Instructions to Reviewers
for *Connect*Oregon II Projects

PURPOSE OF THIS DOCUMENT

The purpose of this document is to provide instruction regarding the C*onnect*Oregon II review and recommendation process to the various committees that are providing recommendations to the Oregon Transportation Commission (OTC).

The application review process includes the following steps:

1. Application Completeness Review
2. Eligibility Review
    a. Applicant
    b. Project
3. Modal Committee Review
4. Regional Committee Review
5. Final Review Committee

REVIEW DOCUMENTS

The application is the primary source of applicant-supplied information regarding the proposed projects. The other documents identified below will be used to document the review process, create a record of actions, and inform the later steps of the review process.

- Application
- Completeness Checklist (using the template shown in Appendix A-1)
- Feasibility Report (using the template shown in Appendix A-2)
- Application Revision Form (if required) (using the template shown in Appendix A-3)
- Modal Project Reports (One per project per Modal Committee using the template shown in Appendix A-4)
- Modal Matrix (One per Modal Committee using the template shown in Appendix A-5)
- Region Project Reports (One per project per project using the template shown in Appendix A-6)
- Region Matrix (One per Regional Committee using the template shown in Appendix A-7)
- Modal and Regional Summary Matrix (Prepared by C*onnect*Oregon Staff prior to the Final Review Committee)
- Final Review Committee Matrix (Prepared by C*onnect*Oregon Staff during the Final Review Committee)

The Appendices in this document provide DRAFT versions of the respective document, agency staff, modal and regional reviewers will receive final versions of each form in Word or Excel prior to the start of the review period.

1 COMPLETENESS REVIEW

C*onnect*Oregon staff includes all agency staff (ODOT, Oregon Economic and Community Development Department, and Oregon Department of Aviation) assigned to develop and administer the C*onnect*Oregon II application process. Applications will be screened by C*onnect*Oregon staff to ensure that each application is complete, including:

- Applicant Signature

- Property Owner Signatures

- Contact Information

- Budget

- Real Estate Details

- Letters of Support (required to answer specific questions)

- Letters of Commitment to use the Project (required to answer specific questions)

1.1 Communication with Applicants during Completeness Review

C*onnect*Oregon staff will return incomplete applications to Applicants. Staff will make all requests for additional written data concerning any application or project from the applicants as needed.

Applicants will be given a specified date (three business days) to provide the requested additional information.

All requests for additional information will be sent to applicants prior to December 7 2007.

2 Eligibility Review

*Connect*Oregon Staff will review whether each applicant and project meet the eligibility requirements including:

- If applicable, the applicant must be current on all state and local taxes, fees, and assessments.

- The applicant must have sufficient management and financial capacity to complete the project.

- The project must benefit aviation, marine, rail, or public transit.

- The project is not eligible for funding from revenues described in Section 3a, Article IX of the Oregon Constitution, i.e., the State Highway Trust Fund. The project does not require or rely upon continuing subsidies from ODOT.

- The project is feasible, including the estimated cost of the project, the expected results from the proposed project, the project schedule, and all applicable and required permits may be obtained within the project schedule.

Ineligible applicants or projects will be processed as outlined in section 2.5.

2.1 Staff Assignments

Applications may be assigned to C*onnect*Oregon staff based on modal expertise as follows:

- Rail projects to the ODOT Rail Division
- Transit projects to the ODOT Transit Division
- Aviation projects to the Oregon Department of Aviation
- Marine projects to the Oregon Economic and Community Development Department
- Multimodal projects will be assigned as appropriate

Applications may also be assigned to C*onnect*Oregon staff for specific subject review, i.e. finance or project management

2.2 Feasibility Review

An independent consultant and C*onnect*Oregon Staff will review the technical information contained in the applications. The feasibility review may result in some applications being deemed technically infeasible. As needed, applicants may be requested to clarify portions of their application.

2.3 Feasibility Consultant Tasks

ODOT will work with an independent consultant to review technical aspects of assigned *Connect*Oregon II applications for project feasibility including:

- proposed project scale in relation to cost;
- anticipated market;
- achievability of the project in the proposed timeframe;
- achievability of all applicable and required permits in proposed timeframe
- reasonableness of economic benefit claimed to be created by the project
- general review of potential safety issues in project applications where there are changes to motor vehicular traffic in and around the site.

The consultant will prepare a report for each application documenting the results of the review. This report will be submitted to ODOT.

Assignment of Feasibility Reports to Agency Staff

Based on the need to meet the program timeline or the specific abilities of ODOT's feasibility Consultant (Section 2.3), Agency staff may be assigned to complete the feasibility report in place of the consultant. Modal staff will use the same format for reports as the consultant.

2.4 Communication with Applicants During Eligibility Review

If the consultant or the *Connect*Oregon staff identify a need for additional written data concerning any applicant or project, *Connect*Oregon Staff will solicit this from applicants.

Applicants will be given a specified amount of time (three business days) to provide the requested additional information.

All requests for additional information must be sent to applicants prior to December 11, 2007.

2.5 Decisions on Applicant and Project Eligibility

1. ODOT will exclude any project from continuing to the Modal, Regional or Final Review process if it is deemed the applicant or project is ineligible, or the project is technically infeasible.

2. If this determination is made, ODOT will notify the applicant in writing.

3. The applicant will have 30 days to file a protest to the ODOT Director. Only applicants may file a protest.

3 MODAL COMMITTEE REVIEW

3.1 Committee Administration

This section provides specific instructions to the staff, chairs, and members of:

- The **State Aviation Board** which will make recommendations on aviation Transportation Projects.
- The **Oregon Freight Advisory Committee** which will make recommendations on freight Transportation Projects.
- The **Public Transit Advisory Committee** which will make recommendations on public transit Transportation Projects.
- The **Rail Advisory Committee** which will make recommendations on rail Transportation Projects.
- The **Economic and Community Development Department** which will convene a Marine Project and Planning Advisory Committee to make recommendations on marine Transportation Projects.

HB 2278 requires the OTC solicit advice from these entities for projects as outlined. In the remainder of this document the board and committees identified above will be referenced as "Modal Review Committees". The staff assigned to support these committees will be referred to as "Modal Review Committee Staff".

All committee meetings will be conducted as public meetings as defined by Oregon Public Meetings Law. Committee staff shall insure adequate notice of the meeting, and compile meeting minutes.

3.1.1 Timeline for Modal Committee Review

Modal Review Committees must complete their work and submit it back to the *Connect*Oregon II staff by March 3, 2008.

3.1.2 Scheduling and Noticing of Review Meetings

All meetings where C*onnect*Oregon II projects are discussed are public meetings and public notices will be posted on the ODOT *Connect*Oregon web site in addition to other posting sites used by the committees. Modal Review Committee staff will coordinate the posting of notices with the C*onnect*Oregon staff.

3.1.3 Conflict of Interest Disclosure

At the start of each meeting, the Committee Chairs shall require committee members to disclose all conflict of interests regarding any projects being discussed. A conflict of interest means the member is an applicant, or a consultant to the applicant, or is a committee or board that has assisted the applicant, or has a financial benefit in the project. All conflict of interest disclosures will be recorded in the committee meeting minutes.

The Committee Chair will ensure that members refrain from voting on or recommending projects in which they have disclosed a conflict of interest. Committee members with conflict of interests are allowed to otherwise participate in the evaluation and recommendation process. This disclosure requirement applies to both public and private sector members.

3.1.4 Applicant Presentations

Modal Review Committees may invite presentations from applicants on an equitable basis, specifically inviting every applicant for projects under that committee's purview. All presentations from applicants are to be conducted during the public meetings.

If applicants are invited to make presentations, the applicants must be informed at the same time as the public meeting notices are posted.

Review committees are not permitted to interview prospective applicants before the beginning of the designated review period (i.e. before January 11, 2008).

3.1.5 Input into the Decision Process

The review committees will review projects based on information provided through:

1. The project application and related documents.
2. Applicant responses to questions;
3. The Eligibility Review; and
4. The committee members' knowledge and expertise.

The review committees may also review projects based on information provided through:

1. Applicant testimony (if all applicants are provided the opportunity to testify).
2. Professional staff recommendations or analysis (if requested by the committee).
3. Public comment

The review committees shall **not consider** information provided through:

1. Any lobbying by the applicant or any other person outside of the committees' public meetings. This includes any request for pre-approval by an applicant or other party.

Committees shall not require applicants seek prior consultation or pre-approval of any projects, nor sort, rank or prioritize any project negatively due to any failure to consult with the committee prior to submitting an application.

3.1.5 Additional Information

Modal Review Committee may request additional written data as needed concerning any application or project. This request must be made through the *Connect*Oregon II staff to solicit this from applicants. Modal Review Committee staff will be responsible for directing all committee requests for information to *Connect*Oregon staff.

Requests from Modal Review Committees for such information must be submitted as soon as possible, but no later than Wednesday February 13, 2008. C*onnect*Oregon staff will forward such requests to applicants, and applicants must respond within one business day.

Committee members will be notified of any additional unsolicited information received (such as late letter of support). This will be posted on an ftp site and committee members will be notified of where to view it.

3.1.6 Staff Support

For each Modal Review Committee, the applicable Modal Review Committee Staff will:

- Participate in the completeness review (See Section 1);
- Participate in the feasibility review (See Section 2);
- Sort projects into Tiers as detailed in (Section 3.3.2);
- Present the "tier" sorting of projects to the committee;
- Assist the committee in understanding the review process, and;
- Record results of committee proceedings,

Modal Review Committee Staff advice and analysis is limited to a supporting role, and the staff cannot provide ranking or prioritizing of projects to a committee.

Modal Review Committee Staff work cannot be substituted for the project recommendation to the OTC role of the Modal Review Committee.

3.2 Committee Evaluation Process

3.2.1 Overview

The determination regarding whether HB2278 considerations are met is based on the responses in the application. Details are provided in Appendix A-8 regarding which items in the ConnectOregon II Application are related to each of the five considerations:

- Whether a proposed transportation project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor;

- Whether a proposed transportation project results in an economic benefit to this state;

- Whether a proposed transportation project is a critical link connecting elements of Oregon's transportation system that will measurably improve utilization and efficiency of the system;

Key Process Terms:

Consideration: A set of five issues specifically identified in HB2278 that the OTC must "consider" when selecting projects.

Sorting: Placement of projects into **"Tiers"** by how many HB2278 considerations are met

Rank: High, Medium, or Low rank assigned to projects by reviewing committees to indicate the relative rank of the given project.

Priority: Assigned to projects by a reviewing committee to indicate the preference of the committee in relation to other projects.

- How much of the cost of a proposed transportation project can be borne by the applicant for the grant or loan from any source other than the Multimodal Transportation Fund; and

- Whether a proposed transportation project is ready for construction.

Because the projects are potentially diverse, no single set of data sources could be specified. It was each applicant's responsibility to be as precise and well-documented as possible in showing how the application responds to any of the five *Connect*Oregon II considerations. Not all considerations may be applicable to each project; evaluate those that apply.

3.2.2 Task Outline

The project recommendation process for the review committees involves three tasks including: sorting, ranking, and prioritizing.

Prior to the initial Modal Review Committee meeting, the Modal Review Committee Staff will provide the committee with the documents needed for the Evaluation Process. The Evaluation tasks are detailed in the following table:

Table 1 Modal Review Outline

Step	Task	Explanation	Responsible party
Pre Meeting Through 1/20/08	Delivery of Information to Modal Committee Staff	Delivery of Project documents including: Applications, Feasibility Reports, and standardized committee reporting material	CO II Staff
	Staff Preparation for meeting	Modal Review Committee Staff ensures all documents are distributed to the Committee members. Modal Review Committee Staff sort projects into "tiers"	Committee Staff
Meetings 1/20/08 Through 3/1/08	Sorting	Draft project sorting is presented to Modal Review Committee. Modal Review Committee discusses staff sorting and adopts or amend staff sorting.	Committee Staff Committee
	Ranking	Projects are ranked as High, Medium, or Low rank.	Committee
	Prioritizing	Projects are prioritized (1- through *n*, with 1 indicating the highest project).	Committee
Post Meeting 3/3/08 through 3/10/08	Reporting	Complete standardized committee report material and obtain approval of the report by the Committee Chair.	Committee Staff

3.3 Prior to Public Meetings

3.3.1 Modal Review Committee Staff Responsibilities

Scheduling and Noticing of Review Meetings

Modal Review Committee Staff will notify C*onnect*Oregon Staff of Modal Review Committee meeting dates, so ConnectOregon Staff can ensure all C*onnect*Oregon meetings, and any revisions or changes, are accurately noticed on the C*onnect*Oregon Website. Modal Review Committee Staff are responsible for all required public meeting notices.

Distribution of Application Materials

The C*onnect*Oregon Staff will provide one printed copy and unlimited access to electronic copies of project application materials (e.g. application, letters of support, and supplemental information) to the Modal Review Committee Staff.

Modal Review Committee Staff will coordinate the distribution of application materials to the Modal Review Committee.

Sort Projects

Prior to the initial meeting, the Modal Review Committee Staff will conduct the initial sorting of projects into Tiers as detailed in Section 3.3.2, below.

3.3.2 Sort Projects

*Connect*Oregon applicants were instructed that, when recommending and selecting projects, the following will be considered as specified in HB 2278:

- Whether a proposed transportation project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor;

- Whether a proposed transportation project results in an economic benefit to this state;

- Whether a proposed transportation project is a critical link connecting elements of Oregon's transportation system that will measurably improve utilization and efficiency of the system;

- How much of the cost of a proposed transportation project can be borne by the applicant for the grant or loan from any source other than the Multimodal Transportation Fund; and

- Whether a proposed transportation project is ready for construction.

The OTC requests the review committees treat the first three of these considerations as strategic considerations. To facilitate this request, the first step of the Modal Review committee review process, projects will be sorted into "Tiers" that indicate how many of the project selection considerations identified in HB2278 are **thoroughly** met by the project. The tiers include:

    a. Tier 1 (Meets all considerations **thoroughly**)

b. Tier 2 (Meets all 3 of the **Strategic** considerations thoroughly)

c. Tier 3 (Meets 1 or 2 of the **Strategic** considerations thoroughly)

d. Tier 4 (Does not meet any of the of the **Strategic** considerations thoroughly)

Based on the application questions, each committee shall determine whether a project **thoroughly** meets each of the HB2278 considerations.

To **thoroughly** meet a consideration a project shall demonstrate through application responses and through the requested independent verification that the project will accomplish the intent of the legislation. The application is written so that most applicants will have to skip one or more questions. (A project review worksheet is provided in Appendix A-8).

Modal Review Committee Staff will provide a preliminary sorting of the projects to the Committee. The Modal Review Committee will discuss staff sorting and vote to adopt or amend the proposed staff sorting approach.

3.3.3 Modal Review Committee Responsibilities

Review Project Documents Provided by ODOT

The Modal Review Committee Staff is responsible for the distribution of the review materials to committee members prior to the scheduled committee meeting.

Prior to the committee meetings, the committee members should review in detail the application packages.

3.3.4 Modal Review Committee Chair Responsibilities

Coordinate with Committee Staff

Prior to meetings, the Committee Chair will coordinate with Modal Review Committee Staff regarding the meeting scheduling and agenda.

3.4 During Public Meetings

3.4.1 Modal Review Committee Staff Responsibilities

General

The Modal Committee Staff will assist the committees to understand the review process, and the expectations of and instructions to the committees. Modal Committee Staff may not rank or prioritize projects for the committees.

Present Consideration "Tier" Sorting

The Modal Review Committee Staff will present the initial sorting of projects into "tiers" based on considerations to the committee

Meeting Minutes

For each committee meeting, Modal Committee Staff will record and prepare committee meeting minutes, and secure the Committee's approval of the minutes. Approved

meeting minutes will be sent to the *Connect*Oregon II Staff for posting on the *Connect*Oregon website.

3.4.2 Modal Review Committee Responsibilities

Conflict of Interest Disclosure

The Committee Members shall adhere to the conflict of interest disclosure instructions in Section 3.1.3.

Review, Discuss and Recommend Projects

Each committee is expected to provide the OTC with a prioritized list of recommended projects for *Connect*Oregon II funding.

All committee meetings related to the recommendations of projects for *Connect*Oregon II funding shall be held as public meetings. Committee members may present information regarding projects, the condition of the states transportation network, or other relevant information to the whole committee. Each committee shall establish a written record of the decision making process and project specific reports (See Appendix A-8 for report format).

3.4.3 Finalize Consideration Tier Sorting

Committees will consider the initial tier sorting presented by the Modal Committee Staff, and approve or modify the sorting.

3.4.4 Identify Project Rank

Within each level of tier, committees will group projects with a ranking of High, Medium, or Low.

The basis for ranking projects is how well the project meets the needs of:

- The mode or transportation system, and
- The region or state.

3.4.5 Prioritize the Projects

The committee will prioritize projects within each rank for each tier level. The committee will assign a number to each prioritized project, with priority 1 indicating the committee's first choice, priority 2 indicating the second choice, and so on, until all prioritized projects are assigned a number.

Each committee will provide only one prioritized list statewide. There is no need to differentiate projects by region.

Modal Review Committee Chair Responsibilities

The Committee Chair shall preside over all meetings, including calling the meeting to order, ensuring members participate appropriately, minutes are taken and approved, and the committee completes its work as outlined in this document.

3.5 After Public Meetings

3.5.1 Modal Review Committee Staff Responsibilities

Preparation and Transmittal of Reviews to the Regional Committees

Modal Review Committee Staff will complete and prepare for publication the following:

- Review Matrix

- Project Reports, and,

- Meeting Minutes.

Modal Review Committee Staff shall secure the authorization of the Committee Chair prior to transmittal of these documents to the C*onnect*Oregon Staff. The documents will be delivered electronically, by email or by mail of electronic media to the ConnectOregon Staff.

Modal Review Committee Report

For each application, the Modal Review Committee staff will complete the Modal Review Committee Report. A Modal Review Committee Report Form is (See: Appendix A-4) and on the *Connect*Oregon II website. The form will summarize the project and will present the details of the Committee's decision-making process to the Regional Committees, the Final Review Committee and the OTC. The Modal Review Committee Report should include any specific details of which Modal Review Committee feels subsequent reviewers should be aware.

Review Matrix

A review matrix will be provided to the review committee in electronic form. (See: Appendix A-5) Modal Review Committee staff will complete the review matrix recording the actions of the committee. The Review Matrix is designed to provide the Regional Committees, Final Review Committee, and the OTC with a summary of the Modal Review Committees' sorting, ranking, and prioritizing.

3.5.2 Modal Review Committee Chair Responsibilities

Preparation and Transmittal of Reviews to the Regional Committees

The Committee Chair shall ensure that all documents (the Review Matrix, Project Reports and Meeting Minutes) prepared by Modal Committee Staff accurately reflect the committee proceedings. The Committee Chair will approve the transmittal of these documents to the C*onnect*Oregon regional committees.

4 REGIONAL COMMITTEE REVIEW

4.1 Committee Administration

Regional Committees will be formed by ODOT as follows:

- An equal number of selected ACT members from each ACT in the Region and representatives from areas not represented by an ACT.

- Where no ACTs exist in a region, the ODOT Director will appoint a Regional Committee.

4.1.1 Region 1

HB2278 defines Region 1 as consisting of Clackamas, Columbia, Hood River, Multnomah and Washington Counties.

The Region 1 Regional Committee will be a special purpose committee that will include the business community, selected JPACT members, and representatives from Columbia and Hood River Counties. It is being created by the Oregon Transportation Commission (OTC) for the purposes of *Connect*Oregon project review in this area.

4.1.2 Region 2

HB2278 defines Region 2 as consisting of Benton, Clatsop, Lane, Lincoln, Linn, Marion, Polk, Tillamook and Yamhill Counties.

The Region 2 Regional Committee will include the Northwest Oregon ACT[1] (Clatsop, and Tillamook counties), the Mid-Willamette Valley ACT (Marion, Polk and Yamhill counties), the Cascades West ACT (Benton, Linn and Lincoln counties), and Lane County Council/Commission.

4.1.3 Region 3

HB2278 defines Region 3 as consisting of Coos, Curry, Douglas, Jackson and Josephine Counties.

The Region 3 Regional Committee will include the South West ACT (Coos, Curry and Douglas counties) and the Rogue Valley ACT (Jackson and Josephine counties).

4.1.4 Region 4

HB2278 defines Region 4 as consisting of Crook, Deschutes, Gilliam, Jefferson, Klamath, Lake, Sherman, Wasco and Wheeler Counties.

The Region 4 Regional Committee will include the Lower John Day ACT (Gilliam, Sherman, Wheeler and Wasco counties) the Central Oregon Act (Crook, Deschutes and Jefferson counties) and the South Central Oregon ACT (Klamath and Lake Counties).

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[1] The Northwest Act will not review projects in western rural Washington county or Columbia county, as these counties are in *Connect*Oregon Region 1, and will be reviewed by the *Connect*Oregon Region 1 Regional Committee.

4.1.5 Region 5

HB2278 defines Region 5 as consisting of Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union and Wallowa Counties.

The Region 5 Regional Committee will include the North East ACT (Morrow, Baker, Union, Umatilla and Wallowa counties and the South East ACT (Grant, Harney and Malheur counties).

4.1.6 Timeline for Review

Regional Review Committees may begin their review, discussion and recommendation of projects when they receive the Modal Committee reports. These reports will be delivered to the Regional Review Committees on March 7, 2008. The Regional Review Committees must complete their work and submit the required documents to the *Connect*Oregon II Staff by April 21, 2008.

Scheduling and Noticing of Review Meetings

As indicated in Section 3.1.2, all meetings where C*onnect*Oregon II projects are discussed are public meetings and public notices will be posted in usual committee posting locations but also on the ODOT *Connect*Oregon web site. Regional Committee Staff will coordinate the posting of notices with the C*onnect*Oregon Staff.

4.1.7 Conflict of Interest Disclosure

At the start of each meeting, the Committee Chairs shall require committee members to disclose all conflict of interests regarding any projects being discussed. A conflict of interest means the member is an applicant, or a consultant to the applicant, or is a committee or board that has assisted the applicant, or has a financial benefit in the project. All conflict of interest disclosures will be recorded in the committee meeting minutes.

The Committee Chair will ensure that members refrain from voting on or recommending projects in which they have disclosed a conflict of interest. Committee members with conflict of interests are allowed to otherwise participate in the evaluation and recommendation process. This disclosure requirement applies to both public and private sector members.

4.1.8 Applicant Presentations

Regional Review Committees may invite presentations from applicants on an equitable basis, specifically inviting every applicant for projects under that committee's purview. All presentations from applicants are to be conducted during the public meetings.

If applicants are invited to make presentations, the applicants must be informed at the same time as the public meeting notices are posted.

Review committees are not permitted to interview prospective applicants before the beginning of the designated review period (i.e. before March 7, 2008).

3.1.5 Input into the Decision Process

The review committees will review projects based on information provided through:

1. The project application and related documents.

2. Applicant responses to questions;

3. The Eligibility Review; and

4. The committee members' knowledge and expertise.

The review committees may also review projects based on information provided through:

1. Applicant testimony (if all applicants are provided the opportunity to testify).

2. Professional staff recommendations or analysis (if requested by the committee).

3. Public comment

The review committees shall **not consider** information provided through:

1. Any lobbying by the applicant or any other person outside of the committees' public meetings. This includes any request for pre-approval by an applicant or other party.

Committees shall not require applicants seek prior consultation or pre-approval of any projects, nor sort, rank or prioritize any project negatively due to any failure to consult with the committee prior to submitting an application.

4.1.9 Additional Information

Regional Review Committee may request additional written data as needed concerning any application or project. This request must be made through the *Connect*Oregon II staff to solicit this from applicants. Regional Review Committee staff will be responsible for directing all committee requests for information to *Connect*Oregon staff.

Requests from Regional Review Committees for such information must be submitted as soon as possible, but no later than Wednesday April 3, 2008. C*onnect*Oregon staff will forward such requests to applicants, and applicants must respond within one business day.

Committee members will be notified of any additional unsolicited information received (such as late letter of support). This will be posted on an ftp site and committee members will be notified of where to view it.

4.1.10   Staff Support

For each Regional Review Committee, the applicable Regional Review Committee Staff will:

- Participate in the completeness review (See Section 1);

- Participate in the feasibility review (See Section 2);

- Sort projects into Tiers as detailed in (Section 3.3.2);

- Present the "tier" sorting of projects to the committee;

- Assist the committee in understanding the review process, and;

- Record results of committee proceedings,

Regional Review Committee Staff advice and analysis is limited to a supporting role, and the staff cannot provide ranking or prioritizing of projects to a committee.

Regional Review Committee Staff work cannot be substituted for the project recommendation to the OTC role of the Regional Review Committee.

4.1.11 Region to Region Communications

*Connect*Oregon projects may require review from multiple regions. To facilitate early contact between regions the Regional Committee Staffs shall correspond while sorting multi-regional projects.

Staff shall record the reasons for significant different sorting recommendations between two regions in the Regional Committee Project Report.

4.2 Committee Evaluation Process

4.2.1 Regional Committee Formation

- The project Modal Reports, Modal Review Matrix, Application, Feasibility Report, and other project information is delivered to the ACT Staff (Regional Committee Staff). *(Note: The Region review process cannot begin without the Modal Reports, and Modal Review Matrix, although regions may start to educate themselves regarding the projects as soon as they are posted, in January of 2008)*

- The ACT staff provides all project information to the ACT members.

- The ACTs meet, to discuss and prioritize projects in their areas. *(Note: ACTs must use the approved prioritization format.)*

- For areas that are not represented by an ACT, a C*onnect*Oregon specific committee will be formed to to discuss and prioritize projects in their areas. *(Note: Such a committee must use the approved prioritization format.)*

- A Region-wide (SuperACT) meeting of ACT delegates meets to rank and prioritize projects. The ranking and prioritizing will reflect the needs of the region as a whole. The regional recommendations do not need to identify projects in each ACT.

4.2.2 Overview

The determination regarding whether HB2278 considerations are met is based on the responses in the application. Details are provided in Appendix A-8 regarding which items in the ConnectOregon II Application are related to each of the five considerations:

- Whether a proposed transportation project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor;

- Whether a proposed transportation project results in an economic benefit to this state;

- Whether a proposed transportation project is a critical link connecting elements of Oregon's transportation system that will measurably improve utilization and efficiency of the system;

- How much of the cost of a proposed transportation project can be borne by the applicant for the grant or loan from any source other than the Multimodal Transportation Fund; and

- Whether a proposed transportation project is ready for construction.

Because the projects are potentially diverse, no single set of data sources could be specified. It was each applicant's responsibility to be as precise and well documented as possible in showing how the application responds to any of the five *Connect*Oregon II considerations. Not all considerations may be applicable to each project; evaluate those that apply.

> **Key Process Terms:**
>
> **Consideration:** A set of five issues specifically identified in HB2278 that the OTC must "consider" when selecting projects.
>
> **Sorting:** Placement of projects into **"Tiers"** by how many HB2278 considerations are met
>
> **Rank:** High, Medium, or Low rank assigned to projects by reviewing committees to indicate the relative rank of the given project.
>
> **Priority:** Assigned to projects by a reviewing committee to indicate the preference of the committee in relation to other projects.

4.2.3 Task Outline

The project recommendation process for the review committees involves three tasks including sorting, ranking, and prioritizing.

Prior to the initial Regional Review Committee meeting, the Regional Review Committee Staff will provide the committee with the documents needed for the Evaluation Process. The Evaluation tasks are detailed in the following table:

Table 2 Regional Review Outline

Step	Task	Explanation	Responsible party
Pre Meeting Through 3/7/08	Delivery of Information to Regional Committee Staff	Delivery of Project documents including: Applications, Feasibility Reports, and standardized committee reporting material	CO II Staff
	Staff Preparation for meeting	Regional Review Committee Staff ensures all documents are distributed to the Committee members. Regional Review Committee Staff sort projects into "tiers"	Committee Staff
Meetings 3/7/08 Through 4/17/08	Sorting	Draft project sorting is presented to Regional Review Committee. Regional Review Committee discusses staff sorting and adopts or amend staff sorting.	Committee Staff Committee
	Ranking	Projects are ranked as High, Medium, or Low rank.	Committee
	Prioritizing	Projects are prioritized (1- through *n*, with 1 indicating the highest project).	Committee
Post Meeting	Reporting	Complete standardized committee report material and obtain approval of the report by the Committee	Committee Staff

4/17/08 through 4/24/08		Chair.	

4.3 Prior to Public Meetings

4.3.1 Regional Review Committee Staff Responsibilities

Scheduling and Noticing of Review Meetings

Regional Review Committee Staff will notify C*onnect*Oregon Staff of Regional Review Committee meeting dates, so ConnectOregon Staff can ensure all C*onnect*Oregon meetings, and any revisions or changes, are accurately noticed on the C*onnect*Oregon Website. Regional Review Committee Staff are responsible for all required public meeting notices.

Distribution of Application Materials

The C*onnect*Oregon Staff will provide one printed copy and unlimited access to electronic copies of project application materials (e.g. application, letters of support, and supplemental information) to the Regional Review Committee Staff.

Regional Review Committee Staff will coordinate the distribution of application materials to the Final Review Committee.

Sort Projects

Prior to the initial meeting, the Regional Review Committee Staff will conduct the initial sorting of projects into Tiers as detailed in Section 3.3.2, below.

4.3.2 Sort Projects

During the Modal Review Committee reviews projects were sorted into "tiers" that indicate how many of the project selection considerations identified in HB2278 are **thoroughly** met by the project. Regional review staffs are encouraged to use the Modal Review Committee sorting as a reference during the following process.

*Connect*Oregon applicants were instructed that, when recommending and selecting projects, the following will be considered as specified in HB 2278:

- Whether a proposed transportation project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor;

- Whether a proposed transportation project results in an economic benefit to this state;

- Whether a proposed transportation project is a critical link connecting elements of Oregon's transportation system that will measurably improve utilization and efficiency of the system;

- How much of the cost of a proposed transportation project can be borne by the applicant for the grant or loan from any source other than the Multimodal Transportation Fund; and

- Whether a proposed transportation project is ready for construction.

The OTC requests the review committees treat the first three of these considerations as strategic considerations. To facilitate this request, the first step of the Regional Review committee review process, projects will be sorted into "Tiers" that indicate how many of the project selection considerations identified in HB2278 are **thoroughly** met by the project. The tiers include:

    e. Tier 1 (Meets all considerations **thoroughly**)

    f. Tier 2 (Meets all 3 of the **Strategic** considerations thoroughly)

    g. Tier 3 (Meets 1 or 2 of the **Strategic** considerations thoroughly)

    h. Tier 4 (Does not meet any of the of the **Strategic** considerations thoroughly)

Based on the application questions, each committee shall determine whether a project **thoroughly** meets each of the HB2278 considerations.

To **thoroughly** meet a consideration a project shall demonstrate through application responses and through the requested independent verification that the project will accomplish the intent of the legislation. The application is written so that most applicants will have to skip one or more questions. (A project review worksheet is provided in Appendix A-8).

Regional Review Committee Staff will provide a preliminary sorting of the projects to the Committee. The Regional Review Committee will discuss staff sorting and vote to adopt or amend the proposed staff sorting approach.

Regional Committees should document the reasoning behind any changes to a project's sorting. For example: if the Rail Committee sorted a project into a low tier; however, a marine project in the region (which the rail committee would not have reviewed) is dependent on the low prioritized rail project, the Regional Committee should note this as the reason for the higher "Tier".

The Regional Committee Staff will report to the Regional Committee on all communication with other regions regarding multi regional projects.

Regional Committee Staff will provide a preliminary sorting of the projects to the Regional Committee. The Regional committee will discuss the staff sorting results and vote to adopt or amend staff sorting.

4.3.3 Regional Review Committee Responsibilities

Review Project Documents Provided by ODOT

The Regional Review Committee Staff is responsible for the distribution of the review materials to committee members prior to the scheduled committee meeting.

Prior to the committee meetings, the committee members should review in detail the application packages.

4.3.4 Regional Review Committee Chair Responsibilities

Coordinate with Committee Staff

Prior to meetings, the Committee Chair will coordinate with Regional Review Committee Staff regarding the meeting scheduling and agenda.

4.4 During Public Meetings

4.4.1 Regional Review Committee Staff Responsibilities
General

The Regional Committee Staff will assist the committees to understand the review process, and the expectations of and instructions to the committees. Regional Committee Staff may not rank or prioritize projects for the committees.

Present Consideration "Tier" Sorting

The Regional Review Committee Staff will present the initial sorting of projects into "tiers" based on considerations to the committee

Meeting Minutes

For each committee meeting, Regional Committee Staff will record and prepare committee meeting minutes, and secure the Committee's approval of the minutes. Approved meeting minutes will be sent to the C*onnect*Oregon II Staff for posting on the *Connect*Oregon website.

4.4.2 Regional Review Committee Responsibilities

Conflict of Interest Disclosure

The Committee Members shall adhere to the conflict of interest disclosure instructions in Section 3.1.3.

Review, Discuss and Recommend Projects

Each committee is expected to provide the OTC with a prioritized list of recommended projects for *Connect*Oregon II funding.

All committee meetings related to the recommendations of projects for *Connect*Oregon II funding shall be held as public meetings. Committee members may present information regarding projects, the condition of the states transportation network, or other relevant information to the whole committee. Each committee shall establish a written record of the decision-making process and project specific reports (See Appendix A-8 for report format).

4.4.3 Finalize Consideration Tier Sorting

Committees will consider the initial tier sorting presented by the Regional Committee Staff, and approve or modify the sorting.

4.4.4 Identify Project Rank

Within each level of tier, committees will group projects with a ranking of High, Medium, or Low.

The basis for ranking projects is how well the project meets the needs of:

- The mode or transportation system, and

- The region or state.

4.4.5 Prioritize the Projects

 The committee will prioritize projects within each rank for each tier level. The committee will assign a number to each prioritized project, with priority 1 indicating the committee's first choice, priority 2 indicating the second choice, and so on, until all prioritized projects are assigned a number.

Each committee will provide only one prioritized list statewide. There is no need to differentiate projects by region.

Regional Review Committee Chair Responsibilities

 The Committee Chair shall preside over all meetings, including calling the meeting to order, ensuring members participate appropriately, minutes are taken and approved, and the committee completes its work as outlined in this document.

4.5 After Public Meetings

4.5.1 Regional Review Committee Staff Responsibilities

Preparation and Transmittal of Reviews to the Regional Committees

Regional Review Committee Staff will complete and prepare for publication the following:

- Review Matrix

- Project Reports, and,

- Meeting Minutes.

Regional Review Committee Staff shall secure the authorization of the Committee Chair prior to transmittal of these documents to the C*onnect*Oregon Staff. The documents will be delivered electronically, by email or by mail of electronic media to the ConnectOregon Staff.

Regional Review Committee Report

For each application, the Regional Review Committee staff will complete the Regional Review Committee Report. A Regional Review Committee Report Form is (See: Appendix A-6) and on the *Connect*Oregon II website. The form will summarize the project and will present the details of the Committee's decision-making process to Final Review Committee and the OTC. The Regional Review Committee Report should

include any specific details of which Regional Review Committee feels subsequent reviewers should be aware.

Review Matrix

A review matrix will be provided to the review committee in electronic form. (See: Appendix A-7) Regional Review Committee staff will complete the review matrix recording the actions of the committee. The Review Matrix is designed to provide the Final Review Committee, and the OTC with a summary of the Regional Review Committees' sorting, ranking, and prioritizing.

4.5.2 Regional Review Committee Chair Responsibilities

Preparation and Transmittal of Reviews to the Final Review Committee

The Committee Chair shall ensure that all documents (the Review Matrix, Project Reports and Meeting Minutes) prepared by Regional Committee Staff accurately reflect the committee proceedings. The Committee Chair will approve the transmittal of these documents to the *Connect*Oregon regional committees.

5 FINAL REVIEW COMMITTEE

5.1 Formation of the Final Review Committee

Following the receipt of recommendations from the modal and regional committee the ODOT Director will convene a Final Review Committee. The Final Review Committee will include representatives from each of the modal and regional committees.

5.2 Committee Administration

The *Connect*Oregon staff will provide the Final Review Committee a combined list of recommendations from of the modal and regional committees. The format of this summary will be developed in consultation with the OTC and the final review committee facilitator.[2]

5.2.1 Scheduling and Noticing of Review Meetings

*Connect*Oregon II staff will work with the OTC to schedule the Final Review Committee meeting in late April or early May.

5.2.2 Staff Support

The C*onnect*Oregon staff will provide staff support for the Final Review Committee.

C*onnect*Oregon staff, unless otherwise directed by the committee, will:

- Present the Modal and Regional sorting prioritization and rankings of projects to the Final Review Committee;

- Assist the committee in understanding the review process; and

- Record results of committee proceedings.

C*onnect*Oregon staff advice and analysis is limited to a supporting role, and cannot be substituted for the required decision making role of the committee.

5.2.3 Conflict of Interest Disclosure

At the start of each meeting, the Committee Chairs shall require committee members to disclose all conflict of interests regarding any projects being discussed. A conflict of interest means the member is an applicant, or a consultant to the applicant, or is a committee or board that has assisted the applicant, or has a financial benefit in the project. All conflict of interest disclosures will be recorded in the committee meeting minutes.

The Committee Chair will ensure that members refrain from voting on or recommending projects in which they have disclosed a conflict of interest. Committee members with conflict of interests are allowed to otherwise participate in the evaluation and

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[2] An independent facilitator will be contracted by ODOT to coordinate the decision making process of the Final Review Committee.

recommendation process. This disclosure requirement applies to both public and private sector members.

5.2.4 Inputs into the Decision Process

Input into the Decision Process

The review committees will review projects based on information provided through:

5. The project application and related documents.

6. Applicant responses to questions;

7. The Eligibility Review; and

8. The committee members' knowledge and expertise.

The review committees may also review projects based on information provided through:

4. Applicant testimony (if all applicants are provided the opportunity to testify).

5. Professional staff recommendations or analysis (if requested by the committee).

6. Public comment

The review committees shall **not consider** information provided through:

2. Any lobbying by the applicant or any other person outside of the committees' public meetings. This includes any request for pre-approval by an applicant or other party.

Committees shall not require applicants seek prior consultation or pre-approval of any projects, nor sort, rank or prioritize any project negatively due to any failure to consult with the committee prior to submitting an application.

5.2.5 Applicant Presentations

The Final Review Committee will not hear presentations from any applicants.

5.3 Final Recommendation Report

This Final Review Committee will provide the ODOT Director a Final Recommendation Report, prioritizing projects.

6 OREGON TRANSPORTATION COMMISSION

The OTC will hold a public hearing on the recommended project list in May 2008.

The OTC will make its project selection decision in June 2008.

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7 CONTACT INFORMATION

7.1 *ConnectOregon Staff:*

Please use this address to send any review documents to the C*onnect*Oregon Staff.

Freight Mobility Section

555 13th Street NE, Suite 2

Salem, Oregon 97301-4178

Email

7.2 Questions

Please direct all questions to:

ConnectOregon@odot.state.or.us

Email specific questions regarding the ConnectOregon II program to this email address.

For Questions about the Connect Oregon Program contact:

Jack Evans at 503-986-3644

Appendices

The Appendices in this document provide DRAFT versions of the respective document, agency staff; modal and regional reviewers will receive final versions of each form in Word or Excel prior to the start of the review period.

A-1 DRAFT COMPLETENESS CHECKLIST TEMPLATE

*Connect*Oregon II Completeness Checklist

Project Number: _____

Project Name: _____

Reviewer Name: _____

Reviewer Phone: _____

Application:

☐ Electronic Submission (Received on: _____)
☐ Paper Submission (Received on: _____)

Completeness:

Part A

☐ Item 1 and 2 – Contact Information (☐ Additional applicant box checked)
☐ Item 3 and 4 – Name location and summary
☐ Item 5
☐ Item 6 (Signatures match names from Item 1 and 2)

Part B

☐ Item 1 – Description completed
☐ Item 2 – Detailed Location
☐ Item 3 – Mode
☐ Item 4 – Region
☐ Item 5 – Taxes – **administrative requirement**
☐ Item 6 – Life of project (☐ Useful life is less then 20 years)
☐ Item 7 – Responsible Party
☐ Item 8 – Source of operational funds
☐ Item 9 – Funding for operation secured or budgeted
☐ Item 10 – Real estate (☐ Signature) (☐ Additional owner box checked)
☐ Item 11 – Property purchase
☐ Item 12 – Property leased
☐ Item 13 – Property Details (optional)

Part C

☐ Item 1 – Source and amount of funds
☐ Item 2 – Source of match (Grant projects only)
☐ Item 3 – Description of larger project context (optional)
☐ Item 4 – Milestones
☐ Item 5 – Milestone details
☐ Item 6 – Milestone budgets

Part D

☐ Item 1 – Improve connections
☐ Item 2 – Link workers to jobs
☐ Item 3 – Statewide traded clusters
☐ Item 4 – Attract new business (☐ Commitment letters box checked)

☐ Item 5 – Economically distressed communities
☐ Item 6 – Job creation (☐ Commitment letters box checked)
☐ Item 7 – Improve use of efficacy of transportation system (☐ Documentation
          included in supplemental information box checked)
☐ Item 8 – Multi-modal links(☐ Contact information of stakeholders in supplemental
          information box checked)
☐ Item 9 – Interstate linkages
☐ Item 10 – Technological solutions to improve of efficacy of transportation system
☐ Item 11 – Construction readiness checklist
☐ Item 12 – Construction limits
☐ Item 13 – Support of public agencies
☐ Item 15 – Other permit approvals
☐ Item 15 – Other Construction readiness text box (optional)

Part E
☐ Item 1 Other Considerations Text box (optional)

Supplemental Information
☐ Part C, Item 3 – Commitment letters
☐ Part D, Item 4 – Commitment letters
☐ Part D, Item 6 – Commitment letters
☐ Part D, Item 8 – Key stakeholder letters and contacts
☐ Part D, Item 13 – Documentation of coordination with approving agencies
☐ Other Supporting documentation

Addenda
☐ Additional text (optional)

Additional Signature page
☐ Not applicable
☐ Complete (☐ Signatures match names)

NOTES: _____

_____

_____

_____

_____

_____

_____

A-2 DRAFT FEASIBILITY REPORT TEMPLATE

DRAFT *CONNECT*OREGON II FEASIBILITY REPORT FORM

[insert reviewer name and originization] , Feasibility Reviewer:

DATE: : _____

_____

Application Number: _____

Applicant Name: _____

Co-Applicant: _____

Project Name: _____

Mode: _____

_____

Applicant Administrative Eligibility:
- ☐ The Applicant is a Public Body or Person within the state of Oregon.
- ☐ The Applicant, if applicable, is current on all state and local taxes, fees, and assessments.
- ☐ The Applicant has sufficient management and financial capacity to complete the Project including without limitation the ability to contribute 20 percent of the eligible grant Project cost.

_____

Project Administrative Eligibility:
- ☐ The project is a Transportation Project that involves one or more of the following modes of transportation: air, marine, rail or public transit.
- ☐ The Project will assist in developing a multimodal transportation system that supports state and local government efforts to attract new businesses to Oregon or that keeps and encourages expansion of existing businesses.
- ☐ The Project is eligible for funding with lottery bond proceeds under the Oregon Constitution and laws of the State of Oregon.
- ☐ The Project will not require or rely upon continuing subsidies from the Department for ongoing operations.
- ☐ The Project is not a public road or other project that is eligible for funding from revenues described in section 3a, Article IX of the Oregon Constitution, i.e. the State Highway Trust Fund.
- ☐ The Project is feasible, including the estimated cost of the Project, the expected results from the proposed Project for each of the considerations as prescribed in 731-035-0060, the Project schedule, and all applicable and required permits may be obtained within the Project schedule.

_____

Technical Feasibility

Is the budget estimate complete?
☐ Yes ☐ No

If budget estimate information is complete, does the cost estimate appear reasonable?
☐ Yes ☐ No

Is timeline in relation to tasks not yet completed feasible?

☐ Yes ☐ No

Are there any elements of the project that could cause unanticipated delays?

☐ Yes ☐ No

Can all applicable and required permits be obtained as indicated in the schedule?

☐ Yes ☐ No

Does the application package include documentation of the desire for and support of the Project from the businesses and entities to be served by the Project

☐ Yes ☐ No

Comments:

No Conflict of Interest Certification: I do not have any conflict of interest with the proposer submitting this project application. A conflict of interest may include any family members presently associated with a proposer, or any financial relationships with a proposer (does not include past employment). I have read and rated the project application independently, and without interference or pressure from anyone. I have not had conversation or other contact with the proposer concerning this project application since it was issued. I have noted any potential conflicts or concerns on this form."

FEASIBILITY EVALUATOR SIGNATURE:

Name   Date

A-3 DRAFT APPLICATION REVISION FORM TEMPLATE

*CONNECT*OREGON II Application Revision Form

DATE: : _____

Application Number: _____

Applicant Name: _____

Co-Applicant: _____

Project Name: _____

Reason for Revision:

☐ Revision requested by ODOT

☐ Revision initiated by Applicant

[Type Applicant Name] requests ODOT accept the following changes to the [Type Project Name] *Connect*Oregon application.

This change will [choose one] the information provided in Part [Select Part], Item [Select Item #].

Certification

I certify that the information on this form above, is accurate, and supersedes, or supplements as indicated, the information on the *Connect*Oregon II application for this project.

APPLICANT SIGNATURE	PRINT NAME	DATE
X		
CO-APPLICANT SIGNATURE	PRINT NAME	DATE
X		

A-4 DRAFT MODAL PROJECT REPORTS TEMPLATE

MODE

	Tier (1-5)	**Rank** (High/Medium/Low)	**Priority**
Project:			
Requested Funds:	#	###	#
Region:			
Report Date:			

Project Description:

Review Comments:

A-5 DRAFT MODAL MATRIX TEMPLATE

The table below is a draft of the fields that will be used on the review matrix provided to the modal review committees. The final version will be a Microsoft Excel spreadsheet.

*Connect*Oregon II Modal Committee Review Matrix												
Application Number	Applicant Name	Project Name / Description	Total ConnectOregon Funds Requested ($)	(a) Project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor	(b) Project results in an economic benefit to this state	(c) Project is a critical link in Oregon's transportation system that will measurably improve utilization and efficiency	(d) Ability of the applicant to fund the project from any source other than the Multimodal Transportation Fund	(e) Construction Readiness	Tier	Rank (High - Medium - Low) Committee Only	Priority Committee Only	Final Review Report
				Staff has placed an "X" for each Consideration that is " thoroughly" met by the project								
1M0000	SAMPLE	**SAMPLE**	50000	X	X	X	X	X	5	M	12	**Tier 5 M 12**

The application number, name, and funds requested columns will be completed by C*onnect*Oregon staff. The "Consideration" and sort columns will be completed by modal review committee staff, and the ranking and priority columns will record the actions of the committee.

A-6 DRAFT REGION PROJECT REPORTS TEMPLATE

REGION

	Tier (1-5)	Rank (High/Medium/Low)	Priority
Project:			
Requested Funds:	**#**	**###**	**#**
Region:			
Report Date:			

Project Description:

Review Comments:

The table below is a draft of the fields that will be used on the review matrix provided to the region review committees. The final version will be a Microsoft Excel spreadsheet.

ConnectOregon II Region Committee Review Matrix												
Application Number	Applicant Name	Project Name / Description	Total ConnectOregon Funds Requested ($)	(a) Project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor	(b) Project results in an economic benefit to this state	(c) Project is a critical link in Oregon's transportation system that will measurably improve utilization and efficiency	(d) Ability of the applicant to fund the project from any source other than the Multimodal Transportation Fund	(e) Construction Readiness	Tier	Rank (High - Medium - Low)	Priority	Final Review Report
				Staff has placed an "X" for each Consideration that is " thoroughly" met by the project						Committee Only	Committee Only	
5R0000	SAMPLE	**SAMPLE**	50000	X			X	X	3	L	21	**Tier 3 L 21**

The application number, name, and funds requested columns will be completed by ConnectOregon staff. The "Consideration" and sort columns will be completed by region review committee staff, and the ranking and priority columns will record the actions of the committee.

A-8 SORTING PROCESS TEMPLATE

On the following pages, a table is provided indicating which application questions relate to the identified consideration. A given question may relate to more than one consideration, and will appear under each relevant consideration.

Committee Staff will be provided with an electronic document containing the following table for use during sorting.

Committee staff will record the results on the Review Matrix for presentation to Committee during public meetings.

Consideration (a) - Whether a proposed transportation project reduces transportation costs for Oregon businesses or improves access to jobs and sources of labor

Part	Item #	Question	Answer
D	1	Does this project improve an existing connection, or add a new connection, to an industrial or employment center?	☐Yes ☐No
D	2	Does this project link workers to jobs? - Identify Passenger mode link(s) - Identify geographic service level	☐Yes ☐No
D	10	Does this project use technology to improve the use or efficiency of Oregon's transportation system?	☐Yes ☐No

Consideration (b) - Whether a proposed transportation project results in an economic benefit to this state

Part	Item #		Answer
B	6	How long will the project continue to function, once completed and all ConnectOregon II funds are spent? Years_____	☐Yes ☐No
D	3	Does the project serve one or more of Oregon's Statewide Traded Clusters or the tourism industry?	☐Yes ☐No
D	4	Does this project provide an economic benefit to the State of Oregon by attracting new business or industry to the State?	☐Yes ☐No
D	5	Is this project located in an economically distressed or severely distressed community, as defined by the Oregon Economic and Community Development Department (OECDD)?	☐Yes ☐No
D	6	Does this project provide an economic benefit to the State of Oregon by creating an immediate non-speculative opportunity for job creation or retention?	☐Yes ☐No

Part	Item #		Answer
D	9	Does the project improve or create linkages to transportation networks and markets outside of Oregon?	☐Yes ☐No
D	10	Does this project use technology to improve the use or efficiency of Oregon's transportation system?	☐Yes ☐No

Consideration (c) - Whether a proposed transportation project is a critical link connecting elements of Oregon's transportation system

Part	Item #		Answer
D	7	Does this project improve use or efficiency of the State's transportation system?	☐Yes ☐No
D	8	Does the project provide links between, or include improvements in, multiple modes (air, marine, pipeline, passenger/freight rail, transit, truck, bus, automobile)?	☐Yes ☐No
D	9	Does the project improve or create linkages to transportation networks and markets outside of Oregon?	☐Yes ☐No

Consideration (d) - How much of the cost of a proposed transportation project can be borne by the applicant for the grant or loan from any source other than the Multimodal Transportation Fund

Part	Item #		Answer
C	1	Please identify the source and amount of moneys comprising your project budget in terms of grants, loans, and match.	☐ Identified ☐ Not Identified
C	2	For grant projects, detail the source and timing of the match shown above.	☐ Detailed ☐ Not Detailed ☐ Not Applicable
C	3	If your project leverages other funds beyond the *Connect*Oregon II grants, loans and match required for the project, please describe the source, timing and basis for valuing the other funds	☐ Detailed ☐ Not Detailed ☐ Not Applicable

Consideration (e) - Whether a proposed transportation project is ready for construction

Part	Item #		Answer
D	12	Is the construction of the project limited to specific construction windows due to environmental considerations (e.g. bird nesting; fish spawning seasons, temperature)?	☐Yes ☐No
D	13	Can the project demonstrate support from public agencies that must approve the project?	☐Yes ☐No
D	14	What permits or approvals (beyond any identified above) are required prior to project construction?	☐ Identified ☐ Not Identified ☐ Not Applicable
D	15	Describe any unique construction readiness issues not identified above:	☐ Detailed ☐ Not Detailed ☐ Not Applicable