



# AGENDA

## *Transportation 2020 Committee Meeting*

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### **Committee Members**

*Curt Pringle, Chair  
Bill Campbell, Vice Chair  
Jerry Amante  
Arthur C. Brown  
Peter Buffa  
Carolyn Cavecche  
Richard Dixon*

*Orange County Transportation Authority Headquarters  
600 South Main Street, First Floor - Room 154  
Orange, California*

***Monday, April 21, 2008, at 8:00 a.m.***

***Note: Change of Time***

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the OCTA Clerk of the Board, telephone (714) 560-5676, no less than two (2) business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

### **Call to Order**

### **Pledge of Allegiance**

Director Brown

### **1. Public Comments**

### **Special Calendar**

### **2. Renewed Measure M Transit Strategic Plan Update**

Kurt Brotcke/Kia Mortazavi

### **Consent Calendar (Items 3 through 4)**

All items on the Consent Calendar are to be approved in one motion unless a Committee Member or a member of the public requests separate action or discussion on a specific item.

### **3. Approval of Minutes**

Of the March 17, 2008, Transportation 2020 Committee meeting.



# AGENDA

## *Transportation 2020 Committee Meeting*

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### **4. Renewed Measure M Progress Report**

David Simpson/Monte Ward

#### ***Overview***

Staff has prepared a Renewed Measure M progress report for January 2008 through March 2008 for review by the Orange County Transportation Authority Board of Directors. The report is also updated online each quarter and highlights progress on Renewed Measure M projects and programs.

#### ***Recommendation***

Receive and file as an information item.

### **Regular Calendar**

### **5. Go Local Step One Screening Results and Step Two Recommendations**

Darrell E. Johnson/Kia Mortazavi

#### ***Overview***

On February 25, 2008, the Orange County Transportation Authority Board of Directors directed staff to screen the submission of Go Local Step One final reports in accordance with the approved Go Local Step One Final Reports Screening Checklist. As of preparation of this report, the cities of Anaheim, Irvine, Santa Ana, (acting as lead agency with Garden Grove) and San Clemente, (acting as lead agency with Dana Point and San Juan Capistrano) have submitted final reports summarizing the cities' Step One results and requests for Step Two funding consideration. Staff has screened 21 projects in total, seven from Anaheim, ten from Irvine, three from Santa Ana, and one from San Clemente, and are presenting the results for the Board of Directors' consideration.

#### ***Recommendations***

- A. Allocate \$5.9 million to the City of Anaheim for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the fixed-guideway Anaheim Regional Transportation Intermodal Center to The Platinum Triangle to Anaheim Resort Connector.



# AGENDA

## *Transportation 2020 Committee Meeting*

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### 5. (Continued)

- B. Authorize the Chief Executive Officer to negotiate a cooperative agreement with City of Anaheim for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the fixed-guideway Anaheim Regional Transportation Intermodal Center to The Platinum Triangle to Anaheim Resort Connector, subject to a maximum Orange County Transportation Authority obligation of \$5.9 million.
- C. Allocate \$5.9 million to the City of Santa Ana for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance of the Santa Ana Fixed-Guideway Project.
- D. Authorize the Chief Executive Officer to negotiate a cooperative agreement with City of Santa Ana for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the Santa Ana Fixed-Guideway Project, subject to a maximum Orange County Transportation Authority obligation of \$5.9 million.
- E. Direct staff to return to the Board of Directors after all Go Local Step One final reports have been submitted with a recommended approach for funding consideration of all station, parking, bicycle, pedestrian, and remaining Go Local Step One projects.
- F. Refer policy discussion on using Renewed Measure M funds for operations and maintenance to the Renewed Measure M Transit Strategic Plan effort, and direct staff to return by June 2008 with a draft strategic plan that evaluates options for funding operations and maintenance.

### 6. Trade Corridors Improvement Fund Program Update

Jennifer Bergener/Kia Mortazavi

#### **Overview**

In December 2007, the Board of Directors approved a candidate list of projects to submit for consideration for funding through the Proposition 1B, Trade Corridors Improvement Fund program. Applications for nine candidate projects were submitted in January, and the California Transportation Commission adopted the program on April 10, 2008. Orange County was successful in securing \$217.7 million for eight projects, including seven grade separation projects and one highway project. Staff has prepared an overview of the adopted program.



# AGENDA

## *Transportation 2020 Committee Meeting*

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### 6. (Continued)

#### ***Recommendations***

- A. Approve the updated project match amounts and sources for the adopted Trade Corridors Improvement Fund projects.
- B. Authorize staff to process all necessary amendments to the Regional Federal Transportation Improvement Program and execute any necessary agreements to facilitate the programming of these projects.

### **Discussion Items**

- 7. **Update on the Los Angeles – San Diego – San Luis Obispo Rail Corridor Service Integration**  
Kia Mortazavi

- 8. **Update On Service Integration Focus Groups**  
Ellen S. Burton

- 9. **Chief Executive Officer's Report**

- 10. **Committee Members' Reports**

- 11. **Closed Session**

There is no Closed Session scheduled.

- 12. **Adjournment**

The next regularly scheduled meeting of this Committee will be held at **8:30 a.m. on Monday, May 19, 2008**, at the OCTA Headquarters.



# **Renewed Measure M Transit Strategic Plan Update**

**Transportation 2020 Committee  
April 21, 2008**



# Strategic Plan Objectives

- Identify points of interaction between programs
- Articulate guiding principles and “umbrella” policy issues
- Develop timelines and budgets for each program
- Living document – periodic updates





# Basis of Competition

## Measure M (M2) Programs and Competition

	Mandated Competitive Programs	Non-competitive Programs	Potentially Competitive Programs
<b>R</b> High-Frequency Metrolink		X	
<b>S</b> Transit Extensions to Metrolink	X		
<b>T</b> Regional Gateways	X		
<b>U</b> Senior/Disabled Program		X	
<b>W</b> Safe Transit Stops			X
<b>V</b> Community Circulators	X		



# Three Policy Questions

**1** <sup>Done</sup> Fare Integration and Service Coordination:  
How extensively should the future family of transit services be coordinated?

**2** <sup>Today</sup> Capital and Operating Funding: What are the appropriate uses of M2 funds for building versus operating the services?

**3** <sup>Done</sup> Basis of Competition: For the competitive M2 programs, how should projects be selected?

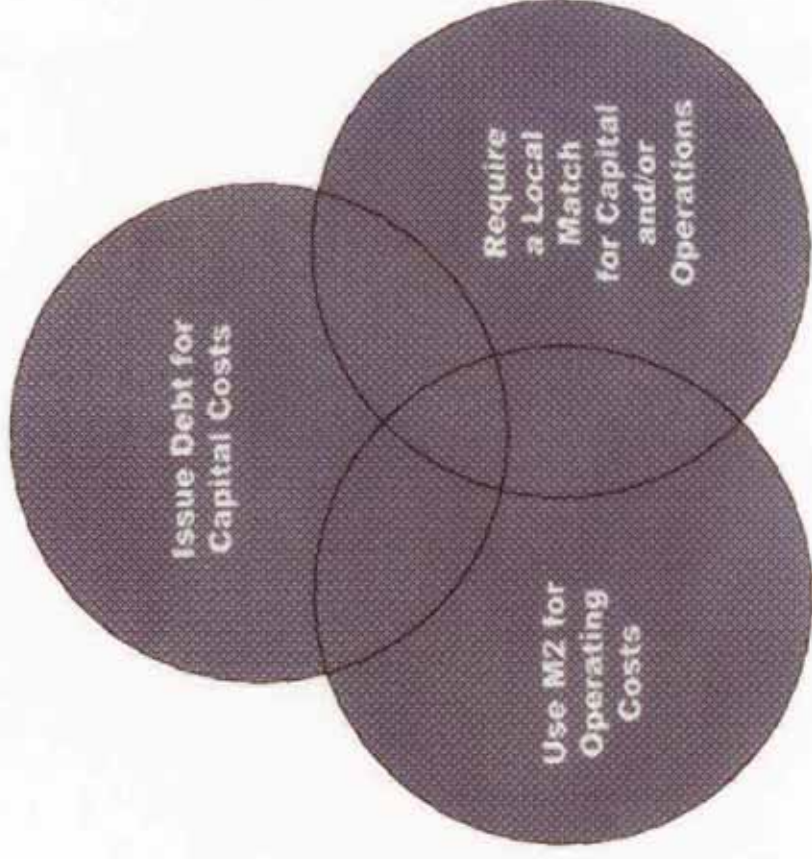
# Funding Concepts

Concept	PROS	CONS
Capital Only	<p>Allows OCTA to fund more projects than other scenarios.</p> <p>Local accountability for operating costs.</p>	<p>Fewer project applications likely.</p>
Capital and Operations	<p>Will provide stable and reliable funding to sustain basic levels of service.</p>	<p>Lacks incentive for performance.</p> <p>Would limit the number of fundable projects.</p>
Capital and Operations with Conditions	<p>Limits OCTA's ongoing obligations on M2.</p> <p>Local match promotes local accountability for operating costs.</p>	<p>May limit project applications.</p> <p>Would limit the number of fundable projects.</p>



# Approach to Scenarios

- Evaluate:
  - Impacts of issuing debt
  - Implications of funding operations
  - Range of options for local match, both operating and capital



# Scenarios

Scenario		Operating Costs		Capital Costs		Capital Debt
		M2	Local	M2	Local	
1	Debt for capital. M2 for operations.	●	○	●	○	●
2	Debt for capital. Local match for capital at 25%. M2 for operations.	●	○	●	●	●
3	Debt for capital. Local match for capital and operations at 25%. M2 for operations.	●	●	●	●	●
4	Pay-as-you-go for capital. M2 for operations.	●	○	●	○	○
5	Debt for capital. Local match for capital at 50%. M2 for operations.	●	○	●	●	●
6	Debt for capital. Local match for capital and operations at 50%. M2 for operations.	●	●	●	●	●
7	Debt for capital.	○	●	●	○	●
8	Debt for capital. Local match for capital at 25%.	○	●	●	●	●
9	Pay-as-you-go for capital.	○	●	●	○	○
10	Debt for capital. Local match for capital at 50%.	○	●	●	●	●
11	Pay-as-you-go for capital. Local match for capital at 25%.	○	●	●	●	○
12	Pay-as-you-go for capital. Local match for capital at 50%.	○	●	●	●	○

Increasing capital program

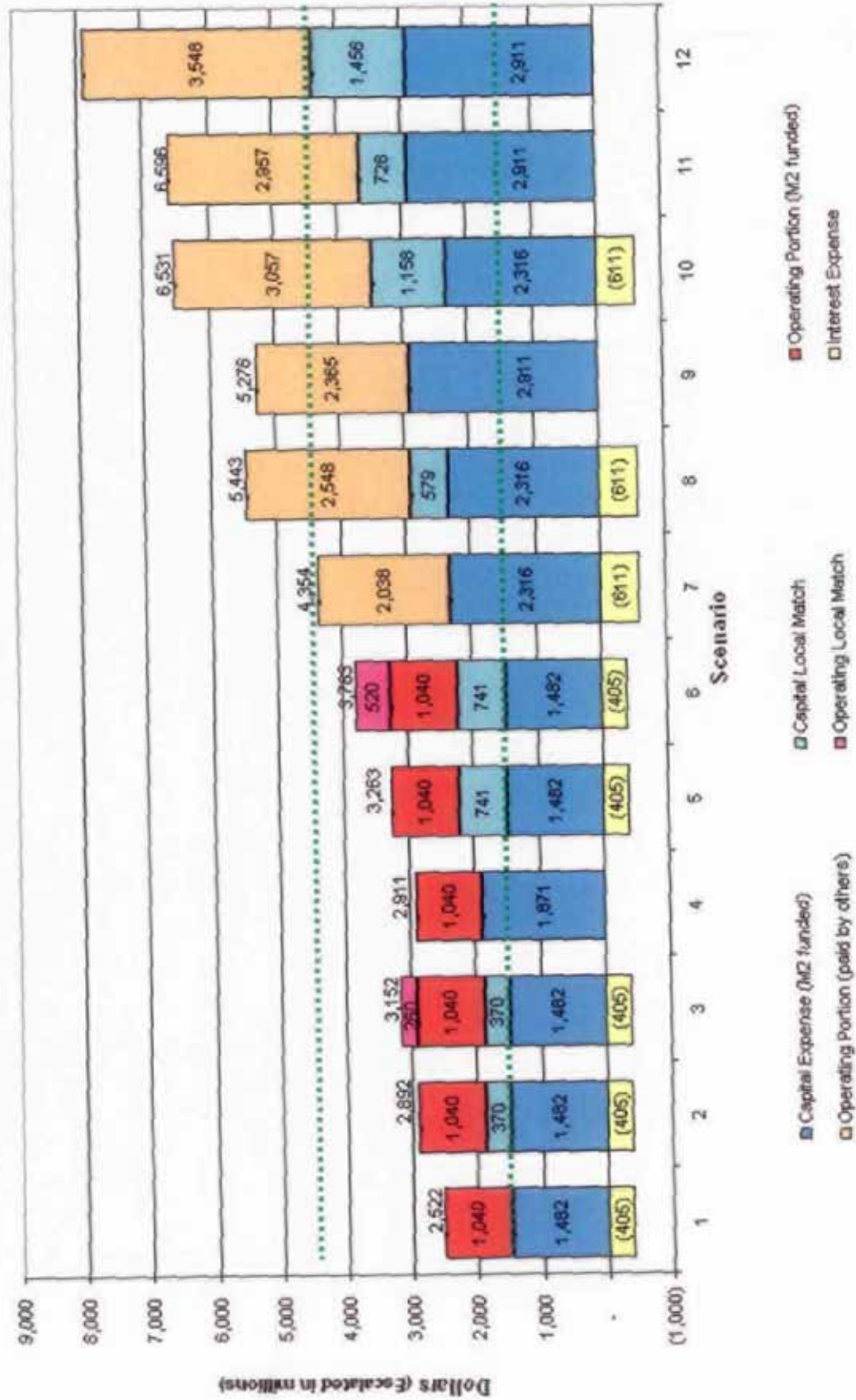


# Key Assumptions

	Competitive Program	Operating Costs
<b>S</b>	Transit Extensions to Metrolink	<b>25%</b>
<b>T</b>	Regional Gateways	<b>45%</b>
<b>V</b>	Circulators	<b>75%</b>
<b>W</b>	Safe Transit Stops	<b>10%</b>

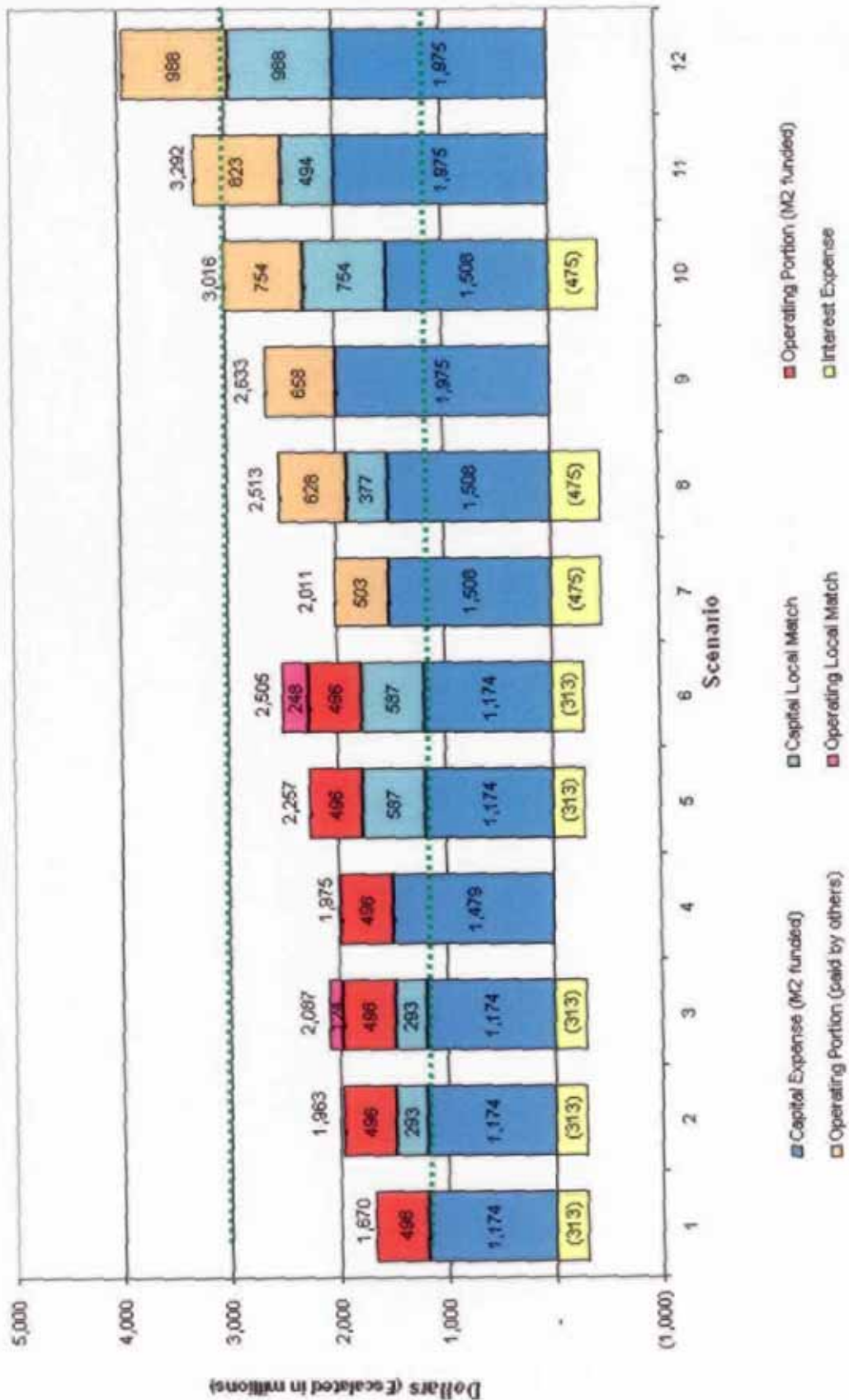
- Operating costs "off the top" and maximum bonding
- Ratio between capital and operating held constant
- Used all available M2 transit revenues in any given period
- Used current sales tax forecast (April/May update underway)
- Allocated debt service by program capital expense
- Interest cost @ 4.5%

# Summary of All Financial Scenarios



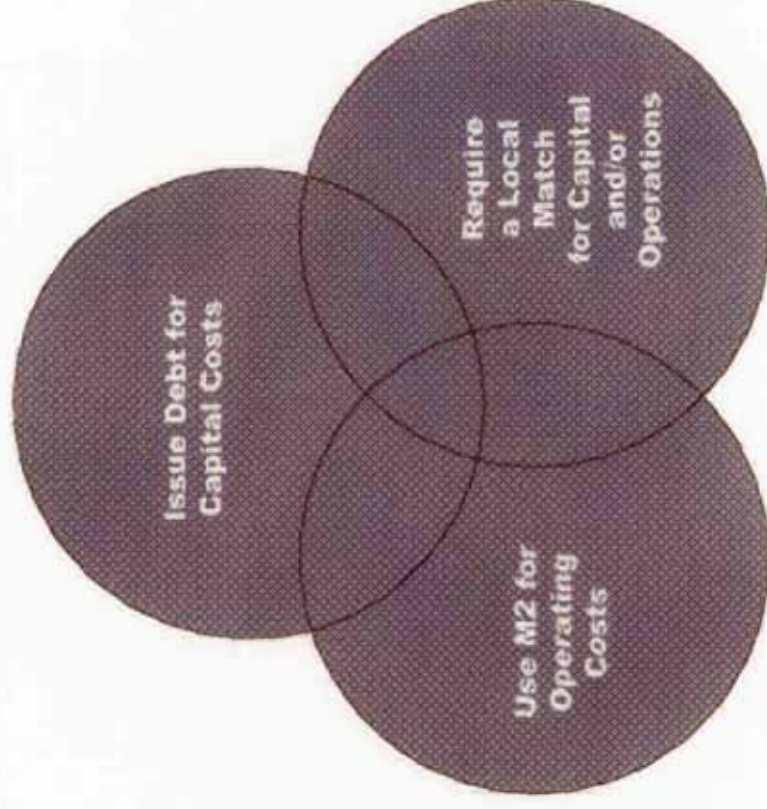


# Summary of All Financial Scenarios for Project S



# General Conclusions

- Scenarios 1 and 12 could result in few projects
- Local match could significantly expand capital and operations funding
- Scenarios 3 and 6 balance debt, operations, and capital (with trade-offs)
- Other iterations possible
- *Four major policy questions...*



# Policy Questions

- Should there be a local match for capital?
  - Local, state, and federal funds
- Should M2 be used for operations?
- If so, should there be a local match for operations?
  - Fares, M2 turnback, advertising, state/federal funds, etc.
- Should there be conditions on local match?
  - Incentives for contracted service, etc.



## Next Steps

- Incorporate T2020 Committee comments and direction
- Return in May with draft Strategic Plan







# MINUTES

## *Transportation 2020 Committee Meeting*

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### **Committee Members Present**

*Curt Pringle, Chair  
Bill Campbell, Vice Chair  
Jerry Amante  
Arthur C. Brown  
Peter Buffa  
Carolyn Cavecche  
Richard Dixon*

### **Staff Present**

*Arthur T. Leahy, Chief Executive Officer  
Paul C. Taylor, Deputy Chief Executive Officer  
Laurena Weinert, Assistant Clerk of the Board  
Mary K. Burton, Deputy Clerk of the Board  
Kennard R. Smart, Jr., General Counsel  
OCTA Staff and members of the General Public*

### **Committee Members Absent**

*None*

## **Call to Order**

The March 17, 2008, meeting of the Transportation 2020 Committee was called to order by Committee Chairman Pringle at 8:35 a.m.

## **Pledge of Allegiance**

Director Amante led in the Pledge of Allegiance.

### **1. Public Comments**

No public comments were received.

## **Consent Calendar (Items 2 through 3)**

### **2. Approval of Minutes**

A motion was made by Director Amante, seconded by Director Cavecche, and declared passed by those present, to approve minutes of the February 18, 2008, meeting.

Director Buffa was not present to vote on this item.

### **3. Approval of Minutes**

A motion was made by Director Amante, seconded by Director Cavecche, and declared passed by those present, to approve minutes of the February 25, 2008, meeting.

Director Buffa was not present to vote on this item.





# MINUTES

## *Transportation 2020 Committee Meeting*

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### **Regular Calendar**

#### **4. Agreement for Renewed Measure M Website Consultant**

Stella Lin, Manager of Marketing, gave an update on the selection process to hire a full-time employee to develop and maintain a comprehensive renewed Measure M (M2) website. Ms. Lin introduced Ryan Armstrong, who has been selected as this Web Developer. Mr. Armstrong shared his visions for the upcoming M2 website, which will create a central source of online information that will serve many facets of the community: taxpayers, businesses, and stakeholders who will have direct access to the most recent information affecting each city on a local level.

A motion was made by Director Brown, seconded by Director Buffa, and declared passed by those present, to authorize the Chief Executive Officer to execute Agreement No. C-7-1370 between the Orange County Transportation Authority and Civic Resource Group, in an amount not to exceed \$150,000 per year for three years, for developing and maintaining the Renewed Measure M website. The total maximum cumulative obligation is \$450,000.

### **Discussion Items**

#### **5. Metrolink Station Operations and Maintenance**

Chief Executive Officer, Arthur T. Leahy, commented that OCTA has received several comments from various cities in regards to the increased cost of station maintenance and if OCTA should assume this responsibility.

Darrell Johnson, Director of Transit Project Delivery, commented that the cities have raised a number of questions as to what role OCTA should play in regards to providing maintenance. OCTA pays for capital programs for stations and service operations for trains. The cities own the stations and the land, and are currently responsible for station operation and maintenance costs.

Committee Chairman Pringle commented that he would like to see the cities, rather than OCTA, become responsible for building the parking structures.

Director Buffa requested staff to ask the Metrolink Consultant for figures for what the annual cost for a parking space at a train station would cost.

Director Brown requested staff provide a breakdown of the operating and maintenance costs (i.e. landscaping, utilities, sweeping, police patrol, and full-time security) for the stations.



# MINUTES

## *Transportation 2020 Committee Meeting*

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### **6. BNSF Railway Company Southern California International Gateway Presentation**

LaDonna DiCamillo, Director of State Government Affairs for the BNSF Railway Company, gave a PowerPoint presentation and went through the handouts for the proposed Southern California International Gateway facility.

Committee Chairman Pringle requested staff provide the percent of port traffic handled by BNSF. He also requested a list of the BNSF Green Action Plan (green initiatives) that addresses negative impacts for surrounding areas (i.e. schools/homes), such as air quality emissions, electric air pumps, yard operations, long-arm electric cranes, and LNG Hostlers.

Committee Chairman Pringle stated that OCTA should be engaged in the Environmental Impact Report (EIR) process for the expansion of capacity that is being demonstrated through the ports by this project. He mentioned to the Anaheim City staff in the audience that they should speak to their City Attorney to make sure Anaheim participates to the fullest degree in the EIR process to address neighborhood impacts when rail lines are added.

### **7. Renewed Measure M Transit Strategic Plan Update**

This item was deferred.

### **8. Chief Executive Officer's Report**

Chief Executive Officer, Arthur T. Leahy, reported that the Southern California Association of Governments will be meeting on Wednesday, March 19, 2008, to discuss transit issues facing our region.

### **9. Committee Members' Reports**

There were no Committee Members' reports.

### **10. Closed Session**

A Closed Session was not conducted at this meeting.



# MINUTES

## *Transportation 2020 Committee Meeting*

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### 11. Adjournment

The meeting adjourned at 10:05 a.m.

The next regularly scheduled meeting of this Committee will be held at **8:30 a.m. on Monday, April 21, 2008**, at the OCTA Headquarters.

ATTEST

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Mary K. Burton  
Deputy Clerk of the Board

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Curt Pringle  
Committee Chairman





***April 21, 2008***

**To:** Transportation 2020 Committee  
**From:** Arthur T. Leahy, Chief Executive Officer  
**Subject:** Renewed Measure M Progress Report

***Overview***

Staff has prepared a Renewed Measure M progress report for January 2008 through March 2008 for review by the Orange County Transportation Authority Board of Directors. The report is also updated online each quarter and highlights progress on Renewed Measure M projects and programs.

***Recommendation***

Receive and file as an information item.

***Background***

Measure M Ordinance No. 3 requires quarterly status reports regarding the major projects detailed in the Renewed Measure M (M2) Transportation Investment Plan be filed with the Orange County Transportation Authority (OCTA) Board of Directors (Board). All M2 progress reports are posted online.

***Discussion***

Considering that voter safeguards have been a critical success factor for public acceptance of Measure M, the quarterly report is an opportunity to show progress in implementing the M2 Transportation Investment Plan. In order to be cost-effective and improve the accessibility of information to stakeholders and the public, all M2 progress reports will be web-based; however, hard copies can be mailed upon request. Additionally, a new and improved "sitelet" (web portal) is being considered to maximize the availability of easily accessed information to the public. The report reflects progress being made on Board-approved Early Action Plan (EAP) projects and programs. Each item features a brief paragraph that provides an overview of significant progress for the time period, with a web link to more information including staff reports and project descriptions (Attachment A).

Highlights of the M2 progress report include:

- Work with all 34 cities to achieve 100 percent participation in the Go Local program
- Progress on freeway improvements with over 45 miles of the freeway improvements anticipated to be underway in 2008
- A tax-exempt commercial paper program to provide as much as \$400 million to fund EAP projects
- Consultant selected to prepare a feasibility study for improvements to the Riverside Freeway (State Route 91)
- Inaugural meetings held for the Environmental Cleanup Allocation and Environmental Oversight Committees

To encourage public review of the quarterly report online, information will be placed in the existing "Transportation Update" advertisement that appears approximately every three weeks in the Orange County Business Journal, Orange County Register, Excelsior, The Korean Daily, The Chinese Daily News, and Nguoi Viet Daily News. Staff will also notify all Orange County cities and use other existing communication tools such as project newsletters and Board action updates to notify the public about the online availability of the progress report. Because the public sees both the original Measure M and M2 as one program, the original Measure M annual report also includes an update on the progress of M2.

### **Summary**

As required by Measure M Ordinance No. 3, a quarterly report is provided to update progress in implementing the M2 Transportation Investment Plan. To facilitate accessibility and transparency of information available to stakeholders and the public, the M2 progress report is presented on the OCTA website.

### **Attachment**

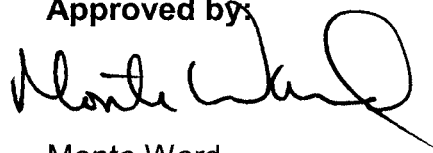
A. M2 Progress Report: January 2008 – March 2008

#### **Prepared by:**



David Simpson  
Principal, Local Government Relations  
(714) 560-5570

#### **Approved by:**



Monte Ward  
Director, Special Projects  
(714) 560-5582



## M2 Progress Report: January 2008 – March 2008

The following is a summary of the progress made on the Renewed Measure M (M2) Early Action Plan covering the period of January 2008 – March 2008.

### Highway Projects

The 1<sup>st</sup> Quarter of 2008 was a very active period in the development of Renewed Measure M highway projects in Orange County. Work was underway on all nine freeway corridors that were targeted for immediate action under the M2 Early Action Plan. The work included the advancement of four conceptual design reports, four environmental documents, and three final designs. This work will set the stage for the eventual construction of 40 miles of freeway improvements, costing over \$1.5 billion, over the next ten years.



The projects underway in the 1<sup>st</sup> Quarter of 2008 were:

**Project C** – Caltrans is preparing a Project Study Report to identify options to increase capacity of the Interstate 5 corridor between the San Diego county line and the Pacific Coast Highway interchange, through communities of San Clemente and Dana Point. This study will evaluate the benefits of extending the current HOV lanes, which presently end at the PCH interchange, all the way down to the county line.

**Project D** – The City of San Juan Capistrano is in the final stages of completing an environmental analysis of proposed improvements to the Interstate 5/Ortega Highway interchange. Currently, the Ortega interchange is one of the most congested local interchanges in Orange County. The City has identified five alternatives to improve traffic flow through the interchange. The City has released the draft environmental document for agency and community review before finalizing their options.

**Project F** – OCTA is preparing a feasibility study to look into options to improve State Route 55 between Interstate 405 and Interstate 5, passing through the communities of Santa Ana and Irvine. The study is look at the feasibility of lane additions within this corridor and possible improvements to the freeway interchanges to improve system performance.

**Project G** – OCTA has started final design for adding a new northbound lane on State Route 57 from Orangethorpe Avenue to Lambert Avenue through the communities of Fullerton and Brea. The first step in the design will be to identify any right of way needed to fit the new lane into the existing freeway. It is expected that most of the widening can be accommodated within the existing freeway right of way. In addition, the OCTA has just started an environmental analysis for adding a new northbound lane on State Route 57 between Katella Street and Lincoln Avenue in the Anaheim area. This study will identify any potential environmental impacts of the project and will propose mitigation measures to minimize any unavoidable impacts.

**Project H** – OCTA is advancing an environmental document to add a new westbound lane to State Route 91 between Interstate 5 and State Route 57 in Anaheim. This effort is looking at the environmental and design issues related to adding the new lane and will identify the best approach that has the least impact on existing properties along the freeway.

**Project I** – OCTA has just begun a feasibility study to look into options for improving the State Route 91/State Route 55 interchange and to add capacity along State Route 91 between State Route 57 and State Route 55. This feasibility study will evaluate previous studies done in the area and pick some of the best options to advance into conceptual design.

**Project J** – Three projects are being advanced along State Route 91 to relieve traffic congestion in the corridor connecting Orange County and Riverside County. Caltrans is advancing the final design of a new westbound lane between State Route 241 and State Route 71 in Riverside County. This project will extend the westbound auxiliary lane that currently terminates before Green River Road all the way to the State Route 71 interchange. Caltrans has also started an environmental analysis for adding one new lane each way along State Route 91 from State Route 55 to State Route 241. This project will add significant new capacity through the cities of Anaheim and Placentia. The third project is being advanced by the Riverside County Transportation Authority (RCTC) to add a lane in each direction between State Route 241 in Orange County to Interstate 15 in Corona. The RCTC is currently developing an environmental analysis of these proposed improvements.

**Project K** – OCTA is advancing the conceptual design for the addition of one new lane in each direction on Interstate 405 between State Route 55 and Interstate 605. These improvements will add capacity and improve the local interchanges along the corridor that serves the communities of Santa Ana, Fountain Valley, Huntington Beach, Westminster, Seal Beach, and Los Alamitos.

## **Moulton Parkway Smart Street Project Update**

The OCTA Board approved a request from the City of Laguna Niguel for \$3.8 million in additional funding to complete the final segment of the Moulton Parkway Smart Street Project. Included in the original Measure M, the goal of the Smart Street Program is to improve travel time and traffic flow by constructing high-capacity, high-volume corridors along Beach Blvd., Katella Ave., Imperial Hwy., and Moulton Pkwy. [Click here](#) for more information.

## **Orange Transportation Center Pedestrian Undercrossing**

Over \$100,000 in Commuter Urban Rail Endowment (CURE) funding was made available in order to make final revisions to the design of a pedestrian undercrossing planned for the Orange Transportation Center. Constructing a pedestrian

underpass will improve safety and provide easier access from the parking lot to the station platform and bus transfer facilities. With the design phase completed, construction on the project is scheduled to begin in April 2008. [Click here](#) for more information on the project.

## **Traffic Light Synchronization Projects**

OCTA has submitted a list of ten projects to compete for \$100 million in Proposition 1B funds which will be made available under the Traffic Light Synchronization Program. The purpose of the program is to provide funding to be used for traffic light synchronization and other technologies to improve the effective capacity of local streets and roads. If the list of projects is approved, it would result in an additional 158 miles of synchronized corridors within Orange County. [Click here](#) for more information.

## **Agreement for M2 Website Consultant**

Civic Resource Group was awarded a three year contract to develop and maintain a completely redesigned Renewed Measure M website. This new resource will provide members of the public with easy access to information on all Renewed Measure M projects, including interactive street-level maps, along with details on project scope, length, and cost. Visitors to the site will be able to participate in online surveys and can also sign up to receive personalized project updates on a regular basis. [Click here](#) for more information.

## **CTC Makes Recommendations on Proposition 1B Funding**

California Transportation Commission (CTC) staff has recommended that OCTA receive \$218 million for local goods movement projects, including:

- SR-91WB Lane Addition (From I-5 to SR-57)
- State College Blvd (Fullerton)
- Placentia Avenue Undercrossing (Placentia & Fullerton)
- Orangethorpe Avenue Overcrossing (Placentia & Anaheim)
- Kraemer Blvd. Undercrossing (Placentia)
- Lakeview Avenue Overcrossing (Placentia & Anaheim)
- Tustin Avenue/Rose Dr Overcrossing (Placentia & Anaheim)

The CTC is expected make a final decision in April on allocating the Proposition 1B bond money, which was approved by voters in 2006. OCTA will provide \$263 million in Renewed Measure M matching funds, bringing the total funding available for the projects to \$481 million. Construction on the projects is scheduled to begin in the next two to five years.

## **I-405 Policy Working Group Meeting**

The San Diego Freeway (I-405) Policy Working Group, which consists of elected officials representing the I-405 corridor between the Costa Mesa Freeway (SR-55) and the San Gabriel River Freeway (I-605), met in January to discuss the I-405 preliminary engineering effort. The group also reviewed design concepts for freeway interchanges and ramps. Preliminary engineering documents have been submitted to Caltrans for review and comments and once the review has been completed, the environmental phase will begin. Community and stakeholder outreach plans are also scheduled to begin in mid-2008.

## **Orange County Cities Participate in Go Local**

Since the inception of the Go Local program, Orange County cities have worked to develop concepts either individually or in partnership with adjacent cities. To date, the Board has approved Go Local concepts from all 34 cities, most recently including the Cities of Los Alamitos, Seal Beach, Westminster, Fountain Valley, Costa Mesa and Newport Beach. With the first of four steps of the program complete, cities will now compete for additional funding to further develop the top-ranked projects. There will be a total of \$25.4 million available for this phase of the program. [Click here](#) to learn more about the Go Local program.

## **SR-91 Feasibility Study**

The Renewed Measure M Early Action Plan calls for the preparation of a conceptual engineering study for the segment of the Riverside Freeway (SR-91) between the Costa Mesa Freeway (SR-55) and the Orange Freeway (SR-57). In February, the Board approved the selection of consulting firm RMC, Inc. to prepare a technical feasibility study for improvements to the SR-91. [Click here](#) to learn more about the project.

## **Freeway Program Update**

At the end of 2008, improvements to 45 miles of the county's freeway system will be underway. In addition to the projects outline by the Early Action Plan, the Board has approved a revised implementation plan for the San Diego Freeway (I-405) West County Connectors projects. Work is also underway on the Santa Ana Freeway (I-5) Gateway project and two other state funded projects on the I-5 in south Orange County. [Click here](#) for more information on the freeway program.

## **M2 Commercial Paper Program**

As part of the plan of finance approved by the Board in 2007, OCTA has obtained financing for Early Action Plan projects through a Tax-Exempt Commercial Paper program, which is secured by Renewed Measure M sales tax revenues. This program will provide OCTA with as much as \$400 million for highway project development, design, right-of-way, and construction. Approximately \$211.1 million will be used for freeway improvements and \$71.1 million will be used for transit projects. [Click here](#) to learn more about the Commercial Paper Program

## **Environmental Programs**

The Environmental Cleanup Allocation Committee and the Environmental Oversight Committee both began meeting on a monthly basis starting in January 2008. The purpose of the Environmental Oversight Committee is to make recommendations to the Board of Directors on the allocation of environmental freeway mitigation funds and monitor the implementation of a master agreement between OCTA and state and federal resource agencies. The Environmental Cleanup Allocation Committee is designed to make recommendations to the Board of Directors on the allocation of funds for water quality improvements. [Click here](#) to learn more about each committee.

## **Progress was made on the following projects which could be eligible for Renewed Measure M funding:**

### **SOCMIS Public Outreach Meetings**

The South Orange County Major Investment Study (SOCMIS) is designed to identify the transportation challenges and potential solutions for southern Orange County. A key component to the Study's success is the development of a Locally Preferred Strategy for which there is overall consensus. For the SOCMIS, OCTA has developed a program to provide proactive communication and engage stakeholders throughout the study process. A series of open houses have been held to gather stakeholder feedback and provide understandable technical information.

### **ARTIC Request for Expressions of Interest**

The City of Anaheim and OCTA recently received responses to the ARTIC Request for Expressions of Interest (RFEI) from 14 private firms representing a variety of industries and market sectors, including:

- Arup and Transmetrics
- Cherokee
- CIM Group
- Citigroup Global Markets, Inc.
- Forest City Development
- Hill International
- Hines
- IBI Group and AREP Group
- Lehman Brothers

- Newport Real Estate Services, Inc., and Focus Real Estate Group, LP
- Opus West Corporation
- Parsons Transportation Group, Inc.
- PB Americas, Inc. and Arlington Group
- WoodStone Capital Group LLC

The RFEI is intended to assist OCTA in determining the availability, magnitude, and timing of private funds, the public private partnership structure, and project delivery mechanisms. These responses were voluntary on the part of the development community and will be used to advance a formal procurement process to select a private partners to undertake ARTIC and the associated development. The City of Anaheim, together with OCTA, will be releasing a Request for Qualifications document later this spring.

## **U.S. Secretary of Transportation Tours ARTIC**

The U.S. Secretary of Transportation, Mary Peters, visited Orange County in February to tour various local projects including the Anaheim Regional Transportation Intermodal Center (ARTIC). The Secretary provided very positive comments about the project and noted she does not know of a better example of a multimodal, public-private partnership transportation project in the country. The Secretary commended Orange County for its efforts in establishing public-private partnerships to deliver traffic relief to residents quickly and without raising taxes. [Click here](#) to see a copy of the Secretary's speech.

## **Placentia Metrolink Station**

The OCTA Board approved a cooperative agreement with the City of Placentia for the design and construction of a new Metrolink station in the city. The Board also approved releasing a request for proposals seeking a design consultant to provide plans, specifications and estimates for the project. The station would be Orange County's 12th and consists of platforms, a parking structure, surface parking, pedestrian access and widening of the existing Melrose Street structure to accommodate new platforms. The proposed Placentia Metrolink Station is on the Metrolink 91 Line serving Riverside, Fullerton, Buena Park and downtown Los Angeles. This line has experienced the most dramatic ridership growth of all the passenger rail lines in Orange County over the past three years.







**April 21, 2008**

**To:** Transportation 2020 Committee

**From:**  Arthur T. Leahy, Chief Executive Officer

**Subject:** Go Local Step One Screening Results and Step Two Recommendations

### **Overview**

On February 25, 2008, the Orange County Transportation Authority Board of Directors directed staff to screen the submission of Go Local Step One final reports in accordance with the approved Go Local Step One Final Reports Screening Checklist. As of preparation of this report, the cities of Anaheim, Irvine, Santa Ana, (acting as lead agency with Garden Grove) and San Clemente, (acting as lead agency with Dana Point and San Juan Capistrano) have submitted final reports summarizing the cities' Step One results and requests for Step Two funding consideration. Staff has screened 21 projects in total, seven from Anaheim, ten from Irvine, three from Santa Ana, and one from San Clemente, and are presenting the results for the Board of Directors' consideration.

### **Recommendations**

- A. Allocate \$5.9 million to the City of Anaheim for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the fixed-guideway Anaheim Regional Transportation Intermodal Center to The Platinum Triangle to Anaheim Resort Connector.
- B. Authorize the Chief Executive Officer to negotiate a cooperative agreement with City of Anaheim for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the fixed-guideway Anaheim Regional Transportation Intermodal Center to The Platinum Triangle to Anaheim Resort Connector, subject to a maximum Orange County Transportation Authority obligation of \$5.9 million.

- C. Allocate \$5.9 million to the City of Santa Ana for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance of the Santa Ana Fixed-Guideway Project.
- D. Authorize the Chief Executive Officer to negotiate a cooperative agreement with City of Santa Ana for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance for the Santa Ana Fixed-Guideway Project, subject to a maximum Orange County Transportation Authority obligation of \$5.9 million.
- E. Direct staff to return to the Board of Directors after all Go Local Step One final reports have been submitted with a recommended approach for funding consideration of all station, parking, bicycle, pedestrian, and remaining Go Local Step One projects.
- F. Refer policy discussion on using Renewed Measure M funds for operations and maintenance to the Renewed Measure M Transit Strategic Plan effort, and direct staff to return by June 2008 with a draft strategic plan that evaluates options for funding operations and maintenance.

### ***Background***

In October 2005, the Orange County Transportation Authority (OCTA) Board of Directors (Board) approved a five-year program to improve public transportation in Orange County. The program envisioned using the existing Metrolink commuter rail corridor as the backbone of the County's transit system as nearly two-thirds of Orange County residents and jobs are within four miles of this core rail system.

A key component of the five-year program was to expand Metrolink service between Laguna Niguel and Fullerton. The Metrolink Service Expansion Program (MSEP) was subsequently approved in November 2005 and permitted the addition of 36 more Metrolink trains serving Orange County every 30 minutes, seven days a week. Another component of the five-year program was to extend commuter rail service by allowing cities to develop extensions that would connect the corridor to major destinations or activity centers currently not being served. On February 27, 2006, the OCTA Board approved the Go Local Program, a four-step process for city-initiated rapid transit planning. Both the MSEP and Go Local Program are funded through the

Measure M (M1) High-Technology Advanced Rail Transit Program, funds that were previously allocated to the former CenterLine Project. The deferring of funds to the Go Local Program and the MSEP comply with the M1 transit project description to provide for improvements to the Los Angeles – San Diego – San Luis Obispo rail corridor and increase access between the primary rail system and employment centers. Providing connections from Metrolink to population and employment centers in Orange County as part of the Go Local Program will complement the increase in the number of trains and frequency of service in Orange County, as designed in the MSEP.

As of March 10, 2008, all 34 Orange County cities are participating in the Go Local Program and have entered into cooperative agreements with OCTA to study transit extensions to Metrolink as part of the Go Local Program. On February 25, 2008, the Board approved the programmatic allocation of \$25.4 million of Go Local funds for development of the fixed-guideway and bus shuttle project types as follows:

- \$15.0 million for fixed-guideway projects
- \$ 3.0 million for mixed-flow bus/shuttle projects
- \$ 5.2 million in reserve for design of fixed-guideway projects
- \$ 2.2 million for future planning

The Board also directed that qualifying station and parking improvement projects submitted under Go Local Step One could compete for \$1 million of Commuter Urban and Rail Endowment (CURE) funds, and qualifying bicycle and pedestrian projects could be considered for Transportation Demand Management (TDM) funding. As part of Go Local Step Two, all fixed-guideway, mixed-flow, and station and parking improvement projects would be subject to a 10 percent project cost local match, up to \$100,000.

The Board has directed that the selection of Go Local projects to enter into Step Two commence by March 1, 2008. Staff has conducted multiple outreach efforts, including sending email blasts, participating in city team meetings, and attending city council meetings to ensure all cities are aware of the Go Local Step One deadlines, as well as the Board's recent policy decisions on the program.

As of preparation of this report, OCTA has received four final reports from the cities of Anaheim, Irvine, Santa Ana teamed with Garden Grove, and San Clemente teamed with Dana Point and San Juan Capistrano.

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***Discussion***

As the MSEP progresses toward implementation in 2010, the Go Local Program development maintains a similar course of development through Step Two and Step Three.

In order to advance qualifying projects from Step One to Step Two, the Board directed that a panel, comprised of OCTA staff, a Citizens Advisory Committee (CAC) member, and two Technical Advisory Committee (TAC) members screen Step One final reports. The CAC is comprised of Board-appointed members of the community while the TAC includes a city technical representative from each Orange County city. The Go Local screening panel assessed whether the project exceeds, meets, or does not meet the Board-approved evaluation criteria for the Go Local Program (Attachment A). After conducting the screening process, the panel made a determination depending upon the level of fit to the criteria. Staff used the screening results to develop recommendations for which projects should advance into Step Two of the Go Local Program.

**City of Anaheim**

The City of Anaheim's Go Local study was initiated in January 2007, in partnership with the cities of Orange and Villa Park. The study was designed to improve transit access to Anaheim Canyon Station and to/from key employment areas to both Orange and the Anaheim Regional Transportation Intermodal Center (ARTIC) stations. While the needs assessment study was conducted between the three cities, Anaheim submitted a separate Go Local Step One final report. The cities of Orange and Villa Park are expected to submit final reports under separate cover.

In total, the City of Anaheim has requested Step Two funding consideration for a fixed-guideway project, two bus rapid transit (BRT) projects, three rubber-tire shuttle projects, and one station improvement project. Attachment B presents a summary of the projects submitted by the City of Anaheim, including project descriptions, Step Two funding requests, anticipated uses of Step Two funds, and screening results.

Based upon the screening results, staff recommends that the ARTIC to The Platinum Triangle to Anaheim Resort Connector be advanced to Step Two with a commitment from OCTA of \$5.9 million for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance. With the local match requirement of \$100,000, the

cost to complete Step Two for the ARTIC to The Platinum Triangle to Anaheim Resort Connector is \$6 million.

Staff also recommends that the City of Anaheim's two BRT services be advanced into Step Two for additional service planning. The City of Anaheim, in conjunction with Anaheim Resort Transit, is requesting funds for capital and operating expenses for the three shuttle projects. These activities have been deemed more suitable for Step Three of the Go Local Program. Steps three and four of the Go Local Program will be funded through \$1 billion made available through Renewed Measure M (M2) Project S - Transit Extensions to Metrolink. Further direction on the use of M2 funds for capital and operating expenses will be addressed as part of the M2 Transit Strategic Plan, a draft of which will be considered by the Board in June 2008. In the interim, given the approved Go Local four-step process, it is staff's recommendation that the three shuttle services undergo additional service planning to allow for further refinement of service proposals as part of Step Two. Shuttle services would be considered for Step Three funds once program guidelines have been developed and evaluated according to OCTA's service planning guidelines. Staff will return to the Board in May 2008 with a recommended approach on a process for conducting service planning for the proposed bus/shuttle projects.

The Go Local screening panel determined that the Anaheim Canyon Station Improvement Project did not meet the minimum screening threshold for the Go Local Program. It is staff's recommendation that, consistent with previous Board direction, the project be directed to compete for the \$1 million in project development funds available through CURE. Further consideration of this project would be deferred until all Step One final reports have been submitted. Considering that staff expects multiple station improvement projects to be submitted based upon interim meetings conducted with cities in December 2007, deferring until Summer 2008 would allow the Board to review the full range of projects proposed within this project type and for staff to present more comprehensive funding and delivery options to the Board for consideration.

#### **City of Irvine**

The City of Irvine submitted ten projects as part of their Go Local Step One final report. Attachment C presents a summary of the projects submitted, including a project description, Step Two funding request, anticipated use of Step Two funds, and Step One screening results. Consistent with Board direction, the Irvine Guideway Demonstration Project was screened and formally included as a Go Local project, although Step Two for the project has already been funded through \$5.2 million, OCTA participation of federal

Congestion Mitigation and Air Quality funds, and \$1.3 million of City of Irvine funding. The City of Irvine is not requesting any additional Step Two funds, but will be seeking \$155 million in Step Three funds for final design and construction of the Irvine Guideway Demonstration Project. Staff recommends that further direction on this project be deferred until the results of the fixed-guideway's alternatives analysis are provided upon completion of Step Two.

The Board has previously awarded the City of Irvine \$5.5 million for the procurement of the Irvine Business Complex (IBC) shuttle vehicles. The expenditure plan for these funds was approved by the Board as part of the BRT Implementation Plan in June 2007. As part of the initial project concept, the City of Irvine proposed to improve traffic circulation in the IBC by providing a shuttle system that will serve as a direct connection from the IBC to the Tustin Metrolink Station. The City of Irvine is requesting operations and maintenance funds for the IBC Shuttle for its Go Local Step One final report. Similar to the City of Anaheim's request for operating funds for shuttle projects, staff is recommending that the consideration of the IBC's operations and maintenance costs be deferred until further discussion on the use of M2 funds for capital and operating expenses as part of the M2 Transit Strategic Plan.

Staff is recommending that the Spectrum Shuttle Study undergo additional service planning that is consistent with existing OCTA service planning guidelines. Further discussion on the proposed service planning process will be brought to the Board in May 2008.

The Go Local screening panel determined that the North Irvine and Great Park shuttles fell significantly below the minimum screening threshold for advancement to Go Local Step Two. A contributing factor to the projects' low results are that the projects are in preliminary stages and minimal data was provided on how the proposed services met each of the criteria. Staff recommends that these projects seek other funding sources to refine the project concepts.

The Go Local screening panel determined that the Irvine Station and Irvine Station Parking projects received low ratings; however, considering that the station and parking improvement projects are being proposed to accommodate the development of the Irvine Guideway Demonstration Project, it is staff's recommendation that consideration of these projects be deferred until the results of the Irvine Guideway Demonstration Project's alternatives analysis are released upon completion of Step Two.

The Go Local screening panel determined that the IBC Sidewalk Gap Closures, IBC Bikeways, and Irvine Station Bikeway Connections projects did not meet the minimum screening threshold for the Go Local Program. Previously, the Board recommended that all pedestrian and bikeway projects be redirected to the TDM program; however, certain TDM guidelines, such as funding limits and eligible project phases, have precluded some pedestrian and bicycle projects submitted under Go Local to be eligible for TDM funds. Staff expects to receive additional pedestrian and bicycle projects from other cities and; therefore, recommends that all pedestrian and bicycle projects presented under Go Local Step One, and not submitted for TDM consideration, be deferred until summer 2008 for the Board to review the full range of projects proposed within this project type and for staff to present more comprehensive funding and delivery options to the Board for consideration.

#### **Cities of Santa Ana and Garden Grove**

The City of Santa Ana partnered with the City of Garden Grove to study connections to the regional transportation network via Metrolink and the Garden Grove Freeway (State Route 22). Attachment D presents a summary of the Go Local Step One study efforts, including project descriptions, Step Two funding requests, anticipated uses of Step Two funds, and Step One screening results. Based upon the screening results, staff recommends that the Santa Ana Fixed-Guideway Project be advanced to Step Two with a commitment from OCTA of \$5.9 million for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance. With the local match requirement of \$100,000, the cost to complete Step Two for the Santa Ana Fixed Guideway Project is \$6 million.

Similar to the Irvine Station improvement projects, staff recommends that because the expansion of Santa Ana Regional Transportation Center and the multi-modal use of the Pacific Electric Right-of-Way (PEROW) are linked to the development of Santa Ana and Garden Grove's fixed-guideway proposal, consideration of the two projects be deferred until the results of the fixed-guideway alternatives analysis are provided, upon completion of Step Two.

#### **Cities of San Clemente, Dana Point, and San Juan Capistrano**

In November 2006, San Clemente, in partnership with Dana Point and San Juan Capistrano, initiated a study to assess ways to provide an easy access link from the San Clemente and San Juan Capistrano stations to various destinations throughout the three cities for residents, visitors, and

commuters. The result of this needs assessment was a mixed-flow Tri-City Trolley proposal. Attachment E presents a summary of the project submitted, including a project description, Step Two funding request, anticipated use of Step Two funds, and Step One screening results.

Based upon the panel's evaluation of the Tri-City Trolley proposal according to the criteria, it is staff's recommendation that the proposed shuttle undergo additional service planning as part of Step Two and be considered for Step Three funds once program guidelines have been developed.

#### **Next Steps**

Due to the significant lead time required to conduct further development of a fixed-guideway project, staff recommends that the alternatives analysis process commence upon Board approval. Staff will return to the Board with negotiated cooperative agreements with the cities of Anaheim and Santa Ana/Garden Grove for detailed planning, alternatives analysis, financial planning, conceptual engineering, and state and federal environmental clearance work to be completed as part of Step Two of its respective fixed-guideway projects.

For the mixed-flow bus/shuttle projects, staff will return to the Board in May 2008 to identify multiple options for conducting the service planning and provide the Board a recommendation on which approach will ensure that OCTA can maintain an integrated and cohesive transit system with the future development of multiple bus/shuttle projects countywide.

Staff will return to the Board in summer 2008, after all Go Local Step One final reports have been submitted, for further direction on considering all station, parking, bicycle, pedestrian, and remaining Go Local Step One projects at a programmatic level. Staff will also continue with development of Step Three and Step Four program guidelines.

#### **Fiscal Impact**

The funds allocated for the cooperative agreements with the City of Anaheim and the City of Santa Ana have been included in the proposed OCTA Fiscal Year 2008-09 Budget, Development Division, Account 0010-7831/T5410-400.



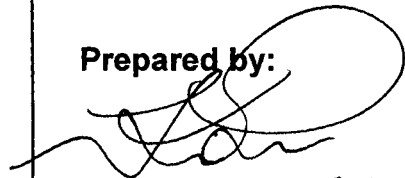
***Summary***

OCTA has received four Go Local Step One final reports from the cities of Anaheim, Irvine, Santa Ana, (in partnership with Garden Grove), and San Clemente, (in partnership with San Juan Capistrano and Dana Point). The four reports represent 21 projects encompassing three fixed-guideway projects, ten mixed-flow bus/shuttles, four station and/or parking improvement projects, three pedestrian and bicycle projects, and the proposal for the multi-modal use of the PEROW. All the projects have been screened according to the Board-approved evaluation criteria and recommendations for which projects should advance to Step Two for further planning, and which should be deferred for consideration after all final reports have been submitted are presented for the Board's approval.

***Attachments***

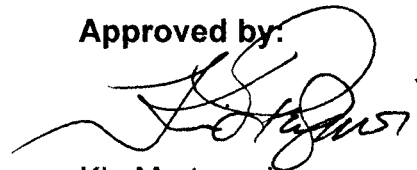
- A. Board-Approved (August 8, 2006) Evaluation Criteria Go Local Program – Final Version
- B. Go Local Program – Step One Final Report Synopsis – City of Anaheim
- C. Go Local Program – Step One Final Report Synopsis – City of Irvine
- D. Go Local Program – Step One Final Report Synopsis – Cities of Santa Ana and Garden Grove
- E. Go Local Program – Step One Final Report Synopsis – Cities of San Clemente, Dana Point, and San Juan Capistrano

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## Board-Approved (August 8, 2006) Evaluation Criteria Go Local Program – Final Version

This criteria will evaluate results of the Step One effort as documented in the city's Final Report that will serve as the city's Step Two funding application.

<b>Criterion</b>	<b>Priority</b>	<b>Purpose</b>	<b>Performance Measures</b>
<b>1. Local Jurisdiction Funding Commitments</b>	High	To appropriately invest scarce Measure M resources and ensure that the project is a high priority for the host cities.	<ul style="list-style-type: none"> <li>• Proof of local funding commitments (e.g. City council actions, city budgets, grant applications, memorandums of understanding [MOUs], etc.)</li> <li>• Level of local funding match</li> </ul>
<b>2. Proven Ability to Attract Other Financial Partners</b>	High	To ensure that Measure M dollars are being invested in areas which others have determined warrants investment and to ensure that Measure M dollars are being leveraged to maximize their return to the public.	<ul style="list-style-type: none"> <li>• Cooperative agreements, MOUs, council actions, grants</li> <li>• Funding agreements with private parties, if any, to demonstrate private sector financial participation in the proposed project related to the area served or affected by the project</li> <li>• Projected increase in land values of lands affected by the proposed project</li> <li>• Percent of proposed project funding not from Measure M</li> <li>• Action plan for obtaining commitments in Step Two</li> <li>• Employer rideshare commitments from employers along the route</li> </ul>
<b>3. Proximity to Jobs and Population Centers</b>	High	Coordinated planning of transit and land use to increase pedestrian safety and access to Metrolink	<ul style="list-style-type: none"> <li>• Recommendations for policies, general plan amendments, etc. applied withing 1500' of station</li> <li>• Recommendations for short or long-term local transit strategies coordinated with land use</li> <li>• Increase the number of people who can get to work/home from Metrolink in 15 minutes using transit or 10 minutes walking (total transit travel time includes walk + wait + in vehicle time)</li> </ul>

<b>Criterion</b>	<b>Priority</b>	<b>Purpose</b>	<b>Performance Measures</b>
<b>4.</b> <b>Regional Benefits</b>	High	<p>Effectively deliver Metrolink riders to regional employment and activity destinations utilizing convenient locally-oriented transit.</p> <p>Expand transit's appeal to those who own autos.</p>	<ul style="list-style-type: none"> <li>• Number of cities served by the proposed project.</li> <li>• Number of existing and planned "regional" employment and activity centers within 15 minutes total transit travel time or 10 minutes walking time of the nearest Metrolink station. Definition of regional activity center to be determined, but examples are California State University Fullerton, Disneyland, UCI Medical Center, Civic Center, John Wayne Airport, regional malls such as South Coast Plaza, Orange Coast College, etc.</li> <li>• Agreements regarding intent to pursue program to develop cooperative ridership development programs (or letters of intent to pursue same in Step Two) etc. with activity centers and/or employers</li> </ul>
<b>5.</b> <b>Ease and Simplicity of Connections</b>	High	<p>To close gaps between existing transit services especially during peak demand hours</p> <p>To maximize ridership by making sure the project includes the optimum number, ease and user-friendly design considerations regarding connections between the project and Metrolink.</p>	<ul style="list-style-type: none"> <li>• Linkage assessment within project area</li> <li>• Number of new transit connections</li> <li>• Number and clarity of transfers required to travel 15 minutes of total transit travel time to/from the nearest Metrolink station</li> <li>• Attention devoted to customer service planning</li> <li>• Ease of access from the Metrolink platform to boarding location of proposed new service or to new land uses</li> <li>• Amount of integration between Metrolink fares and fares of proposed project</li> <li>• Apply sample trips for comparative purposes</li> <li>• Evaluate the amount and type of research done or proposed, and/or considerations given to site design to make connections easy</li> </ul>
<b>6.</b> <b>Cost-Effectiveness</b>	Medium	<p>Assess the benefit for each public dollar spent</p>	<ul style="list-style-type: none"> <li>• Total cost per new rider</li> <li>• Measure M cost per new rider</li> <li>• Total cost per passenger-mile</li> <li>• Measure M cost per passenger-mile.</li> <li>• Private investment attracted per passenger mile.</li> <li>• Non-transit funding attracted per passenger mile</li> </ul>

Criterion	Priority	Purpose	Performance Measures
<b>7.</b> <b>Traffic Congestion Relief</b>	Medium	Reduce congestion so streets and freeways can work better, especially in the local community/project area.	<ul style="list-style-type: none"> <li>Projected number of "new" transit riders</li> <li>Estimated reduction in daily vehicle miles of travel (VMT)</li> <li>Projected ridership in year 2015 (or 2030?; or year of opening?)</li> <li>Projected number of new pedestrian-oriented uses within ½ mile</li> <li>Projected reduction in parking requirements</li> <li>Projected benefits to local street network</li> <li>Complementary congestion relief efforts (signal synchronization, etc.) are proposed for the project to make it work better with the transit connection(s) in place</li> </ul>
<b>8.</b> <b>Right-of-Way (ROW) Availability</b>	Medium	To accurately assess what is needed to build a project and thereby maximize the likelihood of cost effective, timely project delivery.	<ul style="list-style-type: none"> <li>Proof of ROW availability (if required). Appropriate letters of agreement, contracts or ownership records (public ROWs, easements, property donations, etc.)</li> <li>Action plan and schedule for obtaining the necessary commitments in step two.</li> </ul>
<b>9.</b> <b>Sound Long-Term Operating Plan</b>	Medium	Experience elsewhere has shown that early operations planning can be overlooked and is a high priority. The framework of an operating plan can and must be established early to ensure public funds are invested well.	<ul style="list-style-type: none"> <li>5+year operating plan</li> <li>Projected farebox recovery compared with OCTA or other relevant operation's history</li> <li>Qualitative assessment of the proposed funding sources</li> <li>Demonstrations of partnering agreements (letters of intent, MOUs, etc) or intent to pursue same in step two for sustained cooperative agreements to utilize service as a connection to Metrolink for employees, etc.</li> </ul>
<b>10.</b> <b>Compatible and Approved Land Use</b>	Medium	Ensure that transportation and land use are working in concert to maximize the return on transit investment and land values	<ul style="list-style-type: none"> <li>Qualitative assessment of the transit supportiveness of land uses served by the proposed project (e.g. pedestrian friendly, integration of transit stops with development, mixed uses, etc.)</li> <li>Qualitative assessment of ease of pedestrian connectivity to transit stops of proposed new service and/or to the Metrolink station</li> <li>Letters of support from affected interests (e.g. homeowner associations, community associations, chambers of commerce, developers)</li> </ul>

<b>Criterion</b>	<b>Priority</b>	<b>Purpose</b>	<b>Performance Measures</b>
<b>11.</b> <b>Project Readiness</b>	Low	To assess when a project could reasonably benefit a community.	<ul style="list-style-type: none"> <li>• Ability of proposed project or concept to be implemented within five years of submittal of the Go Local Step One final report, as documented in the proposed schedule of project development activities</li> <li>• The proposed implementation schedule will be compared to existing, similar projects from Orange County or other metro areas</li> </ul>
<b>12.</b> <b>Safe and Modern Technologies</b>	Low	Increase the project's public appeal, increase ridership, and, reduce liability and maintenance costs	<ul style="list-style-type: none"> <li>• Actual experience from existing operations or manufacturer's data</li> <li>• Qualitative assessment of the safety of proposed technology</li> <li>• Qualitative assessment of the reliability of the proposed technology</li> </ul>



# Go Local Program - Step One Final Report Synopsis

City of Anaheim

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	CITY'S STEP TWO FUNDING REQUEST	CITY'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>City of Anaheim</b>						
Ana - 1	<p><b>ARTC to The Platinum Triangle to Anaheim Resort Connector:</b> Elevated fixed-guideway system along a high-volume corridor to connect ARTC to the two key centers of interest, the Anaheim Resort and the Platinum Triangle. This system will operate as a high-capacity, collector-distributor system, providing convenient and efficient transfers to Metrolink, Amtrak, BRT, local bus, and future high-speed train services connecting at ARTC.</p> <p><b>Route Length:</b> 2.9-3.4 miles <b>Capital Cost:</b> \$240-\$270 million</p>	Anaheim	Medium	\$5.9 million	<ul style="list-style-type: none"> <li>Planning, alternative analysis (AA), environmental, conceptual engineering</li> </ul>	<ul style="list-style-type: none"> <li>Allocate \$5.9 million to City of Anaheim for detailed planning, AA, financial planning and state and federal engineering and state and federal environmental clearance</li> <li>Negotiate cooperative agreement with City of Anaheim and return to Board to execute agreement</li> </ul>
<b>Mixed Flow Traffic Bus/Shuttle</b>						
Ana - 2	<b>ARTC to Downtown Anaheim to Fullerton Transportation Center Connector:</b> BRT system operating in mixed traffic, will allow residents and workers in downtown Anaheim to reach ARTC, either to commute to jobs outside of the city or to reach other points of interest near ARTC. It will also allow people in the Platinum Triangle to reach downtown Anaheim.	Anaheim Fullerton	Medium	\$675,000	<ul style="list-style-type: none"> <li>Project Definition Study</li> </ul>	<ul style="list-style-type: none"> <li>Advance to Step Two service planning</li> </ul>
Ana - 3	<b>ARTC to Anaheim Canyon Station Connector:</b> BRT system which connects the Anaheim Canyon station to ARTC, eliminating the need for people to make a transfer at the Orange Station.	Anaheim Anaheim Canyon	Medium		<ul style="list-style-type: none"> <li>Project Definition Study</li> </ul>	
Ana - 4	<b>ARTC to Platinum Triangle to Anaheim Resort Shuttle Bus Connector:</b> Bus-based system to jumpstart the elevated fixed-guideway system by operating an at-grade transit connection along the high-volume corridor between ARTC and the Anaheim Resort.	Anaheim	High	\$2.6 million (bus capital)	<ul style="list-style-type: none"> <li>Bus capital &amp; operating funds to expand Anaheim Resort (ART)</li> </ul>	<ul style="list-style-type: none"> <li>Advance to Step Two service planning</li> <li>Request for capital and operating funds to be deferred to M2 Transit Strategic Plan effort that will address the use of M2 funds for capital and operating expenses</li> </ul>
Ana - 5	<b>West Anaheim Commuter Shuttles:</b> Bus-based system to allow transit riders in the west and northwest portions of the City to have a direct link to the Anaheim Resort and to ARTC.	Anaheim	Medium	\$1.4 million (annual operations and maintenance)	<ul style="list-style-type: none"> <li>Bus capital &amp; operating funds to expand ART</li> </ul>	
Ana - 6	<b>Anaheim Canyon Feeder Shuttles:</b> Two new shuttle routes to circulate between Anaheim Canyon Station and within the Anaheim Canyon Business Center. A third shuttle route would ensure continuation of the ART-operated service between Anaheim Canyon Station and Downtown Anaheim.	Anaheim Canyon	Medium		<ul style="list-style-type: none"> <li>Bus capital &amp; operating funds to expand ART</li> </ul>	

# Go Local Program - Step One Final Report Synopsis

City of Anaheim

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	CITY'S STEP TWO FUNDING REQUEST	CITY'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>Station of Parking Improvements</b>						
Ana - 7	<b>Advancing the Anaheim Canyon Station Master Site Plan Improvements:</b> Initial step in positioning the station to serve as an anchor in the neighborhood, by introducing new pedestrian access routes to the station that will allow it to better integrate with the surrounding land uses.	Anaheim Canyon	Low	\$13.9 million	<ul style="list-style-type: none"> <li>Final design and environmental clearance for Phase I</li> </ul>	<ul style="list-style-type: none"> <li>Defer until summer 2008 pending submission of all Step One final reports</li> </ul>

# Go Local Program - Step One Final Report Synopsis

City of Irvine

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	CITY'S STEP TWO FUNDING REQUEST	CITY'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>City of Irvine</b>						
<b>Fixed-Routeway (all or bus)</b>						
Irv - 1	<b>Irvine Guideway Demonstration Project:</b> System (both rubber-tired vehicles and modern streetcar) links Irvine Station to the Irvine Spectrum and future Lifelong Learning District, Great Park, and Transit-Oriented Development District.	Irvine	High	n/a	<ul style="list-style-type: none"> <li>Previously funded: \$5.2M from CMAQ program for environmental impact report/environmental assessment/AA and conceptual engineering</li> </ul>	<ul style="list-style-type: none"> <li>Formally included in Go Local Step Two</li> <li>Request for final design and construction funds deferred until the results of the fixed-guideway's alternatives analysis are provided, upon completion of Step Two</li> </ul>
<b>Mixed-Flow Traffic Bus/Shuttle</b>						
Irv - 2	<b>Irvine Business Complex (IBC) Shuttle:</b> The IBC shuttle will meet peak period and midday trains arriving at and departing from Tustin Station, and will also provide local circulator service within the IBC.	Tustin	High	n/a	<ul style="list-style-type: none"> <li>Previously funded: \$5.5 million from BRT Implementation Plan 2007 for vehicle procurement</li> </ul>	<ul style="list-style-type: none"> <li>Request for operations funds deferred to M2 Transit Strategic Plan effort that will address the use of M2 funds for capital and operating expenses</li> </ul>
Irv - 3	<b>Spectrum Shuttle Study:</b> Complementing and building directly off of the Irvine Guideway Demonstration Project, the shuttle system will provide flexible, convenient local circulator service throughout the many distinct areas within the Irvine Spectrum including newer apartment villages and a variety of corporate offices, retailers, and local businesses.	TBD	Medium	\$50K	<ul style="list-style-type: none"> <li>Prepare operating/financial plan</li> <li>Conduct public outreach</li> </ul>	<ul style="list-style-type: none"> <li>Advance to Step Two service planning</li> </ul>
Irv - 4	<b>North Irvine Transit Study:</b> The northern part of the City of Irvine is not served by transit. The City of Irvine would like to investigate alternative transit opportunities for this area.	TBD	Low	\$75K	<ul style="list-style-type: none"> <li>Prepare implementation plan, operating/financial plan, and conduct public outreach</li> </ul>	<ul style="list-style-type: none"> <li>Concepts are too preliminary</li> <li>Recommend projects seek other funding sources to refine ideas</li> </ul>
Irv - 5	<b>Great Park Shuttle System:</b> The future Orange County Great Park is anticipated to be visited by three million visitors per year. Circulation in the park will be provided by bikeways, trains, pedestrian paths, and a shuttle system, which is being planned to provide connection between uses into the park and the Irvine station.	Irvine	Low	\$50K	<ul style="list-style-type: none"> <li>Prepare implementation plan and operating/financial plan</li> </ul>	

# Go Local Program - Step One Final Report Synopsis

City of Irvine

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	CITY'S STEP TWO FUNDING REQUEST	CITY'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>Station on Parking Improvements</b>						
Irv - 6	<b>Irvine Station Master Plan:</b> The Irvine Station is one of the busiest transportation centers in Orange County. As Metrolink and Amtrak services expand and as OCTA adds BRT service to Irvine station within the next few years, the site's importance and value as a regional gateway will increase.	Irvine	Low			
Irv - 7	<b>Irvine Station Parking:</b> Ridership on Metrolink and Amtrak service continues to exceed expectations at Irvine Station. Parking overflow prompted construction of a new 1,500-space parking structure that is scheduled to open in September 2008. Based on parking demand projections provided in the MSEP, additional parking is needed to meet future demand.	Irvine	Low	\$7M	<ul style="list-style-type: none"> <li>Building design and environmental analysis</li> </ul>	<ul style="list-style-type: none"> <li>Projects to be deferred until completion of Step Two concurrent with Irvine Guideway Demonstration Project</li> </ul>
<b>Pedestrian Access and Bike Improvements</b>						
Irv - 8	<b>IBC Pedestrian Gap Closures:</b> Because the IBC was initially designed for industrial uses, several streets within the IBC were constructed without sidewalks. To support local and regional bus service and encourage walking, the City of Irvine developed a sidewalk gap closure plan. The plan identifies 200, 185 linear feet of missing sidewalks in the IBC.	Shuttle Stations OCTA fixed-bus routes	Low	\$550K	<ul style="list-style-type: none"> <li>Prepare implementation plan, funding plan, and environmental analysis</li> </ul>	
Irv - 9	<b>IBC Off-Street Bikeways:</b> Planning study that will determine the feasibility, design, and costs associated with converting abandoned railroad tracks to walking and bicycle trails.	Tustin	Low	\$500K	<ul style="list-style-type: none"> <li>Preliminary engineering and environmental analysis</li> </ul>	<ul style="list-style-type: none"> <li>Defer until summer 2008 pending submission of all Step One final reports (projects not submitted under TDM)</li> </ul>
Irv - 10	<b>Irvine Station Bicycle Linkages:</b> During the development of the City of Irvine's Bicycle Transportation Master Plan, the community identified needs for additional connections to Irvine Station and the future Orange County Great Park.	Irvine	Low	\$550K	<ul style="list-style-type: none"> <li>Prepare train connections to Irvine Station Plan, funding plan, and environmental analysis</li> </ul>	

# Go Local Program - Step One Final Report Synopsis

Cities of Santa Ana and Garden Grove

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	TEAM'S STEP TWO FUNDING REQUEST	TEAM'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>City of Santa Ana Team</b>						
<b>Fixed-Guideway (Rail on Rails)</b>						
SA - 1	<p><b>Santa Ana Regional Fixed-Guideway:</b> Five-mile fixed-guideway system, which will close the existing gap for riders getting off Metrolink trains at the SARTC to reach their final destinations in Garden Grove and Santa Ana.</p> <p><b>Route Length:</b> 5 miles</p> <p><b>Capital Cost:</b> \$302 million</p>	Santa Ana	High	\$8.9 million	<ul style="list-style-type: none"> <li>Detailed planning, AA, environmental, conceptual engineering, financial strategy planning, public outreach, staff resources</li> </ul>	<ul style="list-style-type: none"> <li>Allocate \$5.9 million to City of Santa Ana for detailed planning, AA, financial planning, conceptual engineering, and state and federal environmental clearance</li> <li>Negotiate cooperative agreement with City of Santa Ana and return to Board to execute agreement</li> </ul>
<b>Station and Parking Improvements</b>						
SA - 2	<p><b>Expansion of SARTC:</b> To accommodate the expansion of Metrolink services, the proposed fixed-guideway system (modern streetcar), and OCTA's planned BRT, a newly expanded SARTC will provide new station areas, additional parking and bus, pedestrian, and bicycle access all integrated into transit-oriented development on and adjacent to the existing SARTC site.</p>	Santa Ana	Medium	\$2.0 million	<ul style="list-style-type: none"> <li>Detailed planning/site design, environmental, conceptual engineering, funding analysis/financial strategy, public outreach, staff resources</li> </ul>	<ul style="list-style-type: none"> <li>Project to be deferred until completion of Step Two concurrent with Santa Ana Fixed-Guideway</li> </ul>
<b>Multi-Modal Use of PE ROW</b>						
SA - 3	<p><b>The Missing Link in Central Orange County (Multi-modal use of PE ROW):</b> Cities propose to transform the PE ROW from an abandoned linear corridor traversing the heart of Orange County into a dynamic multi-modal transportation facility integrating the fixed-guideway system (modern streetcar), BRT, autos, bicycles, and pedestrians.</p>	Santa Ana	Medium	\$3.0 million	<ul style="list-style-type: none"> <li>Detailed planning, conceptual engineering, environmental, funding analysis/financial strategy, public outreach, staff resources</li> </ul>	<ul style="list-style-type: none"> <li>Project to be deferred until completion of Step Two concurrent with Santa Ana Fixed-Guideway</li> </ul>



# Go Local Program - Step One Final Report Synopsis

## Cities of San Clemente, Dana Point, and San Juan Capistrano

April 21, 2008

CODE	PROJECT DESCRIPTION	TARGET STATION	SCREENING RESULT	TEAM'S STEP TWO FUNDING REQUEST	TEAM'S ANTICIPATED USE OF STEP TWO FUNDING REQUEST	PROPOSED NEXT STEPS
<b>City of San Clemente Team</b>						
<b>Mixed Flow Transit (Bus/Shuttle)</b>						
SC - 1	<b>Tri-City Trolley:</b> Bus-based trolley service which connects to Metrolink and Amtrak (San Clemente and San Juan Capistrano), links key destinations, reduces traffic congestion and parking demand, and enhances a pedestrian-friendly atmosphere throughout the three cities.	San Clemente San Juan Capistrano	Medium	\$100K	<ul style="list-style-type: none"> <li>• Work with OCTA on operation issues, funding strategy (contracted service), study lease vs. purchase of vehicles, identify maintenance/storage facility</li> <li>• Team anticipates selecting a consultant and leasing vehicles soon thereafter</li> </ul>	<ul style="list-style-type: none"> <li>• Advance to Step Two Service Planning</li> <li>• Request for capital and operations funds deferred to M2 Transit Strategic Plan effort that will address the use of M2 funds for capital and operating expenses</li> </ul>




## Go Local Step One Screening Results and Step Two Recommendations

Transportation 2020 Committee  
April 21, 2008



## Screening Process



- Screened four final reports
  - Anaheim
  - Irvine
  - Santa Ana/Garden Grove
  - San Clemente/Dana Point/San Juan Capistrano
- Panel comprised of OCTA staff, two Technical Advisory Committee members, and one Citizens Advisory Committee member
- Panel screened projects against Board-approved evaluation criteria
  - Evaluated if projects had a low, medium, or high level of fit to criteria
- Results used to develop staff recommendations

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Summary of 21 Projects						
Team	Fixed-Guideway (rail or bus)	Mixed-Flow Traffic Bus/ Shuttle	Station or Parking Improvements	Pedestrian Access or Bike Improvements	Multi-Modal Use of PE ROW	TOTAL PROJECTS SUBMITTED BY CITY/TEAM
Anaheim	1	5	1	0	0	7
Irvine	1	4	2	3	0	10
Santa Ana/ Garden Grove	1	0	1	0	1	3
San Clemente/ Dana Point/ San Juan Capistrano	0	1	0	0	0	1
PROJECTS SCREENED	3	10	4	3	1	21

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Fixed-Guideway (rail or bus)			
Project	City's Step Two Funding Request (millions)	Proposed Funding Allocation (millions)	Proposed Use of Funding
Anaheim: Anaheim Regional Transportation Intermodal Center (ARTIC) to The Platinum Triangle to Anaheim Resort Connector	\$5.9	\$5.9	<ul style="list-style-type: none"> <li>Detailed Planning</li> <li>Alternatives Analysis</li> <li>Conceptual Engineering</li> <li>State &amp; Federal Environmental Clearance</li> <li>Financial Planning</li> </ul>
Santa Ana/Garden Grove: Santa Ana Fixed-Guideway Project	\$8.9	\$5.9	
Irvine: Irvine Guideway Demonstration Project	N/A	N/A	*Step Two previously funded by \$5.2 million of federal CMAQ funds

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## Mixed Flow Traffic (bus/shuttle)



Project	Proposed Action
Anaheim: ARTIC to Downtown Anaheim to Fullerton Transportation Center Connector (BRT)	<ul style="list-style-type: none"> <li>Advance to Step Two service planning</li> </ul>
Anaheim: ARTIC to Anaheim Canyon Station Connector (BRT)	
Anaheim: ARTIC to The Platinum Triangle to Anaheim Resort Shuttle Bus Connector	
Anaheim: West Anaheim Commuter Shuttles	<ul style="list-style-type: none"> <li>Requests for capital, operations and maintenance deferred to the Renewed Measure M (M2) Transit Strategic Plan effort that will address the use of M2 funds for capital and operating expenses</li> </ul>
Anaheim: Anaheim Canyon Feeder Shuttles	
Irvine: Spectrum Shuttle Study	
San Clemente/Dana Point/San Juan Capistrano: Tri-City Trolley	<ul style="list-style-type: none"> <li>Requests for operations and maintenance deferred to M2 Transit Strategic Plan effort that will address the use of M2 funds for capital and operating expenses</li> </ul>
Irvine: Irvine Business Complex (IBC) Shuttle	
Irvine: North Irvine Transit Study	
Irvine: Great Park Shuttle System	<ul style="list-style-type: none"> <li>Concepts are too preliminary; recommend projects seek other funding sources to refine ideas</li> </ul>

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## Station or Parking Improvements



Project	Proposed Action
Anaheim: Advancing the Anaheim Canyon Station Master Site Plan Improvements	Defer until summer 2008 pending submission of all Step One final reports
Irvine: Irvine Station Master Plan	<ul style="list-style-type: none"> <li>Projects linked to cities' proposed fixed-guideway projects. Defer until completion of Step Two fixed-guideway project analysis</li> </ul>
Irvine: Irvine Station Parking	
Santa Ana/Garden Grove: Expansion of the Santa Ana Regional Transportation Center	
Santa Ana/Garden Grove: Multi-Modal Use of PE ROW	

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## Bike & Pedestrian Improvements



Project	Proposed Action
Irvine: IBC Pedestrian Gap Closures	Defer until summer 2008 pending submission of all Step One final reports (projects not submitted under Transportation Demand Management)
Irvine: IBC Off-Street Bikeways	
Irvine: Irvine Station Bicycle Linkages	

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## Next Steps



- Recommend Anaheim and Santa Ana/Garden Grove fixed-guideway projects begin alternatives analysis
- Return with negotiated cooperative agreements with Anaheim and Santa Ana/Garden Grove
- Continue to monitor the progress of the Irvine Guideway Demonstration Project through Step Two
- Return next month with recommended approach for conducting service planning for bus/shuttle proposals
- Return by June 2008 with a draft M2 Transit Strategic Plan that evaluates options for funding operations and maintenance of M2 transit programs
- Return in summer 2008 for further direction on station, parking, bicycle, pedestrian, and remaining Go Local Step One projects


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**April 21, 2008**

**To:** Transportation 2020 Committee  
**From:**  Arthur T. Leahy, Chief Executive Officer  
**Subject:** Trade Corridors Improvement Fund Program Update

### **Overview**

In December 2007, the Board of Directors approved a candidate list of projects to submit for consideration for funding through the Proposition 1B, Trade Corridors Improvement Fund program. Applications for nine candidate projects were submitted in January, and the California Transportation Commission adopted the program on April 10, 2008. Orange County was successful in securing \$217.7 million for eight projects, including seven grade separation projects and one highway project. Staff has prepared an overview of the adopted program.

### **Recommendations**

- A. Approve the updated project match amounts and sources for the adopted Trade Corridors Improvement Fund projects.
- B. Authorize staff to process all necessary amendments to the Regional Federal Transportation Improvement Program and execute any necessary agreements to facilitate the programming of these projects.

### **Background**

In November 2006, California voters passed Proposition 1B, a \$19.9 billion bond initiative to fund transportation improvements throughout the state. Included in the Proposition 1B funding programs is the Trade Corridors Improvement Fund (TCIF), which made available \$2 billion of the \$19.9 billion for goods movement projects. In November 2007, the California Transportation Commission (CTC) adopted program guidelines and evaluation criteria which defined the competitive process by which these funds would be distributed. Applications were due January 17, 2008.

In November and December 2007, the Orange County Transportation Authority's (OCTA) Board of Directors (Board) committed local matching funds and authorized staff to submit nine project applications for consideration for funding through the TCIF program (Attachment A).

### ***Discussion***

The CTC evaluated 84 project nominations consisting of 107 individual projects, totaling \$4.1 billion of TCIF funding requests. These projects were evaluated based on goods movement factors (throughput, velocity, reliability), transportation system factors (safety, congestion relief, interregional/regional benefits), and community impact factors (air quality, community impact, economic/jobs growth) in addition to project match and readiness. The amount of over programming adopted by the CTC is anticipated to come from future revenue sources including additional federal funds, user fees, and tolls. Should these revenues not materialize, each agency would be responsible for funding its proportional share.

Since the Board's direction in December 2007, staff has performed additional reviews of the projects and has updated the project cost estimates and schedules as appropriate. There were cost increases on two of the projects: the Riverside Freeway (State Route 91) westbound from the Santa Ana Freeway (Interstate 5) to the Orange Freeway (State Route 57) and the Placentia Avenue grade separation. Additionally, the TCIF amounts requested were adjusted slightly to remain consistent with the TCIF program guidelines; however, there was no net change to the amount of TCIF funds requested. Staff has been briefing the committee on the progress and these minor changes. With regard to matching funds, staff has also re-evaluated the potential match sources. A revised strategy that includes previously set aside federal funds and currently approved federal earmarks reduces the anticipated Renewed Measure M share. In total, \$74 million in federal funds, including \$44 million of approved earmarks and \$30 million of Regional Surface Transportation Program and Congestion Mitigation and Air Quality funds, will be used to towards the required \$272.6 million match.

On April 10, 2008, the CTC adopted the TCIF program of projects, totaling \$3.09 billion for 79 projects. The adopted program includes \$217.7 million for eight projects in Orange County. Those projects include seven grade separation projects along the Orangethorpe Corridor(Alameda Corridor East) and one highway project on State Route 91 (SR-91) from State Route 57 (SR-57) to Interstate 5 (I-5). Including matching funds, the total TCIF program in Orange County will provide \$490.4 million towards these improvements. The approved funding levels and updated match requirements are included in Attachment B.

The SR-57 Truck Climbing Lane Project was identified as a good TCIF candidate project; however, due to funding capacity constraints, the project was not recommended for funding. Funding options for this project will be considered through a comprehensive funding strategy, which is expected to come before the Board by July 2008.

#### **Next Steps**

In response to the Governor's executive order on bond accountability, the Proposition 1B programs will be held to a higher standard of accountability. Each local agency will be required to sign a baseline agreement that sets the project benchmarks/milestones that must be achieved for each project to remain eligible to receive funding. Staff will work with the CTC to establish realistic milestones and delivery dates for each of these projects to succeed.

In addition, staff is developing an implementation strategy for the projects. The strategy involves analysis of project delivery and management resources, project staging, and interagency agreements. Also staff is considering coordination with affected cities and involved agencies including, the Burlington Northern Santa Fe Railway Company and the Public Utilities Commission. The report will also discuss the need for communication plans to keep the various stakeholders apprised. A report on the plan is scheduled for the May 19, 2008, Transportation 2020 Committee.

#### **Summary**

The CTC adopted the TCIF program of projects on April 10, 2008. Orange County was successful in securing \$217.7 million for eight projects throughout the County. In response to the program adoption, staff is requesting approval of updated project match amounts and sources.

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**Attachments**

- A. Proposed Trade Corridors Improvement Fund - Program of Projects for Orange County – December 2007
- B. Adopted Trade Corridors Improvement Fund - Program of Projects for Orange County – April 2008

**Prepared by:**



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**Approved by:**



Kia Mortazavi  
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**Proposed Trade Corridors Improvement Fund  
Program of Projects for Orange County  
December 2007**

<b>Project</b>	<b>Total</b>	<b>TCIF</b>	<b>Match</b>	<b>Match %</b>	<b>Match Source</b>
SR-91 WB (I-5 - SR-57)	72,000	23,000	49,000	68.1%	Renewed Measure M
State College grade separation	62,083	31,041	31,042	50.0%	RSTP/CMAQ <sup>1</sup>
Placentia grade separation	29,869	14,935	14,934	50.0%	RSTP/CMAQ
Orangethorpe grade separation	83,957	41,979	41,978	50.0%	Renewed Measure M
Kraemer grade separation	45,911	22,956	22,955	50.0%	Renewed Measure M
Raymond grade separation	63,740	31,870	31,870	50.0%	Renewed Measure M
Lakeview grade separation	58,525	28,685	29,840	51.0%	Renewed Measure M
Tustin - Rose grade separation	63,400	31,700	31,700	50.0%	Renewed Measure M
SR-57 truck climbing lane	161,191	51,000	110,191	68.4%	Renewed Measure M
Sub-Total	640,676	277,166	363,510		

<sup>1</sup> Regional Surface Transportation Program/Congestion Mitigation and Air Quality



**Adopted Trade Corridors Improvement Fund  
Program of Projects for Orange County  
April 2008**

Project	Total	TCIF	Match	Match %	Match Source <sup>1</sup>		
					Federal	Renewed M	Other
SR-91 WB (I-5 - SR57)	73,400	34,950	38,450	52.4%	-	38,450	-
State College grade separation	62,083	30,731	31,352	50.5%	28,333	-	3,019
Placentia grade separation	39,369	14,934	24,435	62.1%	-	24,435	-
Orangethorpe grade separation	83,957	41,666	42,291	50.4%	15,985	25,681	625
Kraemer grade separation	45,910	22,642	23,268	50.7%	19,914	2,729	625
Raymond grade separation	63,740	12,757	50,983	80.0%	3,337	47,646	-
Lakeview grade separation	58,525	28,685	29,840	51.0%	2,868	26,347	625
Tustin Rose grade separation	63,400	31,387	32,013	50.5%	3,328	28,060	625
<b>Total</b>	<b>\$ 490,384</b>	<b>\$ 217,752</b>	<b>\$ 272,632</b>	<b>55.6%</b>	<b>\$ 73,765</b>	<b>\$ 193,348</b>	<b>\$ 5,519</b>

<sup>1</sup> \$44 million federal earmarks, \$30 million RSTP/CMAQ funds