

A-2 SAMPLE ELIGIBILITY/FEASIBILITY REPORT TEMPLATE

SAMPLE *CONNECTOREGON V* FEASIBILITY REPORT FORM

[insert reviewer name and organization] , Feasibility Reviewer:

DATE: : _____

Application Number: _____

Applicant Name: _____

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.
 - The Applicant is not a railroad owner that operates a railroad wholly within the boundaries of Benton and Linn counties that: (A) Charges landowners a fee for an easement to cross a railroad that is necessary for the landowner to access the landowner's property; and (B) Has imposed or collected fees for such an easement on or after January 1, 2013.
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Project Administrative Eligibility:

- The project is a Transportation Project that involves one or more of the following modes of transportation: air, marine, rail, public transit or bicycle/pedestrian.
 - 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.
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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 ECONOMIC CONSIDERATION REVIEW FORM

ConnectOregon V

Project Number and Mode: _____

Project Description: _____

Project Reviewer: _____

Thank you for your participation in evaluating the economic benefit aspects of *ConnectOregon V* applications. One of the five required “considerations” of the Oregon Transportation Commission when selecting applications for funding through the Multimodal Transportation Fund (*ConnectOregon*) asks, “Whether a proposed transportation project results in an economic benefit to this state.”

Use the scoring sheet below as a quick guide to the application. In some instances, where the score is a simple calculation based on information provided in the application, the answer has been provided. The remaining questions require a critical review of the applicant’s answer before selecting an evaluation score based on the range of possible evaluations. Application instructions for questions requiring review are attached as guidance. Calculation and comment areas are provided to show your work and note information critical to your evaluation.

Save a completed electronic version of this document for each application you evaluate. Email signed evaluation forms to connectoregon@odot.state.or.us **no later than Friday, January 17, 2014.**

Section 1

Application Question #s	Evaluation Criteria	Individual Score	Final Score (Higher of 2) 0-3
39a*11 39d/[(19a2+19b)/1,000,000]	Long-term jobs multiplied by projects useful life = long-term job-years OR Private investment (\$) divided by [ConnectOregon V request/1 million] = Private investment per \$ million requested from <i>ConnectOregon</i>		
Point System: 0 – no net positive impacts; 1 – potential net positive impacts; 2 – likely net positive impacts; 3 – significant net positive impacts			
38	Does this project serve one or more of Oregon’s Statewide Business Clusters? [note in comments section which box(es) were checked and any other relevant details from the application]		

<p>Point System: 0 – the project does not serve the identified business clusters; 1 – the project has the potential to serve identified business clusters; 2 – the project is likely to serve identified business clusters; 3 – the project will serve identified business clusters</p>	
<p>Calculations/Comments:</p>	

Section 2

Application Question #s	Evaluation Criteria	Individual Score	Final Score (Higher of 2) 0-3
40c/ [(19a2+19b)/1,000,000]	Short-run construction-related jobs divided by [ConnectOregon IV request/1 million] = construction related jobs per \$ million requested from ConnectOregon		
<p>Point System: 1 – less than 15 jobs per \$million requested; 2 – 15-23 jobs per \$million requested; 3 – greater than 23 jobs per million requested</p>			
41	Project area unemployment rate (from instruction table) compared to state unemployment rate		
<p>Point System: 0 – located in area with unemployment rate more than 2 percentage points <i>below</i> state average; 1 – located in area with unemployment rate 0-2 percentage points <i>below</i> state</p>			

Review of Economic Benefit to the State

Final Point Calculation

Section 1 (no more than 3)	points
Section 2 (no more than 3)	points
Section 3 (no more than 4)	points
Total (no more than 10)	points

Reviewer Name: _____

Reviewer Agency: _____

Date of Review: _____

A-4 STATUTORY CONSIDERATION REVIEW FORM

ConnectOregon V

Project Number: _____

Project Description: _____

Project Reviewer: _____

On the following pages, tables are 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 record the results on the Review Matrix for presentation to the 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

Item No.	Brief Description of Question (from Application)	Points	Appraiser's Score
<p>* Items are evaluated in pairs with a shared point value.</p> <p><i>* To determine the score of questions with a shared point value, score each question separately, then select the highest of the two scores as the "appraiser's score."</i></p>			
34	Industrial or employments connections	* 3	
35	Linking workers to jobs		
33	Measurement of Success (Improved use and efficiency)	* 4	
42	Safety		
32	Transportation Connections	*3	
38	Serving Business Clusters		
TOTAL AVAILABLE POINTS – Consideration "A"		10	
<p>Point System for 34, 35, 32, and 38: 0 – No positive benefit; 1 – Potential positive benefit; 2 – Likely positive benefit; 3 – Significant positive benefit.</p> <p>Point System for 33 and 42: 0 – No positive impacts; 1 – Unlikely to make positive impacts; 2 – Potential positive impacts; 3 – Likely positive impacts; 4 – Significant positive impacts.</p>			
COMMENTS			

Comments Continued:		
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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.

Item No.	Brief Description of Question (from Application)	Points	Appraiser’s Score
* Items 34 and 36 are evaluated together with a shared point value			
34	Industrial or employments connections	* 3	
36	Linking populations to medical care, social services, or shopping		
* Items 33 and 44 are evaluated together with a shared point value and Items 32 and 37 are evaluated together with a shared point value.			
33	Measurement of Success (Improved use and efficiency)	* 4	
42	Safety		
32	Transportation Connections	*3	
37	Improve system efficiency and utilization		
TOTAL AVAILABLE POINTS – Consideration “C”		10	
<p>Point System for 34, 36 and 32, 37: 0 – No positive benefit; 1 – Potential positive benefit; 2 – Likely positive benefits; and 3 – Significant positive benefits.</p> <p>Point System for 33 and 42: 0 – No positive impact; 1 – Unlikely to make positive impact; 2 – Potential positive benefits; 3 – Likely positive benefits; and 4 – Significant positive benefits</p> <p>* To determine the score of questions with a shared point value, score each question separately, then select the highest of the scores as the “appraiser’s score.”</p>			
COMMENT:			

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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.

Item No.	Brief Description of Question (from Application)	Points	Appraiser Score
Overmatch Criteria (Question 19d:Additional Match / Question (19c):ConnectOregon Project Total) x 100 = Overmatch Percentage Example: (\$25K / \$100K) x 100 = 25%			
1	Applicant will provide no Overmatch (\$0K/\$100K) x 100 = 0%	1	
1	Applicant will provide between 1% to 20% Overmatch (\$15K/\$100K) x 100 = 15%	2	
1	Applicant will provide between 21% to 40% Overmatch (\$25K/\$100K) x 100 = 25%	4	
1	Applicant will provide between 41% to 60% Overmatch (\$45K/100K) x 100 = 45%	6	
1	Applicant will provide between 61% to 81% Overmatch (\$70K/100K) x 100 = 70%	8	
1	Applicant will provide >80% Overmatch (\$90K/100K) x 100 = 90%	10	
	TOTAL AVAILABLE POINTS – Consideration “D”	10	
COMMENT:			

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

Item No.	Brief Description of Question (from Application)	Points	Appraiser's Score
For this consideration, assume a grant execution date of <u>September, 2014.</u>			
24	Project is ready to start construction 6 months after grant agreement execution.	10	
24	Project is ready to start construction 12 months after grant agreement execution.	8	
24	Project is ready to start construction 18 months after grant agreement execution.	6	
24	Project where property is not owned by applicant and negotiations are not underway.	-2	
	TOTAL AVAILABLE POINTS – Consideration “E”	10	

FINAL POINT CALCULATION

	AVAILABLE POINTS	TOTAL SCORE
Consideration a –	Maximum 10 Points	
Consideration b –	Maximum 10 Points (Use Score Provided By Economic Benefit Evaluation Team)	
Consideration c –	Maximum 10 Points	
Consideration d –	Maximum 10 Points	
Consideration e –	Maximum 10 Points	
Maximum Available Points = 50		