

Renewed Measure M2 Eligibility Requirements Workshop



Orange County Transportation Authority
April 2012

Eligibility Overview

- Agencies must meet eligibility requirements to be eligible for fair share and competitive M2 funds
- Download eligibility reference materials and CIP software at www.octa.net/cip2012.htm

Eligibility Requirements For Measure M2

- Satisfy Maintenance of Effort (MOE) Requirements
- Adopt and update biennially a Pavement Management Plan (PMP)
- Agree to expend all Local Fair Share revenues received through Measure M2 within three years of receipt
- Adopt and provide an annual Expenditure Report to the OCTA
- Adopt and Update a Capital Improvement Program (CIP)
- Participate in Traffic Forums

Eligibility Requirements For Measure M2 Continued

- Establish a policy requiring new development to pay its fair share of transportation-related improvements associated with their new development
- Provide the OCTA with a project Final Report within six months following completion of a project funded with Net Revenues
- Agree that Net Revenues shall not be used to supplant developer funding
- Consider, as a part of eligible jurisdiction's General Plan, land use and planning strategies that accommodate transit and non-motorized transportation

Eligibility Requirements For Measure M2 Continued

- Comply with the conditions and requirements of the Orange County Congestion Management Program (CMP)
 - Adopt and maintain a Local Signal Synchronization Plan
 - Adopt a General Plan Circulation Element consistent with the Master Plan of Arterial Highways (MPAH)
-
- Submittals are due June 29, 2012

Eligibility Review Process

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

Eligibility Items

Due June 29, 2012

- Maintenance of Effort Certification
- Pavement Management Plan Certification for Even Year Agencies
- Capital Improvement Program (Electronic/Hard Copy)
- Eligibility Checklist (Appendix D)
 - No Supplanting Existing Commitments (Checklist)
 - Timely Expenditure of M2 Funds (Checklist)
 - Transit/ Non-motorized Transportation in General Plan (letter outlining approach)

Maintenance of Effort (MOE) Certification

- Agencies must maintain expenditure of local funds for transportation purposes and not replace them with Measure M funds
- Submitted annually with June 29th submittals
- Use certification form included in eligibility guidelines (Appendix I)
- Submit the Maintenance of Effort Reporting Form with supporting budget documents showing General Fund expenditures
- Must meet or exceed MOE local discretionary funds
- Benchmark is unchanged from Measure M through 2014

Pavement Management Plan (Even Year Agencies)

- Plan must be consistent with the countywide program
- Certification of the following criteria is required every two years (see schedule in Eligibility Manual Table 2-2):
 - 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

Eligibility Checklist Items

- No Supplanting Existing Commitments
- Timely Expenditure of M2 Funds
- Transit/ Non-motorized Transportation in General Plan

Expenditure Report

- Filed within 6 months of end of Fiscal Year (December 31, 2012 for FY2011/12 expenditures)
- Include M2 fair share including interest, project list and M2 CTFP including interest
- Use reporting form included in eligibility guidelines (Appendix G)

Capital Improvement Program

- Seven-year Capital Improvement Program
 - FY12-13 through FY18-19
- Must include all Measure M-funded projects
- Include “Unfunded” projects that may use M1 or M2
- Microsoft Access software and support materials available for download at www.octa.net/cip2012.htm

Capital Improvement Program

- The Smart CIP is made up of 3 files:
 - cipapp
 - cipdat
 - cipdat1
- Save the files to c:/cip2012 for Access 2007 or newer versions
- Save the files to c:/cip2012_ver2002 for Access 2002 or 2003 users
- Click on the “cipapp” file
- Select your agency to load project data from prior year submittal
- Update your jurisdiction's information



Orange County Transportation Authority

Smart CIP 2012/2013



Input Data



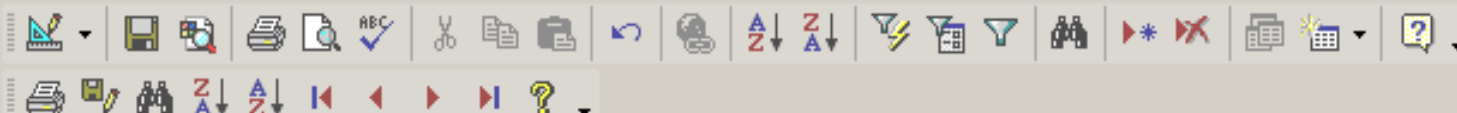
Reports

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
ProjectUpdate
ProjectDelete
ProjectPrint
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 th

Microsoft Access

Please enter comments for 'Unfunded' and 'Other'

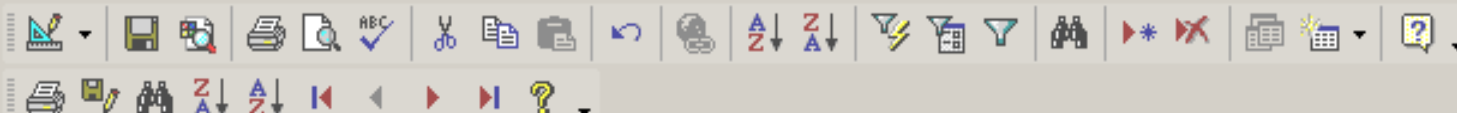
OK

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

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Type Of Work

Bus Stops

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OCTA Project #

94-OCTA-BPF-1007

Project Limits/Location

Countywide

Type Of Work Desc

installation of lightes 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
ProjectUpdate
ProjectDelete
ProjectPrint
Project

Exit Form

Find Project

ID#

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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%	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



Orange County Transportation Authority

Smart CIP 2012/2013



Input Data

Select Agency to Load

6071



Reports



Quit Application

Smart CIP Reports

Project Summary Sorted By Name

Projected Summary Sorted by Improvement Type

Agency by Fund Source

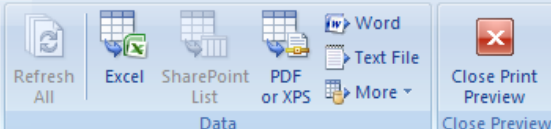
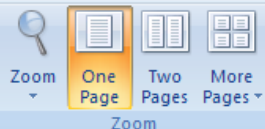
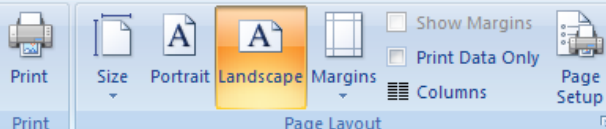
Summary by Improvement Type

CMP Report

PMP Report

Print Preview

Add-Ins



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: n/a
Project Name: #054 Pacific Park Rehabilitation- Marebu to La Paz
Project Limits Loc: Pacific Park Drive from Marebu 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: n/a
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 if using Access 2002 or 2003
- Email the cipdat file to May Hout at mhout@octa.net
- Print a copy of the PMP Reports, Eligibility Checklist (Appendix D) and MOE (Appendix I) and submit with your package by June 29, 2012
- Submit printed and electronic copy of CIP by June 29, 2012
- Obtain Council/Board approval
- Submit final CIP to OCTA by 8/13/12 if original submission was a draft

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

Future Eligibility Items

- Congestion Management Program (Due 2013)
- MPAH Consistency/Circulation Element (Due 2013)
- Mitigation Fee Program (Due 2013)
- Local Signal Synchronization Plan (Due 2014)

Important Dates to Remember

- June – Formalize submittal package, limited support available
- June 29, 2012 – Deadline to submit Eligibility Package based upon checklist (Renewed Measure M Eligibility Guidelines Appendix D)
- August 13, 2012 – Last date to submit adopted CIP
- December 31, 2012 – Deadline for Expenditure Report

Schedule Changes for 2012

- Mitigation Fee Program - are now submitted biennially instead of annually (2013)
- MPAH Consistency/Circulation Element – are also now submitted biennially instead of annually (2013)

Contact Information

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