

2023 Eligibility Workshop



April 20, 2023

Overview

- Acronyms
- Requirements due by June 30, 2023
- 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
- **MFP:** Mitigation Fee Program
- **MOE:** Maintenance of Effort
- **MPAH:** Master Plan of Arterial Highways
- **PMP:** Pavement Management Plan

Requirements due by June 30, 2023

- Eligibility Checklist
- Capital Improvement Program (CIP)*
- Circulation Element/MPAH Consistency*
- Congestion Management Program (CMP)
- Local Signal Synchronization Plan (LSSP)*
- Maintenance of Effort (MOE)
- Pavement Management Plan (PMP)* – *Odd Numbered Year Agencies Only*
- Traffic Forum
- Transit/Non-Motorized Transportation

*Council/Board Adoption Required

Eligibility Checklist

- Certify compliance with all eligibility requirements

Submittal:

- Submit **Appendix D: Eligibility Checklist**

The screenshot shows the top portion of the 'APPENDIX D Eligibility Checklist' form. It features the OCTA logo on the left and the title 'APPENDIX D Eligibility Checklist' on the right. Below the title is a 'Jurisdiction:' label followed by an empty text box. A table with three columns is present: 'Capital Improvement Program (CIP)', 'YES', and 'NO'. The first row of the table contains the question '1. Did you submit your draft or adopted M2 seven-year CIP to OCTA by June 30?' with empty checkboxes under 'YES' and 'NO'. The second row contains the question 'a. Did you utilize the required OCTA OC Fundtracker CIP database?' with empty checkboxes under 'YES' and 'NO'.

Capital Improvement Program (CIP)		YES	NO
1.	Did you submit your draft or adopted M2 seven-year CIP to OCTA by June 30?	<input type="checkbox"/>	<input type="checkbox"/>
a.	Did you utilize the required OCTA OC Fundtracker CIP database?	<input type="checkbox"/>	<input type="checkbox"/>

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

CIP Review and Updates

- ✓ Populate the agency's FY 23-24 CIP by adding new projects or carrying over existing projects including projects that have been accrued from prior year budget(s)
- ✓ Do not include 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 2023 call for projects
- ✓ Include new/additional phase costs, as applicable
- ✓ Reference OCTA project number, as applicable

OC Fundtracker CIP Database

- 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

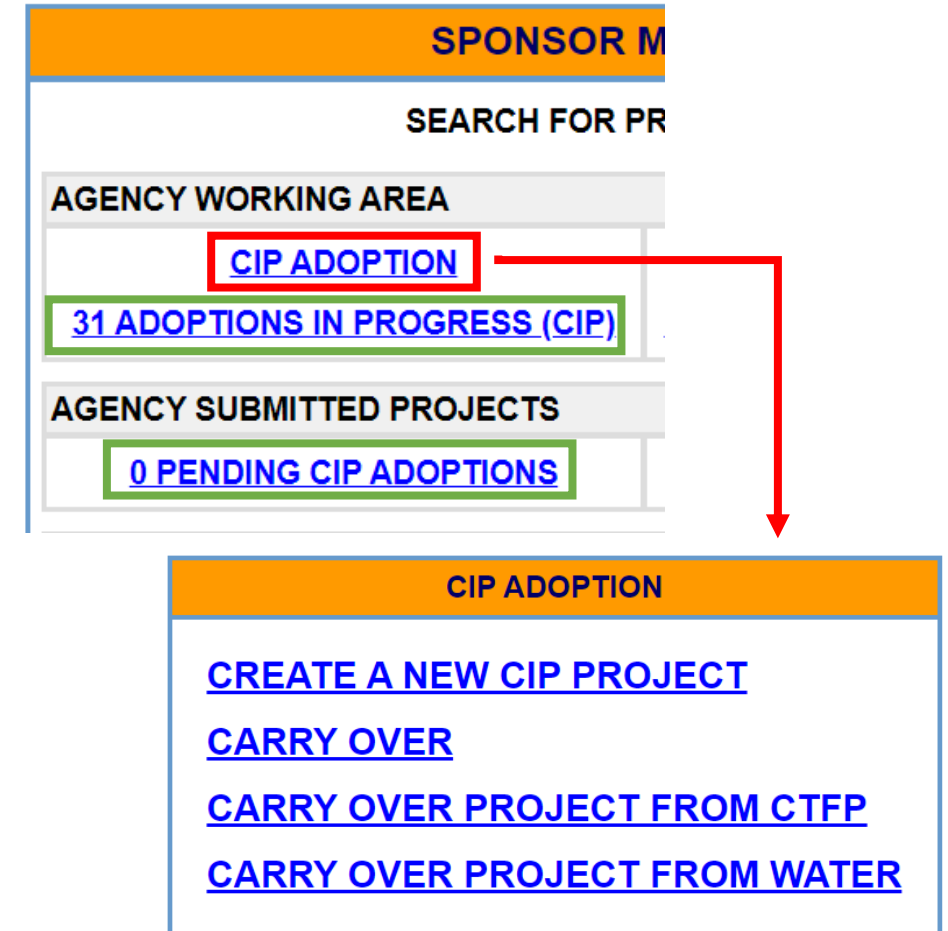
CTFP

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 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 (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 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, 2023**. Final CIP must be adopted by **July 31, 2023**.

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

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

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, 2023
- Report changes or select “No Change” in MPAH centerline miles on **Appendix H: Arterial Highway Mileage Change Report**

Local Signal Synchronization Plan (LSSP)

- Plan must be consistent with the Regional Traffic Signal Synchronization Master Plan (RTSSMP)
- Identify traffic signal synchronization, street routes and traffic signals to be improved
- Submit draft 2023 LSSP to OCTA for feedback to avoid potential issues or delay in acceptance
- Submit final 2023 LSSP and City Council/Board of Supervisors adopted **Appendix E: Resolution by June 30, 2023**

Mitigation Fee Program (MFP)

- Assess costs of improvements attributable to new development

Submittal:

- Submit nexus study, revise impact fee schedule, or process methodology
- Submit City Council/Board of Supervisors adopted **Appendix E: Resolution**

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 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 2 years old and Local Streets are not more than 6 years old

PMP (cont.)

Agencies to adopt and submit PMP by **June 30, 2023**:

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

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

Traffic Forum Overview

- Each jurisdiction must attend at least one Traffic Forum on an annual basis.
- Next traffic forum will be held in September 2023
- 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 2023 Traffic Forum

References

- [FY 2023-24 M2 Eligibility Submittal Checklist](#)
- [Maintenance of Effort Benchmark by Local Jurisdiction](#)
- [Local Fair Share Estimates \(Last Updated February 2023\)](#)
- [Senior Mobility Program Estimates \(Last Updated January 2023\)](#)
- [Sales Tax Receipt Distribution Schedule \(Last Updated April 2023\)](#)
- [FY 23-24 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



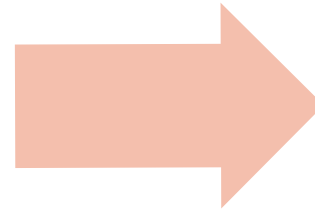
Eligibility Package Submittal:

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

Upcoming Dates and Deadlines – Phase 2

December 31, 2023

- Deadline to submit current year M2 Expenditure Report



June 2024

- 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
- References
- Upcoming Dates and Deadlines

Contact Information

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Questions?

