ODOT Recovery Discretionary Grant Program
5311 and 5311(f) (ARP & CARES Funding)
May 2023

Oregon Department of Transportation Public Transportation Division

For a version of this document with increased font size or in other formats, contact the Public Transportation Division, 555 13th Street NE, Salem OR 97301. Office (503) 986-3300 or fax (503) 986-4189
PART 1: ODOT Recovery Discretionary Grant Overview and Guidance ............................................. 3
  Introduction ........................................................................................................................................ 3
  Applicant Eligibility ............................................................................................................................. 4
  Project Eligibility – Only Operation Projects Accepted ................................................................. 5
  Match Requirements .......................................................................................................................... 6
  Application Submission ....................................................................................................................... 6
Part 2: Application Evaluation Process ............................................................................................... 7
  Evaluation Committee and Factors .................................................................................................... 7
  Appeals Process ................................................................................................................................ 8
Part 3: Reporting Requirements ........................................................................................................ 8
Part 4: Application Format and Use ..................................................................................................... 8
  Applicant Instructions ......................................................................................................................... 9
  Risk Assessment (Conditional Content) ............................................................................................. 9
  Project Details .................................................................................................................................. 10
  Description of Service ....................................................................................................................... 10
  Expense Details ................................................................................................................................. 14
Part 5: Submitting Your Application .................................................................................................. 15
Staff Contacts

Questions about this solicitation should be directed to your Regional Transit Coordinator (RTC).

<table>
<thead>
<tr>
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PART 1: ODOT Recovery Discretionary Grant Overview and Guidance

Introduction

The Recovery Discretionary Grant Program is intended to provide funding to prevent service reductions or discontinuation of services resulting from the effects of the pandemic. This guidance document describes Oregon Department of Transportation (ODOT) Public Transportation Division (PTD) response to the evolving challenges associated with the recovery of Oregon’s public transit industry. Accordingly, Recovery funds will prioritize the preservation of services, retention of drivers and critical personnel, and the payment of costs associated with responding to, and recovering from, the COVID-19 pandemic.

This will be the final solicitation of approximately $8.6 million for Recovery Discretionary Grant funding. Grant applications will be due June 16, 2023. Funding recommendations will be presented to Public Transportation Advisory Committee (PTAC) at the July 10, 2023 meeting.

NOTE: grant funds through these sources can be recalled by the Federal Government at any time. The FTA has informed PTD that they cannot guarantee the availability of these funds. Due to the constraints of the FTA funding, PTD will not pre-award these grant agreements until funding is secured through the FTA, which is anticipated by spring of 2024.

Resources for the Recovery solicitation are comprised of the following sources:

- Coronavirus Aid, Relief, and Economic Security Act (CARES)
  - 5311 Formula
- American Recovery Program Act (ARP)
  - 5311 Formula
  - Intercity 5311(f)

Additional information on COVID-19 relief funding for public transit has been published by FTA and is available online.

Resource link: [Federal Transit Administration Coronavirus Funding website](https://www.fta.dot.gov/coronavirus-funding.html)
Specific guidance on Section 5311 can be found on the FTA and PTD websites.

Links:  
[FTA Formula Grants for Rural Areas](https://www.fta.dot.gov/5311/)  
[PTD 5311 Formula Application Guidance](https://www.oregon.gov/ODOT/PTD/Pages/5311_Formula.aspx)
Applicant Eligibility

This Recovery solicitation includes federal relief funds made available under the CARES and ARP Acts for Operation projects only. Table 1 describes the sources of funding.

Table 1: Recovery funding sources

<table>
<thead>
<tr>
<th>Fund Source</th>
<th>Amount Available</th>
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<tbody>
<tr>
<td>CARES - 5311</td>
<td>$1.5 million</td>
</tr>
<tr>
<td>ARP Act – 5311</td>
<td>$4 million</td>
</tr>
<tr>
<td>5311(f) Intercity</td>
<td>$3.1 million</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$8.6 million</strong></td>
</tr>
</tbody>
</table>

All the resources available under this solicitation are apportioned under FTA’s Section 5311 and 5311(f) programs. Accordingly, subrecipients are required to demonstrate the capacity to meet the following qualifications, as applicable to the project type, before receiving an award:

- Be an entity eligible to enter into agreements.
- Have the legal, managerial, and operational capacity to perform project(s) within the agreed-upon schedule.
- Not be debarred or suspended from receiving federal grants.
- Have the capacity to report on fund use and connection to COVID needs.
- Have the ability to perform the project(s) in a safe, prudent, and timely manner.
- Be current on annual reports to the National Transit Database.
- Be current on reporting requirements for funding previously awarded in connection with the COVID-19 pandemic.
- Have a current and compliant Transit Asset Management plan.
- Be in compliance with applicable drug and alcohol testing requirements at the time of the grant award and at the time of any reimbursable expenses.
- Be in compliance with applicable standards of the Americans with Disabilities Act.
- Be in compliance with applicable federal, state, and local laws and regulations including, but not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety, and health.
- Have maintained compliance with all provisions of current or previously awarded relief grant agreements.
Eligible subrecipients include mass transit districts, transportation districts, federally recognized Indian Tribes, cities, counties, special districts, intergovernmental entities, nonprofit transit providers, for-profit transit providers, and any other political subdivision, municipality, or public corporation that provides public transit services.

For-profit service operators that are NOT eligible to apply for Recovery grants include: taxi services; Transit Network Companies (TNCs); limousine services; ambulance services; charter, tour, and sight-seeing services; and services only ticketing to/from a single location (such as airport shuttles). In the latter case, the agency that has entered into a contract with a provider for the delivery of service may be eligible to apply for funding to pay its contractor(s). Please consult with your Regional Transit Coordinator if you have questions about eligibility.

Project Eligibility – Only Operation Projects Accepted

Only projects that fund operations are eligible. Eligible projects include, but are not limited to:

- Operation projects are eligible for this funding. Other categories of projects will not be eligible.
- Preserving services that may otherwise be at risk of reduction, suspension, or discontinuation.
- Reinstating previously offered services that have been suspended as a result of the pandemic.
- Protecting an applicant’s investment in operational capacity such as the recruitment, retention, and development of drivers and critical personnel engaged in the delivery of eligible services.
- Supporting the purchase of personal protective equipment (PPE), sanitization equipment, and other tools, supplies, and services that allow eligible transit services to continue functioning in a manner that is safe for staff and the traveling public.

These resources provide support for public transportation in rural areas with a population fewer than 50,000 people. Transit services eligible for Section 5311 funds should provide access to, from, between, or within rural communities or areas. Rural access must be the dominant function of the service, and Section 5311 eligible service must be open to the general public.

The resources for 5311 (f) are to provide support for public transportation for intercity services that cover longer distances or operate intercity transportation services.

Approximately $3.1 million of available funds must be awarded in support of intercity transit service. Intercity transit service is eligible for funding under Section 5311(f) if all of the following conditions are true:
• Service covers longer distances (20 miles or more) or closes a significant gap in the Statewide Transit Network;

• Service makes infrequent stops;

• Service is not designed primarily to serve commuters;

• Vehicles have the capacity to carry passenger luggage; and

• Service is open to the general public and makes meaningful connections to the larger intercity and Statewide Transit Network, including passenger rail, where practicable.

Link: FTA Frequently Asked Questions on COVID-19 Relief Funds

Eligible Expenses
All net operating expenses (after subtracting fare revenues from the eligible operating expenses) supporting Section 5311 or 5311(f) eligible service on or after January 1, 2020, and in response to economic or other conditions related to the pandemic, are eligible.

Match Requirements
There is no local match requirement for this solicitation for eligible expenses.

Application Submission
This solicitation will use the following timeline:

| May 1, 2023  | Advance Notice Available |
| May 8, 2023  | Guidance and Application Available |
| May 17, 2023 | Four-hour drop-in grant Training |
| June 16, 2023| Application Deadline |
| Nov. 2023    | Grant Awards Announced |
| Dec. 2023    | Agreements Executed |

Applicants may submit multiple projects on a single application. Applications are due to PTD no later than 5:00 p.m. on June 16, 2023. PTD may ask applicants to supply missing information or to provide clarification about the meaning or intent of any portion of an application.
Part 2: Application Evaluation Process

Evaluation Committee and Factors

PTD will select projects based on each project’s technical merit, the applicant’s success in answering the questions completely, the description regarding how each project addresses current priorities, and staff knowledge of area needs. Applications will be evaluated based on their potential for meeting local community, regional, and state needs. Project recommendations will be posted for public comment and presented to the Public Transportation Advisory Committee (PTAC) for concurrence at their July 10, 2023 meeting.

Examples of evaluation factors that should be addressed in application:

• Applicant’s COVID-19 related need
• Consequences to transit users if the project is not funded
• Geographic equity of fund distribution across eligible transit providers
• Applicant’s funding history, periodic reports, and National Transit Database data
• Total anticipated hours, miles, and/or rides of a qualifying service to be preserved
• Capacity of the applicant to manage funds and comply with the obligations of federal funding
• Scalability of the project
• Equity in relation to serving historically marginalized populations and or target populations

Acknowledging that all eligible entities are likely to have funding needs, the committee will fund the highest scoring applications based on the criteria listed above. Applications scores will consist of three project specific essay questions worth five (5) points each. Please ensure you answer all aspects of the questions being asked. In addition, there will be ten (10) yes/no questions worth two (2) points each and one scalability question worth two (2) points.

Committee will seek consensus when possible and a majority vote when it is not. Applicants may be offered a full award, a partial award, or no award depending on available resources, quantity and competitive quality of applications received, and assessment of the relevance of the project to Recovery.

The application requires information about the project’s equity considerations, including populations served, how the community was engaged, and how the project was shaped by the outreach process.
Appeals Process

PTD will follow the appeals process as identified on page 34 of the State Management Plan for Public Transportation Programs.

Part 3: Reporting Requirements

Grant recipients are required to report on project progress and expenditures throughout the funding period. Recipients must satisfy both PTD and FTA reporting requirements. All recipients should be prepared to fulfill the following general reporting requirements:

- Periodic reports completed in PTD’s Oregon Public Transit Information System (OPTIS), detailing recipient’s project progress, outcomes achieved, and expenditures. The periodic report is due no later than 45 days following the end of each period for which reimbursement is requested.
  
  Note: PTD may require additional documentation and deliverables beyond those indicated in an application, as appropriate to the project.

- Proper documentation must be available for all Recovery funds reimbursed by PTD. Recipients must create and maintain all expenditure records in accordance with generally accepted accounting principles. These records must also provide sufficient detail so that PTD staff can verify how funds were expended.

- Financial records must be maintained for at least six years after PTD disburses the final payment under a grant agreement.

Part 4: Application Format and Use

Link to Application: COVID Relief Application Form

The application form is a fillable, web-based document that requires an internet connection. Chrome, Firefox, and Edge are the recommended web browsers. You may face formatting limitations and errors if using Internet Explorer.

The form uses a combination of check boxes, yes or no questions, text boxes, and buttons for uploading documents and adding information. If there are technical problems using the form, please call Brian Roth at 503-986-3394. For answers to programmatic or process-specific questions, and for application review prior to submission contact your RTC.

You may save your progress as you work through the application by clicking the “Save” button on the last page. A pop-up box will appear asking for your email address, and the form software will send you a link to the saved application. You can return to the last saved version of your application at any time, allowing you to work on the application at your own pace over multiple days. You may also invite collaborators to work on the application by sharing the form hyperlink, but we
recommend that only one person work on the form at a time. Be sure to save the form before sharing with a colleague.

For some questions, a “yes” or “no” response expands the field where you will be asked for additional information. Required fields are marked with an asterisk; if these fields are not completed, the form will prompt you to complete the field before submitting the form.

When you are finished, select “Submit Application.” A notice of your submittal will be sent to PTD staff, and you will receive a message acknowledging PTD’s receipt of the application. A link to the PDF version of your application appears in this message, and it can be opened and saved for your records.

Please review the below guidance for information requested in the application form. Section headers in this document align with those found in the application.

**Applicant Instructions**

Step-by-step instructions are listed below to provide additional clarity. Be sure to answer each part of questions completely on the application. Some fields auto-calculate based on what is entered in a previous field, and some fields present additional text boxes based on your responses. **Applications scores will be based on how well the applicant answers the questions and meets the equity criteria listed. For more information on equity please visit the office of social equity website for the Oregon Department of Transportation.**

Since recipients of these funds must fulfill all Section 5311 requirements, those details are included in the “Capacity Certification” statement in this section. Each applicant must certify that they have the capacity to maintain compliance with complex federal, state, and local laws and regulations that come with accepting FTA funds. This includes certification that the applicant will have a drug and alcohol testing program that meets federal requirements in place prior to receiving funding.

**Risk Assessment (Conditional Content)**

If “No” was selected from the dropdown box that inquiries about whether the applicant has an active agreement under Section 5311 or 5311(f) in the Applicant Information section, a set of conditional sections will appear to collect a DUNS number and Risk Assessment characteristics.

In this section, applicants will provide information about staff turnover, your accounting system, attendance at required trainings, audits, and budget:

- Required trainings and meetings refers to those that PTD has indicated are mandatory, such as grant management training.
- Accounting for 100 percent of employee time means that the agency can track employee time by project, allowing for allocation of all employee costs.
- Accounting systems requires you to select one of the three types:
“Manual” is an accounting system that is updated and maintained by hand, without using a computer system or any automatic system.

“Automated” is a system using a computer which automatically maintains records without the need for any human input.

“Combined” uses both manual and automated systems.

The Risk Assessment fields are mandatory fields for applicants that do not have current 5311/5311(f) agreements. Acceptance of an applicant that does not currently receive 5311/5311 (f) funding is solely at the discretion of the ODOT Public Transportation Division.

Project Details

Applicants must complete separate applications for section 5311 and section 5311 (f) project. Within each application agencies can create one or more projects per application. Each project must be associated with a service and a service type that is eligible for funding using Section 5311 and/or 5311(f) funds. For example, to apply for funding to support a rural fixed route service and complementary paratransit service, you will need to create two projects: one for the fixed route service and one for the complementary paratransit service.

If a proposed activity benefits more than one service, propose separate projects by proportionately allocating activity expenses.

Take particular care with this section. Failure to comply with guidance will result in the rejection of the entire project that may have consequences for other proposed projects.

Within each application and when a project entry is complete, select “Add Project” to create a new project entry template. Projects will be numbered sequentially, beginning at 1, by the online application system.

Description of Service

For each project, select one eligible service type to describe the service and the days it operates. Please consider the following when defining service modes:

**Fixed Route and Complementary Paratransit** - Transit services where vehicles run on regular, scheduled routes with fixed stops and no deviation. Project will also include transportation for people with disabilities who are unable to use the regular, fixed route transit service that serves their region. Paratransit usually provides door-to-door service for people who call to reserve a ride.

**Deviated Fixed Route** – If a specific deviated fixed route service is described by publicly available GTFS data, select the appropriate fixed route category for the service instead of deviated fixed route.

**Intercity** – This is longer distance service, with infrequent stops, and not designed primarily to serve commuters.
Section 5311 and 5311(f) services are open to the general public. If the proposed service is not open to all riders, the application will provide a conditional field to provide an explanation. Please consult with your RTC before submitting.

**Question 1:** Clearly describe service to be preserved by this proposal. What will the Recovery award fund? Why is this service important to your community, and the State of Oregon (location of service, routes, times of service, connections)

Describe the service the project will support. Clearly describe what the requested fund award would be used to accomplish, providing details about tasks and deliverables. The project description helps the evaluation committee fully understand the proposed project and establish project eligibility. Avoid generalizations regarding type and objectives of service.

**An example of a completely answered question:** Our ridership for FY21-22 was just over 30,000, 36% higher than any other FY. We are already at 23,500 for FY22/23, on track to exceed 45,000 rides, which would be 50% more rides than last FY. We provide demand-response service to the general public, seniors, and those with disabilities in the City of Name and up to five miles outside city limits. We also operate the Name/type of service deviated fixed route, which has seven designated stops throughout town and deviates up to 3/4 mile for additional pick-up and drop-offs, funded through STIF. We also operate the Connector, two days a week, funded through STIF. This Recovery funding would help pay for administrative, salary, fuel, fare free trips, including a portion of the Agency Director's pay/fringe for managerial oversite of the XYZ Link and a portion of XYZ Transit's internal city/County/Tribe service expense other type(s) of expenses.

As noted in the example above, the operations projects should include the service description that clearly identify service origin(s) and destination(s) as well as service frequency. The content of this response will help the evaluation committee determine Section 5311 and/or 5311(f) eligibility, as needed.

Question is worth a maximum of five points. Scoring is based on complete answers of the following criteria: Description of service to be preserved (location, routes, times connections), List of what funding will procure, Why service is important to community. -0-1 point if you do not complete each item asked in the question. 2-3 points if you answer some but not all of the of the question. 4-5 points if you have answered the question completely. Scores on based on completeness, and the value it adds to the service area, community and state transit system.

**Question 2:** How does this project address increased costs due to COVID-19 pandemic? Please list all specific challenges this project funding will cover.

Describe how the project will address Recovery impacts. Use this question to highlight how the pandemic has or continues to affect this service and how relief funds would help mitigate them.

**An example of a completely answered question:** The Recovery funds would continue to allow XYZ Agency Name to recruit and retain good drivers to continue delivering service as outlined in question 1, assist XYZ Agency with loss in revenue, provide funding for additional cleaning of buses and list any
additional expenses. Challenges continue to be driver retention related to the pandemic. A nationwide shortage of drivers has necessitated pay increases to ensure our current drivers remain loyal. These pay increases are outcomes of the pandemic, and inflation. Additional funding is being sought to mitigate the impact of ongoing driver shortages. With limited staff, continuing to offer fare free public transportation services has allowed XYZ Agency to dedicate staff resources to sanitation and other needs and helped riders reduce their expenses from transportation. Bus sanitation continues to be a significant cost burden that would be addressed with additional recovery relief funding.

Question is worth a maximum of five points. Scoring is based on the complete answer of the following criteria: Funding addressing increased costs, and challenges funding will cover. 0-1 point if you do not complete each item asked in the question. 2-3 points if you answered portions, but not all of the question. 4-5 points if you have answered the question completely. Scores on based on completeness, and the value it adds to the service area, community and state transit system.

**Question 3:** What are the likely impacts if the proposal is not selected for funding? Are other funds being used to complete this project, if so, please list funding sources. How will this project directly benefit transportation-disadvantaged communities, list communities in your service area that are impacted if funding is not provided.

**The definition of transportation disadvantage populations:** (elderly populations (65 and older), youth (18 and younger), non-white and Hispanic populations, low-income populations (earning less than 200% of the poverty level), limited English proficiency, households without access to a vehicle, people with a disability, crowded householders.)

Describe the impact(s) on passengers, schedules, frequency, the service area, connecting systems, the applicant, and any other compelling outcome if the proposal is not selected for funding.

**An example of a completely answered question:** If our proposal is not selected for funding, it is possible we could lose drivers to other agencies, which could potentially mean we would have to curtail some service if we did not have enough drivers to maintain our level of service. It could also result in having to reinstate collecting bus fares before our community is able to work that back into their budgets and some riders may not be able to afford to ride the bus. Not being selected for funding could also possibly result in less time available to use the cleaning equipment on the Agency Name fleet. We would use these funds to help support those funds coming from STIF. The Name of community continues to see new construction for low-income housing and apartment complexes. Our short-and long-term planning includes identifying disadvantaged areas in order to determine how we can better serve those areas as we work through route design for our next phase(s) of new and enhanced transit services. The project’s work will be determined by services identified in our Coordinated Plan for XYZ County. We also continuously review our LEP policies and Title VI plan to stay current with needs of our disadvantaged or marginalized communities.

Question is worth a maximum of five points. Scoring is based the following criteria: Impacts from no funding, other sources of funding used to help support project, Communities impacted from a lack of funding. 0-1 point if you do not complete each item asked in the question. 2-3 points if you answer some but not all of the of the question. 4-5 points if you have answered the question completely. Scores on based on completeness, and the value it adds to the service area, community and state transit system.
**Question 4:** ODOT strives to provide funding that will have a positive impact for transportation disadvantaged communities. Answer yes or no to any of the populations that your service covers by your operations project. Each population and percentage served by agency is worth two points.

- Provide service to low-income households or housing developments. Percentage served________
- Provide service to shift-workers traveling in high-priority corridors. Percentage served________
- Provide service to individuals with limited English proficiency. Percentage served________
- Provide service for historically marginalized populations. Percentage served__________

PTD strives to utilize the viewpoints of those who reside in communities PTD funding serves and are likely to be affected by our decisions and investments. The goals of our funding decisions strive to invest in the protection and service of marginalized communities.

A community may also be transportation-disadvantaged where it has a high percentage of households that do not own cars or that have limited access to public and active transportation modes. In your project description explain how the proposed project will target the needs of communities and individuals that are most in need of safe, dependable, and equitable transportation options.

Historically marginalized communities are groups who have been relegated to the lower or peripheral edge of society. Many groups were (and some continue to be) denied full participation in mainstream cultural, social, political, and economic activities. Marginalized communities can include people of color, women, LGBTQ+, low-income individuals, prisoners, the disabled, senior citizens, and many more. Many of these communities were ignored or misrepresented in traditional historical sources.

**Question 5:** Please describe your community engagement practices in your operation project’s planning process. How your agency engaged communities during your planning process (community outreach, meetings, technical advisory meetings). What is your level of community engagement moving forward? (Information distributed, Consultation meetings, Community advisory meetings). Is there a plan to return to the community for input after the project is in place to ensure desired outcomes are achieved? Did you engage historically marginalized or transportation disadvantaged individuals or populations in your planning process? Did you identify gaps in service and priorities to address gaps during engagement processes.

**An example of a completely answered question:** XYZ agency holds regularly monthly board and quarterly Technical Advisory Meetings to ensure we have a process that is open to the public and addresses the needs of our community. We recently went through a year long revision of our 2017 Coordinated Plan which included public surveys, public outreach meetings, attending local events, inviting community leaders and transit users to provide input on our service needs and future planning. Moving forward we will be updating our Transit Master plan for our long-range planning, going to job fairs in an effort to diversify our staff, and be seen and meet the community. We will be updating our website to improve inclusivity, increase engagement of new low-income housing developments,
and better target our services of our whole community. In addition, we will be collaborating with a consultant to improve our marketing plan, reaching out to community agencies to form partnerships and help to fill gaps identified in our Coordinated Planning process.

As noted in example answer, ODOT’s Strategic Action Plan highlights our commitment to serving all Oregonians. The voices of our customers matter and influence the work we do. A focus on equity ensures we look beyond merely improving the system to improving the quality of life of every Oregonian. We must be mindful of the benefits and burdens created by our work and ensure they are distributed equitably. Equity goals focus ODOT on workforce diversity and opportunities for advancement, expanding economic opportunities for minority groups, climate equity, and creating more representative public engagement processes.

To determine which services and projects will best target the needs of community members, transit agencies should actively engage with community members and involve them in the planning process. Use this response to describe how the applicant incorporated community member input into the planning process for the proposed service project.

Please explain how the applicant ensured community outreach invites and the voices of BIPOC communities, low-income communities, and other underserved groups was successful. List any challenges faced in completing the community outreach.

Consistent with the adoption of ODOT’s Strategic Action Plan (SAP) by the Oregon Transportation Commission (OTC), the Recovery solicitation is a part of the larger integration of the SAP’s Equity Priority into investments made by PTD. Accordingly, information provided should explain:

• The direct benefits of proposed service on transportation-disadvantaged communities.
• How planning projects and public outreach efforts that inspired the proposed projects engaged historically marginalized populations; and
• How applicants learned from these interactions to shape the projects for which funding requested.

PTD will apply what it learns from this solicitation to improve baseline awareness of public transit equity and engagement practices in Oregon. Among other outcomes, responses received through Recovery funding and companion solicitations are likely to shape questions asked on future applications.

Expense Details

Select one or more expense type. The form will generate additional sections seeking project task details based on the expense types chosen. These sections will contain a description of the task and associated costs to help reviewers understand their importance.

Please indicate if the project is scalable. If so, conditional fields will appear asking for the minimum level of funding that will make the project viable and a description of project elements that will be scaled back if it receives a partial award. This question is worth one point.
Please indicate if the project relies on funding being awarded under another proposal. For example, an ADA complementary paratransit program may not be necessary if the fixed route it supports is not funded under another project (or an altogether separate solicitation). If the project is contingent upon another project, a conditional field will appear that asks for a brief description of the requisite proposal.

Part 5: Submitting Your Application

Signature Box

In the Signature Box, use your mouse and sign the application; this serves as your official signature. Type your name in the box next to the signature box. Submitting the application electronically also attests that the application is complete to the best of your ability. The signature should be completed by the individual who has the fiscal responsibility for the transit agency.

Document Upload

At the bottom of the application, you may upload any files associated with your project(s). This may include GIS files, maps, Coordinated Plan documents, compliance documentation, joint management agreements, and other supporting documents.

Click the “Upload” button to begin uploading documents. A small browser window will appear. If the window does not appear, make sure that your internet browser is not blocking pop-up windows.

Each application has room for 200 MB of uploaded documents. For larger files, consider placing the file on a website or accessible drive such as Dropbox or Google Drive, and linking to the file rather than uploading it.

Application Submittal

When your application is complete, select the “Save” button outlined in orange, located at the bottom right corner of the application. If this is your first time saving the application, the form software will ask for your email address and will send you a link to the saved application. Once the application has been saved, select “Apply.”

After submitting your application, you should receive an automated email response from PTD with the subject “Needs Based Application Submission.” If you do not receive this response, please contact Brian Roth at Brian.Roth@odot.oregon.gov or 541-508-9862 as soon as possible.