METRO RTO SCHOOL RESOURCE GUIDE

Last update: June 1, 2026

This guidance is specific to Regional Travel Options (RTO) school resources for the 2026-2027 school year. For guidance related to all other types of RTO grants, please check Basecamp:

- FY 2027 RTO Mini Grant Guide: https://public.3.basecamp.com/p/ujuMeaipKhGaVHnLU2Bh6BYe/vault/9944956507
- FY 2027-29 RTO Grant Program Framework: https://public.3.basecamp.com/p/ujuMeaipKhGaVHnLU2Bh6BYe/vault/9608129734
- 2023-2026 RTO Grantee Guide (info on previous 3-year RTO grant cycle): https://public.3.basecamp.com/p/7LVD8PBEYdELrTKzuCMqp296/vault

Overview: For the 2026-2027 school year, Metro is offering three types of resources to individual schools/PTOs.

Applications to request school resources for the 2026-2027 school year are **open June 1 - September 1, 2026. The application will close end of day September 1st**, or once all resources are allocated for the fiscal year (whichever comes sooner). Applications are non-competitive and will be reviewed and awarded in the order received on a rolling basis up until the deadline.

Apply for School Resources

Application closes by September 1, 2026

The three tiers of school resources are as follows:

- **Tier 1 - Direct Resources/Bike Accessories:** Up to 50 points per school to request commonly-used bike/walk/roll accessories including helmets, locks, lights, Walking School Bus leader kits (safety vest & flag, poncho, t-shirt, first aid kit, backpack & a clipboard), and Bike Bus leader kits (signage, safety vests, first aid kit & a speaker). Schools choose how to allocate their points, as some accessories are worth more points than others (i.e. helmets "cost" fewer points vs. locks "cost" more points). Tier 1 provides direct materials and does not require schools to manage reimbursement-based funds or track materials distribution.
- **Tier 2 - SRTS Micro-Grants:** Up to $500 per school for eligible materials & services to support Safe Routes to School events and programming (see additional eligibility details below). Provides more flexibility for schools to choose their own materials & services based on the activity they want to provide students. Tier 2 requires schools or PTOs to track receipts and manage reimbursement-based funds through one final report & invoice.
- **Tier 3 - Bike Fairs/Rodeos:** A one-day event that provides bike repair, helmets + helmet fittings, safety & skills stations, and optional bike donation station. Bike Rodeos include all of the above, while the Bike Fairs also include refurbished bicycles. By selecting this Tier, schools will work with a Metro contracted service provider to deliver the bike rodeo/fair, which **requires a school commitment of at least ~10-15 hours of coordination time** — including recruiting students to participate, coordinating any logistics for day-of event and identifying volunteers. Metro is able to support 20-25 Tier 3 events and will prioritize the selection of schools based on student need, geographic distribution and scheduling availability.

Additional Resources for Schools: Metro has traffic playground stencils + paint that individual schools may use. Scooter and balance bike fleets are available for PE teachers to borrow for a pedestrian/bicycle education unit for their classes. Please reach out to rto@oregonmetro.gov directly to request these resources.

If an individual school or nonprofit PTO has a specific request for a material purchase above $500, or resources not provided in this category, RTO staff will consider one-time allowances on a case by case basis — please reach out to RTO staff to discuss: rto@oregonmetro.gov

Application Process: Applications for school resources are accepted through an online form. For SRTS Micro-Grants, the online form includes a required budget template that applicants must complete and upload as an Excel file to be considered for funding.

New for FY27: Individual schools/PTOs may request as many tiers as they would like, however, Metro RTO staff may right-size support to preserve funds & resources for other schools throughout the region. To request addition tiers, please complete a separate application. Individual schools may only receive one SRTS Micro-Grant per school year.

Applications can only include funding for activities that will occur within the fiscal year the funds are awarded (for example, if funding is awarded in fiscal year 2027, activity must be completed by June 30, 2027). Funding cannot go toward activity that occurred prior to the application date. Finally, the proposed activity should occur at least 15 business days after the submission date to allow adequate time for Metro staff to review the application.

Note: The following sections of this guide only pertain to Safe Routes to School (SRTS) Micro-Grants. If you are not applying for an SRTS Micro-Grant, feel free to proceed directly to the school resource application.

SRTS Micro-Grant Final Report & Invoice: To receive reimbursement for your SRTS Micro-Grant, you must submit a final report and invoice. Some tips for submitting your final report and invoice:

- Only one report & invoice should be submitted for the entire SRTS Micro-Grant, with one reimbursement.
- Column G of the Budget tab on each grant's approved Budget & Incentive Tracking Sheet must be completed to record actual expenditures for reimbursement. Recipients will be instructed to **upload as an Excel file** when submitting the final report.
- Receipts for all purchases must be tracked in your Budget & Incentive Tracking Sheet and submitted with your final report. Receipts can be submitted in the following ways, depending on your needs:
    - Save copies of all receipts as one PDF and upload to your final report; or
    - If the file is too large to upload within the report, save copies of all receipts as one PDF and provide a viewable link in the final report.

SRTS Micro-Grant Final Report & Invoice Form

- All invoices should be labeled with a number, which can be the number created within your accounting system or some other unique identifier that Metro can use to track your payment.
- All recipients must submit a W9 to Metro using the 'New Supplier Set Up' PDF guide. If you have already received funding from Metro, we should already have your W9 on file.
    - Note: W9s must match the entity receiving reimbursement.
- Direct deposit forms can also be uploaded through Metro's secure portal – otherwise, checks will be sent to the address on your W9.
- All gift cards, as well as random drawings of higher-value incentive items, must be tracked in the Incentive Tracking tab of the Budget & Incentive Tracking Sheet (provided to applicants when their SRTS Micro-Grant is approved). This sheet must be uploaded to the final report as an Excel file. Incentives and materials must be distributed to participants and tracked (if applicable) prior to requesting reimbursement.

SRTS Micro-Grant Eligibility: Common eligible uses of SRTS Micro-Grant funds include:

- **Vendor-provided services such as bike tune-ups at events**
    - The documentation of payment for services, such as bike tune-ups at an outreach event, must include the standard fee/rate offered for the service by the vendor, including number of staff hours associated with the rate (i.e., Bike Repair Support - 2 staff for 2 hours, including prep and transportation - $350). If you have any questions about necessary documentation for services, please reach out to RTO staff to clarify before the event.
- **New for FY27:** Bike parts for a tune-up or repair event are now eligible to purchase with SRTS Micro-Grant funds.
- **Outreach materials or temporary signage to support an event**
    - If you are purchasing any type of signage, ensure that you check with any property or right of way requirements to ensure the signage is allowable prior to making purchases.
    - If you need support on translation of materials**, funded partners can use Metro's RTO & SRTS Translation Portal** to submit translation requests in up to 5 languages: https://app.linguistlink.net/rto-srts.html
- **Eligible food items or refreshments**
    - Examples of **eligible** food items include:
        - Snacks at a community engagement event like fruit, granola bars, etc.
        - Treats for participation in an event, such as a school walk & roll event with popsicles or cupcakes
        - **New for FY27:** Food (including meals) at an event for volunteers, leaders, or participants who supported a travel options program, such as a thank you event for walk/ride leaders, crossing guards, Walk n Roll volunteers, or student safety patrol
    - Examples of **ineligible** food items include:
        - Alcohol for any purpose
        - Purchase of meal items for other purposes than those listed above
        - Purchases of food for staff meetings, such as coffee, pastries, etc.
- **Participant prizes, incentives, and stipends:** See below for definitions and differences between these closely related types of purchases. This guidance is to provide consistency in

how items distributed to participants are provided and recognizes that funding these activities needs to be scaled appropriately. Purchase of items in this category must be associated with increasing awareness of travel options programs, improving safety while using travel options, and/or changing behavior to reduce single occupancy vehicle trips. The cost should be reasonable and prioritize new participants or expanded use of travel options by existing participants.

- **Participant prizes** are safety or program awareness/marketing items distributed to individuals to encourage people to participate in a program/event intended to increase their use of travel options and reduce single-occupancy vehicle trips. These items do not need to be tracked using the RTO Incentives Tracking Sheet for invoice documentation purposes, but receipts will need to be provided to Metro along with a brief explanation within the final report of how many items were distributed, audience, and purpose the items served in increasing use of/access to travel options.
    - Examples include: Stickers, lights, bike locks, helmets, reflective items, transit fare, safety vests, etc.
    - Cost range: Less than $50 per item
    - For small items for SRTS programs/events, such as pencils, shoelaces or stickers – please utilize statewide SRTS resources, which are available multiple times a year: https://www.oregonsaferoutes.org/walkroll/
    - Gift cards of any value are considered incentives and must be tracked by recipient (see below).
- **Incentives** include all gift cards and higher value items (>$50). **Higher value items must be distributed through random drawings or raffles.** All incentives must encourage or reward people for participating in a program intended to increase their use of travel options and reduce single-occupancy vehicle trips. Incentive items should be related to improving a travel options trip or improving safety. Requests for non-travel options incentives (i.e. a gift card for coffee/local restaurant) will be considered on a case-by-case basis. Incentives cannot go toward the purchase of items for single-occupancy vehicle trips (i.e. gas gift cards, parking payments if not associated with carpooling). *Incentives and recipients must be tracked using the Metro-provided Incentives Tracking tab on the Budget & Incentive Tracking Sheet for invoice documentation purposes. Incentives cannot be provided to paid staff supporting an event.*
    - Examples include: gift cards, bike bag/accessories
    - Cost range: Items over $50, and gift cards of any dollar amount
    - Incentive purchases should be specifically identified in your budget and noted if you are requesting a non-travel options related incentive for approval by RTO staff.
    - If you have questions about which items to track, please reach out to RTO staff prior to distribution.
    - If a program intends to purchase children's kick-scooters as an incentive, there is a cap of $500 for the purchase of scooters for a single program/year and they must be used as an incentive for participation in a travel options program (not a one-time event).
    - Gift cards of any dollar amount are considered incentives and must be tracked.

            - Each gift card generally should not exceed the Oregon volunteer rate, which is currently set at $35, unless being included as part of a random drawing/raffle.
        - Per IRS Rules, if gift cards are used as incentives: If the total value of cash or gift cards received by any individual from your organization (grantee) exceeds $600, the grantee must issue a Form 1099-MISC for that individual, and that individual will be responsible for any taxes. The organization (grantee) is responsible for sharing this information with each gift card recipient as they may be receiving gift cards or cash from another program that would count toward their $600. This language is included in the Metro-provided template.
            - If gift cards are used as an incentive and an individual is receiving more than $600, the program should implement a more formal stipend agreement. Gift cards should be used for short-term program incentive purposes to kickstart activity but not an ongoing payment method.
        - Gift cards as incentives should not go to paid staff whose time supporting the program is covered by another source. Small thank you incentives (gift cards of $5) can be used if time on the program is outside the scope of duties for their job – for example, a teacher doing hand tallies in their classroom for Safe Routes to School.
    - **Stipends** may be used in travel options projects in several ways. This includes compensating individuals for their time assisting in the administration of events or ongoing activities, or for their participation in surveys, focus groups, community walks, or other substantial community engagement activities. Gift cards may be used as a stand-in for stipends, if necessary, for short-term program purposes. Payment amounts should be commensurate with the activity occurring and it is recommended that you review your proposed payment structure with Metro staff before implementing. *All stipends must be documented via a stipend agreement (for cash stipends) or tracked using the Incentive Tracking tab on the Budget & Incentive Tracking Sheet (for gift card stipends) for invoice documentation purposes.*
        - Per IRS Rules: If the total value of cash or gift cards received by any individual from your organization (grantee) exceeds $600, the grantee must issue a Form 1099-MISC for that individual, and that individual will be responsible for any taxes. The organization (grantee) is responsible for sharing this information with each stipend or gift card recipient. This language is included in the Metro-provided template.

Activities and items that are <u>not eligible</u> in the SRTS Micro-Grant category include:

- Projects or programs held outside the Metro boundary.
- Ongoing purchases longer than one calendar year.
- Labor or personnel time (SRTS Micro-Grants are for materials and services only).
- Indirect costs such as overhead or admin rates (SRTS Micro-Grants are for materials and services only and must directly relate to your travel options project).
- Installation of permanent infrastructure. This includes:
    - Indoor or outdoor bike parking

    - Painting of sharrows or other wayfinding signage in the public right of way
- Food purchases beyond those listed above
- Incentive items above $50 without prior approval from RTO staff
- The purchase of bicycles or adult electric scooters for use in a shared system – 'bike-share' or 'scooter-share', OR for individual use.
    - Bicycles and scooters for an educational fleet are eligible purchases (the only eligible bike purchase). An "educational fleet" is a set of bikes or scooters for limited use during educational or outreach events. Grantee must maintain possession of the fleet when not being used directly for educational purposes.
        - If you are interested in purchasing a bike or scooter fleet for educational purposes, first contact Noel Mickelberry (School & Community Travel Options Coordinator) to discuss your options at noel.mickelberry@oregonmetro.gov.
- Any transit or shuttle operational costs or the costs associated with establishing a new service. This includes but is not limited to fare-payment systems, real-time transit tracking, on-board displays, and any other cost related to directly providing service. Costs associated with promoting or encouraging people to use these services are eligible for RTO grant funding.
- Activities or events held on property whose owner discriminates against individuals or groups because of race, color creed, national origin, sex, age, or disability, in violation of Title VI of the Civil Rights Act, as amended; 42 U.S.C. Section 2000d; Section 303 of the Age Discrimination Act of 1975, as amended; 42 U.S.C. Section 6102; Section 202 of the Americans with Disabilities Act of 1990; 42 U.S.C. Section 12132.