



Memo

Date: Thursday, March 13, 2025
To: Joint Policy Advisory Committee on Transportation and Interested Parties
From: Grace Cho, Principal Transportation Planner
Jake Lovell, Assistant GIS Specialist
Jean Senechal Biggs, Resource Development Section Manager
Subject: 28-30 Regional Flexible Fund Step 2 Outcomes Evaluation and Project Delivery Risk Assessment Draft Results

Purpose: To provide JPACT the 28-30 Regional Flexible Fund Step 2 Outcomes Evaluation and Project Delivery Risk Assessment draft results and outline the Step 2 allocation process next steps.

Background and Context:

A call for projects for the 2028-2030 Regional Flexible Fund Step 2 allocation opened on Friday September 6th and closed on Friday November 22nd, 2024. Through a pre-application process, eleven jurisdictions which submitted Step 2 applications received application assistance to support development one Step 2 application for submission. In total, 24 Step 2 applications requesting a little over \$140 million in Regional Flexible Funds were received. The estimated amount of Step 2 Regional Flexible Funds available is between \$42 to \$60 million based on the outcome of the new project bond discussion happening concurrently. The requested amount of Regional Flexible Funds among the 24 applications equates to 2-3 times the amount of Step 2 funding available to allocate.

Getting to a Step 2 Allocation Decision

Multiple pieces of information are presented to decision-makers to inform the development of a Metro staff recommendation of a Step 2 allocation package. These include (in no order):

- Meeting the objectives of the Program Direction for the allocation;
 - Includes objectives, but not limited to: the connection of Regional Flexible Fund investment towards RTP goals advancement, investment across the region without sub-allocation, honoring prior commitments of Regional Flexible Funds.
- Outcomes Evaluation results;
- Public comment received;
- Sub-region indication of Step 2 application priority or prioritization; and
- Input on concepts to shape different Step 2 allocation packages.

Of these five pieces of information, no one piece is weighted greater than others. The technical and qualitative pieces of information are different tools to help support and deliberate the prioritization of Step 2 applications for allocating Flexible Funds to meet the Program Direction objectives.

Lastly, another important factor in getting to a Step 2 allocation decision is constraining to the estimated amount of Flexible Funds available. With the pending discussion on the new project bond, which would begin in the 2028-2030 Regional Flexible Fund cycle, regional partners should anticipate a conservative allocation of funds being available in Step 2. At this time, Metro staff anticipates a Step 2 allocation package recommended up to \$42 million.

Outcomes Evaluation & Project Delivery Risk Assessment Role & Draft Results

The Outcomes Evaluation and Project Delivery Risk Assessment are both technical evaluations of the Step 2 applications received. The Outcomes Evaluation primarily focuses on assessing how well the proposed project, as described in the application, advances regional goals and objectives. The Project Delivery Risk Assessment focuses on the potential risks the project may encounter going through project delivery and meeting the necessary requirements of the federal aid process. The Project Delivery Risk Assessment historically has not been utilized by Metro staff as a factor in shaping a Metro staff recommendation for a Step 2 allocation package. The Outcomes Evaluation results is one of five pieces of information to inform the development of a staff recommendation for a Step 2 allocation package.

Attached to this memorandum are the Outcomes Evaluation and Project Delivery Risk Assessment draft results for the 2028-2030 Regional Flexible Fund Step 2 process. The attachments include:

- Outcomes Evaluation Report – Draft as of February 28, 2025
- Appendix 1: Summary of the Outcomes Evaluation Draft Results
- Appendix 2: Methodology and Individual Draft Results Sheets for Step 2 Applications
- Project Delivery Risk Assessment Technical Memorandum

Metro staff aims to finalize before the end of March 2025.

Initial takeaways from the Outcomes Evaluation:

- Applications which were clear in identifying the project’s purpose and the deficiencies the project aimed to address and linking the scope elements as the solutions rated well.
- Applications which applied Designing Livable Streets and Trails Guidelines rated well.
- All applications tended to perform well, indicated by higher scores, in the Equitable Transportation, Safe System, and Thriving Economy goal areas.
- The effect of application assistance varied in terms of the results of the Outcomes Evaluation, but overall did support the Project Delivery Risk Assessment.

Initial takeaways from the Project Delivery Risk Assessment:

- Overall, the average risk scores for the Step 2 applications in the 28-30 cycle were lower than the scores in the previous two cycles of Step 2 project applications.

Next Steps

Table 1. outlines the next steps in the Step 2 allocation process.

Table 1. 2028-2030 Regional Flexible Funds Step 2 – Next Steps and Key Dates

Activity	Date
JPACT: Share draft results of 28-30 Regional Flexible Fund Step 2 Outcomes Evaluation and Project Delivery Risk Assessment - Note: Comment from the chair only; materials provided in packet	March 20, 2025
2028-2030 RFFA public comment opens	March 24, 2025
2028-2030 RFFA opportunity for public testimony	April 17, 2025*
Metro staff to provide finalized Outcomes Evaluation and Project Delivery Risk Assessment reports to coordinating committees and City of Portland for deliberations.	End March/Early April 2025
2028-2030 RFFA public comment closes	April 28, 2025
TPAC: Solicit concept input for Step 2 allocation package options	May 2, 2025
JPACT: Solicit concept input for Step 2 allocation package options	May 15, 2025*

Activity	Date
<p>Summary of 2028-2030 RFFA public comments with responses and draft/tentative staff recommendations for refinements (if needed) issued to TPAC and JPACT</p> <ul style="list-style-type: none"> - Summary also provided to coordinating committees and City of Portland for deliberations. 	<p>May 16, 2025*</p>
<p>Coordinating committee and City of Portland deadline to submit subregional priorities (if electing)</p>	<p>June 3, 2025</p>
<p>TPAC: 28-30 Regional Flexible Funds Step 2 allocation package options</p> <ul style="list-style-type: none"> - Reflective of technical analysis, concept input, and public comment. Possibly subregional priorities. - Opportunity to provide input on preferred Step 2 allocation package 	<p>June 6, 2025</p>
<p>JPACT: 28-30 Regional Flexible Funds Step 2 allocation package options</p> <ul style="list-style-type: none"> - Reflective of technical analysis, concept input, public comment and TPAC input. Possibly subregional priorities. - Opportunity to provide input on preferred Step 2 allocation package 	<p>June 12, 2025</p>
<p>Metro Council: Work session with updates on Step 1A.1 bond proposal & Step 2 staff recommendation</p>	<p>June 10 or 17, 2025*</p>
<p>TPAC: Staff recommendation on finalized bond proposal package. Request action on 2028-2030 RFFA including the preferred bond proposal (Step 1A.1) and Step 2</p>	<p>July 11, 2025</p>
<p>JPACT: Carry forward TPAC recommendation. Request action on 2028-2030 RFFA including the preferred bond proposal (Step 1A.1) and Step 2</p>	<p>July 17, 2025</p>
<p>Metro Council: Adoption of 2028-2030 RFFA including the preferred bond proposal (Step 1A.1) and Step 2</p>	<p>July 31, 2025*</p>