

Information for *ConnectOregon* III Applicants

Scoring and Tiering of Applications

This information is provided for applicants to inform them of the *ConnectOregon* III scoring criteria prior to the deadline date for submittal of applications (November 20, 2009). The information contained below will be republished in the Instructions to Reviewers for *ConnectOregon* III Projects and posted to the *ConnectOregon* website in December 2009.

Key Process Terms:

Consideration: A set of five issues specifically identified in ORS 367.084 that the OTC must “consider” when selecting projects.

Scoring: Assignment of points to considerations based on how well ORS 367.084 considerations are met.

Sorting: Placement of projects into “**Tiers**” based on total points assigned.

1. OVERVIEW

The determination regarding whether ORS 367.084 considerations are met is based on the responses in the application. The five considerations are:

- 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.

2. APPLICATION EVALUATION: SCORING and TIERING

A. Scoring.

All applications will be scored for each of the five considerations. The first three considerations are considered **strategic**. Some questions have more than one part. Where two or more parts have a shared point value, the maximum of the two scores will be used for calculating the total points under the consideration. The maximum possible score is **40 points**.

B. Tiering will be assigned using the scoring method as detailed in Section 3 below.

- **Very High Point Value** - Tier 1
- **High Point Value** - Tier 2
- **Medium Point Value** - Tier 3
- **Low Point Value** - Tier 4

C. Identify Project Rank

Review 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.

This will be a second application review and the rank will not be tied directly to the assigned tier.

D. Prioritize the Projects

The review 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 to the Final Review Committee. This is no opportunity to differentiate projects by region.

During project prioritization each committee will review the assigned projects' tier and rank.

3. EVALUATION QUESTIONS AND MAXIMUM POINT ASSIGNMENT

Points are used for review purposes only.

- A.** The evaluation questions are listed below. A table is provided that indicates 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.
- B.** Committee staff will be provided with an electronic document containing the following tables for use during sorting.
- C.** Committee staff will record the results on a Review Matrix for presentation to Committees 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 No.	Brief Description of Question (from Application)	Points
Items D1 and D2 are evaluated together with a shared point value.			
D	1	Industrial or employments connections	3
D	2	Linking workers to jobs	
D	8	Efficiency and reliability of transportation	4
D	9	Safety	
D	10	Transportation Connections	3
TOTAL AVAILABLE POINTS			10

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

Part	Item No.	Brief Description of Question (from Application)	Points
Items B7 and D5 are evaluated together with a shared point value			
B	7	Project's useful life	3
D	5	Long-term jobs or private investment	
Items C1c, D6 and D7 are evaluated together with a shared point value			
C	1c	<i>ConnectOregon</i> III requested funding	3
D	6	Construction jobs per \$million requested from <i>ConnectOregon</i>	
D	7	Unemployment rate	
Items D8 and D9 are evaluated together with a shared point value			
D	8	Efficiency and reliability of transportation system	4
D	9	Safety	
TOTAL AVAILABLE POINTS			10

Consideration (c) - 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

Part	Item No.	Brief Description of Question (from Application)	Points
Items D1 and D3 are evaluated together with a shared point value			
D	1	Industrial or employments connections	3
D	3	Linking populations to medical care, social services, or shopping	
Items D8 and D9 are evaluated together with a shared point value			
D	8	Efficiency and reliability of transportation system	4
D	9	Safety	
D	10	Transportation Connections	3
TOTAL AVAILABLE POINTS			10

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 No.	Brief Description of Question (from Application)	Points
C	1c	Additional applicant match. Match is based on the <i>ConnectOregon</i> Total Project amount which equals the total of the Grant and/or Loan amount plus the required 20% match	
		Match amount equals >80% of <i>ConnectOregon</i> Total Project	5
		Match amount equals 80% of <i>ConnectOregon</i> Total Project	4
		Match amount equals 60% of <i>ConnectOregon</i> Total Project	3
		Match amount equals 40% of <i>ConnectOregon</i> Total Project	2
		Match amount equals >20% of <i>ConnectOregon</i> Total Project	1
TOTAL AVAILABLE POINTS			5

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

Part	Item No.	Brief Description of Question (from Application)	Points
D	10	Construction readiness – 6 months after agreement is signed	5
		Construction readiness – 1 year after agreement is signed	3
		Construction readiness – 1.5 years after agreement is signed	1
		TOTAL AVAILABLE POINTS	5

4. SUMMARY OF GUIDELINES FOR AWARDING POINTS

Scoring of applications will be based on the total number of points assigned based on how well ORS 367.084 considerations are met. The numerical scores will be used to sort applications into “tiers” and will be used by ODOT to compare projects.

Following is a description of how CO III reviewers will assign points to the considerations:

Questions: D1, D2, and D3

- “0” Points:** No positive impacts
- “1” Points:** Potential positive impacts
- “2” Points:** Likely positive impacts
- “3” Points:** Significant positive impacts
- “4” Points:** N/A

Questions: B7 and D5

- “0” Points:** No net positive impacts
- “1” Points:** Potential net positive impacts
- “2” Points:** Likely net positive impacts
- “3” Points:** Significant net positive impacts
- “4” Points:** N/A

Questions: C1.c. and D6

- “0” Points:** N/A
- “1” Points:** <18 jobs per \$million requested from *ConnectOregon*
- “2” Points:** 18-28 jobs per \$million requested from *ConnectOregon*
- “3” Points:** >28 jobs per \$million requested from *ConnectOregon*
- “4” Points:** N/A

Question: D7

- “0” Points:** Located in an area w/>2 percentage points below the statewide average
- “1” Points:** Located in an area w/0-2 percentage points below the statewide average
- “2” Points:** Located in an area w/0-2 percentage points above the statewide average
- “3” Points:** Located in an area w/>2 percentage points above the statewide average
- “4” Points:** N/A

Questions: D8 and D9

- “0” Points:** No positive impacts
- “1” Points:** Unlikely to make positive impacts
- “2” Points:** Potential positive impacts
- “3” Points:** Likely positive impacts
- “4” Points:** Significant positive impacts

Question: D10

- “0” Points:** No positive impacts
- “1” Points:** Potential positive impacts
- “2” Points:** Likely positive impacts
- “3” Points:** Significant positive impacts
- “4” Points:** N/A