

Renewed Measure M2 Eligibility Requirements Workshop



Orange County Transportation Authority
April 12, 2011

Eligibility Overview

- Agencies must meet eligibility requirements to be eligible for fair share and competitive Measure M funds
- FY2011/12 eligibility cycle will include CMP conformity verification for all jurisdictions

Eligibility Review Process

- CIP reviewed by OCTA
- TOC will review:
 - Congestion Management Program (CMP)
 - Mitigation Fee Program
 - Expenditure Report
 - Local Signal Synchronization Plan
 - Pavement Management Plan

Annual Eligibility Requirements For Measure M

- Fair Share Funds
 - Satisfy Maintenance of Effort (MOE) Requirements
 - Adopt and fund a Pavement Management Plan (PMP)
 - Adopt a General Plan Circulation Element consistent with the Master Plan of Arterial Highways (MPAH)
 - Agree to expend all net tax revenues received through Measure M within three years of receipt

Eligibility Requirements Cont.

- Competitive Funds
 - PMP consistent with OCTA Countywide Pavement Management Program Guidelines
 - General Plan Circulation Element consistent with the MPAH
 - City Council resolution that no unilateral reduction in lanes have been made on any MPAH arterials
- Packages are due June 30, 2011

Additional Eligibility Requirements For Renewed Measure M

- Have a clearly defined transportation mitigation fee program – submit any updates
- Adopt and maintain a Circulation Element consistent with MPAH
- Annual participation in traffic forums
- Adopt and maintain a Local Signal Synchronization Plan

Congestion Management Program

- Complete checklist (Eligibility Manual – Appendix C)
- Improvements needed to address deficient intersection must be identified in the CIP

Mitigation Fee Program

- Agencies must submit a copy of nexus study improvement list, current fee schedule, and adopted ordinance when updates occur
- If mitigation measures are used in lieu of a fee program, a Council-approved policy outlining steps for determining and assessing mitigation measures must be submitted

Pavement Management Plan

- Plan must be consistent with the countywide program
- Certification of the following criteria is required every two years (see schedule in Eligibility Manual):
 - Inventory of existing pavements and assessment of condition
 - Determine budget needs for replacement of deficient sections of pavement, regardless of funding availability
 - Discussion of budget and backlog issues in executive summary form

Local Signal Synchronization Plan

- Agencies must ensure local plan is in conformance with the Regional Traffic Signal Synchronization Master Plan (TSSMP)
- If local plan is any plan other than the TSSMP, a copy of the plan must be submitted every 3 years, beginning in the 2010/11 cycle – *all jurisdictions appear to be in compliance at this time*
- Participate in annual Traffic Forum

Checklist Items

- Timely use of Measure M
- No supplanting of developer responsibilities
- Project Final Report

Expenditure Report

- Filed within 6 months of end of Fiscal Year (December 31, 2011 for FY2010/11 expenditures)
- Include Measure M fair share and turnback project summary
- Use reporting form included in eligibility guidelines (Appendix G)

Maintenance of Effort

- Agencies must maintain expenditure of local funds for transportation purposes (see GMP Manual for established benchmarks) and not replace them with Measure M funds
- Submit the Maintenance of Effort Reporting Form with supporting budget documents showing General Fund expenditures
- Benchmark is unchanged from Measure M through 2014

Capital Improvement Program

- Seven-year Capital Improvement Program
 - FY11-12 through FY17-18 *M1 or M2*
- Must include all Measure M-funded projects
- Include “Unfunded” projects that may use M1 or M2
- Microsoft Access XP software and support materials available for download at www.octa.net/cip2011.html

Capital Improvement Program

- The Smart CIP is made up of 3 files:
 - cipapp.mdb
 - cipdat.mdb
 - cipdat1.mdb
- Save the files to c:/cip2011
- Click on the cipapp.mdb file
- Select your agency to load project data from prior year submittal
- Update your jurisdiction's information

Microsoft Access ribbon with tabs: Home, Create, External Data, Database Tools, Add-Ins. The Home tab is active, showing groups for Views, Clipboard, Font, Rich Text, Records, Sort & Filter, Window, and Find.



Orange County Transportation Authority Smart CIP 2011/2012



Input Data



Reports

Select Agency to Load

- 195 County of Orange
- 5055 Anaheim
- 5063 Santa Ana
- 5073 Orange
- 5133 Fullerton
- 5151 Newport Beach
- 5181 Huntington Beach
- 5229 Seal Beach
- 5237 Brea
- 5266 La Habra
- 5269 Placentia
- 5270 Laguna Beach
- 5271 Tustin
- 5274 San Clemente
- 5310 Buena Park
- 5312 Costa Mesa



Quit Application



Smart CIP

Add New Project
 Update Project
 Delete Project
 Print Project
 Exit Form

Find Project

ID#
 SCAG#
 Type Of Work
 Project Name

Agency
 OCTA Project #
 Project Limits/Location

Type Of Work Desc

Brief Project Description (250 Characters)

Microsoft Access

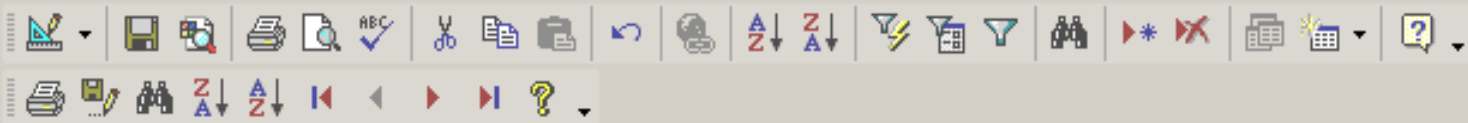
Please enter comments for 'Unfunded' and 'Other'

Fund Source

	Fund Type	Pcnt	Current	Escalated	Explain Other/Unfunded
	BPF	75%	0	0	
	Unfunded	0%	0	0	
		0%	0	0	

Project Cost

	Phs	Escl	02/03	03/04	04/05	05/06	06/07	07/08	08/09	Curr. Cost	Esc. Cost
	Yes		0	0	0	0	0	0	0	0	0



Smart CIP

Add New Project
 Update Project
 Delete Project
 Print Project
 Exit Form

Find Project

ID# 460	SCAG# 6071	Type Of Work Bus Stops	Project Name Bus Stop Improvements
Agency OCTA	OCTA Project # 94-OCTA-BPF-1007	Project Limits/Location Countywide	
Type Of Work Desc installation of lighting for bus benches or shelters			
Brief Project Description (250 Characters) Install overhead lights at seventeen bus shelters across the county			

Fund Source

	Fund Type	Pcnt	Current	Escalated	Explain Other/Unfunded
	BPF	75%	0	0	
▶	Unfunded	25%	0	0	Working on securing additional funding
*		0%	0	0	

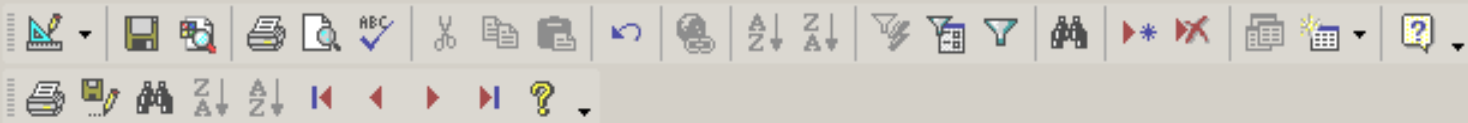
Project Cost

	Phs	Escl	02/03	03/04	04/05	05/06	06/07	07/08	08/09	Curr. Cost	Esc. Cost
✎	C	Yes	0	0	0	0	0	0	0	0	0
*	E	Engineering		0	0	0	0	0	0	0	0
	R	Right Of Way									

Record: C Construction of 26

Select Project Phase from pull-down menu

NUM



Smart CIP

Add New Project
 Update Project
 Delete Project
 Print Project
 Exit Form

Find Project

ID#
 SCAG#
 Type Of Work
 Project Name

Agency
 OCTA Project #
 Project Limits/Location

Type Of Work Desc

Brief Project Description (250 Characters)

Fund Source

	Fund Type	Pcnt	Current	Escalated	Explain Other/Unfunded
	BPF	75%	11,250	11,765	
▶	Unfunded	25%	3,750	3,922	Working on securing additional funding
*		0%	0	0	

Project Cost

	Phs	Escl	02/03	03/04	04/05	05/06	06/07	07/08	08/09	Curr. Cost	Esc. Cost
▶	C	Yes	0	10,000	5,000	0	0	0	0	15,000	15,686
*		Yes	0	0	0	0	0	0	0	0	0

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Orange County Transportation Authority Smart CIP 2011/2012



Input Data




Reports





Quit Application


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Smart CIP Reports


 Project Summary Sorted By Name

 Projected Summary Sorted by Improvement Type

 Agency by Fund Source

 Summary by Improvement Type

 CMP Report

 PMP Report

Print Size Portrait Landscape Margins Columns Page Setup Zoom One Page Two Pages More Pages Refresh All Excel SharePoint List PDF or XPS More Word Text File Close Print Preview Close Preview

14-Mar-11

Measure M and Renewed Measure M (M2)

1

Seven Year Capital Improvement Program (Sorted by Name)
Fiscal Years 2011/2012 through 2017/2018

Agency : Aliso Viejo
Project Number : na
Project Name : #054 Pacific Park Rehabilitation- Mareblu to La Paz
Project Limits Loc : Pacific Park Drive from Mareblu to La Paz (1,850 ft)
Type Of Work : Road Maintenance
Additional TO W : rehabilitation of roadway
Project Description : Rehabilitation of roadway including full depth replacement of failed areas, pavement grinding, and asphalt overlay.

Fund Name	Percent	Estimated Cost	Projected Cost	ExplainOther
M2 Fairshare	100.00%	485,000	498,350	
	100.00%	\$485,000	\$498,350	

Project Cost:

Project Phase	FY 1 Cost	FY 2 Cost	FY 3 Cost	FY 4 Cost	FY 5 Cost	FY 6 Cost	FY 7 Cost	Estimated Cost	Projected Cost
	11/12	12/13	13/14	14/15	15/16	16/17	17/18		
C	445,000	0	0	0	0	0	0	445,000	458,350
E	40,000	0	0	0	0	0	0	40,000	40,000
	\$485,000	\$0	\$0	\$0	\$0	\$0	\$0	\$485,000	\$498,350

Agency : Aliso Viejo
Project Number : na
Project Name : Aliso Creek Road Rehab - Aliso Viejo to City Limits
Project Limits Loc : Aliso Creek Road from Aliso Viejo Parkway south to City Limits (4,500 ft)
Type Of Work : Road Maintenance
Additional TO W : rehabilitation of roadway
Project Description : Rehabilitation of roadway including full depth replacement of failed areas, pavement grinding, and asphalt overlay.

Fund Name	Percent	Estimated Cost	Projected Cost	ExplainOther
M2 Fairshare	100.00%	1,010,000	1,159,600	
	100.00%	\$1,010,000	\$1,159,600	

Project Cost:

Project Phase	FY 1 Cost	FY 2 Cost	FY 3 Cost	FY 4 Cost	FY 5 Cost	FY 6 Cost	FY 7 Cost	Estimated Cost	Projected Cost
	11/12	12/13	13/14	14/15	15/16	16/17	17/18		
C	0	0	0	0	935,000	0	0	935,000	1,084,600
E	0	0	0	0	75,000	0	0	75,000	75,000
	\$0	\$0	\$0	\$0	\$1,010,000	\$0	\$0	\$1,010,000	\$1,159,600

CIP Submittal

- Change the file extension to cipdat.md
- Email the cipdat.md file to Louis Zhao at lzhao@octa.net
- Print a copy of the PMP and CMP Reports
- Submit printed copy with your package by June 30, 2011
- Obtain Council/Board approval
- Submit the final CIP to OCTA by 8/12/11

Lessons Learned

- Save CIP software properly
- Include “Unfunded” projects
- Add Signal and Competitive projects to CIP
- Include Fund key with MOE budget
- Sign all forms
- Include Executive Summary of PMP

Important Dates to Remember

- Now – Download software and prepare documentation
- June – Formalize submittal package, limited support available
- June 30, 2011 – Deadline to submit Eligibility Package
- August 12, 2011 – Last date to submit adopted CIP
- December 31, 2011 – Deadline for Expenditure Report