

Federal Fiscal Year 2026-2027 and Federal Fiscal Year 2027-2028 Surface Transportation Block Grant/Congestion Mitigation and Air Quality Improvement Program Prioritization Guidance – Orange County Transportation Authority Ranking Criteria

Overview

The Southern California Association of Governments (SCAG) federal fiscal year (FFY) 2026-2027 and FFY 2027-2028 Surface Transportation Block Grant (STBG)/Congestion Mitigation and Air Quality Improvement (CMAQ) Program (STBG-CMAQ Program) prioritization guidance, establishes the framework for project selection, and allocation of CMAQ and STBG funds within the SCAG region. The 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 as highly recommended, recommended, contingency list, or not recommended for funding as part of the final SCAG selection.

Funding and General Application Information

Funding is made available through the Infrastructure Investment and Jobs Act which is set to expire in September 2026. Therefore, STBG/CMAQ Program funding is subject to subsequent congressional reauthorization or continuing resolution as this Program will provide funding in FFY 2026-2027 and FFY 2027-2028. OCTA estimates Orange County projects could receive approximately \$200 million based on SCAG's targets. This estimated target does not represent a guaranteed funding level, a nomination floor, or a nomination ceiling.

Applicants must comply with the SCAG STBG/CMAQ Program and should refer to the SCAG guidelines for information on submitting an application and overall eligible applicant, eligible projects, eligible costs, minimum matching requirements, funding availability targets and other information. The SCAG program guidelines are available here - <https://scag.ca.gov/surface-transportation-block-grant-program-congestion-mitigation-and-air-quality-improvement-program>.

For applicants or for projects that are in Orange County, the following specific OCTA prioritizations apply:

- Applications from local jurisdictions (cities and the County of Orange), the Southern California Regional Rail Authority, the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency and OCTA will be prioritized. Other organizations are encouraged to apply through Orange County cities or the County of Orange.
- Agencies will be required to prioritize their projects, and OCTA will prioritize the first three priority applications for scoring purposes.
- Capital project applications from applicants other than OCTA, LOSSAN, and Metrolink that request funding between \$500,000 minimum and \$7,000,000

maximum will be prioritized by OCTA for scoring purposes. Planning grant applications are not subject to this prioritization limitation.

- Projects that are included in OCTA’s Directions 2025 – Long-Range Transportation Plan which can be found through this link: [Directions 2045 Long-Range Transportation Plan](#) will be prioritized by OCTA.

Schedule

Milestone	Date
STBG-CMAQ Program Adoption by SCAG	March 6, 2025
Project Nomination Opens	March 31, 2025
Application Submission Deadline to SCAG	May 16, 2025
OCTA Project Prioritization Scoring and Eligibility Reviews	May 16 – June 20, 2025
OCTA Staff Recommendations Published	July 3, 2025
OCTA Board of Directors’ (Board) STBG/CMAQ Program Project Prioritization	July 14, 2025
Project Prioritization Due to SCAG	August 1, 2025
SCAG Project Review and Scoring	August – October, 2025
SCAG Regional Council Awards	November or December 2025

SCAG Required County Transportation Commission Project Prioritization Framework

OCTA is responsible for developing a project prioritization framework which will guide OCTA’s evaluation of all applications within Orange County. These evaluations will result in a prioritization ranking. According to the SCAG guidelines for the STBG/CMAQ Program, OCTA must base its prioritization ranking on the following criteria:

1. Eligibility
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 United States Code Section 133, 149, et al. Given the limited time that is available to review projects, OCTA will progressively review project and project component throughout the STBG/CMAQ Program period and up until the project is to be included in the Federal Transportation Improvement Program by SCAG.
2. County Priorities
County transportation commissions are expected to develop a prioritization framework that considers applicable county-level plans, policies, and objectives.
3. Community/Stakeholder Engagement
County transportation commissions should prioritize project nomination applications with demonstrated community support.

4. Deliverability and Readiness

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.

OCTA will review submittals first for eligibility and compliance with basic application requirements. Then the remaining projects will be ranked as highly recommended, recommended, contingency list or not recommended through a scoring process. The scoring criteria are derived from the goals outlined in OCTA's 2025 Board and Chief Executive Officer (CEO) Initiatives and Action Plan, the Board-approved Capital Programming Policies for STBG and CMAQ, letters of interest, focus group meetings with Orange County Technical Advisory Committee (TAC) representatives, OCTA's Directions 2045 Long-Range Transportation Plan, and STBG/CMAQ Program draft guidelines.

From 2025 Board and CEO Initiatives

- Support thriving communities by advancing environmental stewardship and sustainability
- Maintain Financial Integrity and Effectively Administer Taxpayer Dollars for Transportation
- Actively Engage with Stakeholders and Seek Input from Diverse Communities

From Capital Programming Policies

- CMAQ may be used for any of the following:
 - 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)
 - Eligible bicycle and pedestrian projects
- STBG may be used for any of the following:
 - Measure M2 (M2) Freeway Program
 - Local streets and roads
 - Bicycle, pedestrian and/or complete streets projects
 - Countywide planning activities up to five percent annually

From Letters of Interest

- In November 2024, OCTA solicited letters of interest for CMAQ and STBG funds from all 34 Orange County cities, the County of Orange, Southern California Regional Rail Authority (Metrolink), LOSSAN, and over 500 transportation stakeholders. OCTA provided basic introductory information on the upcoming SCAG STBG-CMAQ Program and requested optional feedback regarding funding needs, potential projects, and project types. OCTA received responses from

Metrolink, the County of Orange, and 21 cities for 61 potential projects. These project types varied from road rehabilitation, complete streets improvements, road widening, safety projects, planning documents, train locomotives, and others. Approximately 50 of the 61 projects proposed through the letters of interest OCTA received indicated a need for funding for complete streets projects and/or road rehabilitation. However, OCTA has provided more than \$90 million dollars over the last two years for complete streets projects which are now in the process of being delivered. Also in late January, OCTA held focus groups with members of the TAC Committee which provides guidance primarily on local streets and roads concerns made up of Public Works directors and local jurisdiction engineers to discuss transportation needs in Orange County. The TAC members expressed a great need for assistance with street rehabilitation, particularly for arterials around Orange County. For this reason, OCTA is prioritizing road rehabilitation over complete streets projects.

OCTA Prioritization Part 1 – Application Preference

OCTA will review submitted documentation to determine whether the submitted project application meets OCTA’s application preference. The review will consider consistency with preferred applicant, fiscal responsibility, countywide funding distribution, and OCTA’s Long-Range Transportation Plan - Directions 2045. Any issues identified for any of these criteria will be communicated to the applicant’s contact. Projects which receive a score of 75 or higher in the OCTA prioritization section will move to the scoring criteria section or Part 2 of the application. Prioritization Part 1 does not apply and is not required for Metrolink, LOSSAN, and OCTA projects.

OCTA Prioritization – Application Preference with Requirements	Maximum Points
<ul style="list-style-type: none"> Is the applicant a local jurisdiction (cities and the County of Orange), the Metrolink, LOSSAN, or OCTA? 	Up to 25 Points
<ul style="list-style-type: none"> Is the funding request within the \$500,000 minimum request to \$7,000,000 maximum funding limitation for capital projects (excluding planning)? 	Up to 25 Points
<ul style="list-style-type: none"> 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
<ul style="list-style-type: none"> Is your project included in the OCTA 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

OCTA Prioritization Part 2 – Scoring Criteria

In Part 2 of the OCTA prioritization applications, projects which have received between 75 and 100 points in Part 1 of the application will be scored up to 100 points to determine which projects are highly recommended, recommended, contingency list, or not recommended using the following rubric. Projects that receive less than 75 points in Part 1 of the application will be ranked as not recommended by OCTA.

OCTA Prioritization – Project Type	Possible Points
<u>First Priority</u> <ul style="list-style-type: none"> • Road Rehabilitation Project – Arterials Only • Transit Projects (Fixed-Guideway, Alternative Fuel Bus, Enhancements to Improve the Passenger Experience) 	50 Points
<u>Second Priority</u> <ul style="list-style-type: none"> • Complete Streets Projects • Active Transportation Projects 	40 Points
<u>Third Priority</u> <ul style="list-style-type: none"> • Signal Synchronization • Local Streets and Roads (Safety, Widening, Operational Improvements) • Planning Studies 	30 Points
OCTA Prioritization – Fiscal and Environmental Responsibility	Possible Points
<ul style="list-style-type: none"> • Does the project improve air quality or provide environmental benefits? Provide documentation. 	Up to 5 Points
<ul style="list-style-type: none"> • 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 (Review Required by SCAG)	Possible Points
<ul style="list-style-type: none"> • Does the project have community support? Please provide evidence of community support. 	Up to 10 Points

Deliverability and Readiness (Review Required by SCAG)	Possible Points
<ul style="list-style-type: none"> Is your project included in a plan? Please provide a link to plan and page number that references project. 	Up to 5 Points
<ul style="list-style-type: none"> What is the status of environmental studies? Provide documentation. 	Up to 5 Points
<ul style="list-style-type: none"> Has a preferred alternative been selected? Provide documentation. 	Up to 5 Points
<ul style="list-style-type: none"> 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. Also, please provide the federal funding program. Preference would be for projects delivered using funds through the Federal Highway Administration process through the California Department of Transportation. 	Up to 10 Points

OCTA will rank the highest scoring projects within each project type and then will balance how much funding is available for each project type based on the overall funding target of STBG and CMAQ. Finally, the ranking will consider which projects would be eligible for which funding program. Other considerations may also be taken into account such as projects which may have already been approved by OCTA for previous STBG and/or CMAQ funding where the STBG or CMAQ funding may expire before the project can receive federal approval to proceed.