Southern California Association of Governments
Federal Fiscal Year 2026-2027 & Federal Fiscal Year 2027-2028 Surface Transportation Block Grant / Congestion Mitigation and Air Quality Improvement Program Overview

February 26, 2025

Overview

The Southern California Association of Governments (SCAG) FFY 2026-2027 & FFY 2027-2028 Surface Transportation Block Grant / Congestion Mitigation and Air Quality Improvement Program (STBG-CMAQ Call) Guidelines, establishes the framework for project selection and allocation of CMAQ and STBG funds within the SCAG region.

Orange County Transportation Authority (OCTA) as the county transportation commission is required to develop a Project Prioritization Framework outlining how project nominations submitted within the county will be prioritized for funding as part of the final SCAG selection

Milestone	Date
OCTA Regional Transportation Planning Committee	March 3, 2025
SCAG Guideline Adoption	March 6, 2025
OCTA Board Approval of Prioritization Guidance	March 10, 2025
SCAG Workshop #1	March 12, 2025
SCAG Workshop #2	March 18, 2025
SCAG/OCTA Workshop	March 19, 2025
Call Opening	March 31, 2025
Local Agency Applications due to OCTA	May 16, 2025
OCTA Review and Scoring	May 16 – June 20, 2025
OCTA Staff Recommendations published	July 3, 2025
OCTA Board of Directors Approval of Prioritization	July 14, 2025
OCTA Project Prioritization due to SCAG	August 1, 2025
SCAG Review and Scoring	August – October, 2025
SCAG Regional Council Award Recommendation Approval	November or December 2025

SCAG Detailed Scoring Rubric

County Transportation Commission Prioritization	Possible Points
Prioritized in the county transportation commission list as Highly Recommended	50 Points
Prioritized in the county transportation commission list as Recommended	40 Points
Prioritized in the county transportation commission Contingency List	20 Points
Not recommended	0 Points

Regional Priorities	Possible Points
Project identified as part of Tier 1 Regional Priorities Program Categories: • Clean Transportation • Resilience of At-Risk Infrastructure • Transit and Multimodal Integration • Transportation Demand Management • Transportation System Management and Goods Movement	20 Points
Projects identified as part of Tier 2 Regional Priorities Program that also demonstrate a systems approach to identifying and managing needs by means of: • A transportation related natural lands preservation plan, including for wildlife crossings • A pavement management plan or program • A complete streets plan, program, or policy	15 Points
Projects identified as part of Tier 2 Regional Priorities Program Categories: • Complete Streets • Natural Lands Preservation • System Preservation	10 Points
Projects identified as neither Tier 1 nor Tier 2 Regional Priorities Program Categories	0 Points

Federal Performance Management Areas	Possible Points
Project supports multiple federal performance management areas OR demonstrates significant improvement in one federal performance management area, as confirmed by general responses. Project-specific data is available in the current project development phase for multiple federal performance categories.	20 Points
Project implementation supports at least one federal performance management area as confirmed by general responses. Project-specific data is available in the current development phase.	15 Points
Project implementation supports at least one federal performance management area as confirmed by general responses, but project specific data is not available. (Includes projects in early stages of development that may not have quantitative data available yet.)	10 Points
Project implementation abstractly supports at least one federal performance management area but cannot be confirmed by general responses. There is no current or future planned project-specific data available.	5 Points
Project does not support any federal performance management areas.	0 Points

Community Economic Development Benefits	Possible Points
Proposed project includes four or more strategies that advance community economic development benefits.	10 Points
Proposed project includes one to three strategies that advance community economic development benefits.	5 Points
Proposed project does not include any strategies that advance community economic development benefits.	0 Points

Air Quality Improvements	Possible Points
Cost Effectiveness Relative to Similar Projects*	
• 75-100 percentile	8 Points
• 50-74 percentile	6 Points
• 25-49 percentile	4 Points
• 1-24 percentile	2 Points
• Does not address cost-effectiveness	0 Points
Particulate Matter 2.5 Reduction Relative to ALL Projects	
• Top 50% of PM2.5 Reducing Projects	2 Points
• Below top 50% of PM2.5 Reducing Projects	0 Points

*If limited or no similar projects are available for evaluation, an alternative evaluation will be conducted

SCAG Workshop will cover
- Initial Considerations for Federal Funding (High level information on federal-aid project development/ project management)
- Eligibility & Funding Availability
- Program Schedule
- Evaluation Criteria & Rubric
- Application Demo
- Office Hours Sign-Ups
- FAQ's and Participant Q&A
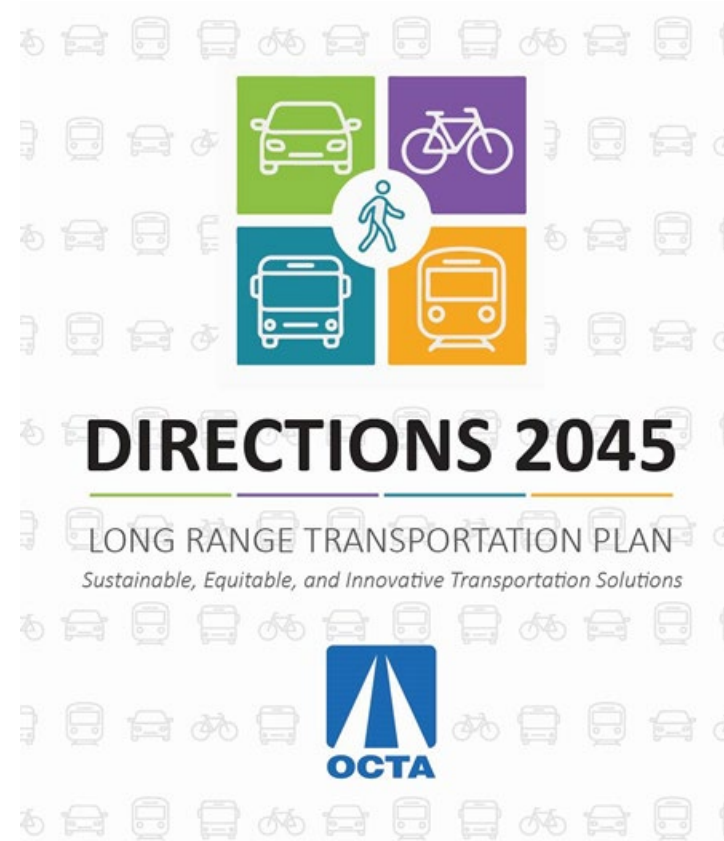
OCTA Project Prioritization Framework

- <u>Eligibility</u>

  - County transportation commissions will screen potential implementing agencies and projects for eligibility with federal and regional requirements. Projects must be eligible for STBG and/or CMAQ funds, as detailed in 23 USC Sec. 133, 149, et al.

- <u>County Priorities</u>

  - County transportation commissions are expected to develop a prioritization framework that considers applicable county-level plans, policies, and objectives.

- <u>Community/Stakeholder Engagement</u>

  - County transportation commissions should prioritize project nomination applications with demonstrated community support from priority populations.

- <u>Deliverability and Readiness</u>

  - County transportation commissions should evaluate potential implementing agencies and projects for deliverability issues. Commissions should consider if potential implementing agencies have sufficient capacity and technical expertise to meet deadlines. Commissions should encourage projects with demonstrated readiness within the programming period.

Prioritization Based on OCTA Goals/Policies

Basis for Criteria:

- ➤ CEO/Board initiatives
- ➤ Letters of Interest – Rehab, Complete Streets
- ➤ TAC Focus Groups – Rehab for Arterials
- ➤ Capital Programming Policies
- ➤ OCTA LRTP- Directions 2045

Funding Source/Agency	State and Federal Programming Policies
	Federal
Congestion Mitigation and Air Quality (CMAQ)/Caltrans for Federal Highways Administration (FHWA)	Use CMAQ funding for: • Fixed-guideway and/or high-occupancy vehicle or high-occupancy toll operational improvements, • vanpool program and rideshare services, • rail and bus transit capital projects, • traffic light synchronization projects, • new or expanded transit operations (three years of CMAQ funding may be used for the first five years), and • eligible bicycle and pedestrian projects. All projects that use CMAQ funds must demonstrate a quantifiable air quality benefit. Projects must be recommended based on performance.
Surface Transportation Block Grant Program - Formerly the Regional Surface Transportation Program/Caltrans for FHWA	Use funds for M2 Freeway Program (consistent with the latest Next 10 Plan) and for other non-M2 freeway projects that are complementary with the M2 freeway program, local streets and roads, and bicycle, pedestrian, and/or Complete Streets projects. Funds may also be used for countywide planning activities up to five percent annually Projects will be recommended based on performance.

DIRECTIONS 2045
LONG RANGE TRANSPORTATION PLAN
Sustainable, Equitable, and Innovative Transportation Solutions

OCTA

Orange County Transportation Authority
2025 Board & CEO Initiatives

Deliver the Public a Balanced, Sustainable, & Equitable Transportation System
- Provide Efficient, Reliable, and Accessible Options to Move People and Goods
- Continue to Fulfill Commitments through the Voter-Approved Measure M2 Local Sales Tax Program
- Actively Engage with Stakeholders and Seek Input from Diverse Communities

Ensure Organizational Resiliency through Fiscal & Environmental Responsibility
- Maintain Financial Integrity and Effectively Administer Taxpayer Dollars for Transportation
- Adapt to Changes in the Environment through Enhanced Resiliency Initiatives
- Support Thriving Communities by Advancing Environmental Stewardship and Sustainability

Uphold Continued Excellence, Diversity, & Collaboration
- Optimize Relationships with Regional, Business, and Community Partners to Advance Shared Priorities
- Reflect Community Values through a Continued Commitment to an Inclusive and Diverse Work Culture
- Promote Employee Development and Belonging by Providing a Safe and Welcoming Workplace

Doug Chaffee
Chair

Darrell E. Johnson
Chief Executive Officer

OCTA Application Part 1: OCTA Prioritization – Application Preference

- Eligible Agencies –
  - Local Jurisdictions
  - OCTA
  - LOSSAN
  - Metrolink
- Minimum funding $500k
- Maximum funding $7 million
- Limit to 3 project applications
- Inclusion in the LRTP

Projects which receive a score of 75 or higher in the OCTA Prioritization section will be considered through the Scoring Criteria section

OCTA Prioritization – Application Preference with Requirements	Maximum Points
• Is the applicant a local jurisdiction (cities and the County of Orange), the Metrolink, the LOSSAN or OCTA	Up to 25 Points
• Is the funding request within the $500,000 minimum request to $7,000,000 maximum the funding limitation for capital projects (excluding Planning)?	Up to 25 Points
• Please list project/application ranking and number of total projects/applications submitted for consideration (e.g., one out of three projects, two out of three projects, three out of three projects).	Up to 25 Points
• Is your project included in the OCTA's Board 2025 – Long Range Transportation Plan which can be found through this link: Directions 2045 Long-Range Transportation Plan, please provide page number that references project or project type.	Up to 25 Points

Part 2: County Priorities, Engagement, and Deliverability

- Project Type - Priority 1-3
- Air Quality Improvement/Environmental Benefit
- Match/Leverage – points for match
- Community Engagement
- Deliverability/Readiness

County Priorities (project type)	Possible Points
First Priority • Road Rehabilitation Project – Arterials only • Transit Projects (Fixed Guideway, Zero Emission Bus, Enhancements to Improve the Passenger Experience)	50 Points
Second Priority • Complete Streets Projects • Active Transportation Projects	40 Points
Third Priority • Signal Synchronization • Local Streets and Roads (Safety, Widening, Operational Improvements) • Planning Studies	30 Points

County Priorities	Possible Points
• Does the project improve air quality or provide environmental benefits? Provide documentation.	Up to 5 Points
• What Local Match is the implementing agency providing? What percentage of the project cost is being supported with local agency and/or nonfederal match. Please provide funding sources. Points are provided for greater local match commitment.	Up to 10 Points

Community Engagement	Possible Points
• Does the project have community support? Please provide evidence of community support.	Up to 10 Points

Deliverability and Readiness	Possible Points
• Is your project included in a Plan? Please provide link to plan and page number that references project?	Up to 5 Points
• What is the status of environmental studies? Provide documentation.	Up to 5 Points
• Has a preferred alternative been selected? Provide documentation.	Up to 5 Points
• Has the implementing agency successfully delivered federal projects on time in the past? Please describe the project and when the project or project phase was completed.	Up to 10 Points

Ranking/Next Steps

OCTA provides recommendations

➢Highly Recommended

➢Recommended

➢Contingency List

➢Not Recommended

SCAG includes recommendation in their scoring.

Next Steps

March 12 and 18 - SCAG Workshops

March 19 – OCTA / SCAG Workshop

March 31 - Call Open. Online Database submittal

May 16 – Projects due to OCTA

Questions

SCAG Program Website
https://scag.ca.gov/stbg-cmaq-program
Questions regarding STBG and CMAQ funding should be directed to:
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OCTA Program Website
https://www.octa.net/programs-projects/programs/funding-programs/call-for-projects/

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