articulated vehicles, potentially with hydrogen propulsion.
- Transit signal priority, including fiber, signal, and intersection upgrades.
- Possible lane conversions or widening for transit priority, with specifics to be determined.
- Potential bicycle and pedestrian improvements, coordinated with Portland's 82nd Avenue Critical Fixes project, including street trees.
- Split of route 72, with local service extending to Parkrose and BRT service potentially upgraded to 10-minute frequencies.



Vicinity Map: 82nd Avenue Transit Project

Project Outcomes Advancing Regional Goals

The 82nd Corridor project supports regional goals from the High-Capacity Transit (HCT) System Plan, 2023 Regional Transportation Plan (RTP), and 2018 Regional Transit Strategy, prioritizing Bus Rapid Transit (BRT) and significant transit investments. It addresses long-standing transit challenges, improves access for underserved communities, and enhances efficiency with solutions like queue bypasses, BAT lanes, and transit signal priority. The project also promotes active transportation, safety, and equitable mobility, contributing to sustainability, reduced congestion, and improved quality of life.



Resolution 24-5415

2028-2030 Regional Flexible Fund Allocation program direction

June 2024

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit oregonmetro.gov/civilrights or call 503-797-1555.

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INTRODUCTION

As the federally designated Metropolitan Planning Organization (MPO) for the greater Portland, Oregon area, Metro is responsible for allocating and administering federal transportation dollars. Every three years, Metro conducts a process to select specific investments to make in the region's transportation system with these dollars. This process is known as the Regional Flexible Funds Allocation (RFFA). Allocating these funds is one of several activities required of MPOs, others being the development of the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP), and the Unified Planning Work Plan (UPWP).

As part of the RFFA process, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council consider how the available funding can be used strategically to address needs identified through the RTP. The RTP establishes the vision, goals, and objectives for the Portland region's transportation system, as well as defines performance measures and an investment strategy to ensure progress is made towards creating the envisioned system. In particular, the RTP provides the policy framework to guide how specific sources of transportation funds should be coordinated in order to invest in all parts of the planned system.

JPACT and Metro Council adopted the most recent update of the RTP at the end of 2023. In the time spent developing the 2023 RTP, an extensive two-year outreach process resulted in nearly multiple touch points with community leaders, elected officials, racial justice advocates, business leaders, community organizations, and federal and state agency partners.

Through this work with the community and policymakers, the region reaffirmed the need to continue near-term capital and program investments to advance the previous RTP goals of : Equitable Transportation, Safe System, Climate Action and Resiliency, and Mobility Options.¹ In addition, a fifth goal area was added to the 2023 RTP focusing on Thriving Economy. These five goals directs how funding is to be prioritized through the 2028-2030 RFFA.

Along with adopting the 2023 RTP, JPACT and Metro Council also adopted a new model strategy for High Capacity Transit. The updated High Capacity Transit strategy more fully articulates the multi-modal regional transportation system and investments needed to improve the existing system, and complement the Regional Transportation Safety Strategy (2018), Region Transit Strategy (2018), Regional Freight Strategy (2018), Emerging Technology Strategy (2018), Regional Travel Options Strategy (2018), Regional Active Transportation Plan (2014), Climate Smart Strategy (2014) and Regional Transportation System Management and Operations (2021). Collectively, these planning policy documents provide guidance for how the region can thoughtfully direct funding through the RFFA process to advance the five goals outlined in the 2023 RTP.

The 2028-2030 RFFA Program Direction builds upon previous RFFA policy established by JPACT and Metro Council. It has been updated to align with new regional policy from the 2023 RTP and the supportive modal and topical strategies, specifically focusing on the five goals noted above. It continues the two-step funding approach adopted in 2011 for the 2014-2015 allocation cycle, which directs funding towards region-wide investments and supports construction of capital projects in specific focus areas.

¹ Metro Ordinance 23-1496

Funding allocated in Step 1 represents the region’s ongoing commitments to fund portions of the transportation system that are critical to following through on RTP-identified goals and objectives. Step 1 is represented by two components: Step 1A represents the region’s commitment to repay bonds used to build portions of the region’s transit system; Step 1B represents investments to support transportation programs and planning activities coordinated region-wide. These programs and planning activities advance federal, state, and regional requirements for building a multi-modal transportation system, meeting federal air quality regulations, and reducing greenhouse gas emissions from vehicles, per mandates from the state.

Funding allocated in Step 2 is for local capital projects with regional impacts. After significant deliberation, the allocation of Step 2 Regional Flexible Funds updates to the Step 2 framework, maintaining the single capital projects category and focuses on projects that improve the system in multiple ways, which was first utilized in the 2025-2027 RFFA cycle.

2023 REGIONAL TRANSPORTATION PLAN GOALS

The 2023 RTP serves as the blueprint for the regional transportation system for the next 25 years. It identifies on five interconnected goals – equitable transportation, climate action and resilience, safe system, mobility options, and thriving economy – in which 17 supporting objectives and 16 performance measures and targets define and measures progress towards the region’s aspirational system.

The 2023 RTP goals, objectives, and performance measures provide the policy directives for the 2028-2030 RFFA in shaping the process, setting key objectives for the allocation, establishing project eligibility and selection criteria.

2023 RTP Chapter 2 lays out this vision and includes 16 system performance measures to provide a basis for measuring expected performance of the plan in the long-term. Chapter 3 provides specific policy direction and priorities to guide investments to demonstrate the region’s actions are following its commitments and demonstrate progress towards the Plan’s implementation. The Plan’s priorities for investment to achieve the five interconnected goals of the RTP are outlined in Chapter 6. In taking the policy and plan direction from the RTP, projects funded through the 2028-2030 RFFA are to align with the RTP prioritization of investments identified in Chapter 6.2.

The aim is at the end of the 2028-2030 RFFA process, the allocation of the approximate \$150 million available in Regional Flexible Funds meets the objectives, policy directives, and investment prioritization of the RTP.

The RTP goals emerged from a multiyear discussion and identification of the region’s most urgent transportation needs by regional policymakers. They guided the development and refinement of the 2023 RTP projects and programs financially constrained list and reflect direction from JPACT and Metro Council to prioritize near-term investments to address these priorities.

The five RTP Goals are:

- **Equitable Transportation:** Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.

- **Safe System:** Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.
- **Climate Action and Resilience:** People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.
- **Mobility Options:** People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming.
- **Thriving Economy:** Centers, ports, industrial areas, employment areas and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.

STRATEGIC REGIONAL FUNDING APPROACH (INTERIM)

Since May 2009, the region has followed a strategic regional funding approach to direct how the transportation needs of the region are to be addressed by existing or potential transportation funding sources. JPACT developed this regional funding approach to provide a starting point for the various funding programs or sources that are addressed in the MTIP and State Transportation Improvement Program (STIP).

The strategic approach identifies funding mechanisms agencies use and a regional strategy for sources to be pursued to address unmet needs of the different elements of transportation system in the region. Utilized in the development of RFFA policies since the 2010-2013 MTIP cycle, the strategic approach is updated as needed to reflect current funding sources and planning policy. Additionally, as other available funding opportunities emerged since the 2010-2013 MTIP cycle, the strategic regional funding approach serves as a starting point for informing a regionally coordinated set of priorities to pursue those other funding opportunities. Recognizing the strategic regional funding approach has influenced the development of a coordinated regional list of capital investment priorities, tailored to the context of the funding opportunity – such as the 2020 regional transportation funding measure and the congressional request of regional priorities for appropriations earmarks – the 2028-2030 RFFA Program Direction follows the core principles of the strategic regional funding approach.²³

Uses for regional flexible funds, as defined in the strategic regional funding approach include:⁴

- Active Transportation
- Arterial Expansion, Improvements, and Reconstruction⁵
- Throughway Expansion⁶
- High-capacity Transit Expansion
- Transportation System Management and Operations
- Regional Travel Options
- Transit Oriented Development

REGIONAL FLEXIBLE FUNDS ALLOCATION OBJECTIVES

In addition to directives from the Regional Transportation Plan and the strategic regional funding approach, the Regional Flexible Funds is obligated to meet necessary federal eligibility and administrative requirements, as they are fully comprised of federal surface transportation funds. Additionally state mandates, particularly centered around greenhouse gas emissions reduction and improving air quality also provide direction on the use of Regional Flexible Funds. As a result, the

² See Metro Council Resolution 16-4702.

³ The strategic regional funding approach remains an interim approach as JPACT and the Metro Council begin discussions pertaining to transportation funding and revenues throughout 2024 with the intent of developing a set of transportation funding priorities.

⁴ Most recent strategic regional transportation funding approach is from the 2027-2030 MTIP program direction.

⁵ Limited to arterial freight facilities for ITS, small capital projects, and project development.

⁶ Limited to project development with large discretionary funding leverage opportunities to address multiple transportation issues around the mainline facilities, focusing on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

following objectives define how to conduct the RFFA process and define what outcomes to achieve with the overall allocation process to meet all necessary requirements.

1. Select projects from throughout the region; however, consistent with federal rules, there is no sub-allocation formula or commitment to a particular distribution of funds to any sub-area of the region.
 - a. To further support selecting projects from throughout the region, those projects awarded construction funding in Step 2 in the 2025-2027 cycle are ineligible to apply for funds in the 2028-2030 cycle.
2. Honor previous funding commitments made by JPACT and the Metro Council.
3. Address air quality requirements by ensuring State Implementation Plan for air quality requirements are met and that an adequate pool of CMAQ-eligible projects is available for funding.
4. Achieve multiple transportation policy objectives.
5. Allow use of funding for project development and local match of large-scale projects (greater than \$10 million) that compete well in addressing policy objectives when there is a strong potential to leverage other sources of discretionary funding.
6. Encourage the application of projects that efficiently and cost-effectively make use of federal funds.
7. Recognize the difference in transportation infrastructure investment needs relative to an areas stage of development (developed, developing, undeveloped) consistent with RTP Table 3-2.
8. Identify project delivery performance issues that may impact ability to complete a project on time and on budget.
 - a. Which may lead to different recommendations from the project delivery risks assessment that play a role in awarding funding and conditions of approval.
9. Identify opportunities for leveraging, coordinating, and collaboration.

Per RTP Equitable Transportation Policy 7 (Table 3.2.2.3), projects and programs funded through the RFFA should demonstrate support of family-wage job opportunities and a diverse construction workforce through inclusive hiring practices and contracting opportunities for investments in the transportation system.

2028-2030 REGIONAL FLEXIBLE FUNDS STRUCTURE

The 2028-2030 RFFA follows the two-step framework the region has followed starting with the 2014-2015 allocation process. This framework was adopted to ensure the region is investing in the system in accordance with RTP direction and the RFFA objectives.

A total of \$153 million is projected to be allocated in the 2028-2030 federal fiscal years. Funding amounts for each of the funding areas is as shown in Table 2 below.

Table 2: Total 2025-2027 Regional Flexible Funds

Step 1A: Transit & Project Development Bond Repayment Commitment	\$51.78 million
Step 1A: New Bond Commitment (pending approval)	\$ TBD

Step 1B: Region-wide Program Investments, Planning	\$40,557,783
Step 2: Capital Investments	\$ TBD based Step 1A New bond commitment
Total 2028-2030 RFFA	\$153 million (estimate as of spring 2024)

Step 1 consists of two funding focus areas. Step 1A repays bonds issued to develop and construct key elements of the region’s multi-modal system, with particular emphasis on the transit network. Step 1B targets funding towards key system investment needs and ensures the region has capacity to follow federal planning requirements and can respond to and plan for future system opportunities. The region is interested in pursuing a new project bond for Step 1A for the 2028-2030 RFFA cycle. Further described in the following section, the nature of the new project bond will determine the final amounts allocated between Step 1A and Step 2. The allocation for Step 1B remains.

Step 2 provides capital project funding to develop and construct improvements to the regional system. The focus of these project funds is on completing gaps or improving the active transportation system, address crashes and safety hazards, and making strategic improvements to support a healthy economy

Step 1A – Bond Repayment Commitments



Regional flexible funds have been used to help construct the region’s high-capacity transit system. 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. The region’s current obligation to repay bond debt extends to 2034. 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 directed regional funding to be used to develop a selected package of improvements to address regional active transportation needs, and freeway interchanges or arterials that were identified as significant system deficiencies, particularly in the areas of safety and freight delay. This decision was in advance of the

Oregon State Legislature adopting House Bill 2017, which placed further investment statewide in the transportation network.

Regional flexible funds were used in a manner consistent with the Regional Transportation Finance Approach that targets these funds to the connecting arterial portions of freeway interchange projects and Active Transportation projects. For projects coordinated with freeway mainline and associated interchange elements, flexible funds were invested as a part of a multi-agency approach to addressing multiple transportation issues around the mainline facilities and focused on the multi-modal portions of these projects that are on the regional arterial network adjacent to the freeway interchange.

The past decisions on the Regional Flexible Fund Allocation committed future Regional Flexible Fund dollars to project bond repayment in effort to advance financial resources to delivery larger capital projects earlier and capitalize on federal funding opportunities. As a result, the region remains committed to bond repayment through 2034 for transit and project development are shown below in Table 3. Pending funding to be allocated in the 2028-2030 RFFA cycle is highlighted in blue.

Table 3: Regional bond repayment commitment schedule

Federal Fiscal year	Amount (millions)
2025	\$21.78*
2026	\$21.76*
2027	\$21.74*
2028	\$17.28
2029	\$17.26
2030	\$17.24
2031	\$17.22
2032	\$17.19
2033	\$17.17
2034	\$17.15

** Amount due in each of the three years of the 28-30 RFFA cycle*

For the 2028-2030 timeframe, the region’s scheduled bond repayments are \$51.78 million in total. This is a decrease from the 2025-2027 RFFA timeframe where the total scheduled bond repayments are \$65.28 million. The net difference between the two RFFA cycles is \$13.5 million newly unencumbered towards project bond repayments.

Recognizing the transportation needs of the region, the increased funding capacity starting in 2028 opened a discussion as to whether the region should consider a new project bond commitment of Regional Flexible Funds to implement regional or corridor scale projects to advance Regional Transportation Plan goals and outcomes. Over the course of the 2028-2030 RFFA program direction development, input and feedback from regional partners indicated a desire to pursue a new project bond in exchange for committing future Regional Flexible Funds. However, regional partners also expressed caution as committing future funding provides less flexibility in latter cycles to invest into emerging transportation needs. To address this feedback and additional

direction, the purpose and principles was developed as described in Table 4. The development of the list of projects and programs to receive bond proceeds are set to be developed in parallel with the Step 2 process. A proposal to identify and select candidate projects for the new project bond will come forward with regional partners after the adoption of the 2028-2030 RFFA program direction.

Table 4. Purpose, Principles, and Project Category Themes for a New Project Bond (beginning the 2028-2030 Regional Flexible Fund Allocation)

Purpose	A method to utilize regional revenues on regional or corridor scale projects.
	Advance the ability to construct projects earlier than would otherwise be possible.
	Leverage significant discretionary revenue that will otherwise be allocated to other metropolitan areas.
	Continuing the past practice to use bonded RFFA revenues to advance transportation projects that improve equitable access to jobs and services, reduce climate impacts, and improve safe travel on the transportation system.
Principles	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and the Metro allocation of Carbon Reduction Program funds.
	<ul style="list-style-type: none"> • The new project bond size is to be guided by: <ul style="list-style-type: none"> - Ability of future revenues to maintain support of the primary elements of the Regional Flexible Fund, which include: <ul style="list-style-type: none"> ▪ Contributions to the development and implementation of regional or corridor-scale projects of high impact on priority regional outcomes (Step 1A) ▪ On-going support for programmatic regional transportation investments (Step 1B) ▪ Support for local capital projects that are impactful on regional outcomes (Step 2) - Attempts to maintain prior funding levels of existing Step 1B programmatic allocations and Step 2 capital project funding (with the previously established 3% annual growth rate for both) for forecasted revenues in 2028-2030. - Keeps a debt payment to forecasted revenue ratio at a level that minimizes the risks of severe reductions to other Step 1B programmatic investments and Step 2 capital projects in the case of revenues being less than forecasted in all future years impacted by the bonding. - Attempts to contain extension of bond commitment beyond the next four RFFA cycles (through the year 2039) to preserve the ability of future JPACT and Metro Council bodies the ability to direct spending to priority projects and to minimize risk to the agency guaranteeing the bonding of these revenues.
	The projects identified for a new project bond proceeds are a reasonable trade-off between the advantages of funding priority projects earlier than

	would otherwise be possible with the reduction in purchasing authority for future allocation cycles.
	The identified projects significantly and comprehensively advance the RTP goals of safe system, equitable transportation, mobility options, thriving economy, and climate action and resilience.
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.
	The list of identified projects for bond proceeds is made available for public comment during the 2028-2030 RFFA cycle comment and decision period.

Furthermore, to achieve and implement the purpose and principles described above, regional and/or corridor-scale projects to be supported through the new project bond must be one or more of the following project types:

- Capital Investment Grants (CIG) projects or transit projects leveraging other federal funding
 - Regional contribution to funding plans of existing priority projects
 - Next Corridor funding
- First/last mile transit investments
 - includes safe access to transit
- Transit vehicle priority investments, such as Better Bus or transit signal priority improvements

Bond repayment commitments for the 2028-2030 RFFA cycle are:

Bond Repayment Commitment	\$51,780,000
New Project Bond Repayment Commitment	\$ To be determined

Step 1B – Region-wide program investments, MPO and regional planning

Region-wide program investments

Three region-wide programs have been defined over time by their regional scope, program administration, and policy coordination, and a consistent allocation of regional flexible funds to support them. The three programs are:

- **Regional Travel Options/Safe Routes to School –** Grant program that supports local jurisdictional and non-governmental organization partners’ public 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, measurement and partner coordination activities.
- Grants to local partners that support public outreach and encouragement, to help people reduce automobile use and travel by transit, ridesharing, bicycling or walking, and to build a coordinated regional Safe Routes to School program



- **Transit Oriented Development –** 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 –** 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.

Funding targets are set for the existing region-wide programs in this cycle based on their historical allocation levels which includes an annual 3% increase to address increasing program costs and maintain purchasing power. The region-wide programs are reviewed in each RFFA cycle. TPAC was presented an overview and highlights at the February and April 2024 workshop meetings.

Region-wide program investments for the 2028-2030 RFFA cycle are:

Regional Travel Options/Safe Routes to School (RTO/SRTS)	\$12,131,862
Transit Oriented Development (TOD)	\$12,900,856
Transportation System Management and Operations (TSMO)	\$7,586,478

c. MPO, Freight, Economic Development, Corridor and System Planning

Regional funds are used to support planning, analysis and management work required of an MPO. JPACT and Metro Council have directed Regional 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 the region’s transportation investments.

Planning-related funding commitments for the 2028-2030 RFFA cycle are:

MPO Planning (in lieu of dues)
Corridor and System Planning

\$5,169,460
\$2,791,973

Step 2 – Capital Investments

The 2028-2030 RFFA program direction retains the single Step 2 capital projects category and maintains the same focus on local projects with regional impact that improve the region’s active transportation network and supporting freight mobility and economic outcomes.

JPACT and Metro Council continue to direct a strategic approach is followed to allocating Step 2 funds, including:

- A topically or geographically focused impact rather than an array of disconnected projects
- Achieves appreciable impacts on implementing a regional scale strategy given funding amount available
- Addresses specific outcomes utilizing the 2023 Regional Transportation Plan goals
- Prioritizes catalytic investments
 - leveraging large benefits or new funding
- Positions the region to take advantage of federal and state funding opportunities as they arise



In the development of the 2028-2030 RFFA program direction, participants largely supported the structure for Step 2 utilized in the 2025-2027 RFFA cycle. However, members of TPAC indicated a need some refinements to the Step 2 process and evaluation criteria. Already knowing the Step 2 evaluation criteria would require refinements to align to the 2023 RTP, the emphasis and focus on Step 2 has largely centered on refinements. From February through April 2024, Metro staff gathered input to

help inform the refinements necessary for Step 2. After assessing the feedback and comments, the three main themes emerged: 1) a desire for more technical assistance throughout the Step 2 application process; 2) greater context sensitive consideration in the evaluation of Step 2 applications; and 3) ensuring Step 2 Regional Flexible Funds are awarded across the region.

The two themes provided through the April 2024 combined with input heard with the adoption of the Regional Transportation Plan comprises the refinements for Step 2 in the 2028-2030 RFFA cycle. The refinements are described further in the following sections.

These refinements are to support result in projects that achieve multiple outcomes and lead to better outcomes in implementing the five goals outlined in the 2023 RTP.

Step 2 Evaluation Criteria

The criteria shown below in Table 4 (center column) serve as the evaluation standards for the applications received and in consideration for Step 2 funding. The criteria illustrate the region’s

commitment to invest to advance the 2023 RTP goals and priorities. Projects that perform well in the outcomes evaluation will demonstrate significant and measurable improvements in each of these criteria.

Table 5: Step 2 Project Evaluation Criteria

RTP Goal Area*	28-30 RFFA Evaluation Criteria	Draft Performance Measures for Consideration
<p>Equitable Transportation – Transportation system disparities experienced by Black, Indigenous and people of color and people with low incomes, are eliminated. The disproportionate barriers people of color, people who speak limited English, people with low incomes, people with disabilities, older adults, youth and other marginalized communities face in meeting their travel needs are removed.</p>	<ul style="list-style-type: none"> • Increased accessibility • Increased access to affordable travel options • Meets a transportation need identified by the community 	<ul style="list-style-type: none"> • Project makes improvements in an Equity Focus Area (EFA) • Improves access to community places for Black, Indigenous, and People of Color (BIPOC), and underserved communities <ul style="list-style-type: none"> ○ E.g. Closes active transportation gaps or substandard facilities along frequent transit lines and stations in EFAs ○ E.g. Active transportation and/or regional trail network system completeness contribution in EFA • Makes active transportation improvements in area with poor community health outcomes • Improves access to low and middle wage jobs • Removes, reduces disparities and barriers (jobs, transit, services for equity communities) • Demonstrated transportation project was/is identified by community as a priority • Improves access in area with high lack of access to vehicle/high housing + transportation burden

RTP Goal Area*	28-30 RFFA Evaluation Criteria	Draft Performance Measures for Consideration
<p>Safe System – Traffic deaths and serious crashes are eliminated and all people are safe and secure when traveling in the region.</p>	<ul style="list-style-type: none"> • Reduced fatal and serious injury crashes for all modes of travel 	<ul style="list-style-type: none"> • Project location is designated as a priority for safety improvements • Scope of project is to address a known safety issue and uses proven safety countermeasures or higher quality design • Improve safety and mitigates for potential traffic congestion occurred through incident management in an area identified as a high crash location • Design elements prioritize safety with a hierarchy of users based on the project facility’s designated design classification • Project is within 1 mile (or designated walking zone) of a K-12 school
<p>Climate Action and Resilience – People, communities and ecosystems are protected, healthier and more resilient and carbon emissions and other pollution are substantially reduced as more people travel by transit, walking and bicycling and people travel shorter distances to get where they need to go.</p>	<ul style="list-style-type: none"> • Reduced emissions from vehicles • Reduced drive alone trips • Reduces impacts/mitigates for weather events (e.g. flood, heat) • Increases stability of existing critical transportation infrastructure 	<ul style="list-style-type: none"> • Provides/increases transit option, biking/walking • Improves system management via technology • Improves/adds street connectivity • Integrates transportation demand management strategies (outside of TSMO) • In/supports development patterns of a designated 2040 priority Land Use center or corridor • Addresses environmental hazard (e.g. stormwater)

RTP Goal Area*	28-30 RFFA Evaluation Criteria	Draft Performance Measures for Consideration
		<p>runoff/wetness index, tree canopy)</p> <ul style="list-style-type: none"> • Addresses an Emergency Transportation Route • Decreases impervious surface • Increases tree canopy
<p>Mobility Options – People and businesses can reach the jobs, goods, services and opportunities they need by well-connected, low-carbon travel options that are safe, affordable, convenient, reliable, efficient, accessible, and welcoming</p>	<ul style="list-style-type: none"> • Increased reliability • Increased travel and land use efficiency • Increased travel options • Reduced drive alone trips 	<ul style="list-style-type: none"> • Increases reliability and efficiency for all travel modes • Improves transit reliability • Increases reliability by removing a barrier on regional freight system • Improves/adds street connectivity • Provides/increases transportation option
<p>Thriving Economy – Centers, ports, industrial areas, employment areas, and other regional destinations are accessible through a variety of multimodal connections that help people, communities, and businesses thrive and prosper.</p>	<ul style="list-style-type: none"> • Increased access to jobs • Increased access to centers • Increased access to industrial and transport facilities 	<ul style="list-style-type: none"> • Supports/increases industrial/commercial developability • In/supports development patterns of a designated 2040 priority Land Use center or corridor • Provides/increases access to Target Industries (see Economic Value Atlas) • Increases multimodal mobility and access to industrial and transport facilities
<p>Design* - Supporting the implementation of livable streets and trails that advance the region towards the 2040 Growth Concept vision and</p>	<ul style="list-style-type: none"> • Design clearly demonstrates prioritized values/objectives of the project appropriate to context and 	<ul style="list-style-type: none"> • In/supports future desired development of a designated 2040 priority Land Use center or corridor • Design elements prioritize pedestrian and bicycle access,

RTP Goal Area*	28-30 RFFA Evaluation Criteria	Draft Performance Measures for Consideration
regional transportation system vision.	facility/design classification <ul style="list-style-type: none"> • Design implements 2040 Growth Concept • Design reflects outcomes of performance-based planning and design 	mobility and safety and other functions based on the project facility's designated design classification <ul style="list-style-type: none"> • Project design represents the best possible improvement in project area, based on functional and design classification and contextual constraints.

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

Further staff work will take place during the summer of 2024 to finalize the Step 2 performance measures (furthest right column in Table 4) and provide additional guidance to applicants prior to the Call for Projects in September 2024. The performance measures listed above are examples and may not completely reflect the final performance measures utilized in the evaluation of candidates for Step 2 funding. Metro will present proposed performance measures at an upcoming TPAC workshop for further comment and clarification.

The evaluation will measure how completely, and thoroughly proposed projects address the criteria. The analysis will include both quantitative and qualitative measures to provide decision-makers with a well-rounded understanding of the proposed project's attributes and improvements to the regional system.

Depending on the pool of candidate projects submitted for consideration, additional emphasis of select performance measures or criteria may be required to ensure there is an adequate pool of eligible projects to utilize the different sources of federal funding which comprises the Regional Flexible Funds, particularly the use of Congestion Mitigation/Air Quality (CMAQ) funds.

Step 2 Cycle Objectives and Process Refinements

Upon action taken by JPACT and the Metro Council to allocate federal Redistribution funding in Summer 2024, the region will develop a process to provide application assistance to local jurisdictions for the Step 2 allocation. The details of the application assistance are in development, but based on staffing and funding availability to date, the known eligibility process elements for the application assistance include:

- Instituting a pre-application window prior and letter of intent to apply prior to the opening of the Step 2 application.
 - All eligible jurisdictions or agencies intending to apply for funding in the Step 2 application process are required to submit a letter of intent to apply.
 - Those jurisdictions eligible for application assistance must indicate during the pre-application window request for assistance.

In efforts to respond to the feedback from the RTP and regional partners desire to see Regional Flexible Funds invested across the region, the following cycle objectives and eligibility requirements are new to the 2028-2030 RFFA Step 2 cycle:

- Projects which received funding for construction in the 2025-2027 RFFA cycle are ineligible for applying for the upcoming cycle.
 - Projects which received project development funding in the 2025-2027 RFFA cycle would remain eligible.
- Increase the minimum funding request for project development work from \$500,000 to \$700,000
- Increase the minimum funding request for capital projects from \$3 million to \$4 million

Further staff work will take place during the summer of 2024 to define further the process for the Step 2 allocation. The proposer’s handbook available prior to the opening of the Step 2 Call for Projects will provide the details for the Step 2 process and provide further information on the outcomes evaluation and project delivery risk assessment for the purposes of supporting applicants in developing competitive applications.

TOTAL Step 2: **\$ To Be Determined**
(dependent upon new project bond outcome, but estimated range from \$47 - \$60 million)

STEP 2 PROJECT SELECTION PROCESS

All project funding proposals received in the Step 2 Capital Project category will be considered for selection using the following process:

Pre-Application Window – A pre-application window will take place prior to the Proposer Workshop(s) and Call for Projects (see below). Interested local jurisdictions and agencies will be asked to submit a letter of intention to apply during the pre-application window. One letter submitted by the jurisdiction or agency will suffice. As part of the letter, jurisdictions and agencies are to include a small number of details, such as project title and short description, draft project cost estimate and funding request, and whether the project seeks full funding through construction or project development funding only. More than one candidate project can be indicated in the letter.

In addition, those local jurisdictions and agencies eligible for application assistance will be asked to nominate themselves during the pre-application window.

Further detail outlining the Pre-Application Window and next steps for Step 2 are to be released in July 2024. The Pre-Application Window is tentatively scheduled for August 2024.

Proposer Workshop – Prior to the Call for Projects, Metro will hold at a minimum of one, but possibly more proposer’s workshop(s). The purpose of the workshop is to clarify the application and evaluation approach to help proposers prepare thorough project proposals that fully demonstrate project benefits and system improvements. Additional workshops may be held on specific areas of the application. An example may include a workshop focused on the questions to inform the Project Delivery Risk Assessment. The desired outcome is to ensure proposers understand how criteria will be used to evaluate their

project and understand what factors will be reviewed in determining the thoroughness of the project's scope, budget and timeline.

Call for Projects – Metro will issue the call for project proposals in September 2024. Applicants will have approximately nine weeks to complete proposals, which are due in November 2024.

Outcomes Evaluation – A work group will review and rate the submitted proposed projects. Proposals will receive an evaluation score reflecting how well the project addresses the criteria. In addition to this quantitative analysis, the evaluation will also include qualitative information to reflect attributes about each project that may not be reflected in a strict numerical score.

By presenting both quantitative and qualitative information, decision-makers and the public can better understand the technical merits of projects, which will help to better inform the regional decision-making process.

Project Delivery Risk Assessment – To ensure that RFFA-funded projects can be delivered as proposed, on time, within budget, and make it through the federal aid process, Metro will conduct a project delivery risk assessment on each candidate and issue a report documenting the findings. Candidates will be evaluated on how completely the project has been planned, developed and scoped, and measure the risk of project completion within the 2028-2030 timeframe. An opportunity for clarifications on questions will be provided to candidates before issuing final findings. Recommendations from the Project Delivery Risk Assessment will inform conditions of approval and/or required early project development activities if the candidate project is awarded Regional Flexible Funds.

This report will be made publicly available and used as a part of the regional decision-making process.

The Outcomes Evaluation and Project Delivery Risk Assessment processes will occur concurrently in December 2024 – March 2025.

Public Comment – Following issuance of the Outcomes Evaluation and Project Delivery Risk Assessment reports, Metro will conduct a 30-day public comment period in period between March through April 2025, focusing on outreach to community and neighborhood organizations, county coordinating committees and other stakeholders. A joint public meeting of JPACT and Metro Council is planned to give decision-makers the opportunity to hear public testimony on project proposals. A summary of input received through the public comment period will be made available along with the Outcome Evaluation and Project Delivery Risk Assessment reports to inform the final 2028-2030 RFFA decision making process.

County Coordinating Committee/City of Portland Recommendations – Each county coordinating committee and the City of Portland will have the opportunity to provide recommendations to decision-makers on which projects submitted from their jurisdictions best reflect their local priorities. Recommendations are to be provided to TPAC and JPACT in advance of the TPAC action to recommend a package of projects to JPACT.

TPAC/JPACT Discussion and Action – Following the above information gathering steps, TPAC will be asked to consider and discuss the input received, and to provide a recommendation to JPACT on a package of projects to be funded, including both Step 1 and Step 2 investments.

JPACT will consider and discuss the TPAC recommendation and will be requested to take action to refer a package of projects to Metro Council in July 2025.

Council Action – Metro Council will consider and take action on the JPACT-referred package in July 2025.

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If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

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Memo

Date: Monday, December 30, 2024
To: Metro Council and Interested Parties
From: Grace Cho, Principal Transportation Planner
Noel Mickelberry, Senior Transportation Planner
Subject: 2028-2030 Regional Flexible Fund – Step 1A.1 – Candidate Project Evaluation Results with Attachments

Purpose: Provide an overview of the performance evaluation & project delivery assessment results for the candidate projects in consideration.

Background & Current Place in Development:

As part of the adoption of the 2028-2030 Regional Flexible Fund Program Direction, regional leadership agreed to move forward in the development of a new project bond proposal (also referred to as Step 1A.1) for consideration by the region. After a project nomination period was held a total of nine (9) bond nominations moved forward to undergo the candidate project evaluation, in which the results are being shared with Metro Council.

Candidate Project Evaluation Overview

The candidate project consists of three separate evaluations which assesses 1) the consistency towards the bond purpose and principles; 2) the performance towards advancing Regional Transportation Plan (RTP) goals and outcomes; and 3) project delivery challenges outstanding. The purpose of the first two evaluations – comprising the performance evaluation – is not to rank projects, but to instead assess the relative performance by measure and to use the information as one input within the larger discussion of the candidate projects for the bond scenario phase.

Each project was evaluated based on the associated measures for each evaluation shown in Table 1. For the performance evaluation methodology, each measure was weighted equally and each received five (5) total points. Each measure had a quantitative or geospatial analysis element assessed using the specific project characteristics as well as a qualitative element assessed based on application and supplemental materials. The RTP goal advancement assessment applied the RTP goals and outcomes in relation to transit, given the program direction focus on transit. A map and summary of the candidate project applications can be found in Attachment 1.

Metro staff conducted the first two evaluations and utilized an external firm to conduct a project delivery assessment. The candidate project evaluation was conducted from late October through November 2024. Specifically in the bond purpose and principles consistency evaluation, the results are based on historic precedence of federal surface transportation programs. As new information emerges through the development process, the aim is to incorporate it into the bond development considerations.

Table 1. Evaluation Measures for the Three Part Candidate Project Evaluation

Technical Evaluation Component	Measure	Evaluation Results
Bond Purpose & Principles	Regional/Corridor scale project	Rating + brief narrative
	Leverage significant discretionary funding	
	Advance ability to construct projects early	
	Consideration of funding strategy and request relative to other available funding sources	
RTP Goal Advancement	Improves transit service for residents in an Equity Focus Area	Rating + brief narrative
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	
Project Delivery Assessment	Planning	One qualitative rating for overall project delivery assessment
	Partnerships and Support	
	Environmental Considerations	
	Preliminary Engineering and Design	
	Construction	

Candidate Project Evaluation Results and Draft Findings

Table 2. is a summary of the evaluation results by the individual measures for performance evaluation and project delivery assessment organized by the category the project was nominated. Table 3. is a summary of all projects and their ratings on each measure for the three evaluations and by nomination categories. Included as an attachment are individual rating sheets for each project with qualitative comments on each evaluation component. Lastly, the analysis and details of the project delivery assessment of the bond nominations are included as an attachment.

The following are findings from the technical evaluation.

- Candidates which included elements from more than one transit project category (e.g. major transit capital infrastructure, pedestrian transit access, and signal priority) performed best in the performance evaluation. The comprehensive packaging and scale better advance regional goals.
- Inversely, singularly focused candidate projects (i.e. candidates with their scopes elements primarily in one transit project category) do not perform as well as in the performance evaluation. There is recognition these candidate projects address an identified regional need for the system and a part of the region’s transportation strategy, but being more tightly focused and/or smaller in scale even when compiled together programmatically is less impactful in advancing regional goals. For some candidates the consideration of other funding opportunities to advance those projects was also a factor in the performance evaluation ratings.
- Candidates which have a funding strategy that matches the program direction performed best in the bond purpose and principles consistency assessment.

- Articulation specifically on the role the bond proceeds play in leveraging other funding and targeting different discretionary opportunities and local commitment of funding effected the different ratings for the candidate projects.
- While each project is in different stages of development, the project delivery assessment identified at least one or more areas of project delivery challenges for each candidate, with mitigations needed for project delivery.
 - The nominating agencies demonstrated an awareness of the project delivery challenges the candidate project faces and seek to address those challenges through their development processes. This led to no one candidate project receiving a high mitigation effort rating.
 - For some candidates, the project delivery agency demonstrated through the proposed scope, schedule, and budget are adequate to address needed mitigations.
 - Project development only candidates tend to show ability to deliver the project development work as proposed with the bond proceeds, but additional project delivery mitigations will be needed in progressing the project into construction.
 - The major transit capital candidates were assessed under additional criteria specific to the Federal Transit Administration (FTA) Capital Investment Grant (CIG) process. The results highlight the additional rigor required of those candidate projects to meet project delivery milestones in efforts to meet the CIG program requirements.

Based on the draft fundings, some nominations tended to perform better than others, but also maintain project delivery matters in need of resolution. As expressed, the technical evaluation is not to rank projects, but to instead assess the relative performance and flag for implementation challenges. This information is to help shape the next stage of the bond development process, which will introduce additional technical information – in particular the financial analysis of the bond scenarios. These are expected to roll out in the following months to continue to inform the discussion.

Table 2. Summary of Results by Individual Measures for the Performance Evaluation According to Bond Project Category

2028-3030 Regional Flexible Fund Allocation: Step 1A.1 Candidate Project Performance Evaluation Results Summary												
Evaluation Section	Measure	Capital Investment Grant (CIG)/Large Transit Projects			First/Last Mile & Access to Transit Projects				Transit Vehicle Priority			
		Montgomery Park	82nd Ave	TV Highway	Sunrise	Burnside Bridge	OR99E	72nd Ave	185th Overcross	Better Bus	Burnside Bridge	
Bond Purpose & Principles Consistency	Use regional revenues on regional or corridor scale projects											
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.											
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro											
	Leverage significant discretionary federal, state and/or local funding											
RTP Goals & Outcomes Advancement	Improves transit service for residents in an Equity Focus Area											
	Increases speed, frequency and reliability of high capacity transit											
	Provides safer and more convenient access to transit											
	Improves access to jobs and essential services by transit											
	Identified by communities who face disparities in the transportation system as a priority											
Project Delivery Assessment	Number of mitigations	3	2	2	3	1	1	1	2	2	1	
	Level of mitigation effort	Med/Med/Low	Low/Low	Low/Med	Low/Low/Med	Low	Med	Low	Low/Low	Low/Low	Low	

Key: Darker shades of blue indicate higher scoring/rating, while lighter shades blue indicates lesser scoring/rating. For the Project Delivery Assessment, the number of mitigations reflect areas of identified project delivery challenges within the project delivery agency's scope of control. The level of mitigation effort reflects by mitigation area the efforts needed to address the project delivery challenge.

Table 3. Summary of Candidate Evaluation Ratings

Evaluation Component/Category	Sunrise	185th	Better Bus	Burnside Bridge	OR99E	Montgomery Park	72nd Ave	82nd Ave	TV Highway
Overall score									
Capital Investment Grant (CIG)/Large Transit									
First/Last & Access to Transit									
Transit Vehicle Priority									
Bond Purpose & Principles Consistency									
RTP Goals & Outcomes Advancement									
Project Delivery Assessment (see attachment 3 for details)	Number of Mitigations								
	3	2	2	1	1	3	1	2	2
	Level of Mitigation Effort								
	Low/Low/Med	Low/Low	Low/Low	Low	Med	Med/Med/Low	Low	Low/Low	Low/Med

Key: Darker shades of blue indicate higher scoring/rating, while lighter shades blue indicates lesser scoring/rating

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: Sunrise Corridor

Applicant: Clackamas County

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	This is a regional corridor, without high ridership transit lines. Requested RFFA Step 1A.1 is for project development funds only for the environmental reassessment of Sunrise Highway and complete streets retrofit with bike/pedestrian and transit hub elements on Highway 212. There are other sources of funds in the region that could support project development for the project. The project also necessitates agreement from ODOT to complete the parallel new Sunrise facility and the jurisdictional transfer and/or agreed upon design for Highway 212. At this point does not have a pipeline for construction funding at state or federal level. Project delivery agency intends to seek state legislative and federal discretionary grants.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Primary focus is improved bike/pedestrian facilities to improve access to existing transit. This corridor does not currently have high capacity transit or frequent transit lines, through there are plans to add two local routes and more County operated shuttle service. Extensive outreach has been conducted with general need for better safety and pedestrian/bicycle facilities in the corridor. Feedback has also been received about the new roadway facility planned.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: 185th Max Overcrossing

Applicant: City of Hillsboro

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	Locally specific project on a high ridership line, funding request is for project development and not construction. While eligible for federal funding sources, unclear on competitiveness. Local sources could support project development funding request. While this project was submitted under CIG category, CIG not identified as a funding source for construction in application materials but rather potential Federal Rail Administration (FRA) grant funds.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Directly serves an equity focus area, however there has not been extensive engagement on this specific project with impacted communities. Separation at one location has the ability to decrease conflicts (e.g. pedestrian-vehicle) and provide some speed and reliability to TriMet’s Line 52 frequent bus.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: Better Bus Program

Applicant: Metro

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	Regional impact via many smaller scale improvements for local transit lines. Program has a good history of delivering projects, but that may be impacted if it switches to federal aid process. Historically has leveraged significant local funds, but those funds are not yet committed.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Location can vary across the region, using equity focus area or safety concerns as an eligibility criterion. Purpose of the program is to increase speed, frequency and reliability of transit. Community input can also be a relevant criterion for advancement of projects.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project
Applicant: Multnomah County

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	Regionally significant as the bridge serves many high ridership lines and is the surface lifeline route across the Willamette River. Eligible and reliant on many other sources of funding to construct and has raised significant local revenue.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Application focused on the pedestrian and transit elements near the bridge as well as the transit prioritization on the bridge itself. Significant equity-focused efforts have shaped various components of the project and it serves an equity focus area directly with many social and human service providers. Transit reliability anticipated and resilience of transit lines through a highly utilized corridor.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: McLoughlin Boulevard (OR99E) First and Last Mile and Safe Access to Transit Streetscape Enhancements

Applicant: City of Oregon City

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	Regional impact on a corridor serving high ridership lines. Aggressive schedule with reliance on discretionary sources. Other regional sources available (e.g. Step 2) and necessitates future agreement from ODOT to implement agreed upon design.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Supports equity focus area with extensive engagement. Focuses on improving pedestrian environment on a high crash corridor to enhance access to transit. Designed to be implemented with prior funded transit signal priority for a frequent service bus line and accessing the Oregon City transit center. No further transit reliability or frequency upgrades identified beyond those being coordinated with Line 33 transit signal priority project.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: Montgomery Park Streetcar Extension

Applicant: City of Portland

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	This is a Tier 1 High-Capacity Transit corridor in the 2023 RTP and is well suited for federal discretionary grants for a project type and entity that has had success previously (CIG). Some level of risk in funding strategy that is reliant on local development.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Not located in an equity focus area. The project has conducted significant engagement and plans to include culturally specific art into project scope. This project will add new high capacity transit service where it does not currently exist and will upgrade the pedestrian and bike connections in the project area.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: 72nd Ave. Phase 1 Tigard Triangle Corridor Improvements (Pacific Highway to Dartmouth St.)

Applicant: City of Tigard

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles:	Use regional revenues on regional or corridor scale projects	This is a locally specific project. Well-articulated schedule and potential funding sources, but may not be taking into account the federal aid process for construction timeline. There are other potential sources of regional funds for this project (e.g. Step 2).
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Does not serve an equity focus area and while community engagement was noted the impact that input has had on the project was unclear. Application includes extensive pedestrian and bicycle upgraded facilities for accessing transit. This project is not on a high crash corridor and does not have a high capacity transit line but will serve a realigned frequent service Line 76 and is in the corridor area of the suspended Southwest Corridor project. Line 76 is a Tier 3 high capacity transit corridor, but not currently prioritized for short-term implementation, though it is one of several routes under consideration for FX service. The 72 nd Ave bridge itself does not include significant improvements for transit speed, frequency or reliability.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: 82nd Avenue Transit Project

Applicant: TriMet

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	This is a tier 1 high capacity transit project in the 2023 RTP and is well suited for federal discretionary grants for a project type and entity that has had success previously (CIG). Is consistent with prior use of RFFA bond funding to support transit capital projects that have limited sources of local funds to leverage significant federal discretionary funding.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	A majority (80%) of the project corridor runs through equity focus areas and project has conducted extensive community engagement that continues through 82 nd Ave. Coalition. Project is specifically designed to increase speed, frequency and reliability on the busiest transit line in TriMet’s network. Extensive improvements to pedestrian environment and access included in this project, located on a high crash corridor. Part of the project area necessitates future agreement from ODOT to implement agreed upon design.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

Attachment 2 – Individual Candidate Project Evaluations – Summary of Main Comments

Project Name: Tualatin-Valley (TV) Highway Transit Project

Applicant: TriMet

Evaluation Framework components & measures		Comments
Bond Purpose/ Principles	Use regional revenues on regional or corridor scale projects	This is a tier 1 high capacity transit corridor in the 2023 RTP and is well suited for federal discretionary grants for a project type and entity that has had success previously (CIG). Is consistent with prior use of RFFA bond funding to support transit capital projects that have limited sources of local funds to leverage significant federal discretionary funding.
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.	
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro	
	Leverages significant discretionary federal and state and/or local funding, including support for a pipeline of Federal Transit Administration (FTA) Capital Investment Grant projects.	
RTP Goals	Improves transit service for residents in an Equity Focus Area	Over 80% of the project corridor is in equity focus areas with extensive engagement through steering committee and equitable development strategy. Specific improvements are not as detailed, but this project focuses on transit reliability, frequency and speed. Pedestrian safety upgrades noted, the project is on a high crash corridor The project necessitates future agreement from ODOT to implement agreed upon design.
	Increases speed, frequency and reliability of high-capacity transit	
	Provides safer and more convenient access to transit	
	Improves access to jobs and essential services by transit	
	Identified by communities who face disparities in the transportation system as a priority	

TECHNICAL MEMORANDUM

December 2, 2024

Project# 29295.003

To: Metro Staff: Grace Cho, Monica Krueger, Noel Mickleberry, Dan Kaempff, and Ted Leybold
From: Nicholas Meltzer, Lekshmy Hirandas, and Camilla Dartnell, PE
RE: 2028-30 Regional Flexible Fund Step 1A.1 Project Delivery Assessment

As part of the adoption of the 2028-2030 Regional Flexible Fund Program, Metro is developing a new project bond proposal for the region to consider, referred to as Step 1A.1. Step 1A.1 projects will be evaluated based on three components: 1) Bond purpose and principles consistency and advancement; 2) Regional Transportation Plan (RTP) goals advancement; and 3) Project delivery assessment. Kittelson & Associates, Inc. (Kittelson) is supporting Metro by performing the project delivery assessments. This memorandum contains an overview of the methodology applied for the project delivery assessments.

Background

Regional decision makers – through a Metro-led process – are considering a new commitment of future Regional Flexible Funds starting in 2028-2030 to support a bond and make funding available to advance regional projects. The estimated amount of funding generated through a new bond is between \$55 and \$105 million based on the eligible projects selected and other factors related to the bond financing mechanism.

Kittelson is evaluating project delivery aspects of the applications received by Metro including the scope, schedule, and budgets to determine if: 1) the scope of work sufficiently covers all work anticipated to be necessary for project success; 2) the budget and schedule are appropriate to the scope of work outlined in the application; and 3) the scope of work and expenditure of funds can be underway or completed in the federal fiscal year 2026 through 2029 timeframe.

Project Delivery Assessment

Kittelson developed a scoring template focused on assessing the project delivery considerations for Step 1A.1 proposed projects. The project team based this scoring template on best practices related to common state and federal project delivery processes, including the Oregon Department of Transportation, Federal Highway Administration and Federal Transit Administration processes, best practices within project delivery, and experience assessing risk for Step 2 Regional Flexible Fund Allocation projects in the 2022-2024 and 2025-2027 cycles.

The intention for the project delivery assessment is to understand if the estimated budgets and schedules for each project will sufficiently address necessary scope items and rules and regulations of state and federal project delivery. If these are addressed, the risk to project delays, budget overages, and inability to deliver the intended scope is reduced.

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Each project is evaluated based on evaluation criteria grouped into six broad categories, including scope, schedule, and budget sufficiency related to:

- Planning
- Partnerships and Support
- Environmental Considerations
- Preliminary Engineering and Design
- Construction
- FTA Considerations*

*Only applicable to nominations in the CIG project category

The intent of utilizing the criteria under these six categories is not to rank projects against one another but to better understand whether there are additional scope, schedule, and/or budget considerations that may need to be added to lead to successful delivery of projects.

For each criterion, the assessment team identified whether the project 1) completed the step and/or sufficiently addressed the need in the scope, budget, and schedule, 2) insufficiently addressed the need in the scope, budget, and schedule, or 3) did not address the need. The assessment team performed the assessment based on materials provided by the applicant. If information was not provided or not provided in sufficient detail to indicate that a criterion is addressed, the project team assumed it is not addressed. At the request of Kittelson and Metro, applicants provided additional information to aid in assessing their projects.

Some projects are only requesting funds for planning, while others are requesting funding through construction. The project team primarily assessed the risk of each project to be completed through the project phase for which Step 1A.1 funding would be provided. Because of this, the project team is primarily applying criteria relevant to the level of project development for which the project is requesting funding. Therefore, projects not requesting construction funding will not be assessed against criteria relevant to construction; however, we have requested the applicant provide information on their plan for funding future construction of the project. This is provided alongside the results of the project delivery assessment, as it is relevant to understanding the likelihood of a project receiving future funding for construction.

Assessment Summaries

Kittelson developed a summary of each project requesting funding through the RFFA process. The summary includes a project description, funding overview, project phases, and project applicant. The summary also includes Kittelson's assessment of the likely adequacy of the proposed project scope, schedule and budget. Recommended actions to address project delivery considerations are organized according to project delivery assessment categories: Planning (PL), Partnerships and Support (PS), Environmental Considerations (EC), Design (DE), Construction (CN), and FTA Considerations (FTA).

To aid in the review process, a short glossary of terms is provided below, followed by the nine project summaries.

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Federal Transit Administration (FTA): The government agency responsible for funding and regulating public transportation systems in the United States.

Federal Highway Administration (FHWA): The government agency responsible for funding and regulating ground transportation in the public right of way in the United States.

Capital Improvement Grant (CIG): A discretionary grant program within the Federal Transit Administration's Section 5309 that focuses on Fixed Guideway (i.e. rail or similar) systems. Large transit agencies commonly use it as a source of capital construction funding. The CIG program is divided into three subprograms: New Starts, Small Starts, and Core Capacity.

New Starts: CIG funding for design and construction of new fixed-guideways or extensions to fixed guideways (projects that operate on a separate right-of-way exclusively for public transport or include a rail or catenary system. For projects over \$400 million in total costs, seeking more than \$150 million in grants.

Small Starts: CIG funding for design and construction of corridor-based bus rapid transit projects operating in mixed traffic that represents a substantial investment in the corridor and emulate the features of rail. Total project cost less than \$400 million, seeking less than \$150 million in grants.

Planning: A term for the initial planning and scoping phase of a project, up to 30% conceptual design. The Oregon Department of Transportation refers to this phase as Program Development, while the Federal Transit Administration refers to it as Project Development.

Design: A term for the predominant design phase of a project, when Plans, Specifications and Estimates (PS&E) are further developed from 30% to 100%. The Oregon Department of Transportation refers to this as Project Development, while the Federal Transit Administration refers to it as Engineering.

Construction: A term for the phase of a project after 100% Plans, Specifications and Estimates are complete and the project is put out to bid. Includes all work until the improvement is open and operational.

Certified Agency: An organization that has been qualified to deliver federally funded projects by the Oregon Department of Transportation. The Federal Highway Administration allows states to determine appropriate oversight methods for delivering federally funded projects and ODOT uses a certification process. Once approved, they are known as a Certified Agency and can deliver projects as opposed to working with ODOT to deliver the project.

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Capital Investment Grant Projects

Project Name	Montgomery Park Streetcar Extension	
Project Description:	<p>The Portland Streetcar Montgomery Park Extension Project will extend the Portland Streetcar North-South (NS) Line 0.65 miles one-way (1.3 miles round trip) from its existing terminus at NW 23rd Avenue and NW Northrup Street to a new terminus at NW 26th Avenue and NW Wilson Street near Montgomery Park in Northwest Portland. The Project will support a new transit-oriented mixed use district west of Highway 30 between NW Nicolai and NW Vaughn streets, where underutilized industrial land is proposed to undergo land use changes to employment- and housing-supportive mixed uses</p>	
Project Funding:	<p><i>Requested from RFFA:</i> \$20 million for match to a larger grant</p>	<p><i>Total Project Cost:</i> \$119 million in design and construction anticipated from FTA Small Starts or \$178 million in design, construction and vehicle purchases anticipated from FTA Small Starts.</p>
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	Portland Bureau of Transportation, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	<p>Permitting and right-of-way may not be sufficiently addressed in the budget and schedule. The project budget and ridership estimates, key pieces of FTA grants, are contingent on development of the Montgomery Park area.</p>	
Recommended Action:	<p>(DE) Project budget and schedule may require some extension to account for unknowns. (CN) Project schedule may require some extension to account for development timeline which affects ridership estimates and project match.</p> <p>FTA Considerations: Project schedule may require some extension to account for development timeline which affects ridership estimates and project match.</p>	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

December 2, 2024

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2028-30 Regional Flexible Fund Step 1A.1 Project Delivery Assessment

Project Name	82 nd Ave Transit Project	
Project Description:	<p>The purpose of the 82nd Avenue Transit Project is to improve transit speed, reliability, capacity, safety, comfort, and access for Line 72 through development of a corridor-based bus rapid transit (BRT) route that will include enhanced crossings or traffic signal at all stations; platforms with curbs and waiting areas, shelters, lighting, seating, real-time arrival info. The project seeks to address the needs of people who live, work, learn, shop, and travel within the corridor both today and in the future – in particular, BIPOC and low-income individuals – through context-sensitive transit improvements in a constrained corridor.</p>	
Project Funding:	<p><i>Requested from RFFA:</i> \$30 million to use as match for a larger grant</p>	<p><i>Total Project Cost:</i> \$300 million total anticipated from FTA CIG Small Starts</p>
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	TriMet, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	<p>There are unknowns regarding the project scope and schedule due to the fact that the project terminus is currently undecided. The project team expects a terminus decision to be finalized in January. Additional time may be needed in the schedule to account for coordination with and design requirements for multiple jurisdictions, including both PBOT and ODOT. The lack of local match commitments presents a concern to the budget, however the schedule accommodates time to get agreements in place, and potential sources for funding have been identified. The decision for whether Portland Clean Energy Funds may be used as match funding is anticipated to be made in December 2024.</p>	
Recommended Action:	<p>(DE) Project schedule may require some extension to account for multi-jurisdictional coordination, as the project crosses multi-jurisdictional boundaries. (CN) The project team should also focus on securing local match to support project success.</p> <p>FTA Considerations: No additional considerations.</p>	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Project Name	TV Highway Transit Project	
Project Description:	The purpose of the TV Highway Safety and Transit Project is to improve speed, reliability, accessibility and safety for transit riders on TV Highway, particularly for communities of color and low-income communities. The project replaces TriMet Rote 57 with a new Frequent Express (FX) Route and includes improved rider amenities, intersection improvements, and signal enhancements to improve bus speeds.	
Project Funding:	<i>Requested from RFFA:</i> \$30 million	<i>Total Project Cost:</i> \$300 million total anticipated from FTA CIG Small Starts
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	TriMet, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	While the project team has begun coordination with the railroad, railroad right-of-way requirements and rail orders, if necessary, may significantly impact the project schedule. Only a small percentage of the required project match has been secured.	
Recommended Action:	<p>(DE) Although the project team has already engaged the railroad, project schedule may require some extension to account for coordination with the adjacent railroad, including potential rail crossing orders or minor rail right of way acquisition. (CN) The project team should also focus on securing local match to support project success.</p> <p>FTA Considerations: No additional considerations.</p>	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Transit Vehicle Priority Projects

Project Name	SW 185 th MAX Overcrossing	
Project Description:	The purpose of the SW 185th Avenue MAX Overcrossing project is to grade separate MAX light rail vehicles up and over SW 185th Avenue.	
Project Funding:	<i>Requested from RFFA:</i> \$20-\$30 million to be used as match	<i>Total Project Cost:</i> \$108 million total anticipated through Federal Rail Administration crossing elimination program
Project Phase(s):	Design	
Applicant and Project Delivery:	TriMet, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	<p>Project Planning (as requested from RFFA): The schedule may have little flexibility to accommodate any additional complexities that may arise, and the time anticipated for right-of-way acquisition in the schedule may be optimistic.</p> <p>Project Construction/Completion: As construction funding is sought, there are limited examples of previous FRA grant funded projects in Oregon, which could result in some unknowns to the overall completion of the project.</p>	
Recommended Action:	<p>(PE) This project is anticipated to include all steps required to accomplish project development, as is the focus for the funding request. Consider extending the schedule to account for uncertainties.</p> <p>(CN) Construction is not part of the funding request, however consider exploring additional or secondary grant/funding sources.</p>	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Project Name	Better Bus Program	
Project Description:	The program consists of initial planning work and program administration, project development, and design and delivery of a select number of Better Bus projects. Projects will be focused on those that help transit service operate more quickly and reliably. Projects that would advance through this grant could include those identified through the Better Bus program, FX planning, or other efforts depending on evaluation and analysis.	
Project Funding:	<i>Requested from RFFA:</i> \$11 million total project cost	<i>Local Match:</i> \$1,129,700 cash match from Metro local funds
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	Metro (applicant), TriMet (partner), local jurisdictions (project delivery agencies)	
Project Delivery Considerations for Scope, Schedule and Budget:	If federal funds are used, the scope of each project within the program is expected to grow to address federal requirements. This may impact local partnerships and the number of projects that can be delivered under the requested funding.	
Recommended Action:	(PS, CN). No cost risk mitigation anticipated, however keeping the project funding non-federal is expected to allow for more scope to be completed with requested funding. Project team should also have regular conversations with project partners to update partners on the anticipated scope.	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

December 2, 2024

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2028-30 Regional Flexible Fund Step 1A.1 Project Delivery Assessment

Project Name	Transit and Access-to-Transit Components to Earthquake Ready Burnside Bridge	
Project Description:	The Earthquake Ready Burnside Bridge (EQRB) Project will replace the existing Burnside Bridge with one that is seismically resilient, and has improved transit, pedestrian, and bicycle access to serve our community for decades to come. Multnomah County will be adding permanent transit improvements to the new bridge and the surrounding area to improve safe access to transit and transit vehicle priority. In 2026, the County will construct permanent improvements along transit, pedestrian, and bicycle detour routes that will be utilized during the construction of the new bridge Improvements such as new bus stops, protected bike lanes, signing and striping, pedestrian refuge islands, traffic diverters and other traffic calming measures, sidewalk reconstruction, and modifications to traffic signals will provide safer access to transit.	
Project Funding:	<i>Requested from RFFA:</i> \$25 million for match to a larger grant	<i>Total Project Cost:</i> \$897 million total via a mix of local and federal funds
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	Multnomah County, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	There is a possibility of minor schedule and budget impacts from the extent of planned right-of-way acquisition.	
Recommended Action:	(CN) No cost risk mitigation anticipated, however reserve project funding should be considered in the case that there are complexities with the right-of-way process.	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

FIRST-LAST MILE AND SAFE ACCESS TO TRASIT PROJECTS

Project Name	Sunrise Gateway Corridor/Highway 212	
Project Description:	The project will focus on improving transit access and the first/last mile connections to and through the North Clackamas Industrial Area. The future improvements will provide key regional connections to support the implementation of the Clackamas to Columbia (C2C) corridor, design solutions to address the gaps in the pedestrian and bikeway facilities along Highway 212/224, first last mile transit access solutions including improved safety of bus stops and seamless transit transfers.	
Project Funding:	<i>Requested from RFFA:</i> \$15 million for design only	<i>Local Match:</i> \$1,540,500 cash match from the Road Fund
Project Phase(s):	Design	
Applicant and Project Delivery:	Clackamas County, Certified Agency	
Project Delivery Considerations for Scope, Schedule and Budget:	<p>Project Planning (as requested from RFFA): The project schedule may be underdeveloped, and therefore may not currently anticipate all project complexities that may arise.</p> <p>Project Construction/Completion: Project construction is contingent upon securing the extensive required right-of-way, for which funding may not have been considered for relocations; developing a funding plan; and securing grants.</p>	
Recommended Action:	<p>(EC, DE) This project is anticipated to include all steps required to accomplish project development, as is the focus for the funding request. Project schedule may require some extension if complexities arise in environmental permitting or preliminary engineering.</p> <p>(CN) Construction is not part of the funding request, however for project construction, relocation fees should be added to right-of-way costs.</p> <p>After the FEIS is complete, it is only valid for a 3-year period, so it will be important for the project team to secure final design and construction funding though the project development period to keep from needing to perform an additional FEIS update in the future.</p>	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

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2028-30 Regional Flexible Fund Step 1A.1 Project Delivery Assessment

Project Name	McLoughlin Boulevard (OR-99E) First and Last Mile and Safe Access to Transit Streetscape Enhancements	
Project Description:	The project includes first/last mile bicycle and pedestrian connection will work in tandem with recently-funded TriMet improvements to Line 33, including transit signal priority on McLoughlin Boulevard for Line 33 (east of 10th Street), to activate McLoughlin Boulevard as a transit corridor with safe and comfortable active transportation connections.	
Project Funding:	<i>Requested from RFFA:</i> \$9 million for design and construction	<i>Local Match:</i> \$924,300 in cash match from Transportation System Development Charges
Project Phase(s):	Design, Construction	
Applicant and Project Delivery:	City of Oregon City. Delivery by ODOT	
Project Delivery Considerations for Scope, Schedule and Budget:	The project schedule may not appropriately account for the ODOT project delivery process or collaboration required with ODOT staff due to the project location within ODOT's right-of-way.	
Recommended Action:	(DE) Project schedule may require some extension to account for multi-jurisdictional coordination, and to account for the ODOT federal aid delivery process.	

Attachment 3. 28-30 RFFA Step 1A.1 - Project Delivery Assessment

Project Name	72 nd Ave Phase I Tigard Triangle Corridor Improvements	
Project Description:	This project will transform 72nd Avenue into a complete street featuring separated cycle tracks, sidewalks, enhanced pedestrian crossings, and improved transit stops, providing safer and more sustainable transit options.	
Project Funding:	<i>Requested from RFFA:</i> \$15,904,000 total project cost	<i>Local Match:</i> \$3,976,000 in cash match from tax increment financing
Project Phase(s):	Planning, Design, Construction	
Applicant and Project Delivery:	City of Tigard. Delivered by ODOT	
Project Delivery Considerations for Scope, Schedule and Budget:	The project has a well defined scope and identifies mitigations for possible complexities. A funding gap exists between the updated cost estimate and the proposed funding sources in the initial application.	
Recommended Action:	(PL) Project's funding strategy may need to be expanded to account for full project cost estimates.	

Assessment Summary Table

A table summarizing the assessment information follows on the next page and contains the following headings:

- **Project Applicant**
- **Project Name and Description**
- **Overview of Project Delivery Considerations**
This information matches the project summaries in this memorandum and allows for consolidated project review
- **Cost Risk Mitigation Needs**
Mitigation needs are identified according to the project delivery assessment categories Kittelson reviewed and include Planning, Partnerships and Support, Environmental Considerations, Design, Construction and FTA Considerations. Recommended actions are matched with mitigation needs.
- **Recommended Action**
Actions that can be taken to address anticipated cost risk mitigation needs.

For each project, if cost risk mitigation is suggested the appropriate project delivery assessment category is identified along with a level of mitigation effort. The level of mitigation effort is sorted into low, medium and high, which corresponds to the impact an unaddressed consideration could have on the project.

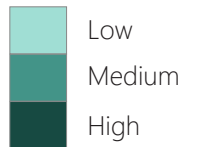
PROJECT DELIVERY ASSESSMENT - SUMMARY

The table below provides an overview of project delivery considerations, mitigation needs to reduce cost risk, and the recommended actions.

Project Delivery Assessment Categories






- PL Planning
- PS Partnerships & Support
- EC Environmental Considerations
- DE Design
- CN Construction
- FTA FTA Considerations

Mitigation Effort



Project Applicant	Project Name & Description	Overview of Project Delivery Considerations	Cost Mitigation Risk	Recommended Action
CAPITAL INVESTMENT GRANT PROJECTS				
PBOT	<p>Montgomery Park Streetcar Extension This project is part of the Montgomery Park Area Plan, and this extension will bring streetcar service to Montgomery Park, enhancing transit access and supporting planned development in the area.</p>	Permitting and right-of-way may not be sufficiently addressed in the budget and schedule. The project budget and ridership estimates, key pieces of FTA grants, are contingent on development of the Montgomery Park area.		<ul style="list-style-type: none"> DE Project budget and schedule may require some extension to account for unknowns. CN FTA Project schedule may require some extension to account for development timeline, which affects ridership estimates and project match.
TriMet	<p>82nd Ave Transit Project The purpose of the project is to improve transit speed, reliability, capacity, safety, comfort, and access for Line 72 through the development of a Frequent Express (FX) route that will include enhanced crossings or traffic signals at all stations; platforms with curbs and waiting areas, shelters, lighting, seating, real-time arrival info</p>	There are unknowns regarding the project scope and schedule due to the fact that the project terminus is currently undecided. The project team expects a terminus decision to be finalized in January. Additional time may be needed in the schedule to account for coordination with and design requirements for multiple jurisdictions, including both PBOT and ODOT. The lack of local match commitments presents a concern to the budget, however the schedule accommodates time to get agreements in place, and potential sources for funding have been identified. The decision for whether Portland Clean Energy Funds may be used as match funding is anticipated to be made in December 2024.		<ul style="list-style-type: none"> DE Project schedule may require some extension to account for multi-jurisdictional coordination, as the project crosses multi-jurisdictional boundaries. CN The project team should also focus on securing local match to support project success.
TriMet	<p>TV Highway Transit Project The project replaces TriMet Route 57 with a new Frequent Express (FX) Route and includes improved rider amenities, intersection improvements, and signal enhancements to improve bus speeds.</p>	While the project team has begun coordination with the railroad, railroad right-of-way requirements and rail orders, if necessary, may significantly impact the project schedule. Only a small percentage of the required project match has been secured.		<ul style="list-style-type: none"> DE Although the project team has already engaged the railroad, project schedule may require some extension to account for coordination with the adjacent railroad, including potential rail crossing orders or minor rail right of way acquisition. CN The project team should also focus on securing local match to support project success.
TRANSIT VEHICLE PRIORITY PROJECTS				
Hillsboro	<p>185th Max Overcrossing The project intends to grade separate MAX light rail vehicles up and over SW 185th Avenue.</p>	The schedule may have little flexibility to accommodate any additional complexities that may arise, and the time anticipated for right-of-way acquisition in the schedule may be optimistic. As construction funding is sought, there are limited examples of previous FRA grant funded projects in Oregon, which could result in some unknowns to the overall completion of the project.		<ul style="list-style-type: none"> DE This project is anticipated to include all steps required to accomplish project development, as is the focus for the funding request. Consider extending the schedule to account for uncertainties. CN Construction is not part of the funding request, however for project construction, the project team should consider exploring additional or secondary grant/funding sources.

*Not included in project funding request

Project Applicant	Project Name & Description	Overview of Project Delivery Considerations	Cost Mitigation Risk	Recommended Action
Metro	<p>Better Bus Projects will be focused on those that help transit service operate more quickly and reliably. Projects that would advance through this grant could include those identified through the Better Bus program, FX planning, or other efforts depending on evaluation and analysis.</p>	<p>If federal funds are used, the scope of each project within the program is expected to grow to address federal requirements. This may impact local partnerships and the number of projects that can be delivered under the requested funding.</p>		<p>PS CN No cost risk mitigation anticipated, however keeping the project funding non-federal is expected to allow for more scope to be completed with requested funding. Project team should also have regular conversations with project partners to update partners on the anticipated scope.</p>
Multnomah County	<p>Burnside Bridge This project will replace the existing Burnside Bridge with a new structure designed to withstand seismic activity. The new bridge will improve transit, pedestrian, and bicycle access, offering a more resilient and accessible crossing point.</p>	<p>There is a possibility of minor schedule and budget impacts from the extent of planned right-of-way acquisition.</p>		<p>CN No cost risk mitigation anticipated, however reserve project funding should be considered in the case that there are complexities with the right-of-way process.</p>
FIRST-LAST MILE AND SAFE ACCESS TO TRANSIT PROJECTS				
Clackamas County	<p>Sunrise Corridor The project will focus on improving transit access and the first/last mile connections to and through the North Clackamas Industrial Area. The future improvements will provide key regional connections to support the implementation of the Clackamas to Columbia (C2C) corridor, design solutions to address the gaps in the pedestrian and bikeway facilities along Highway 212/224, first last mile transit access solutions including improved safety of bus stops and seamless transit transfers.</p>	<p>The project schedule may be underdeveloped, and therefore may not currently anticipate all project complexities that may arise. Project construction is contingent upon securing the extensive required right-of-way, for which funding may not have been considered for relocations; developing a funding plan; and securing grants.</p>		<p>EC DE (EC, DE) This project is anticipated to include all steps required to accomplish project development, as is the focus for the funding request. Project schedule may require some extension if complexities arise in environmental permitting or preliminary engineering.</p> <p>CN Construction is not part of the funding request, however for project construction, relocation fees should be added to right-of-way costs.</p> <p>After the FEIS is complete, it is only valid for a 3-year period, so it will be important for the project team to secure final design and construction funding though the project development period to keep from needing to perform an additional FEIS update in the future.</p>
Oregon City	<p>McLoughlin Blvd OR-99E The project includes first/last mile bicycle and pedestrian connection that will work in tandem with recently-funded TriMet improvements to Line 33, including transit signal priority on McLoughlin Boulevard for Line 33 (east of 10th Street), to activate McLoughlin Boulevard as a transit corridor with safe and comfortable active transportation connections.</p>	<p>The project schedule may not appropriately account for the ODOT project delivery process or collaboration required with ODOT staff due to the project location within ODOT's right-of-way.</p>		<p>DE Project schedule may require some extension to account for multi-jurisdictional coordination, including the ODOT federal aid delivery process.</p>
Tigard	<p>72nd Ave - Phase 1 Tigard Triangle Corridor Improvements This project will transform 72nd Avenue from Pacific Highway to Dartmouth St into a complete street featuring separated cycle tracks, sidewalks, enhanced pedestrian crossings, and improved transit stops, providing safer and more sustainable transit options.</p>	<p>The project has a well defined scope and identifies mitigations for possible complexities. A funding gap exists between the updated cost estimate and the proposed funding sources in the initial application.</p>		<p>PL Project's funding strategy may need to be expanded to account for full project cost estimates.</p>

*Not included in project funding request

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: Monday, December 30, 2024
To: Metro Council and Interested Parties
From: Grace Cho, Principal Transportation Planner
Subject: 2028-2030 Regional Flexible Fund Step 1A.1 – Next Steps

Purpose: To provide an overview of the next steps in the 28-30 Regional Flexible Fund Allocation new project bond development process (Step 1A.1).

Background & Current Place in Development:

As part of the adoption of the 2028-2030 Regional Flexible Fund Program Direction, regional leadership agreed to move forward in the development of a new project bond proposal (also referred to as Step 1A.1) for consideration by the region. After a project nomination period, nine (9) bond nominations underwent candidate project evaluations, in which the results were shared at TPAC and JPACT to help jump start a discussion towards concepts/themes to shape bond scenarios. The remainder of this memorandum is to provide an overview of the next steps in the 28-30 Regional Flexible Fund Step 1A.1 new project bond development process.

2028-2030 RFFA Step 1A.1: Getting to a Preferred Bond Scenario

Several pieces of information are intended to inform and shape bond scenarios and an eventual preferred bond scenario/proposal for consideration by TPAC, JPACT, and Metro Council. These are:

- Technical Information
 - Performance evaluation
 - Bond purpose and principles
 - Regional Transportation Plan (RTP) goals and outcomes
 - Project delivery assessment
 - Financial assessment of bond scenarios
- Financial, Administrative, and Regulatory
 - Bond mechanism selection and requirements (e.g. restrictions, reporting, costs)
 - Regulatory and economic outlook
- Policy Direction
 - Objectives of the 28-30 RFFA Program Direction are met
- Partner and Public Input
 - TPAC, JPACT, and Metro Council input bond scenario themes/concepts
 - Public comment
 - TPAC, JPACT, and Metro Council input on local priorities

Some of the pieces of information has been shared at TPAC and JPACT towards the end of 2024, but many pieces remain as input to continue to gather as well as further technical analysis and research. The schedule outlined in next sections outlines the anticipated dates as to when the next pieces will come before different regional committees and Council.

2028-2030 Regional Flexible Fund New Project Bond Development Process – Next Steps

Between December 2024 through March 2025, Metro staff will continue analysis and provide information to support the discussion of shaping bond scenarios and ultimately taking action on a preferred bond scenario to carry through public comment. Tables 1. and 2. both summarize upcoming bond development activities and key dates. Short descriptions of the activities follow.

Metro Council will play a key role in new project bond, where the Council will be asked to take action in July 2025 to adopt the 2028-2030 Regional Flexible Fund Allocation – including the New Project Bond (Step 1A.1) if agreed upon by regional partners, and Step 2. Along the way, Metro staff anticipates updating and gathering input from Council as the bond proposal development progresses.

Table 1. Upcoming Activities, Timeframe, and Audiences

Timeframe	Activities	Audiences
December 2024	Technical Information <ul style="list-style-type: none"> • Performance evaluation <ul style="list-style-type: none"> ○ Bond purpose and principles consistency ○ Regional Transportation Plan (RTP) goals and outcomes advancement • Project delivery assessment Partner and Public Input <ul style="list-style-type: none"> • TPAC and JPACT input bond scenario themes/concepts 	TPAC JPACT
January 2025	Technical Information <ul style="list-style-type: none"> • Financial assessment of bond scenarios (draft) Financial, Administrative, and Regulatory <ul style="list-style-type: none"> • Bond mechanism selection and requirements (e.g. restrictions, reporting, costs) (tentative) Partner and Public Input <ul style="list-style-type: none"> • Metro Council input bond scenario themes/concepts 	TPAC JPACT Metro Council
February 2025	Technical Information <ul style="list-style-type: none"> • Financial assessment of bond scenarios (revised) Financial, Administrative, and Regulatory <ul style="list-style-type: none"> • Further updates on bond mechanism Policy Direction <ul style="list-style-type: none"> • 28-30 RFFA Program Direction objectives met Partner and Public Input <ul style="list-style-type: none"> • TPAC, JPACT, and Metro Council input on local priorities 	TPAC JPACT
March 2025	Technical Information <ul style="list-style-type: none"> • Financial assessment of bond scenarios (for preferred scenario) Financial, Administrative, and Regulatory <ul style="list-style-type: none"> • Further updates on potential outlook Policy Direction <ul style="list-style-type: none"> • 28-30 RFFA Program Direction objectives met Partner and Public Input <ul style="list-style-type: none"> • TPAC, JPACT, and Metro Council input on local priorities • Open public comment 	TPAC JPACT Metro Council*
April 2025	Public comment	Public

*Indicates tentative date. Unconfirmed on committee or Metro Council calendars.

Project Evaluation and Bond Scenarios Assessment (December 2024 – February 2025)

Following the candidate project evaluations, Metro staff seeks to gather regional partner input concepts/themes build different scenarios for financial evaluation. With the candidate evaluation results as a starting point for the discussion, this input is primarily being sought in December 2024 in efforts to maintain the schedule for completing the financial analysis of the scenarios.

With the combination of the concepts/themes input and the candidate evaluation results, Metro staff will develop scenarios to go through a financial analysis to understand additional information regarding costs, revenues advances, future revenues committed to debt service, and implications for Step 2. Scenarios will be assessed under the selected bond mechanism, which may add new considerations or complexity towards the incurred costs for bonding. The financial analysis will convey the different funding tradeoffs relative of each composed scenario while adhering to the bond principles in the Program Direction.

Metro staff will engage with community members on potential bond scenarios during this time frame through outlets such as Metro news. A first look at the draft financial analysis of the bond scenario analysis is anticipated for January 2025 with revised updates in February and March as input and further information on the regulatory and economic outlook comes into focus. The bond scenario analysis results will be shared with TPAC, JPACT, and Metro Council. The committees will have the opportunity to provide input and/or recommendations as they deliberate composing the preferred bond scenario/proposal.

Preferred Bond Scenario/Proposal Selection and Public Comment (February – May 2025)

The results of the bond scenarios assessment will be presented at TPAC and JPACT. At the committee meetings regional partners will have the opportunity to express their preferred bond scenario or local priorities, or components of different scenarios to create a preferred bond scenario/proposal. The preferred bond scenario will be assessed one last time to assure the size, schedule of repayment, and funding availability meet the bond purpose and principles. An update will be provided to the Metro Council nearing this stage of a potential preferred bond scenario. At the following meeting, Metro staff will request TPAC recommendation for JPACT to consider releasing the preferred bond scenario/proposal for public comment.

Step 1A.1 and Step 2 will converge at the public comment period, where the public comment will solicit whether there is general support for the preferred bond scenario, gather input on the Step 2 candidates. Following the public comment period, a summary and public comment report with responses and, as appropriate, recommendations in response to comments will be available for TPAC and JPACT deliberations.

Deliberations and Adoption (June – July 2025)

Following the public comment period and public comment report, the regional committees will have until July to deliberate on the preferred bond scenario/proposal. Any additions or significant changes via an amendment to the preferred bond scenario at this stage will be subject to re-evaluation for meeting policy objectives and financial analysis. Metro staff will request TPAC and JPACT for recommendation to approve the full 2028-2030 Regional Flexible Fund Allocation at their July 2025 meetings.

Table 2. 2028-2030 RFFA – New Project Bond Development – Key Dates

Activity	Date
Candidate project evaluation	October – December 2024

Activity	Date
Candidate project evaluation results and summary <ul style="list-style-type: none"> TPAC first look of draft results; final results at JPACT Bond scenario concepts and themes input	December 6* & 19, 2024
Bond scenarios development and assessment <ul style="list-style-type: none"> Utilizing concept and themes input Gather Metro Council input 	December 2024 – January 2025
Metro Council work session <ul style="list-style-type: none"> Update on bond development process Gather input 	January 14, 2025
First draft bond scenarios with assessments released	January 10 & 16*, 2025
Second draft bond scenarios assessment <ul style="list-style-type: none"> Gather TPAC input on preferred bond scenario 	February 7 & 20, 2025
Metro Council update <ul style="list-style-type: none"> Format TBD 	March 2025
Request action to release recommended preferred bond scenario/proposal (TPAC and JPACT)	March 7 & 20, 2025
2028-2030 RFFA public comment opens	March 24, 2025
2028-2030 RFFA public hearing/testimony	April 17, 2025*
2028-2030 RFFA public comment closes	April 28, 2025
Summary of 2028-2030 RFFA public comments with responses and draft/tentative staff recommendations for refinements to TPAC & JPACT	May 2 & 15, 2025*
TPAC and JPACT opportunity to deliberate input received on preferred bond scenario and finalize the preferred bond proposal	June 2025
TPAC and JPACT action on 2028-2030 RFFA including the preferred bond proposal (Step 1A.1) and Step 2	July 2025

*Indicates tentative date. Unconfirmed on committee or Metro Council calendars or delivery date project work is on the aggressive side and may change.

Materials following this page were distributed at the meeting.

2028-30 Regional Flexible Funds Allocation (RFFA) Step 1A.1

*Bond Development Updates,
Scenarios and Next Steps*

Metro Council Work Session
January 14, 2025



What are Regional Flexible Funds?

- Allocated to each Metropolitan Planning Organization (MPO) from the federal government
- Approx. 5% of all transportation funding in region
- Direct link to Regional Transportation Plan implementation
- Approximately \$150-\$153M estimated for 2028-2030

How do we allocate these funds?

Exhibit A to Resolution 24-5415



Resolution 24-5415

2028-2030 Regional Flexible
Fund Allocation program
direction

June 2024

- Region's intent on how to spend/allocate aligned w/regional goals
- TPAC, JPACT and Council all have a role
- Allocation categories
 - Step 1A – bond repayment
 - **Step 1A.1 – develop new project bond proposal (focused on transit)**
 - Step 1B – regionwide programs & planning
 - Step 2 – local projects

What we heard from Council

Council feedback included comments to:

- Leverage discretionary funding opportunities
- Strategically invest to garner greater impact
- Emphasize transit
- Fiscal responsibility to Step 2 local capital projects and region-wide programs and planning
- Ensure region wide investment



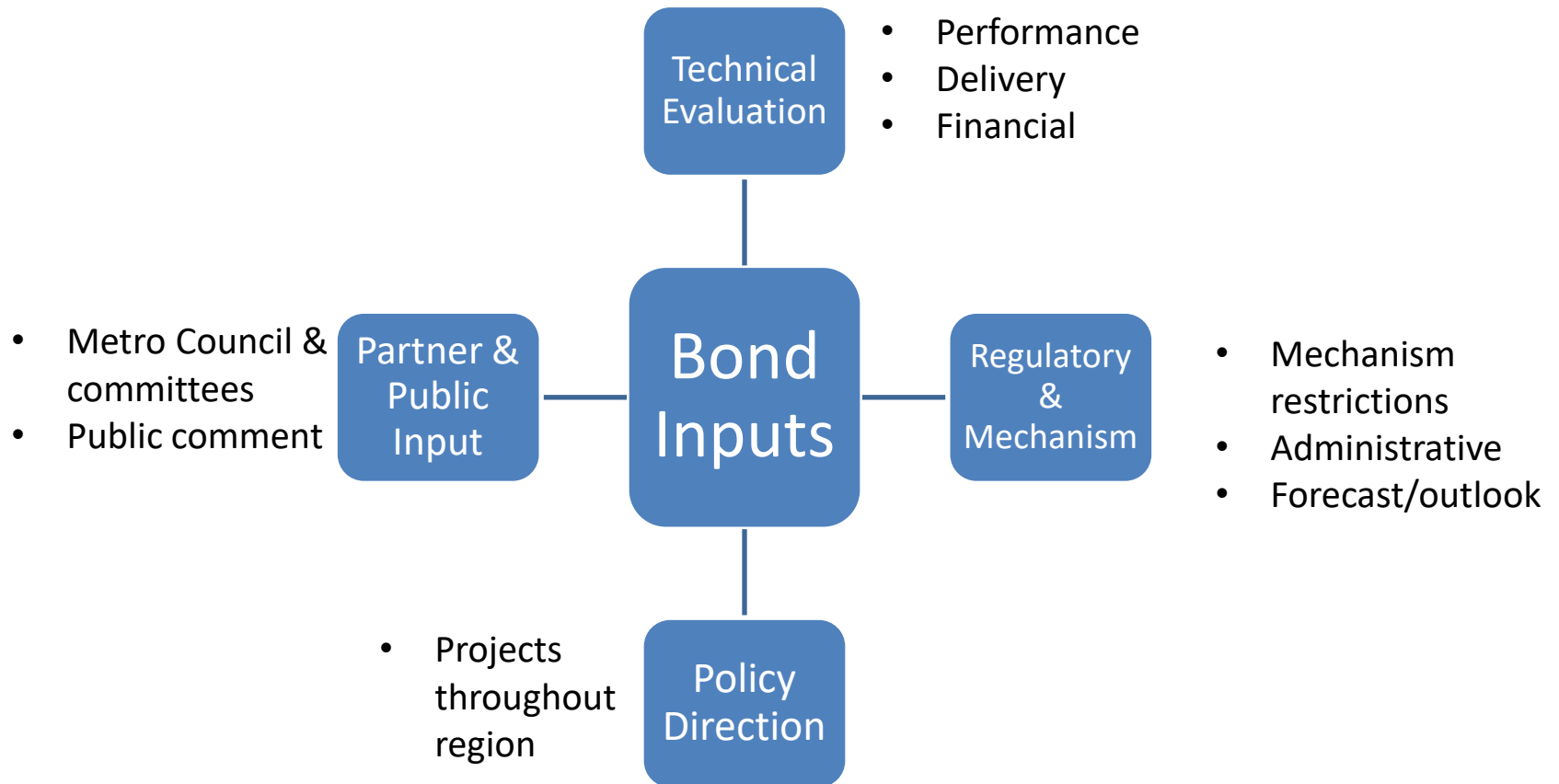
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What we've done (so far)

New Project Bond Proposal

- Focus on transit capital projects
- Regional appetite to “do big things”
- Council commitments to advance adopted 2023 RTP priorities
- Seize discretionary funding opportunities
- Make the most of retiring debt starting in 2028
- Emphasis of differing transit needs across the region

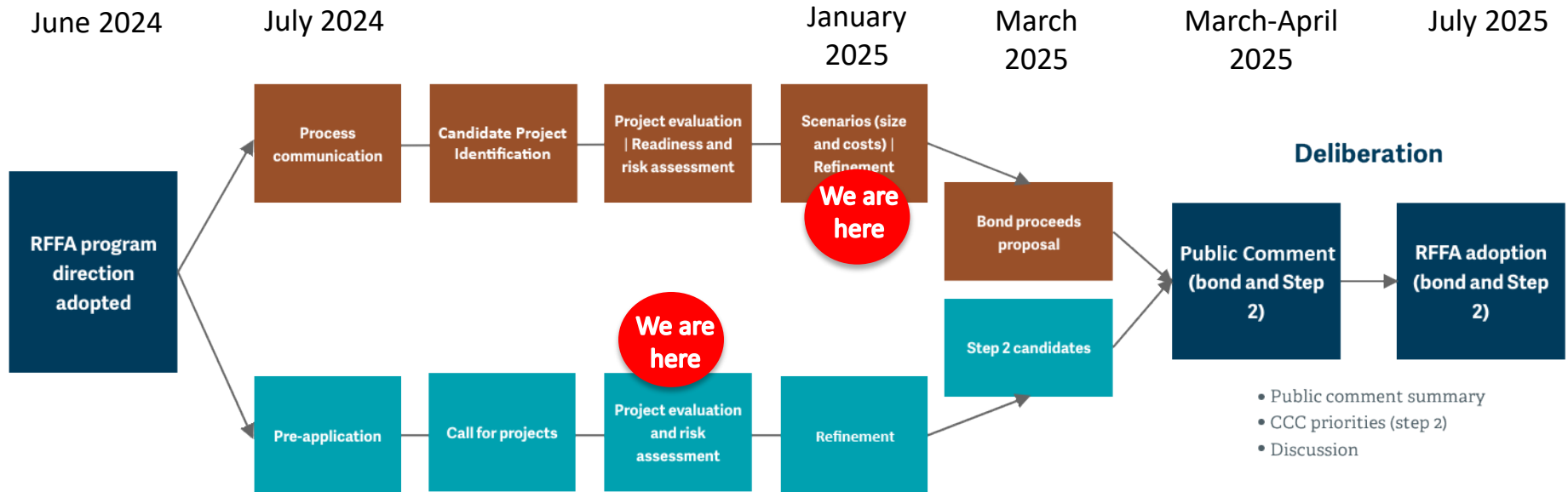
Bond Proposal Development Process



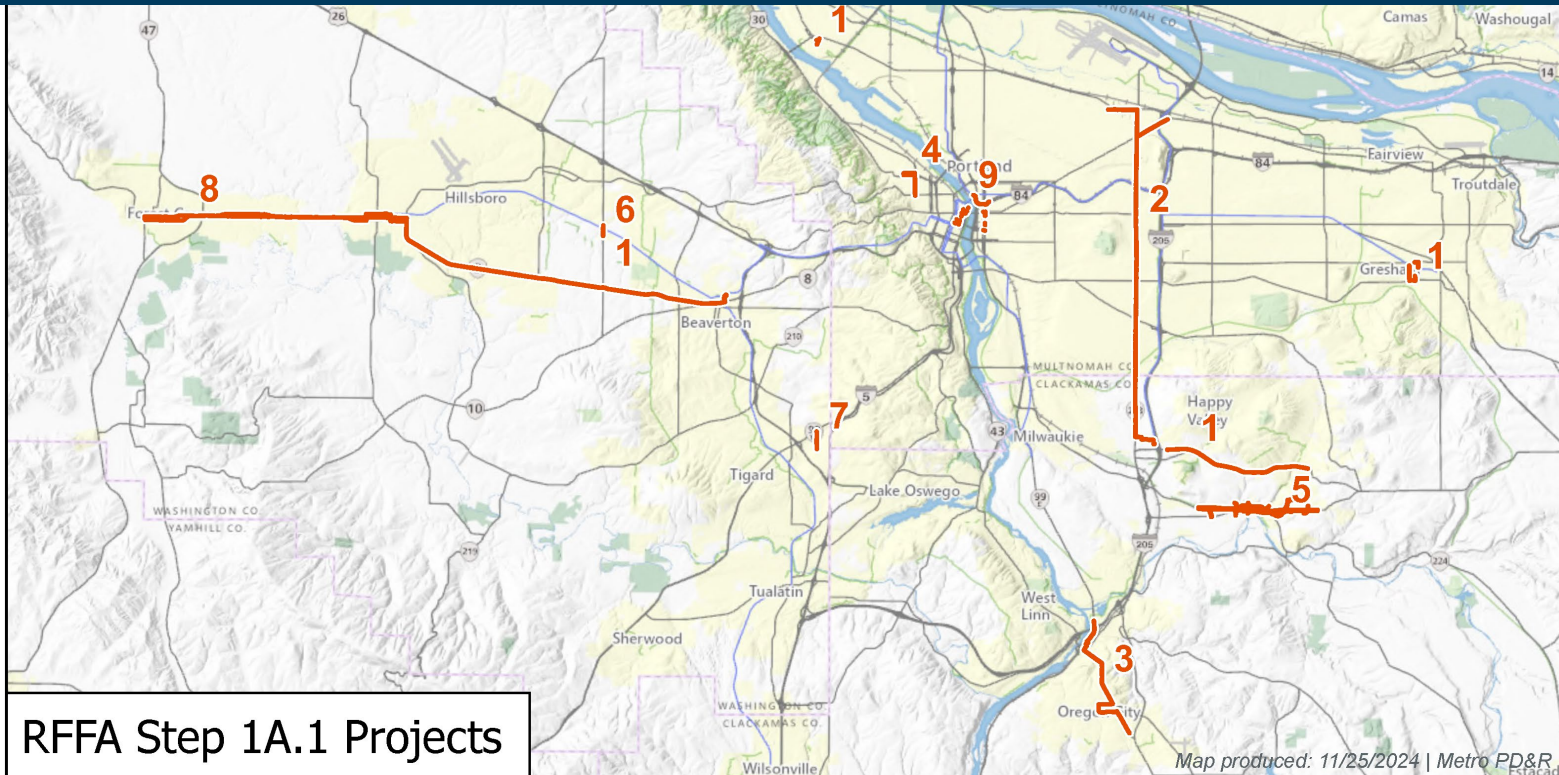
Bond Development Activities to Date

Activity	Timeframe
Council briefings and work session on project direction	Jan-April 2024
28-30 RFFA Program Direction adoption by JPACT and Council	July 2024
Bond development process roll out	Mid-July 2024
Bond project open nomination period	Late summer- early fall 2024
Eligibility screening and candidate evaluations	October-December 2024
Bond scenario development and analysis <ul style="list-style-type: none">• Regional partner input on scenarios• Council input on scenarios	December 2024 – today
Bond mechanism research, options, and initial analysis <ul style="list-style-type: none">• Conversations w/TriMet (previous bonding partner)	Fall 2024 – today

Where we are: Bond Proposal & Step 2



Candidate Projects



RFFA Step 1A.1 Projects

Map Label	Project Name	Applicant	Application Category	Funding Request
1	Better Bus Program [Representative projects]	Metro	Transit Vehicle Priority	\$11,000,000.00
2	82nd Avenue Transit Project	TriMet	CIG	\$30,000,000.00
3	OR99E First and Last Mile and Safe Access to Transit Streetscape Enhancements	City of Oregon City	First-Last Mile/Safe Access	\$9,000,000.00
4	Portland Streetcar: Montgomery Park Extension	City of Portland	CIG	\$20,000,000.00
5	Sunrise Gateway Corridor/Hwy 212	Clackamas County	First-Last Mile/Safe Access	\$15,000,000.00
6	SW 185th Avenue MAX Overcrossing Project	City of Hillsboro	Transit Vehicle Priority	\$12,618,499.00
7	72nd Ave. Phase 1 Tigard Triangle Corridor Improvements	City of Tigard	First-Last Mile/Safe Access	\$15,904,000.00
8	Tualatin Valley Highway Transit Project	TriMet	CIG	\$30,000,000.00
9	Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project	Multnomah County	Combined First-Last Mile and Transit	\$25,000,000.00



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Where we are now: Bond Scenario Proposals and Assessment

Starting Place: Regional Input on Bond Scenarios

Regional partners input

- Maximize advancing RTP goals
 - Emphasis on equity, safety, climate
- Make bonding worth it
 - Leverage discretionary funding
 - Account for project readiness and implementation
- Invest across nominating categories¹²
- Emphasis on regional or corridor scale investment
- Reflect all Program Direction objectives are met
 - Including investment across the region



Building Bond Scenarios

- Preliminary/opening exercise focused on:
 - Maximized performance according to one theme
 - Coming from regional input
 - Unconstrained
 - Candidate evaluation results
- Helps us to understand financial implications of bond proposals
- Helps answer Program Direction questions:
 - Schedule of proceeds available, length of debt repayment, bond size, Step 2 tradeoffs, overall consistency with Program Direction principles

To Bond or Not to Bond

Implications for 2028-2030 Allocation (millions of \$)

RFFA Category	No Bond	Bond
Step 1A	\$51.78	\$51.78 + \$15
Step 1A.1	\$0	\$84
Step 1B	\$40.58	\$40.58
Step 2	\$57-\$60	\$42-\$45

Initial Bond Scenarios: Theme, Composition & Requested Funds

Scenario emphasis	Maximized RTP Outcomes	Leverage	Category Type	Regional-Corridor Scale	Readiness
Projects	82 nd Avenue Transit	82 nd Avenue Transit	82 nd Avenue Transit	82 nd Avenue Transit	82 nd Avenue Transit
	TV Highway Transit	TV Highway Transit	TV Highway Transit	TV Highway Transit	TV Highway Transit
	Montgomery Park Streetcar Extension	Montgomery Park Streetcar Extension	Better Bus Program	Sunrise Gateway Corridor	Montgomery Park Streetcar Extension
	Burnside Bridge Transit Access/Priority	Burnside Bridge Transit Access/Priority	Sunrise Gateway Corridor	Burnside Bridge Transit Access/Priority	Burnside Bridge Transit Access/Priority
	OR99E (McLoughlin Boulevard)	185 th MAX Overcrossing			
Requested Bond Proceeds Total	\$114 million	\$117,618,499 million	\$86 million	\$100 million	\$105 million

Initial Bond Scenarios Findings & Takeaway

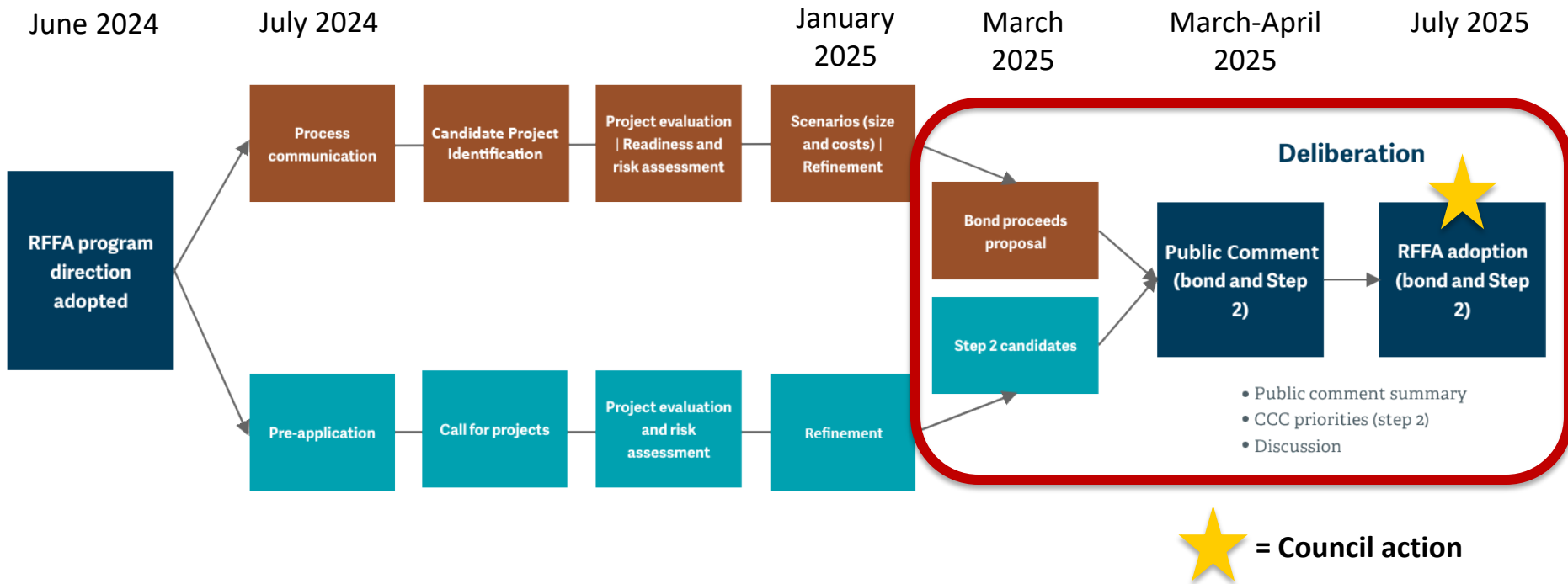
- Cannot meet Program Direction objectives with one driving theme
 - Maximizing one means lower performance in other themes
- Propose balanced approach for building scenarios
 - Minimum acceptable performance in all/most themes
 - Maximize overall performance across all themes
- Upcoming financial assessment contributes to whether Program Direction objectives met



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Where we're going next

What's ahead: Bond Proposal & Step 2



Next Steps

Bond Scenario Assessment: December 2024 – February 2025

Selecting Preferred Bond Scenario: March 2025

- TPAC recommendation to JPACT: March 7th
- JPACT approval: March 20th

Public Comment: March – April 2025

- Open public comment: March 24th
 - Includes public comment on Step 2 applications



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Bond & Reference Scenario Questions

- What input does Metro Council have about the proposed approach?
- Are there specific performance trade offs to explore with a bond scenario?
- What local priorities or factors to consider in creating final scenarios for assessment?
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- What questions do Metro Council members have regarding the reference scenario options?

Questions? Comments

Contact: Grace Cho

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oregonmetro.gov/rffa



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Extra Slides

Nominated Projects

Project Title	Applicant
Portland Streetcar: Montgomery Park Extension	City of Portland
Tualatin Valley Highway Transit Project	TriMet
82nd Avenue Transit Project	TriMet
Better Bus Program	Metro
72nd Ave. Phase 1 Tigard Triangle Corridor Improvements	City of Tigard
OR99E (McLoughlin Boulevard) First and Last Mile and Safe Access to Transit Streetscape Enhancements	City of Oregon City
Transit and Access-to-Transit Components of the Earthquake Ready Burnside Bridge (EQRB) Project	Multnomah County
Downtown Hillsboro Transit Center Expansion Project	City of Hillsboro
SW 185th Avenue MAX Overcrossing Project	City of Hillsboro
Sunrise Gateway Corridor/ Hwy 212	Clackamas County

Performance Evaluation Results

2028-3030 Regional Flexible Fund Allocation: Step 1A.1 Candidate Project Performance Evaluation Results Summary												
Evaluation Section	Measure	Capital Investment Grant (CIG)/Large Transit Projects			First/Last Mile & Access to Transit Projects				Transit Vehicle Priority			
		Montgomery Park	82nd Ave	TV Highway	Sunrise	Burnside Bridge	OR99E	72nd Ave	185th Overcross	Better Bus	Burnside Bridge	
Bond Purpose & Principles Consistency	Use regional revenues on regional or corridor scale projects											
	Candidate projects proposed with bond proceeds for construction activities are well advanced through project development activities and have an achievable funding strategy to complete the project.				N/A				N/A			
	The allocation of a new project bond proceeds to regional projects is made in consideration of other transportation spending in the region by other agencies and Metro											
	Leverage significant discretionary federal, state and/or local funding											
RTP Goals & Outcomes Advancement	Improves transit service for residents in an Equity Focus Area											
	Increases speed, frequency and reliability of high capacity transit											
	Provides safer and more convenient access to transit											
	Improves access to jobs and essential services by transit											
	Identified by communities who face disparities in the transportation system as a priority											
Project Delivery Assessment	Number of mitigations	3	2	2	3	1	1	1	2	2	1	
	Level of mitigation effort	Med/Med/Low	Low/Low	Low/Med	Low/Low/Med	Low	Med	Low	Low/Low	Low/Low	Low	

Key: Darker shades of blue indicate higher scoring/rating, while lighter shades blue indicates lesser scoring/rating

Evaluation Findings

- Varying degrees of meeting bond purpose and principles
 - Candidate projects have greater performance variance given project development status, delivery challenges, funding strategy, and fund leverage ability
- All candidates advance regional outcomes
 - All projects needed to meet RTP goals, but comprehensive projects perform best; whereas focused projects have localized impact
- All candidates carry one+ delivery challenge to mitigate

Initial Bond Scenarios: Theme & Other Outcomes Achieved

Scenario	Maximized RTP Outcomes	Leverage	Category Type	Regional-Corridor Scale	Readiness
Other Themes/Factor Achieved					
Readiness	high	medium-high	medium-low	medium	high
Leverage	high-medium	high	medium-low	medium	high
RTP Outcomes	high-medium	medium-high	medium	medium-high	high
Category Type	high	high	High	high	medium
Corridor-Regional Scale	medium	medium	medium-high	high	high-medium
Geographic Representation	high	low	high	high	low