2024 Eligibility Workshop

March 14, 2024

Overview

- Acronyms

- Requirements due by Friday June 28, 2024

- Upcoming Dates and Deadlines

- Eligibility Website → www.octa.net/OCGoEligibility

- Contact Information

- Questions

Acronyms

- **CIP:** Capital Improvement Program

- **CMP**: Congestion Management Plan

- **LFS:** Local Fair Share

- **LSSP**: Local Signal Synchronization Plan

- **MFP**: Mitigation Fee Program

- **MOE:** Maintenance of Effort

- **MPAH:** Master Plan of Arterial Highways

- **PMP:** Pavement Management Plan

Requirements due by Friday, June 28th

❑ Eligibility Checklist

❑ Capital Improvement Program (CIP)*

❑ Maintenance of Effort (MOE)

❑ Pavement Management Plan (PMP)* – *Even-Numbered Year Agencies Only*

❑ Traffic Forum Attendance

❑ 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

Capital Improvement Program (CIP) Overview

7-Year funding plan that includes:

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

CIP Review and Updates

- ✓ Populate the agency's FY 24-25 CIP by <u>adding new projects</u> or <u>carrying over existing projects</u> including projects that have been accrued from prior year budget(s)

- ✓ Delete projects that do not have ongoing, current or new phases/funding

- ✓ Include <u>all</u> capital transportation projects using <u>or</u> potentially using M2 Net Revenues

- ✓ Include projects submitted during 2024 call for projects

- ✓ Include new/additional phase costs, as applicable

- ✓ Reference OCTA project number, as applicable

OC Fundtracker CIP Database

- Please contact Stephanie Mooney (smooney@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
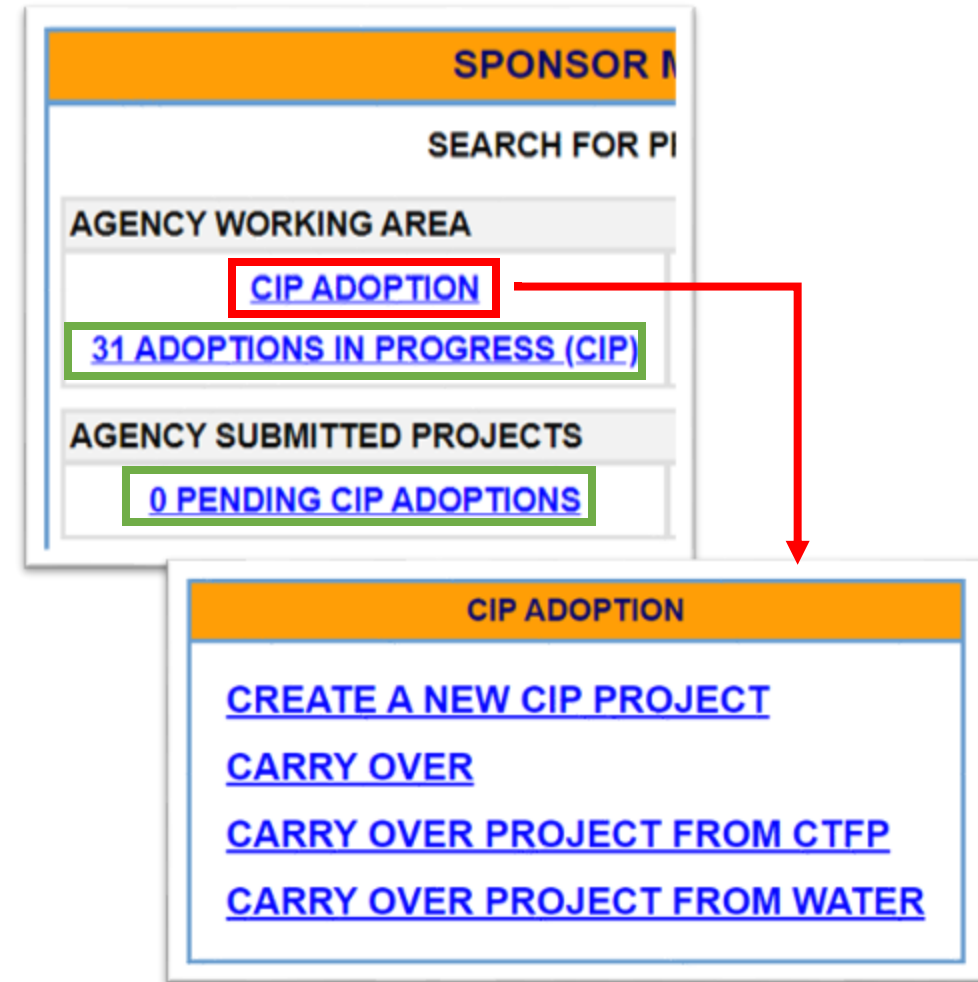
○ CTFP

○ WATER

○ CIP

- 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

- 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"

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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 <u>direct report</u> must be adopted by the agency's Council/Board and included in eligibility submittal package

SPONSOR MAIN MENU

SEARCH FOR PROJECTS (CIP)

AGENCY WORKING AREA	
CIP ADOPTION	CIP AMENDMENT IS CLOSED
31 ADOPTIONS IN PROGRESS (CIP)	**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 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 28, 2024.

  ▪ Final CIP must be adopted by July 31, 2024.

CIP Website: https://ocfundtracker.octa.net

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 adjusted in 2023 effective July 1, 2023

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 <u>2 years old</u> and Local Streets are not more than <u>6 years old</u>

PMP (cont.)

Agencies to adopt and submit PMP by **June 28, 2024:**

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 Management Data Files

❑ GIS Digital Data

Traffic Forum Overview

- Each jurisdiction must attend at least one Traffic Forum on an annual basis.

- Next traffic forum will be held on October 1, 2024

- 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 October 2024 Traffic Forum

References

- M2 Eligibility FAQ (Last Updated April 2023)
- M2 Eligibility Contacts
- FY 2023-24 M2 Eligibility Submittal Checklist
- Maintenance of Effort Benchmark by Local Jurisdiction
- Local Fair Share Estimates (Last Updated January 2024)
- Senior Mobility Program Estimates (Last Updated January 2024)
- Sales Tax Receipt Distribution Schedule (Last Updated April 2023)
- FY 24-25 Traffic Forum Verification
- Pavement Management Plan Prequalified Inspectors

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**

June 28, 2024
- Deadline to submit current year Eligibility Package

July 31, 2024
- Deadline to adopt final CIP for City Council or Board of Supervisors

February 2025
- OCTA Board determines Phase 1 current year eligibility

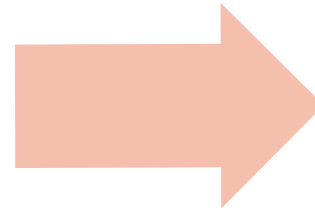**Eligibility Package Submittal:**

- Electronic copy (no hardcopies)
- Separate PDFs for each requirement
- Via email, Dropbox, etc. (no ZIP files)

Upcoming Dates and Deadlines – **Phase 2**

December 31, 2024

- Deadline to submit current year M2 Expenditure Report

July/August 2025

- OCTA Board determines Phase 2 current year eligibility

Eligibility Website

www.octa.net/OCGoEligibility

- Latest Forms/Templates

- Local Fair Share (LFS) and Senior Mobility Program (SMP) Projections

- Workshop Presentation

- Guidelines

- Reference Materials & Resources (M2 Report)

- Upcoming Dates and Deadlines

Contact Information

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LSSP Contact
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TBD
OCTA PMP Contact
Contact Stephanie and Paul in the interim

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Ivy Hang
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Questions?