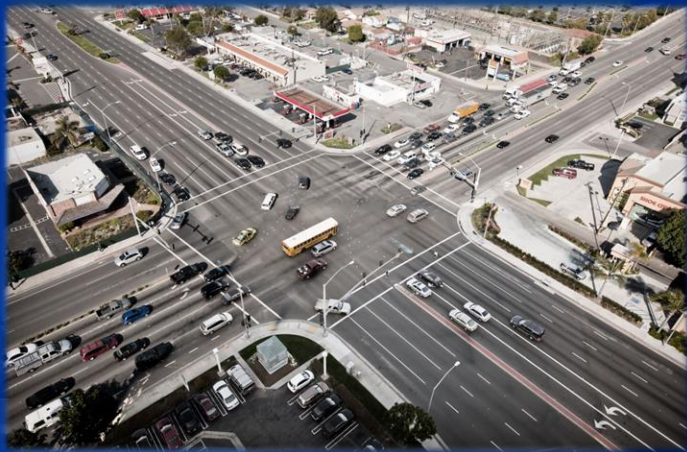


FY 2021-2022 Eligibility Workshop



April 15, 2021

Overview

- Acronyms
- Requirements due by June 30, 2021
- 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, 2021

- Eligibility Checklist
- Capital Improvement Program (CIP)*
- Maintenance of Effort (MOE)
- Pavement Management Plan (PMP)* – *Odd Year Agencies Only*
- Congestion Management Program (CMP)
- Circulation Element/Master Plan of Arterial Highways (MPAH) Consistency*
- Mitigation Fee Program (MFP)*
- Traffic Forum
- Transit/Non-Motorized Transportation

*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

- 2nd year using the new OC Fundtracker (OCF) CIP database to prepare and submit CIPs
- Please contact Kelsey Imler (kimler@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

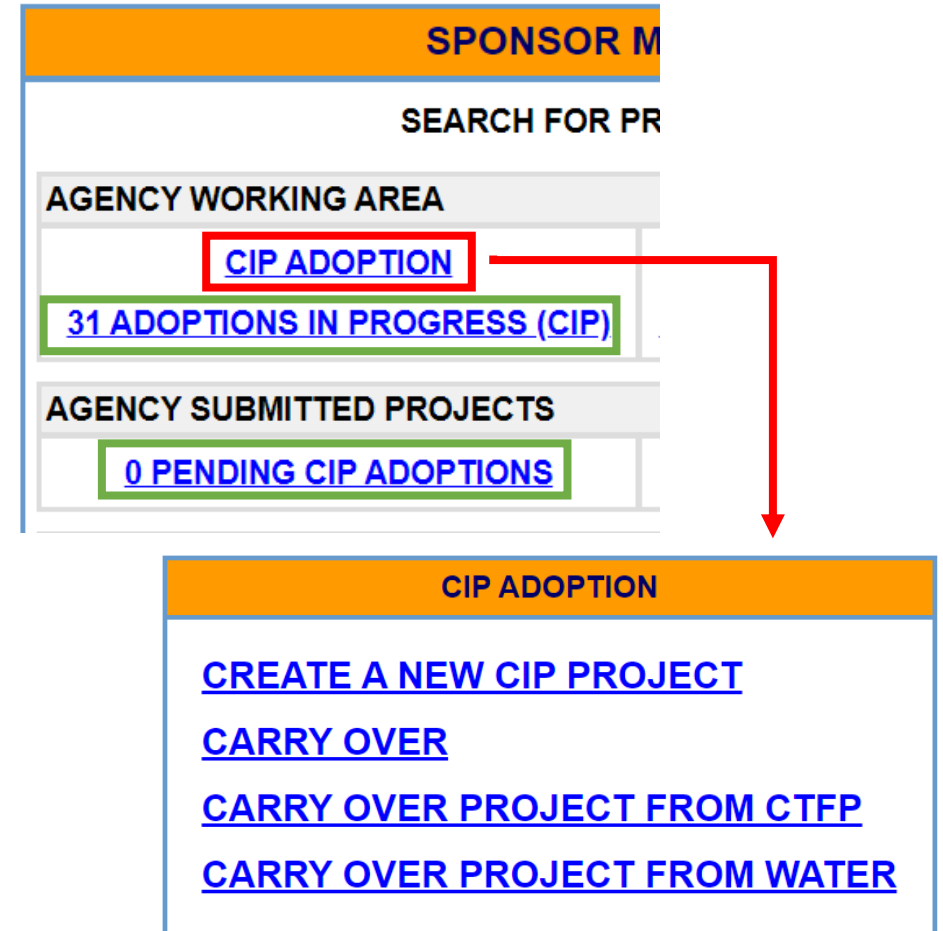
CTFP

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 FY 21-22 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 report 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 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

- ✓ Populate the agency's FY 21-22 CIP by adding new projects or carrying over existing projects
- ✓ 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 2021 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, 2021. Final CIP must be adopted by July 31, 2021.

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
- Modification due to COVID-19 → Certify that budgeted MOE expenditures meet the MOE benchmark requirement through one of the options below:
 1. The traditional MOE benchmark dollar amount (shown in column A of Exhibit 2); or
 2. An MOE target that is based on the percent of the MOE benchmark value to GFRs (see column C of Exhibit 2).
- Monitor GFRs throughout the year and adjust use of GFRs for MOE to either meet the MOE benchmark dollar amount or the proportionate (percent) share of GFRs

MOE Submittal

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

**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, 2021**:

Anaheim	La Habra
Brea	Los Alamitos
County of Orange	Newport Beach
Cypress	San Clemente
Dana Point	San Juan Capistrano
Irvine	Stanton
Lake Forest	Tustin

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

Congestion Management Program (CMP)

- Comply with requirements of the Orange County Congestion Management Program to be eligible for gas tax revenues and M2 funding

Submittal:

- Submit **Appendix C: CMP Checklist***
- Include projects in CIP to address deficient intersections, if applicable

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

Circulation Element/MPAH Consistency

- Certify that the Circulation Element is consistent with MPAH

Submittal:

- Submit **Appendix D: Eligibility Checklist**
- Submit the current Circulation Element Exhibit (Map)
- Submit City Council/Board of Supervisors adopted **Appendix E: Resolution***. Deadline to adopt: June 30, 2021
- Report changes or select “No Change” in MPAH centerline miles on **Appendix H: Arterial Highway Mileage Change Report***

**Changes were made to these documents. Please use the latest templates.*

Mitigation Fee Program (MFP)

- Assess costs of improvements attributable to new development

Submittal:

- Submit City Council/Board of Supervisors adopted **Appendix E: Resolution**
- Submit one or more of the supporting documents outlined in chapter 2.7 of the Eligibility Guidelines

Traffic Forum Overview







- Each jurisdiction must attend at least one Traffic Forum on an annual basis.
- Next traffic forum will be held on April 22, 2021
- 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 April 22, 2021 Traffic Forum

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
 - Orange, CA 92868
- ❑ Submit only referenced excerpts of policies from Land Use section of General Plan

Upcoming Dates and Deadlines – Phase 1



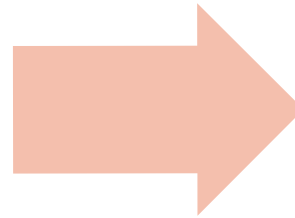
Eligibility Package Submittal:

- 1 electronic copy (no hard copies)
- Via email, Dropbox, etc.

Upcoming Dates and Deadlines – Phase 2

December 31, 2021

- Deadline to submit FY 2020-21 M2 Expenditure Report



June 2022

- OCTA Board determines Phase II FY 2021-22 eligibility

Eligibility Website

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

Kelsey Imler
Eligibility Lead
kimler@octa.net

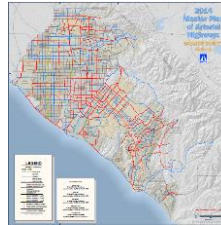
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Questions?

