

# 2022 Eligibility Workshop



March 24, 2022

# Overview

- Acronyms
- Requirements due by June 30, 2022
- Upcoming Dates and Deadlines
- Eligibility Website → [www.octa.net/OCGoEligibility](http://www.octa.net/OCGoEligibility)
- Contact Information
- Questions

# Acronyms

- **CIP:** Capital Improvement Program
- **LFS:** Local Fair Share
- **MOE:** Maintenance of Effort
- **MPAH:** Master Plan of Arterial Highways
- **PMP:** Pavement Management Plan

# Requirements due by June 30, 2022

- Eligibility Checklist
- Capital Improvement Program (CIP)\*
- Maintenance of Effort (MOE)
- Pavement Management Plan (PMP)\* – *Even Year Agencies Only*
- Traffic Forum
- Transit/Non-Motorized Transportation

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\*Council/Board Adoption Required

# Eligibility Checklist

- Certify compliance with all eligibility requirements

## Submittal:

- Submit **Appendix D: Eligibility Checklist\***

*\*Changes were made to the Eligibility Checklist. Please use the latest template.*

# 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 (CTFP and/or Local Fair Share)
  - Projects required to demonstrate compliance with requirements related to:
    - Signal Synchronization
    - Pavement Management
    - Congestion Management Program

# OC Fundtracker CIP Database

- 3<sup>rd</sup> year using the OC Fundtracker (OCF) CIP database to prepare and submit CIPs
- Please contact Cynthia Morales ([cmorales@octa.net](mailto:cmorales@octa.net)) if you require access to the CIP database or experience any issues
- A CIP User Manual is available on the Eligibility [webpage](#) under the “Guidelines” dropdown menu

PLEASE SELECT DATABASE

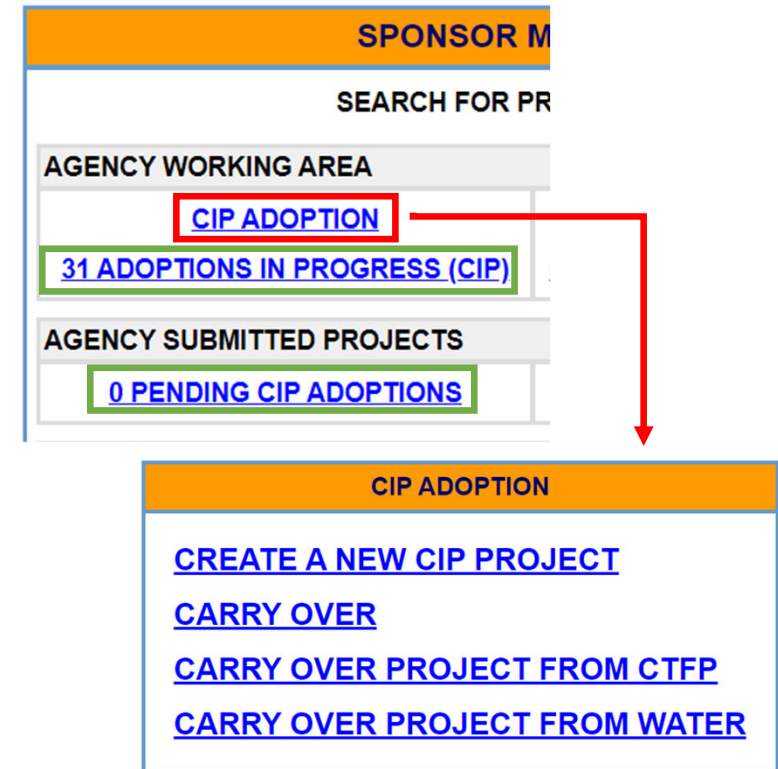
CTFP

WATER

CIP

# Overview of OCF CIP Database – Main Menu

- Click on “CIP Adoption” to create a new project or carry over a project from:
  - Previous CIP
  - CTFP or WATER database
- Adoptions In Progress
- Pending CIP Adoptions
- Denied CIP Adoptions





# Overview of OCF CIP Database – Project Page

**ADDING A NEW CIP PROJECT**

**ADMINISTRATIVE EDIT**

CIP DOC  
21-00 - CIP ▼

**PROJECT INFORMATION**

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

\* 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
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 current year 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 OCF 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”
- **This direct report must be adopted by the agency’s Council/Board and included in eligibility submittal package**

SPONSOR MAIN MENU	
SEARCH FOR PROJECTS ( <a href="#">CIP</a> )	
AGENCY WORKING AREA	
<a href="#">CIP ADOPTION</a> 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	
<a href="#">Reports</a>	
<a href="#">LOG INTO CTFP</a>	
<a href="#">LOG INTO WATER</a>	

REPORTS
<a href="#">CIP PROGRAMMED REVENUE BY FUNDING SOURCE</a>
<a href="#">CIP PROJECT LISTING REPORT</a>

# CIP Review and Updates

- ✓ Populate the agency's FY 22-23 CIP by adding new projects or carrying over existing projects including projects that have been accrued from prior year budget(s)
- ✓ 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 2022 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. Include this report in the Council/Board adoption item.
- Provide staff report and minutes for City Council/Board of Supervisors adoption of 7-Year CIP.
- Draft must be submitted by **June 30, 2022**. Final CIP must be adopted by **July 31, 2022**.

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**
- MOE Benchmark is adjusted every 3 years, most recently in 2020
- Alternative Methodology due to COVID-19 is no longer in effect
- MOE benchmark requirement for FY 2022-23 and thereafter:
  - Local jurisdictions must certify that the budgeted MOE expenditures meet the FY 2022-23 traditional MOE benchmark dollar amount (shown in column A of Exhibit 2)

# MOE Submittal

- Submit **Appendix I: MOE Certification Form** signed by Finance Director (or equivalent) \*
- Provide supporting budget documentation for planned MOE expenditures and fund key reference information

*\*Changes were made to the MOE Certification Form. Please use the latest template.*

# 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, 2022:**

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



# PMP Submittal

- Submit **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

# Traffic Forum Overview

- Each jurisdiction must attend at least one Traffic Forum on an annual basis.
- Next traffic forum will be held on sometime in September 2022
- 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 Eligibility Website under “References”
- It will be updated after the September 2022 Traffic Forum

## References

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-  [FY 2021-22 M2 Eligibility Submittal Checklist](#)
-  [Maintenance of Effort Benchmark by Local Jurisdiction](#)
-  [Local Fair Share Estimates](#) (Last Updated October 2021)
-  [Senior Mobility Program Estimates](#) (Last Updated October 2020)
-  [Sales Tax Receipt Distribution Schedule](#) (Last Updated April 2021)
-  [FY 22-23 Traffic Forum Verification](#)
-  [Pavement Management Plan Prequalified Inspectors](#)
- [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:

Ms. Charvalen Alacar

Section Manager, Measure M Local Programs

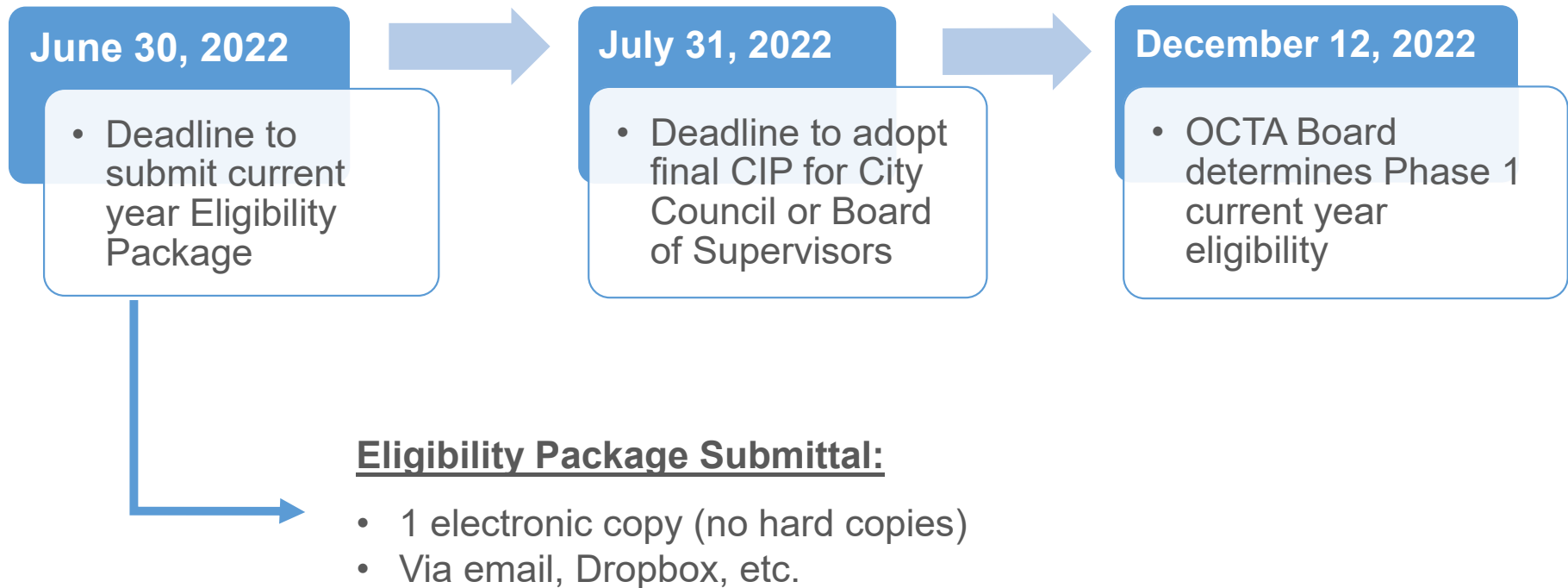
Orange County Transportation Authority

600 S. Main Street

Orange, CA 92868

- Submit only referenced excerpts of policies from Land Use section of General Plan

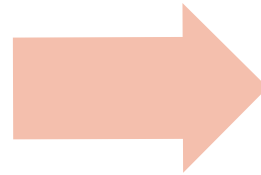
# Upcoming Dates and Deadlines – Phase 1



# Upcoming Dates and Deadlines – Phase 2

**December 31, 2022**

- Deadline to submit current year M2 Expenditure Report



**June 2023**

- OCTA Board determines Phase 2 current year eligibility

# Eligibility Website

[www.octa.net/OCGoEligibility](http://www.octa.net/OCGoEligibility)

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



# Contact Information

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**Harry Thomas**  
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# Questions?

