

FY 2020-2021 Eligibility Workshop



April 30, 2020

Overview

- Acronyms
- Requirements due June 30, 2020
- Upcoming Dates and Deadlines
- Eligibility Website → www.octa.net/OCGoEligibility
- Contact Information
- Questions

Acronyms

- **CIP:** Capital Improvement Program
- **CMP:** Congestion Management Program
- **LFS:** Local Fair Share
- **LSSP:** Local Signal Synchronization Plan
- **MOE:** Maintenance of Effort
- **MFP:** Mitigation Fee Program
- **MPAH:** Master Plan of Arterial Highways
- **PMP:** Pavement Management Plan
- **RTSSP:** Regional Traffic Signal Synchronization Program

Requirements due by June 30, 2020

- Eligibility Checklist
- Capital Improvement Program (CIP)***
- Maintenance of Effort (MOE)
- Pavement Management Plan (PMP)* – Even Year Agencies Only**
- Mitigation Fee Program (MFP) – *if updates to Nexus Study or process methodology*
- Local Signal Synchronization Plan (LSSP)***
- Traffic Forum
- Transit/Non-Motorized Transportation

***Council/Board Adoption Required**

Eligibility Checklist

- Certify compliance with all eligibility requirements

Submittal:

- Submit **Appendix D: Eligibility Checklist**

Capital Improvement Program (CIP) Overview

- 7-Year funding plan that includes:
 - Projects funded with M2 funds
 - Projects that may be candidates for future M2 funding (competitive and/or Local Fair Share)
 - Projects required to demonstrate compliance with requirements related to:
 - Signal Synchronization
 - Pavement Management
 - Congestion Management Program

New CIP Database

- WebSmart CIP was previously used to prepare and submit CIPs
- Starting this cycle, a new CIP database that has been incorporated into the OC Fundtracker website will be used
- Please contact Kelsey Imler (kimler@octa.net) if you require access to this new CIP database or experience any issues
- A CIP User Manual available on the Eligibility [webpage](#) under the “Guidelines” dropdown menu

Overview of New CIP Database – Main Menu

- Click on “CIP Adoption” to create a new project
- OCTA has populated database with information from FY19/20 CIPs as a starting point
- These projects can be found under “Adoptions in Progress”

The screenshot displays the 'SPONSOR MAIN MENU' interface. At the top, there is a search bar labeled 'SEARCH FOR PROJECTS (CIP)'. Below this, the menu is organized into three main sections: 'AGENCY WORKING AREA', 'AGENCY SUBMITTED PROJECTS', and 'OTHER'. In the 'AGENCY WORKING AREA' section, there are two buttons: 'CIP ADOPTION' (with '31 ADOPTIONS IN PROGRESS (CIP)' below it) and 'CIP AMENDMENT IS CLOSED' (with '0 AMENDMENTS IN PROGRESS (CIP)' below it). The 'CIP ADOPTION' button is highlighted with a red border. In the 'AGENCY SUBMITTED PROJECTS' section, there are two buttons: '0 PENDING CIP ADOPTIONS' and '0 PENDING CIP AMENDMENTS', both highlighted with red borders. In the 'OTHER' section, there are three buttons: 'Reports' (highlighted with a red border), 'LOG INTO CTFP', and 'LOG INTO WATER'.

SPONSOR MAIN MENU	
SEARCH FOR PROJECTS (CIP)	
AGENCY WORKING AREA	
CIP ADOPTION 31 ADOPTIONS IN PROGRESS (CIP)	CIP AMENDMENT IS CLOSED 0 AMENDMENTS IN PROGRESS (CIP)
AGENCY SUBMITTED PROJECTS	
0 PENDING CIP ADOPTIONS	0 PENDING CIP AMENDMENTS
OTHER	
Reports	
LOG INTO CTFP	
LOG INTO WATER	

Overview of New CIP Database – Project Page

ADMINISTRATIVE EDIT

CIP DOC
20-00 - CIP ▼

PROJECT INFORMATION

* IMPLEMENTING AGENCY LOCAL PROJECT NUMBER STATUS ADDITIONAL PROJECT IDS
 City of ▼ [] Planned ▼ []

* PROJECT TITLE
[]

* PROJECT DESCRIPTION
[]

* LIMITS ⓘ
[]

* TYPE OF WORK * TYPE OF WORK DESCRIPTION
 [] ▼ [] ▼

PROGRAMMING INFORMATION (\$0) [\[MAP\]](#)

FISCAL YEAR	FUND TYPE	ENG	ROW	CON/IMP	O&M	TOTAL
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
▼	▼					\$0
Update Subtotals		GRAND TOTAL	\$0	\$0	\$0	\$0

PROJECT NOTES - ⓘ
[]

SUMMARY OF CHANGES (AUTOMATE) Update Narrative

Save for Later Submit to OCTA Reset Form

- Double check info for accuracy and update info as needed for the FY 20-21 eligibility cycle
- “Save for Later” will move project to “Adoptions in Progress”
- Click “Submit to OCTA” once editing is complete and project will be moved to “Pending CIP Adoptions”

Overview of New CIP Database - Reports

- Two reports available:
 - 1) CIP Programmed Revenue by Funding Source Report
 - 2) CIP Project Listing Report
- Once all projects have been input and submitted to OCTA, run the “CIP Project Listing Report”
- **Save and include report print out in Eligibility submittal package**

SPONSOR MAIN MENU	
SEARCH FOR PROJECTS (CIP)	
AGENCY WORKING AREA	
CIP ADOPTION 31 ADOPTIONS IN PROGRESS (CIP)	CIP AMENDMENT IS CLOSED 0 AMENDMENTS IN PROGRESS (CIP)
AGENCY SUBMITTED PROJECTS	
0 PENDING CIP ADOPTIONS	0 PENDING CIP AMENDMENTS
OTHER	
Reports	
LOG INTO CTFP	
LOG INTO WATER	

REPORTS
CIP PROGRAMMED REVENUE BY FUNDING SOURCE
CIP PROJECT LISTING REPORT

CIP Review and Updates

- ✓ Review and update FY 19-20 projects in the “In Progress” menu
- ✓ Delete projects that do not have ongoing, current or new phases/funding.
- ✓ Include all capital transportation projects using or potentially using M2 Net Revenues
- ✓ Include projects submitted during 2020 call for projects
- ✓ Include new/additional phase costs, as applicable
- ✓ Reference OCTA project number, as applicable

CIP Submittal

- ❑ Run “CIP Project Listing Report” and download/save PDF
- ❑ Provide staff report and Minutes for City Council/Board of Supervisors adoption of 7-Year CIP
- ❑ Draft must be submitted by June 30, 2020. Final CIP must be adopted by July 31, 2020.

CIP Website: <https://ocfundtracker.octa.net/login.asp>

Maintenance of Effort (MOE) Overview

- Maintain a minimum level of local streets and roads expenditures using discretionary funds
- Meet/exceed MOE Benchmark in **Exhibit 2**
- The MOE Benchmark was recently updated and approved by the OCTA Board on April 13, 2020. It will be effective July 1, 2020*.

*The MOE requirement for FY 19-20 and FY 20-21 is currently under review due to the impacts of the COVID-19 pandemic. Proposed modifications to the requirement are going to the OCTA Board on May 11, 2020 for consideration.

MOE Submittal

- ❑ Submit **Appendix I: MOE Certification Form*** signed by Finance Director
- ❑ Provide supporting budget documentation for planned MOE expenditures and fund key

*The MOE Certification Form (Appendix I) is currently under review due to the impacts of the COVID-19 pandemic. A revised form is going to the OCTA Board on May 11, 2020 for consideration.

Pavement Management Plan (PMP) Overview

- Adopt and update a PMP that includes, but not limited to, the following elements:
 - Current status of road pavement conditions
 - A seven-year plan for road maintenance and rehabilitation, including projects, funding, and unfunded backlog of pavement needs
 - Projected pavement conditions resulting from improvements
 - Alternative strategies and estimated costs to improve road pavement conditions
- Confirm that MPAH inspections are not more than 2 years old and Local Streets are not more than 6 years old

PMP (cont.)

Agencies to adopt and submit PMP by **June 30, 2020**:

Aliso Viejo	Laguna Beach	Placentia
Buena Park	Laguna Hills	Rancho Santa Margarita
Costa Mesa	Laguna Niguel	Santa Ana
Fountain Valley	Laguna Woods	Seal Beach
Fullerton	La Palma	Villa Park
Garden Grove	Mission Viejo	Westminster
Huntington Beach	Orange	Yorba Linda

PMP Submittal

- Submit **one** hard copy of completed **Appendix F: PMP Submittal Template**
- Submit City Council/Board of Supervisors adopted **Appendix E: Resolution** or staff report with adoption recommendation
- PMP Certification signed by Public Works Director or City Engineer (Included in Submittal Template)
- Pavement Data Files

Mitigation Fee Program (MFP)

- Assess costs of improvements attributable to new development
- Only required this cycle if, since the last submittal, there has been a new program or update to the local agency's:
 - Nexus study; or
 - Process methodology

Submittal:

- Submit nexus study or process methodology, if applicable

Local Signal Synchronization Plan (LSSP)

- ❑ Plan must be consistent with the Regional Traffic Signal Synchronization Master Plan (RTSSMP)
- ❑ Identify traffic signal synchronization, street routes and traffic signals to be improved
- ❑ Submit draft 2020 LSSP Plan by May 1, 2020 to OCTA for review
- ❑ Submit final 2020 LSSP Plan and City Council/Board of Supervisors adopted **Appendix E: Resolution** by June 30, 2020

Traffic Forum Overview

- Each jurisdiction must attend at least one Traffic Forum on an annual basis.
- Next traffic forum will be held on September 30, 2020
- Traffic Forum Topics:
 - General traffic and transportation issues;
 - Traffic circulation between participating jurisdictions;
 - Coordination of specific projects; and
 - RTSSP







Traffic Forum Submittal

- ❑ Enter date(s) of attendance on **Appendix D: Eligibility Checklist**

Traffic Forum Attendance Record Verification can be found on the OCTA Eligibility Website under **References:**

<http://www.octa.net/OCGoEligibility>

References

-  FY 2020-21 M2 Eligibility Submittal Checklist
-  Maintenance of Effort Benchmark by Local Jurisdiction
-  Local Fair Share Estimates (Last Updated April 2020)
-  Senior Mobility Program Estimates (Last Updated April 2020)
-  **FY 20-21 Traffic Forum Verification**
-  Payments to Local Agencies

Transit/Non-Motorized Transportation

- Consider land use planning strategies/policies that accommodate transit and non-motorized transportation

Policy Examples:

- ✓ Transit Oriented Developments
- ✓ Transportation Demand Management programs
- ✓ Mixed use developments
- ✓ Enhanced pedestrian networks
- ✓ Low-stress bicycle facilities
- ✓ Provision of bicycle amenities
- ✓ Developer mitigation requirements to construct bicycle/pedestrian amenities

Transit/Non-Motorized Transportation Submittal

- ❑ Letter outlining land use planning strategies that accommodate transit and active transportation. Letter addressed to:
 - Mr. Joe Alcock
 - Section Manager, Measure M Local Programs
 - Orange County Transportation Authority
 - 600 S. Main Street
 - P.O. Box 14184
 - Orange, CA 92863-1584
- ❑ Submit only referenced excerpts of policies from Land Use section of General Plan

Upcoming Dates and Deadlines – Phase 1

June 30, 2020

- Deadline to submit FY 20-21 Eligibility Package

July 31, 2020

- Deadline to adopt final CIP for City Council or Board of Supervisors

December 14, 2020

- OCTA Board determines Phase I FY 2020-21 eligibility

Eligibility Package Submittal:

- 1 electronic copy (flash drive or Dropbox)
- 1 hardcopy copy

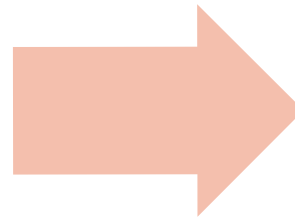
Submittal Address:

Ms. Kelsey Imler
Orange County Transportation Authority
600 S. Main Street
P.O. Box 14184
Orange, CA 92863-1584

Upcoming Dates and Deadlines – Phase 2

December 31, 2020

- Deadline to submit FY 2019-20 M2 Expenditure Report



June 2021

- OCTA Board determines Phase II FY 2020-21 eligibility

Eligibility Website

www.octa.net/OCGoEligibility

- ❖ Latest Forms
- ❖ Local Fair Share (LFS) and Senior Mobility Program (SMP) Projections
- ❖ Workshop Presentation
- ❖ Guidelines
- ❖ References
- ❖ Upcoming Dates and Deadlines

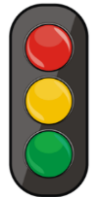
Contact Information

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Questions?

