

EXCERPTS

COMPREHENSIVE TRANSPORTATION FUNDING PROGRAMS GUIDELINES

2027 CALL FOR PROJECTS

Orange County Transportation Authority



Chapter 7 – Regional Capacity Program (Project O)

Overview

The RCP (Project O) is a competitive program that will provide more than \$1 billion over a thirty-year period. The RCP replaces the Measure M local and regional streets and roads competitive programs (1991-2011).

Although each improvement category described in this chapter has specific eligible activities, the use of RCP funding is restricted to and must be consistent with the provisions outlined in Article XIX and the California State Controller’s [Guidelines Related to Gas Tax Expenditures for Cities and Counties \(Gas Tax Fund Guidelines\) Guidelines Relating to Gas Tax Expenditures \(March 2019\)](https://sco.ca.gov/pubs_guides.html). These Guidelines are available at the following link: https://sco.ca.gov/pubs_guides.html — <https://www.sco.ca.gov/Files-AUD/Gas-Tax-Fund-Guidelines.pdf>.

The MPAH serves as the backbone of Orange County’s arterial street network. Improvements to the network are required to meet existing needs and address future demand. The RCP is made up of three (3) individual program categories which provide improvements to the network:

- The ACE improvement category complements freeway improvement initiatives underway and supplements development mitigation opportunities on arterials throughout the MPAH.
- The ICE improvement category provides funding for operational and capacity improvements at intersecting MPAH roadways.
- The FAST focuses upon street to freeway interchanges and includes added emphasis upon arterial transitions to interchanges.

Projects in the arterial, intersection, and interchange improvement categories are selected on a competitive basis. All projects must meet specific criteria in order to compete for funding through this program.

Also included under the RCP is the Regional Grade Separation Program (RGSP), which is meant to address vehicle delays and safety issues related to at-grade rail crossings. Seven rail crossing projects along the MPAH network were identified by the California Transportation Commission (CTC) to receive TCIF. TCIF allocations required an additional local funding commitment. The RGSP captures these prior funding commitments. Future calls for projects for grade separations are not anticipated.

Funding Estimates

Consistent with the M2 Ordinance, funding for transportation improvements and operations will be provided on a pay-as-you-go basis. Under this approach, the RCP is anticipated to make approximately \$1.5 billion (in 2022 dollars) available during the 30-year life of the M2 program. Programming estimates are developed in conjunction with periodic calls for projects. Funding is shared with intersection, interchange, and grade separation improvement categories. No predetermined funding has been set aside or established for street widening.

Programming Approach

Programming decisions are based upon project prioritization ranking, feasibility and readiness. Each round of funding has resulted in a diverse range of activities, cost and competitive score. Funding applications may seek financial assistance for planning, engineering, ROW, construction or a combination of these activities. Effective grant programs include a combination of project development as well as implementation projects. In order to ensure continued distribution of funding opportunities between small and large-scale projects, a tiered funding approach will be used.

Typically, OCTA has made approximately \$32 million available for each RCP (Project O) programming cycle. Category 1 projects are limited to those projects requesting \$5 million or less. Category 2 projects are defined as those requesting more than \$5 million in Measure M2 funds.

Tiered Funding Approach: The two-tiered funding (Tier 1 and Tier 2) approach will only be applicable to the RCP. This approach is proposed to prioritize high scoring projects while providing a balanced program with funding availability for small and large projects. The first tier is for projects scoring 50 points or higher, and the second tier is for all projects after first satisfying the Tier 1 ranking. Within Tier 1, two categories ~~are~~ would be established with 60 percent (60%) (Category 1) of the M2 funds available for smaller projects (requesting \$5 million or less), and 40 percent (40%) (Category 2) of the M2 funds available for larger projects (requesting \$5 million or more). This approach is intended to broaden the distribution of M2 funds to higher scoring/lower cost projects and retain the ability to fund larger projects without placing formal funding caps on allocations. Any M2 funds not programmed in Tier 1 will be designated for Tier 2 allocation. A funding split between small and large projects is not recommended for Tier 2.

Applications may be for any project phase provided it represents a meaningful, logical terminus and is consistent with scoping from a previously funded project if applicable (i.e., if engineering was previously funded, the ROW and/or construction request must be for the same project scope).

	Category 1 (60%)	Category 2 (40%)
Tier 1 >=50	<ul style="list-style-type: none"> • \$0 - \$5 million • Score at least 50 points • Logical, standalone project • Unallocated balance shifts to Tier 2 for programming 	<ul style="list-style-type: none"> • \$5+ million request • Score at least 50 points • Logical, standalone project • Unallocated balance shifts to Tier 2 for programming
Tier 2	<ul style="list-style-type: none"> • Balance of unallocated funds from Tier 1 prioritization • Request can be of any dollar value to compete in Tier 2 • Multiple segments of the same project cannot be submitted under both categories. 	

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Funding will be provided for the three RCP funding programs: ACE, ICE, and FAST. Chapter 7 details the specific program’s intent, eligible project expenditures, ineligible project expenditures, and additional information that may be needed when applying for funds. Each section should be read thoroughly before applying for funding. Applications should be prepared for the program that best fits the proposed project.

For this call, OCTA shall program projects for a three-year period (FY ~~276/287~~ – ~~298/3029~~), based upon the current estimate of available funds. For specifics on the funding policies that apply to this call, refer to the Program Precepts as found in Section V of these guidelines.

Applications

In order for OCTA to consider a project for funding, applications will be prepared by the lead agency. A separate application package must be completed for each individual project. Multiple variations of the same project (i.e. with different local match rates) will not be considered. If funding is requested under multiple program components for a single project (i.e. arterials and intersections) a separate application must be prepared for each request. OCTA shall require agencies to submit electronic applications for the 2026 call for projects by **5:00 p.m. on Thursday, October 22, 2026** ~~November 20, 2025~~. **Late and/or incomplete submittals will not be accepted.**

Since each funding program has slightly different application requirements, an "Internal Application Checklist Guide" has been provided for the three programs under the RCP



(Exhibits 7-1, 7-2, and 7-3). The checklist guide identifies the basic forms and documentation required for each of the program components. In addition, items required at the time of project submittal are differentiated from supplemental items due later. The appropriate **checklist must be provided as a cover sheet for each application submitted**. For any items that are required for the candidate project or program that are missing or incomplete, an explanation should be included in a cover letter with the application. In addition to this checklist guide, please review the **Attachments/Additional Information** section of each program component for a description of supplementary documentation which may be required to support your agency's project application in specific cases.

An electronic copy on a USB, thumb drive, memory stick, or via electronic file upload and/or email of the application and any supporting documentation must be submitted to OCTA by the application deadline. **Hardcopies will not be accepted.**

Digital media files shall be mailed or delivered in person to, as needed:

By mail:

Orange County Transportation Authority
Attn: Cynthia Morales
550 South Main Street
P.O. Box 14184
Orange, CA 92863-1584
Tel: (714) 560-5905

In person:

Orange County Transportation Authority
600 South Main Street
Orange, CA 92868

Electronic application copies may be emailed to: cmorales@octa.net

Exhibit 7-1

Arterial Capacity Enhancement (ACE)

CTFP Application Checklist Guide

Planning – Environmental & Engineering

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- ADT Counts and LOS Calculations
- Aerial Photo w/ Proposed Improvements Shown

Right-of-Way

- CTFP Online Application – submitted through OCFundtracker
- Project Description Detail (include plat maps and legal descriptions for proposed acquisitions)
- Detailed right-of-way Acquisition/Disposal Plan using the OCTA provided right-of-way acquisition/disposal plan form available for download at <https://ocfundtracker.octa.net>.
- Cost Estimate for Complete Project - ALL PHASES
 - Estimated right-of-way Cost by Parcel (Land, Improvements Taken, Severance, Goodwill, Incidental Expenses)*
- General Application Sample Resolution
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Aerial Strip Map w/ Existing and Proposed Improvements Shown
 - Include right-of-way Improvements and Parcels to be Acquired
- Preliminary Construction Layout Plans*
- ADT and LOS Calculations

Construction

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Project Construction Specifications
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Project Development Documents - Project Report or Materials Report *
- Approved Project Final Design (100% PS&E) Plans*
- ADT and LOS Calculations

NOTE: To qualify for the 10 percent (10%) local match discount for measurable improvement of PCI, please include documentation from the last two PMP biennial Measure M Eligibility submittals that provide average PCI for Overall System.

****Items are due after first application review. OCTA staff will contact you regarding those projects that will require this additional information. If final engineering is underway, final design (100% PS&E) must be submitted prior to encumbrance/ contract award.***

Exhibit 7-2

Intersection Capacity Enhancement (ICE)

CTFP Application Checklist Guide

Planning – Environmental & Engineering

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS Calculations, and ADT for each leg of the intersection
- Aerial Photo w/ Proposed Improvements Shown

Right-of-Way

- CTFP Online Application – submitted through OCFundtracker
- Project Description Detail (include plat maps and legal descriptions for proposed acquisitions)
- Detailed right-of-way Acquisition/Disposal Plan using the OCTA provided right-of-way acquisition/disposal plan form available for download at <https://ocfundtracker.octa.net>.
- Cost Estimate for Complete Project - ALL PHASES
 - Estimated right-of-way Cost by Parcel (Land, Improvements Taken, Severance, Goodwill, Incidental Expenses) *
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS/ICU Calculations, and ADT for each leg of the intersection
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Aerial Strip Map w/ Existing and Proposed Improvements Shown
 - Include right-of-way Improvements and Parcels to be Acquired
- Preliminary Construction Layout Plans*

Construction

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Project Construction Specifications
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS Calculations, and ADT for each leg of the intersection
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Project Development Documents - Project Report or Materials Report *
- Approved Project Final Design (100% PS&E) Plans*

NOTE: To qualify for the 10 percent (10%) local match discount for measurable improvement of PCI, please include documentation from the last two PMP biennial Measure M Eligibility submittals that provide average PCI for Overall System.

**** Items are due after first application review. OCTA staff will contact you regarding those projects that will require this additional information. If final engineering is underway, final design (100 % PS& E) must be submitted prior to encumbrance/ contract award.***

Exhibit 7-3

Freeway Arterial/Streets Transition (FAST)

CTFP Application Checklist Guide

Planning – Environmental & Engineering

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS Calculations, ADT for arterial and ramp exit volumes
- Caltrans Letter of Support
- Aerial Photo w/ Proposed Improvements Shown

Right-of-Way

- CTFP Online Application – submitted through OCFundtracker
- Project Description Detail (include plat maps and legal descriptions for proposed acquisitions)
- Detailed right-of-way Acquisition/Disposal Plan using the OCTA provided right-of-way acquisition/disposal plan form available for download at <https://ocfundtracker.octa.net>.
- Cost Estimate for Complete Project - ALL PHASES
 - Estimated right-of-way Cost by Parcel (Land, Improvements Taken, Severance, Goodwill, Incidental Expenses) *
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS Calculations, and ADT for each leg of the intersection
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Aerial Strip Map w/ Existing and Proposed Improvements Shown
 - Include right-of-way Improvements and Parcels to be Acquired
- Preliminary Construction Layout Plans*

Construction

- CTFP Online Application – submitted through OCFundtracker
- Project Description, Scope of Work and Project Limits
- Project Construction Specifications
- Cost Estimate for Complete Project - ALL PHASES
- General Application Sample Resolution
- Peak Hour Turning Movement Counts, LOS Calculations, and ADT for each leg of the intersection
- CEQA Compliance Form (CE, Negative Declaration, EIR)
- Project Development Documents - Project Report or Materials Report*
- Approved Project Final Design (100% PS&E) Plans*
- Appropriate agreements between Caltrans and the project lead agency need to be in draft form and/or in place.

NOTE: To qualify for the 10 percent (10%) local match discount for measurable improvement of PCI, please include documentation from the last two PMP biennial Measure M Eligibility submittals that provide average PCI for Overall System.

**** Items are due after first application review. OCTA staff will contact you regarding those projects that will require this additional information. If final engineering is underway, final design (100 % PS&E) must be submitted prior to encumbrance/ contract award.***

Attachments

OCFundtracker Application

Agencies must submit a copy of the OCFundtracker application and scoring information with all application submittals. This document is created within the OCFundtracker web-based application.

"Project Cost Estimate" Form

Include a separate attachment listing all expenditures and costs for the project using the Revised Cost Estimate Form 10-3 provided by OCTA and available for download at <https://ocfundtracker.octa.net>. ~~An additional attachment may be included, if desired. Another attachment may be included in addition if desired.~~

Accurate unit prices and a detailed description of work, including design activities, are will be critical during when the candidate project review process is reviewed. Cost estimates must provide sufficient detail to understand cost components and determine eligible and noneligible items. For example, design applications ~~should~~ must include major tasks that will be performed.

ROW cost estimate ~~must should~~ include parcel information (including project area needed), improvements taken, severance damages, easements, ROW engineering, appraisal and legal costs.

Construction cost estimates must should include a listing of all bid items, including a maximum up to 10 percent (10%) ~~allowance for~~ contingencyies and a maximum 20 percent (20%) of the M2 grant ~~allowance~~ for construction support, subject to match requirements.

The anticipated disbursement of costs (e.g., Agency, Other, Non-Eligible) must also be completed. Local jurisdictions should reference the program from which funding is expected to be allocated when completing this portion of the form. Each of the funding programs described in these guidelines may have differing matching fund requirements.

If ~~funding is more than one project phase is~~ requested for more than one project phase to be funded, a separate project cost estimate form ~~must is to~~ be completed for each phase, ~~or each phase must be clearly indicated, and a subtotal prepared on this form.~~ Separate forms ~~are should~~ also required when ~~be prepared if~~ funding for project phases is being requested over multiple fiscal years.

"Sample Resolution" Form

A resolution or minute action must be approved by the local jurisdiction's governing body prior to the Board approval of grant funds. A sample resolution is included as Exhibit 7-4. Local jurisdictions, at a minimum, must include items a-h. The mechanism selected shall serve as a formal request for CTFP funds and states that matching funds will be provided

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by the jurisdiction, ~~if necessary~~. All project requests must be included in this action. **If a draft copy of the resolution is provided, the local jurisdiction must also provide the date the resolution will be finalized by the local jurisdiction's governing body.**

ROW Acquisition/Disposal Plan

For all projects requesting ROW phase funding, a detailed plan for acquisition/disposal of excess right-of-way, along with any reasonable labor costs expected, must be included. The ROW acquisition/disposal plan and labor cost estimate must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.

Project Summary Information

For each application that is recommended for funding, the local jurisdiction shall submit a PowerPoint presentation summarizing the pertinent project information for TAC review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**

Pavement Management Supporting Documentation

The M2 Ordinance provides for a 10 percent (10%) reduction in the required local match if the local jurisdiction can either:

- a. Show measurable improvement of paved road conditions during the previous reporting period defined as an overall weighted (by area) average system improvement of one Pavement Condition Index (PCI) point with no reduction in the overall weighted (by area) average PCI in the MPAH or local street categories;

or

- b. Road pavement conditions during the previous reporting period within the highest 20% (20 percent) of the scale for road pavement conditions in conformance with OCTA Ordinance No. 3, defined as a PCI of 75 or higher, otherwise defined as in "good condition".

If a jurisdiction is electing to take the 10 percent (10%) local match reduction, **supporting documentation indicating either the PCI improvement or PCI scale must be provided.**

Additional Information

The following documentation should be included with your completed project application:

If a project includes more than one jurisdiction and is being submitted as a joint application, one jurisdiction shall act as lead agency and must provide a resolution of support from the other jurisdiction.

1. Letters of support for the candidate project (optional). As part of the application submittal projects that require Caltrans consent, review, or approval must have a letter of support or acknowledgement.
2. Geotechnical/materials reports for all applicable candidate projects (e.g., widening, intersection improvement, new roadway). The reports should contain sufficient detail for an accurate assessment of improvements needed and costs, since funding will be jeopardized if a project is unable to meet proposed schedule and costs.
3. Preliminary plans, if available for the project. The plans (1"=40' preferred) should be included as digital pdf attachments and include:
 - a. Existing and proposed ROW (include plat maps and legal descriptions for proposed acquisitions).
 - b. Agency boundaries, dimensions and station numbers.
 - c. Existing and proposed project features such as: pavement width and edge of pavement, curb, gutter and sidewalk, raised median, driveway reconstruction, signal pole locations, etc.
 - d. Typical cross sections.
 - e. Proposed striping.
 - f. Structural sections per the materials report.
 - g. Proposed traffic signals, storm drains, bridges, railroad crossing improvements, safety lighting, etc.
 - h. If requesting funds for traffic signals, include traffic signal warrant(s) prepared by the City Traffic Engineer or City Engineer.
 - i. If the project includes construction, relocation, alteration or widening of any railroad crossing or facility, include a copy of the letter of intent sent to the railroad, a copy of which must be sent to the Public Utilities Commission (PUC). Any project including work of interest to a railroad will not be considered for eligibility until the railroad and PUC have been notified.

- j. If the project is proposed as a staged project and additional funds will be necessary in subsequent calls for projects, the preliminary project statement should be accompanied with a complete preliminary estimate and schedule for the completion of the entire project.
 - k. If the project is proposed as a safety improvement, provide justifying accident data for the past three years and show the expected decrease in intersection or mid-block accident rate.
4. Current 24-hour traffic counts (taken for a typical mid-week period within the preceding 12-month period) for the proposed segment. Projects submitted without "current counts" will be considered incomplete and non-responsive. Counts taken no more than 36 months prior to the application due date may be accepted.



Exhibit 7-4

**Sample Resolution for Candidate Orange County
Comprehensive Transportation Funding Programs Projects**

A resolution of the _____ City Council approving the submittal of _____ improvement project(s) to the Orange County Transportation Authority for funding under the Comprehensive Transportation Program

THE CITY COUNCIL OF THE CITY OF _____ HEREBY RESOLVES, DETERMINES, AND ORDERS AS FOLLOWS THAT:

- (a) WHEREAS, the City of _____ desires to implement the transportation improvements listed below; and
- (b) WHEREAS, the City of _____ has been declared by the Orange County Transportation Authority to meet the eligibility requirements to receive M2 "Fair Share" funds; and
- (c) WHEREAS, the City's Circulation Element is consistent with the County of Orange Master Plan of Arterial Highways; and
- (d) WHEREAS, the City of _____ will not use M2 funds to supplant Developer Fees or other commitments;
- (e) WHEREAS, the City/County must include all projects funded by Net Revenues in the seven-year Capital Improvement Program as part of the Measure M2 Ordinance eligibility requirement.
- (f) WHEREAS, the City of _____ will provide a minimum in ___% in matching funds for the _____ project as required by the Orange County Transportation Authority Comprehensive Transportation Funding Programs Guidelines; and
- (g) WHEREAS, the Orange County Transportation Authority intends to allocate funds for transportation improvement projects, if approved, within the incorporated cities and the County; and
- (h) WHEREAS, the City/County authorizes a formal amendment to the seven-year Capital Improvement Program to add projects approved for funding upon approval from the Orange County Transportation Authority Board of Directors, if necessary.

NOW, THEREFORE, BE IT RESOLVED THAT:

The City Council of the City of _____ hereby requests the Orange County Transportation Authority allocate funds in the amounts specified in the City's application to said City from the Comprehensive Transportation Funding Programs. Said funds, if approved, shall be matched by funds from said City as required and shall be used as supplemental funding to aid the City in the improvement of the following street(s):

ADOPTED BY THE CITY COUNCIL on _____, 20____.

SIGNED AND APPROVED on _____, 20____.

City Clerk

Mayor

***Required language a-h**

Application Review Process

OCTA staff will conduct a preliminary review of all applications for completeness and accuracy, request supplemental information (i.e., plans, aerial/strip maps, CEQA forms) for projects that appear to rank well during initial staff evaluations, and prepare a recommended program for the TSC. In addition, OCTA may hire a consultant(s) to verify information within individual applications such as, but not limited to, project scope, cost estimates, ADT and LOS. These applications will be selected through a random process.

The following guidelines will be used in reviewing project applications. Any application that does not meet these minimum guidelines must include an explanation of why the guidelines were not met:

1. The travel lane width should be no less than 11 feet (12 feet if adjacent to a raised median or other obstruction) for all arterial highways.
2. For divided roadways, the minimum median width should be no less than 10 feet to allow for turning movements. Divided roadways are defined as those with either a painted or raised median.
3. Arterial highways that are designated for uses in addition to automobile travel (e.g., bicycle, pedestrian, parking) shall provide additional ROW consistent with local jurisdiction standards to facilitate such uses.
4. An eight-lane roadway should provide for a continuous median, protected dual or single left-turn pockets as warranted at signalized intersections, single left-turn pockets at non-signalized intersections, and a right-turn lane at signalized intersections where determined necessary by traffic volumes. ROW for a free right-turn lane should be provided at locations warranted by traffic demand.
5. A six-lane divided roadway should provide a continuous median, protected dual or single left-turn pockets as warranted by existing traffic at all signalized intersections, and single left-turn pockets at non-signalized intersections. A right-turn option lane should also be provided as warranted by traffic demand.
6. A four-lane divided roadway should provide a continuous median, protected dual or single left-turn pockets at all signalized intersections, and a left-turn pocket at all non-signalized intersections. A right-turn lane should also be provided as warranted by traffic demand.
7. A four-lane undivided roadway shall provide for a single left-turn pocket at all intersections as warranted by traffic demand.

Applications will be reviewed by OCTA for consistency, accuracy and concurrence. Applications determined complete in accordance with the program requirements will be scored, ranked and submitted to the TSC, TAC and Board for consideration and funding approval.



Local agencies awarded funding will be notified as to which projects have been funded and from what sources after the Board takes action. A tentative call schedule is detailed below:

Board authorization to issue call: ~~August 10, 2026~~ ~~September 8, 2025~~

Application submittal deadline: ~~October 22, 2026~~ ~~November 20, 2025~~

TSC/TAC Review: ~~February/March 2027~~ ~~March/April 2026~~

Committee/Board approval: ~~April/May 2027~~ ~~May/June 2026~~

Funding

M2 RCP (Project O) funding will be used for this call.

The CTFP Guidelines include a provision that allows applicants to request ROW and/or construction funding prior to completion of the planning phase (including final design) provided that the phase is underway, substantially complete and the local jurisdiction will complete the activities within six months of the start of the new phase programmed year.

A thorough review of eligible activities is not always possible during the call for projects evaluation period. As a result, it is possible that cost elements contained within an application and included in a funding recommendation may ultimately be deemed ineligible for program participation. The applicant is responsible for ensuring projects are implemented according to eligible activities contained within the program guidelines.

~~In order to make certain that local jurisdictions are aware of ineligible activities and/or potentially ineligible elements within a funded project, OCTA staff will review the cost elements following Board approval of the funding recommendation for construction. ~~is available to review elements of the project design at any time through the duration of the M2 grant. OCTA will then issue written confirmation identifying eligible and ineligible costs and provide staff approve to proceed prior to the obligation of any funds through contract award.~~ It is highly recommended that local jurisdictions engage in the design review process with OCTA staff as early as possible **prior to initiating project implementation** (i.e., 35%-65% design, commencing ROW acquisitions, ~~executing construction contract~~) to allow for design changes by the local jurisdictions, as needed.~~

Arterial Capacity Enhancements (ACE)

Overview

The MPAH serves as the backbone of Orange County's arterial street network. Improvements to the network are required to meet existing needs and address future traffic demand. The ACE improvement category complements freeway improvement initiatives underway, supplements development mitigation activities and enables improvements based upon existing deficiencies.

Projects in the ACE improvement category are selected on a competitive basis. Projects must meet specific criteria in order to compete for funding through this program.

Objectives

- Complete MPAH network through gap closures and construction of missing segments
- Relieve congestion by providing additional roadway capacity where needed
- Provide timely investment of M2 Revenues
- Leverage funding from other sources

Project Participation Categories

The ACE category provides capital improvement funding (including planning, design, ROW acquisition and construction) for capacity enhancements on the MPAH for the following:

- Gap closures – the construction of a roadway to its full MPAH build-out for the purpose of connecting two existing ends of that roadway by filling in a missing segment or for completing the terminus of an MPAH roadway. This applies to increased roadway capacity only as it relates to vehicular traffic. Gap closures shall use the minimum lane width of 12- feet. Lane widths less than 12-feet will be considered by OCTA on case-by-case basis and local jurisdiction will need to provide supporting documentation justifying the reduction. Lane width shall not be less than 11-feet on arterial highways designated as Truck Routes. For reference see the MPAH map: <https://www.octa.net/programs-projects/projects/streets-projects/master-road-plan>
- Roadway widening where additional capacity is needed
- New roads / extension of existing MPAH facility

Eligible Activities

- Planning, environmental clearance
- Design
- ROW acquisition

- Construction (including curb-to-curb, lighting, drainage, etc.)
- Rehabilitation and/or resurfacing of existing pavement when necessitated by proposed improvement (such as change in profile and cross section).

Potentially Eligible Items

Below is a list of potentially eligible items. However, ~~initial final~~ determination of the eligibility of all project related costs will be made following Board approval and OCTA will provide a written confirmation of the eligible costs for construction at the time of reimbursement. Prior to the submittal of an application for funding, or at any point in the project life cycle, local jurisdictions may meet with OCTA staff to review the eligibility of project related costs. **Application review and approval does not guarantee the eligibility of all items.**

- ~~Direct E~~Environmental mitigation for projects funded by ACE (subject to limitations identified in ~~P~~precepts 30) as defined in an approved CEQA environmental document
- Storm drains/catch basins/detention basins/bioswales/other pollutant discharge mitigation devices
- Sound walls (in conjunction with roadway improvement mitigation measures) as defined in an approved CEQA environmental document
- Aesthetic improvements (e.g., decorative sidewalks, enhanced sidewalk and driveway treatments such as brick or stamped concrete) including landscaping within the project ROW (eligible improvements up to 10 percent (10%) of the construction grant costs, subject to match requirements, provided costs are reasonable for the transportation benefit)
- ITS infrastructure (advance placement in anticipation of future project)
- Rehabilitation and/or resurfacing of incidental pavement areas within the proposed project limits is eligible but shall not exceed 10 percent (10%) of the ~~M2~~ construction grant, subject to match requirements.
- Improvements and/or betterments (e.g., gates, minor parking lot restriping, underground utility, etc.) to private property if part of a ROW settlement agreement
- Utility relocation where the serving utility has prior rights as evidenced by a recorded legal document
- ~~Roadway G~~grading within the roadway is eligible. ROW (inclusive of any TCE and/or ROW agreement related improvements) should not exceed a depth for normal roadway excavation (e.g., structural section). However, aAdditional grading will be considered on a case-by-case basis. Agencies ~~must shall~~ provide supporting documentation (e.g., soils reports, ROW agreements) to justify the additional grading, if seeking reimbursement for this component.

- Additional ROW and CON to accommodate pedestrian or bike improvements (including Class II and Class IV bike lanes) **as a complementary feature to the MPAH project** are eligible. Construction of eligible bike facilities shall not exceed 25 percent (25%) of the M2 construction grant, subject to match requirements.
- Installation of a pedestrian activated traffic signal where necessitated by pedestrian traffic warrants or other engineering criteria.

Environmental mitigation will be allowed only as required for the proposed roadway improvement, and only as contained in the environmental document. Program participation in environmental mitigation shall not exceed 25 percent (25%) of the total eligible construction grant costs.

~~Storm drain systems required per the hydrology report for the MPAH road improvement are eligible. However, M2 funds shall not supplant developer funding (see Precept 5). Longitudinal storm drains are eligible for program participation when the storm drain is an incidental part (cost is less than 25 percent (25%) of the total eligible construction cost) of an eligible improvement. Program participation shall not exceed 10 percent (10%) of the cost of storm drain longitudinal/parallel and main lines. Storm drain inlets, connectors, laterals and cross culverts shall have full participation in ACE Program funding.~~ Storm drains outside standard MPAH ROW widths are not eligible, excluding catch basins within reasonable distance and in general proximity to a project intersection (e.g., within ten feet of the curb return). Catch basins and drainage systems extending into adjacent areas (including public streets) shall not be eligible past the first catch basin designated by aforementioned criteria.

The relocation of detention basins/bioswales are potentially eligible dependent on prior rights and will be given consideration on a case-by-case basis (see Utility Relocations below).

Soundwalls are eligible only if they are required as part of the environmental mitigation for the proposed project and the Measure M contribution to the cost of soundwalls shall not exceed 25 percent (25%) of the total eligible construction grant costs. Aesthetic enhancements and landscaping in excess of minimum environmental mitigation requirements are subject to limitations described in this section above.

Roadway grading is eligible for structural sections if within the standard MPAH cross section for the facility (inclusive of any TCEs). Rough grading can be considered eligible, so long as it supports MPAH improvement(s) within the ROW and does not supplant developer (or any other project obligations). Any proposed rough grading outside of the MPAH ROW will be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).

Utility Relocations

The expenses associated with the relocation of utilities are eligible for RCP reimbursement only when all conditions listed below have been met:

- The relocation is made necessary due to conflict with proposed improvements.
- The facility to be relocated is within the project right-of-way.
- It has been determined that the local agency is legally liable for either a portion of or all of the relocation costs.

Liability can be determined by property rights, franchise rights/agreements, state and local statutes/ordinances, permits, a finding by the local agency's counsel, or other recorded legal document. Documentation providing proof of the local agency's liability for the costs of utility relocation must be submitted at the time of a payment request (see Chapter 9). Utilities funded through enterprise funds shall not be eligible for reimbursement.

If a relocation is eligible to be reimbursed, and to be performed by the utility owner or by the utility owner's contractor, the work should be included in the ROW phase costs and clearly identified in the project application submittal. For eligible relocations to be performed during the construction phase by the local jurisdiction's contractor, the work should be included in the plans and specifications similar to other construction activities. Adjustment of existing utilities to grade (e.g., water valves, manhole frames and covers), due to new roadway cross sections are either eligible or not eligible in the construction phase subject to the limitations previously described (e.g., prior rights). New or relocated fire hydrants are ineligible.

In all cases, eligible costs shall only include "in-kind" relocation. No reimbursements will be made for betterments above the cost of "in-kind" relocation. Additionally, costs submitted for program reimbursement must include any salvage credits received.

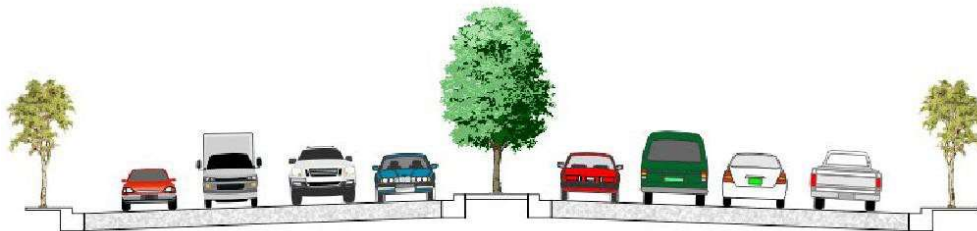
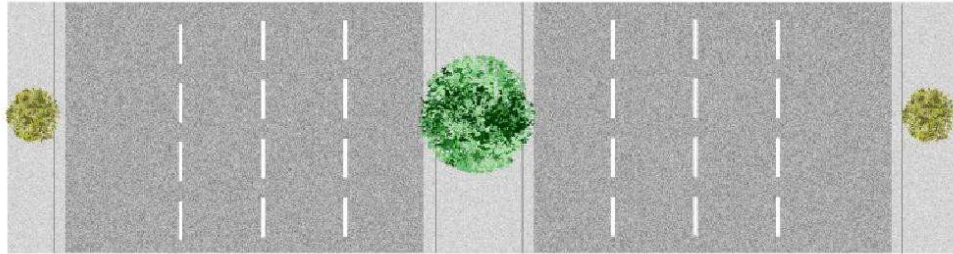
Ineligible Items Expenditures

Items that are not eligible under the ACE Program are:

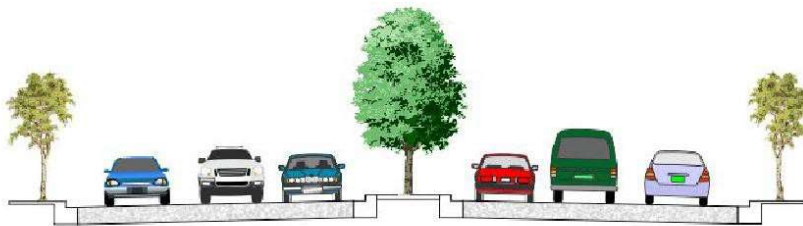
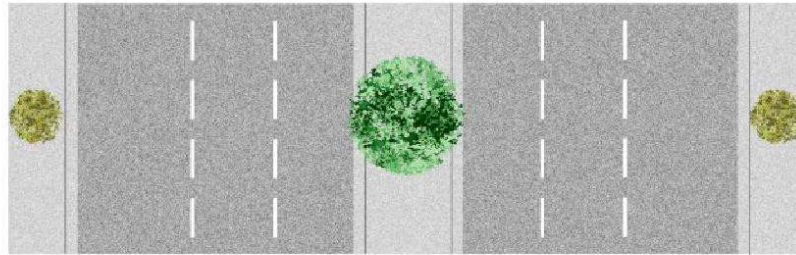
- Grading outside of the roadway ROW not related to a TCE or ROW agreement is generally considered ineligible but can be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).
- Rehabilitation, unless there is a change in profile and cross section
- Reconstruction (unless in ROW agreement or within project scope)
- New Railroad Grade Separation Projects

-
- Enhanced landscaping, aesthetics and gateway treatments (e.g., new city sign, statues, ornaments, public art, fountains, trees greater than a 24 inch box, wrought iron fencing, etc. ~~landscaping that exceeds that necessary for normal erosion control and ornamental hardscape~~)
 - ROW acquisition and construction costs for improvements greater than the typical ROW width for the applicable MPAH Roadway Classification (See standard MPAH cross sections in Exhibit 7-5), unless required by Class II or Class IV bike facilities. Where full parcel acquisitions are necessary to meet typical ROW requirements for the MPAH classification, any excess parcels shall be disposed of in accordance with the provisions of these guidelines, State statutes as outlined in Article XIX and the California State Controllers Guidelines Relating to Gas Tax Expenditures.
 - Construction and/or ROW for separated Class I bike facilities, unless a connection into the MPAH roadway is required.
 - Utility Betterments
 - Construction of new utilities
 - Street improvements and maintenance activities (e.g., curb and gutter, pavement rehabilitation/restoration, sidewalk reconstruction, or full catch-basin replacement/construction) are not eligible, unless surface repairs are required to restore a funded RCP project area to pre-construction conditions.

Exhibit 7-5
Standard MPAH Cross Sections

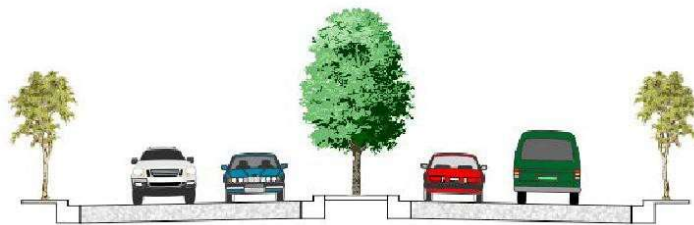
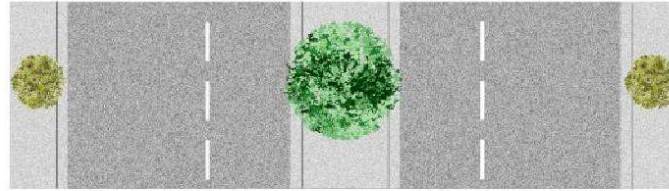


PRINCIPAL
144 FT
(8 LANES, DIVIDED)

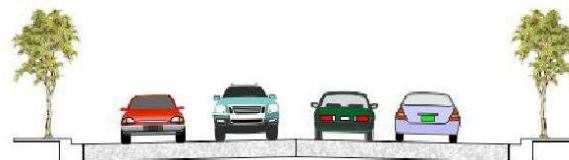
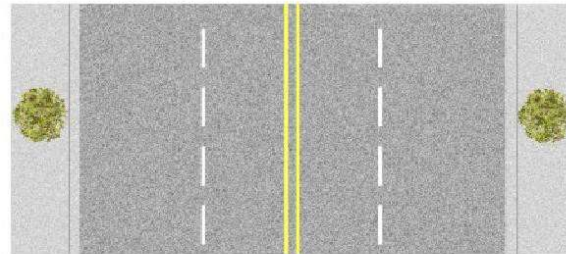


MAJOR
120FT
(6 LANES, DIVIDED)

Exhibit 7-5 *continued*
Standard MPAH Cross Sections

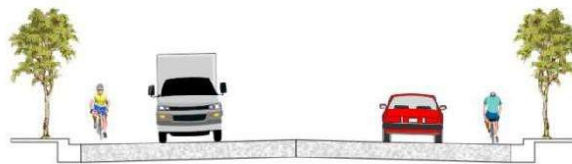
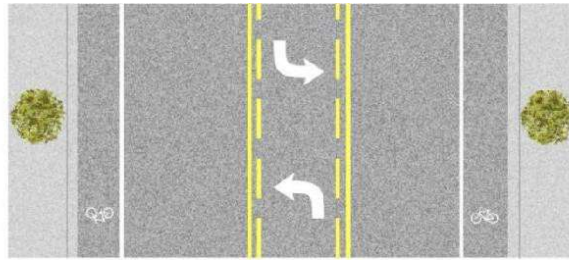


PRIMARY
100 FT
(4 LANES, DIVIDED)

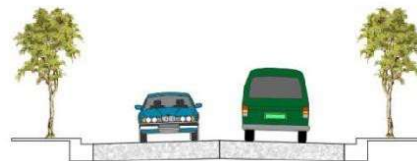
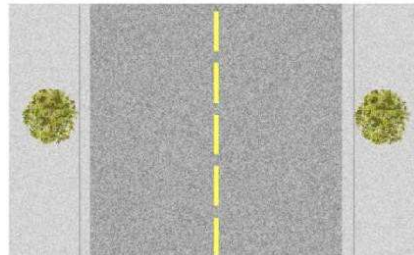


SECONDARY
80 FT
(4 LANES, UNDIVIDED)

Exhibit 7-5 *continued*
Standard MPAH Cross Sections



DIVIDED COLLECTOR
80 FT
(2 LANES, DIVIDED)



COLLECTOR
56 FT
(2 LANES, UNDIVIDED)

Application Process

Project grants are determined through a competitive application process. Local jurisdictions seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below. Detailed instructions and checklists are provided in this chapter.

Complete application

- Funding needs by phase and fiscal year
- Local committed match funding source, confirmed through city council resolution or minute order
- Supporting technical information (including current traffic counts)
- Project development and implementation schedule
- ROW status and detailed plan for acquisition/disposal of excess right-of-way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.
- Any additional information deemed relevant by the applicant
- Grants subject to Master Funding Agreement

Calls are expected to be issued on an annual basis, or as determined by the Board. Complete project applications must be submitted by the established due date to be considered eligible for consideration.

Minimum Eligibility Requirements

Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program.

All project roadways must be identified on the MPAH network. Local streets not shown on the MPAH are not eligible for funding through this program.

Other Application Materials

Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local agencies will be required to submit the following materials:

Council Approval: A Council Resolution or Minute Order action authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a *draft* copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.

Project Documentation: If proposed project has completed initial planning activities (such

as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineer stamped site plan, or other summary information to demonstrate completion or planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information if necessary, to adequately evaluate the project application.

Project Summary Information: With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**

Master Plan of Arterial Highway Capacities

Below are the approximate roadway capacities that will be used in the determination of LOS:

<u>Type of Arterial</u>	<u>Level of Service (LOS)</u>				
	A	B	C	D	E
	.51 - .60 v/c	.61 - .70 v/c	.71 - .80 v/c	.81 - .90 v/c	.91 - 1.00 v/c
8 Lanes Divided	45,000	52,500	60,000	67,500	75,000
6 Lanes Divided	33,900	39,400	45,000	50,600	56,300
4 Lanes Divided	22,500	26,300	30,000	33,800	37,500
4 Lanes (Undivided)	15,000	17,500	20,000	22,500	25,000
2 Lanes Divided	9,000	12,000	15,000	20,000	22,000
2 Lanes (Undivided)	7,500	8,800	10,000	11,300	12,500

Note: Values are maximum Average Daily Traffic

Selection Criteria

Specific selection criteria will be used to evaluate competitive program project applications. Emphasis is placed on existing usage, proposed Vehicle Miles Traveled (VMT), level of services benefits, local match rate funding and overall facility importance. Technical categories and point values are shown on Tables 7-1 and 7-2. Data sources and methodology are described below.

Projected/Current Average Daily Trips (ADT): Current ADT is the preferred method of measuring congestion. However, traffic counts projected to the year of opening for the project will be allowed as part of the competitive evaluation. These must be submitted along with current 24-hour traffic counts for the proposed segment for comparison purposes. The agency must submit the project's projected ADT, current ADT, the delta, and justification of the increase.

Regarding "current" counts, these are defined as those taken for a typical mid-week period within the preceding 12-months. Projects submitted without "current counts" will be considered incomplete and non-responsive.

Project applications using projected ADT must use traffic counts taken within the preceding 12 months. Project applications not using projected ADT may use traffic counts taken within the 36 months preceding the release date of the current call. **Note:** New facilities must be modeled through OCTAM and requests should be submitted to OCTA a minimum of six (6) weeks prior to application submittal deadline. **The OCTAM modeling request deadline is September 10, 2026 ~~October 9, 2025~~ for the **2027** Call for Projects.** If modeling requests are not submitted six (6) weeks prior to the application submittal deadline, the application will not be considered. For agencies where event, weekend, or seasonal traffic presents a significant issue, Average Annual Daily Traffic (AADT) counts can be used, provided the agency gives sufficient justification for the use of AADT.

VMT: Centerline length of segment proposed for improvement multiplied by the existing ADT for the proposed segment length. Measurements must be taken proximate to capacity increase. VMT for improvements covering multiple discrete count segments are calculated on a weighted average basis.

Current Project Readiness: This category is additive. **Points are earned for the highest qualifying designation at the time applications are submitted.** Local jurisdictions should select the most current phase of the project.

- Environmental Approvals – applies where all environmental clearances have been obtained on the project.
- Preliminary design (35 percent (35%) level) – will require certification from the City Engineer and is subject to verification.
- Final Design (PS&E) – applies where the jurisdiction's City Engineer or other authorized person has approved the final design.
- ROW (all offers issued) – applies where offers have been made for every parcel where acquisition is required and/or offers of dedication or orders of immediate possession have been received by the jurisdiction. Documentation of ROW possession will be required with application submittal.
- ROW (all easements and titles) – applies where no ROW is needed for the project or where all ROW has been acquired/dedicated.

Cost Benefit: Total project cost (including unfunded phases) divided by the existing ADT (or modeled ADT for new segments).

Funding Over-Match: The percentages shown apply to match rates above a jurisdiction's minimum local match rate requirement. M2 requires a 50 percent (50%) local match for RCP projects. ~~This minimum match can be reduced by up to 25 percentage points if certain eligible components are met. Pursuant to the M2 Ordinance, this minimum match requirement may be reduced by up to twenty-five (25) percentage points if the following criteria are met:~~

- A ten percent (10%) local match reduction if the local jurisdiction implements, maintains and operates in conformance with the Traffic Signal Synchronization Master Plan.
- A ten percent (10%) local match reduction if the local jurisdiction either: (a) has measurable improvement of paved road conditions during the previous reporting period as determined pursuant to OCTA's method of measuring improvement of road pavement conditions or (b) has road pavement conditions during the previous reporting period which are within the highest twenty percent (20%) of the scale for road pavement conditions as determined pursuant to OCTA's method of measuring improvement of road pavement conditions.
- A five percent (5%) local match reduction if the local jurisdiction does not use any Net Revenues as part of the funds for the local match.

If a jurisdiction's minimum match target is 30 percent (30%) and a local match of 45 percent (45%) is pledged, points are earned for the 15 percent (15%) over-match differential. The pledged amount is considered the committed match rate and will be required, at a minimum, from the local agency throughout the life of the project.

Transportation Significance: Roadway classification as shown in the current MPAH.

Operational Attributes (within the roadway): This category is additive. Each category, except Active Transit Routes, must be a new feature added as a part of the proposed project. Only one feature can be selected for any qualifying category. For example, installation of a bike lane that is identified in an adopted ATP plan can be awarded points under "Bike Facilities" or "Active Transportation Focused Plan Elements," but not both.

- Pedestrian Facilities: Placement of a new sidewalk where **none currently exists** along an entire segment of proposed project.
- Meets MPAH configuration: Improvement of roadway to full MPAH standard for the segment classification.
- Active Transit Route(s): Segments served by fixed route public transit service.
- Bus Turnouts: Construction of bus turnouts.
- Bike Facilities: Installation of new bike facilities (Class II or Class IV bike lanes) **as**

a complementary feature to the MPAH project. Class I is not eligible. All proposed bike facilities must be included in an approved transportation plan or circulation element. For bonus points (max 5 total), Class II and Class IV facilities may also describe how improvements will help improve street operations and reduce congestion including how the project will connect a diversity of land-uses, fill gap(s) in existing bicycle facilities, and contribute to the broader bicycling infrastructure network AND/OR a quantitative analysis showing congestion reduction/reduction in vehicle miles traveled. Potential methodology includes the California Air Resources Board (CARB) VMT reduction or alternative quantification method, see CARB link: https://ww2.arb.ca.gov/sites/default/files/auction-proceeds/bicycle%20facilities_summary_032519.pdf

- Median (Raised): Installation of a mid-block raised median where none exists today. Can be provided in conjunction with meeting MPAH standards.
- Safety Improvements: Project features that increase the safety of pedestrians. These elements can include the new installation of: median barriers, curb extensions, residential traffic diverters, pedestrian crossing islands, pedestrian activated signals, crosswalk enhancements, safety signage, and the addition, modification, or improvement of existing pedestrian signals. Other elements of safety may be considered on a case-by-case basis.
- Elements of Approved Active Transportation Plan/Active Transportation Focused Sections of other Types of Mobility Plans: Incorporate project features that are approved in an active transportation plan or if very focused, in active transportation focused sections of other types of plans that improve mobility. These elements can include bike infrastructure and pedestrian elements. Other elements of an active transportation plan may be considered on a case-by-case basis. Documentation of approved plan will be required with application submittal and assignment of points for active transportation focused sections of other types of plans will be considered on a case-by-case basis.
- Sustainability Elements: Includes the use of multiple complete street elements, the installation of solar lighting within the roadway cross section, or water conservation elements that reduce water consumption, compared to current usage within project limits; such as the replacement of existing landscaping with hardscape and/or "California Native" drought tolerant type landscaping; the replacement of existing sprinklers with drip irrigation systems; the installation of new "grey" or recycled water systems where such does not currently exist. Other elements of sustainability may be considered on a case-by-case basis. Points are awarded at construction phase only.
- Other (e.g., Golf cart paths in conformance with California Vehicle Code and which are demonstrated to remove vehicle trips from roadway).

Improvement Characteristics: Select one characteristic which best describes the project:

Gap Closures: the construction of a roadway to its full MPAH build-out for the purpose of connecting two existing ends of that roadway by filling in a missing segment or for completing the terminus of an MPAH roadway. This applies to increased roadway capacity only as it relates to vehicular traffic.

- New Facility/Extensions: Construction of new roadways.
- Bridge crossing: Widening of bridge crossing within the project limits to full MPAH width. Widening beyond MPAH shall not qualify for Project O funding.
- Adds capacity: Addition of through traffic lanes.
- Improves traffic flow: Installation of a median, restricting cross street traffic, adding midblock turn lanes, or elimination of driveways.

LOS Improvement: This category is a product of the existing or projected LOS based upon volume/capacity -- or v/c -- and LOS improvement "with project". **Projects must meet a minimum existing or projected LOS of "D" (.81 v/c) "without project" condition to qualify for priority consideration for funding.** Existing LOS is determined using current 24-hour traffic counts for the proposed segment. However, for projects where traffic volumes follow unconventional patterns, unidirectional volumes may be proposed as an acceptable alternate methodology for determining LOS. If unidirectional volumes are used for LOS calculations, ADT for the proposed direction of improvement shall serve as the basis for ADT, cost benefit and vehicle miles travelled (VMT) scoring categories. Projects that do not meet the minimum LOS "D" can be submitted but are not guaranteed consideration as part of the competitive process.

If during the competitive process, it is determined that additional programming capacity exists after all eligible projects with LOS "D" have been funded, a consideration of projects with a minimum LOS "C" (.71 v/c) may be undertaken. Such consideration will be at the discretion of OCTA. Projects with a LOS better than "C" (.70 v/c) will not be considered.

LOS Improvement: This category is a product of the existing or projected LOS based upon volume/capacity -- or v/c -- and LOS improvement "with project". **Projects must meet a minimum existing or projected LOS of "D" (.81 v/c) "without project" condition to qualify for priority consideration for funding.** Existing LOS is determined using current 24-hour traffic counts for the proposed segment. However, for projects where traffic volumes follow unconventional patterns, unidirectional volumes may be proposed as an acceptable alternate methodology for determining LOS. If unidirectional volumes are used for LOS calculations, ADT for the proposed direction of improvement shall serve as the basis for ADT, cost benefit and vehicle miles travelled (VMT) scoring categories. Projects that do not meet the minimum LOS "D" can be submitted but are not guaranteed consideration as part of the competitive process.

If during the competitive process, it is determined that additional programming capacity exists after all eligible projects with LOS "D" have been funded, a consideration of projects

with a minimum LOS "C" (.71 v/c) may be undertaken. Such consideration will be at the discretion of OCTA. ~~Projects with a LOS better than "C" (.70 v/c) will not be considered. Unless the project is a New Facility/Extension, projects with less than a LOS better than "C" (.70 v/c) will not be considered.~~

~~Application Process~~

~~Project grants are determined through a competitive application process. Local jurisdictions seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below. Detailed instructions and checklists are provided in this chapter.~~

~~Complete application~~

- ~~• Funding needs by phase and fiscal year~~
- ~~• Local committed match funding source, confirmed through city council resolution or minute order~~
- ~~• Supporting technical information (including current traffic counts)~~
- ~~• Project development and implementation schedule~~
- ~~• ROW status and detailed plan for acquisition/disposal of excess right of way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.~~
- ~~• Any additional information deemed relevant by the applicant~~
- ~~• Grants subject to Master Funding Agreement~~

~~Calls are expected to be issued on an annual basis, or as determined by the Board. Complete project applications must be submitted by the established due date to be considered eligible for consideration.~~

~~Minimum Eligibility Requirements~~

~~Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program.~~

~~All project roadways must be identified on the MPAH network. Local streets not shown on the MPAH are not eligible for funding through this program.~~

New Facilities

New facilities must be modeled through OCTAM. A local agency planning on submitting a request for funding for a new facility must submit a modeling request a minimum of six (6) weeks prior to the application submittal deadline. If modeling requests are not submitted six (6) weeks prior to the application submittal deadline, the application associated with the related project will not be considered. Any request for modeling **must**

be submitted to OCTA no later than September 10, 2026 ~~October 9, 2025~~ for the 2027 call.

Facility Modeling: For consistency purposes, all proposed new facilities will be modeled by OCTA using the most current version of OCTAM. Applicants may supplement their application with a locally-derived model with OCTAM used for validation purposes. The facility will be modeled with the lane capacity reflected in the application.

Average Daily Trips Determination: OCTAM will provide an "existing" ADT using a "with project" model run under current conditions. The ADT for the proposed segment will serve as the ADT value to be considered in the application. LOS Improvement: LOS on existing facilities may be positively or negatively affected by a proposed new roadway segment through trip redistribution. A current condition model run is generated "with" and "without" the proposed project. The intent is to test the efficacy of the proposed segment. A comparison of these before and after project runs (using current traffic volumes) yields potential discernable changes in LOS. The greatest benefit is generally on a parallel facility directly adjacent to the proposed project. Trip distribution changes generally dissipate farther from the project. For evaluation purposes, the segment LOS (determined through a simple volume / capacity calculation) for the "with" and "without project" will be used for the existing LOS and LOS improvement calculations.

LOS Improvement: LOS on existing facilities may be positively or negatively affected by a proposed new roadway segment through trip redistribution. A current condition model run is generated "with" and "without" the proposed project. The intent is to test the efficacy of the proposed segment. A comparison of these before and after project runs (using current traffic volumes) yields potential discernable changes in LOS. The greatest benefit is generally on a parallel facility directly adjacent to the proposed project. Trip distribution changes generally dissipate farther from the project. For evaluation purposes, the segment LOS (determined through a simple volume / capacity calculation) for the "with" and "without project" will be used for the existing LOS and LOS improvement calculations.

Matching Funds

Local agencies are required to provide local match funding for each phase of the project. As prescribed by the M2 Ordinance, the minimum local match requirement is 50 percent (50%) with potential to reduce this amount if certain eligibility requirements are met, as described in the Selection Criteria section of this chapter. The amount pledged during the application process is considered the committed match rate and will be required, at a minimum, from the local jurisdictions throughout the life of the project. Actual project contributions by the local jurisdiction are dependent on final project costs and may not be equal to the committed match rate in the event of cost overruns. OCTA will not increase the funding grant to cover cost overruns. Ineligible expenditures do not contribute to the local match rate. The match must be a monetary contribution and may not be made up of in-kind services.

2027 Call for Projects

Other Application Materials

Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local agencies will be required to submit the following materials:

~~Council Approval:~~ A Council Resolution or Minute Order action authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a draft copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.

~~Project Documentation:~~ If proposed project has completed initial planning activities (such as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineerstamped site plan, or other summary information to demonstrate completion or planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information if necessary, to adequately evaluate the project application.

~~Project Summary Information:~~ With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**

Reimbursements

This program is administered on a progress payment basis, see Chapter 10. ~~reimbursement basis for capital improvements, planning, design, and ROW acquisition. Reimbursements will be disbursed upon review and approval of an acceptable initial payment submittal, final report, and consistency with Master Funding Agreement or cooperative agreement if federal funds are awarded. The reimbursement process is more fully described in Chapter 9 of this manual.~~

Project Cancellation

If a local jurisdiction decides to cancel a project, for whatever reason, the jurisdiction shall notify OCTA as soon as possible. Projects deemed infeasible during the planning phase shall bring that phase to a logical conclusion, file a final report, and cancel remaining phases so that remaining funds can be reprogrammed without penalty. All ROW funding received for property acquisition prior to cancellation shall be repaid upon

cancellation even if property has been acquired. All construction funding received prior to cancellation shall be repaid upon cancellation.

Cancelled projects will be eligible to reapply upon resolution of issues that led to original project termination. Agencies can resubmit an application for funding consideration once either the cancellation of the existing funding grant has been approved by the OCTA Board or is in the process of approval through the semi-annual review. In the event the OCTA Board does not approve the cancellation, the lead jurisdiction will be required to withdraw the application.

Audits

All M2 payments are subject to audit. Local jurisdictions must follow established accounting requirements and applicable laws regarding the use of public funds. Failure to submit to an audit in a timely manner may result in loss of future funding. Misuse or misrepresentation of M2 funding will require remediation, which may include repayment, reduction in overall grant, and/or other sanctions to be determined. Audits shall be conducted by OCTA's Internal Audit department or other authorized agent either through the normal annual process or on a schedule to be determined by the Board (see Chapter ~~11~~ 10).

Proceeds from the sale of excess ROW acquired with program funding must be paid back to the project fund as described in Chapter 10.9 and the Master Funding Agreement.

Table 7-1
Regional Capacity Program
Street Widening Selection Criteria

Category	Points Possible	Percentage
Facility Usage		25%
Existing ADT & VMT	15	15%
Current Project Readiness	10	10%
Economic Effectiveness		15%
Cost Benefit	10	10%
Funding Over-Match	5	5%
Facility Importance		25%
Transportation Significance	10	10%
Operational Efficiency	15	15%
Benefit		35%
Improvement Characteristics	10	10%
Level of Improvement and Service	25	25%
Total	100	100%
Bonus: Additional details and analysis for Class II or Class IV bike facility as complementary feature to the MPAH project, as applicable.	5	

Table 7-2 Street Widening Point Breakdown

ACE SCORING CRITERIA Point Breakdown for Arterial Capacity Enhancement Projects Maximum Points = 100

Facility Usage			Points: 25
Existing ADT & VMT			Max Points: 15
<u>Existing ADT Range</u>			<u>Points</u>
45+	thousand	10	
40 – 44	thousand	8	
35 – 39	thousand	6	
30 – 34	thousand	5	
25 – 29	thousand	4	
20 – 24	thousand	3	
15 – 19	thousand	2	
10 – 14	thousand	1	
<10	thousand	0	
<u>VMT Range</u>			<u>Points</u>
31+	thousand	10	
26 – 30	thousand	8	
22 – 25	thousand	6	
18 – 21	thousand	5	
14 – 17	thousand	4	
11 – 13	thousand	3	
08 – 10	thousand	2	
04 – 07	thousand	1	
<4	thousand	0	
Current Project Readiness			Max Points: 10
ROW (All Easement and Titles)		5	
Final Design (PS&E)		4	
Environmental Approvals		2	
Preliminary Design (35%)		2	
ROW (All Offers Issued)		2	
Economic Effectiveness			Points: 15
Cost Benefit (Total \$/ADT)			
<u>Range*</u>			<u>Points</u>
< 49		10	
50 – 74		9	
75 – 99		7	
100 – 149		5	
150 – 199		4	
200 – 249		3	
250 – 299		2	
300 – 349		1	
350+		0	
Funding Over-Match (local match/project cost) minus minimum local match requirement.			
<u>Range*</u>			<u>Points</u>
25+%		5	
20 – 24%		4	
15 – 19%		3	
10 – 14%		2	
05 – 09%		1	
00 – 04%		0	
*Range refers to % points above agency minimum requirement.			
Facility Importance			Points: 25
<u>Transportation Significance Range</u>			<u>Points</u>
Principal or CMP Route		10	
Major		8	
Primary		6	
Secondary		4	
Collector		2	
Operational Attributes (within the roadway)			Max Points: 15
Meets MPAH Configs.		4	
Pedestrian Facilities (New)		4	
Bike Facilities (New)		4	
Active Transit Route(s)		2	
Bus Turnouts		2	
Median (Raised)		2	
Safety Improvements		3	
Active Transportation Focused Plan Elements		2	
Sustainability Elements		2	
Other		2	
Benefit			Points: 35
<u>Improve Characteristics</u>			<u>Points</u>
Gap Closure		10	
New Facility/Extension		8	
Bridge Crossing		8	
Adds Capacity		6	
Improves Traffic Flow		2	
LOS Improvement			Max Points: 25
<u>Existing LOS Starting Point Range (LOS Imp x LOS Starting Pt)</u>			<u>Points</u>
1.01+		5	
.96 – 1.00		4	
.91 – .95		3	
.86 – .90		2	
.81 – .85		1	
<.81		0	
LOS Improvements with Project (exist. Volume)			
<u>Existing LOS Starting Point Range</u>			<u>Points</u>
.20+		5	
.16 – .20		4	
.10 – .15		3	
.05 – .09		2	
.01 – .05		1	
<.01		0	
Bonus			Points: 5
Additional details and quantitative analysis for Class II and Class IV bike facilities as a complementary feature to the MPAH project, as applicable.			

Intersection Capacity Enhancements (ICE)

Overview

The MPAH serves as the backbone of Orange County’s arterial street network. Intersections at each intersecting MPAH arterial throughout the County will continue to require improvements to mitigate current and future needs. The ICE improvement category complements roadway improvement initiatives underway and supplements development mitigation opportunities.

Projects in the ICE improvement category are selected on a competitive basis. Projects must meet specific criteria in order to compete for funding through this program.

For the purposes of the ICE improvement category, the limits of an intersection shall be defined as the area that includes all necessary (or planned) through lanes, turn pockets, and associated transitions required for the intersection. Project limits of up to a maximum of 600 feet for each intersection leg are allowable. Projects that, due to special circumstances, must exceed the 600-foot limit, shall include in their application the request for a technical variance. The project shall be presented to the TSC by the local agency to request approval of the variance.

Objectives

- Improve MPAH network capacity and throughput along MPAH facilities
- Relieve congestion at MPAH intersections by providing additional turn and through lane capacity
- Improve connectivity between neighboring jurisdictions by improving operations
- Provide timely investment of M2 revenues

Project Participation Categories

The ICE category provides capital improvement funding (including planning, design, ROW acquisition and construction) for intersection improvements on the MPAH network for the following:

- Intersection widening – constructing additional through lanes and turn lanes, extending turn lanes where appropriate, and signal equipment
- Street to street grade separation projects

Eligible Activities

- Planning, environmental clearance
- Design (plans, specifications, and estimates)
- ROW acquisition
- Construction (including bus turnouts, curb ramps, median, and striping)

- Rehabilitation and/or resurfacing of existing pavement when necessitated by proposed improvement (such as change in profile and cross section).

Potentially Eligible Items

Below is a list of potentially eligible items. However, ~~initial final~~ determination of the eligibility of all project related costs will be made ~~following Board approval and OCTA will provide a written confirmation of the eligible costs for construction at the time of reimbursement~~. Prior to the submittal of an application for funding, or at any point in the project life cycle, local agencies may meet with OCTA staff to review the eligibility of project related costs. **Application review and approval does not guarantee the eligibility of all items.**

- ~~Required~~ Environmental mitigation for projects funded by ICE (subject to limitations identified in Precept 30) as required in an approved CEQA environmental document
- Storm drains/catch basins/detention basins/bioswales/other pollutant discharge mitigation devices
- Sound walls (in conjunction with roadway improvement mitigation measures) as required in an approved CEQA environmental document
- Aesthetic improvements (e.g., decorative sidewalks, enhanced sidewalk and driveway treatments such as brick or stamped concrete) including landscaping within the project ROW (eligible improvements up to 10 percent (10%) of the construction grant costs, subject to match requirements, provided costs are reasonable for the transportation benefit)
- Signal equipment (as incidental component of program), including the installation or upgrade of pedestrian countdown heads
- Bicycle detection systems
- Rehabilitation and/or resurfacing of incidental pavement areas within the proposed project limits is eligible but shall not exceed 10 percent (10%) of the ~~M2 construction~~ grant, subject to match requirements.
- Improvements and/or betterments (e.g., gates, minor parking lot restriping, underground utility, etc.) to private property if part of a ROW settlement agreement
- Utility relocation where the serving utility has prior rights as evidenced by a recorded legal document and are located within the roadway right-of-way.
- ~~Roadway~~ Grading within the ROW is eligible. (inclusive of any TCEs and/or ROW agreement related improvements) should not exceed a depth for normal roadway excavation (e.g., structural section). However, a Additional grading will be considered on a case-by-case basis. Agencies must shall provide supporting documentation (e.g., soils reports, ROW agreements) to justify the additional grading, if seeking reimbursement for this component.

- Additional ROW and CON to accommodate pedestrian or bike improvements (including Class II and Class IV bike lanes) **as a complementary feature to the MPAH project** are eligible. Construction of eligible bike facilities shall not exceed 25 percent (25%) of ~~the M2 construction~~ grant, subject to match requirements.

Utility Relocations

The expenses associated with the relocation of utilities are eligible for RCP reimbursement only when all conditions listed below have been met:

- The relocation is made necessary due to conflict with proposed improvements.
- The facility to be relocated is within the project right-of-way.
- It has been determined that the local agency is legally liable for either a portion of or all of the relocation costs.

Liability can be determined by property rights, franchise rights/agreements, state and local statutes/ordinances, permits, a finding by the local agency's counsel, or other recorded legal document. Documentation providing proof of the local jurisdiction's liability for the costs of utility relocation must be submitted at the time of a payment request (see Chapter 10). Utilities funded through enterprise funds shall not be eligible for reimbursement.

If a relocation is eligible to be reimbursed, and to be performed by the utility owner or by the utility owner's contractor, the work should be included in the ROW phase costs and clearly identified in the project application submittal. For eligible relocations to be performed during the construction phase by the local jurisdiction's contractor, the work should be included in the plans and specifications similar to other construction activities. Adjustment of existing utilities to grade (e.g., water valves, manhole frames and covers), due to new roadway cross sections are either eligible or not eligible in the construction phase subject to the limitations previously described (e.g., prior rights). New or relocated fire hydrants are ineligible.

In all cases, eligible costs shall only include "in-kind" relocation. No reimbursements will be made for betterments above the cost of "in-kind" relocation. Additionally, costs submitted for program reimbursement must include any salvage credits received.

Ineligible Items

Grading outside of the roadway ROW not related to a TCE or ROW agreement is generally assumed to be ineligible but can be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).

- ROW acquisition greater than the typical ROW width for the applicable MPAH Roadway Classification, unless required by Class II or Class IV bike facilities. Additional turn lanes not exceeding 12 feet in width needed to maintain an

intersection LOS D requiring ROW in excess of the typical ROW width for the applicable MPAH classification shall be fully eligible. Where full parcel acquisitions are necessary to meet typical ROW requirements for the MPAH classification any excess parcels shall be disposed of in accordance with State statutes and the acquisition/disposal plan submitted in accordance with these guidelines.

- Enhanced landscaping and aesthetic improvements (landscaping that exceeds that necessary for normal erosion control and ornamental hardscape).
- ROW and/or construction for separated Class I bike facilities, unless a connection into the MPAH roadway is required.
- Street improvements and maintenance activities (e.g., curb and gutter, pavement rehabilitation/restoration, sidewalk reconstruction, or full catch-basin replacement/construction) are not eligible, unless surface repairs are required to restore a funded RCP project area to pre-construction conditions.

Environmental mitigation will be allowed only as required for the proposed roadway improvement and only as contained in the environmental document. Program participation in environmental mitigation shall not exceed 25 percent (25%) of the total grant eligible project costs.

Storm drain systems required per the hydrology report for the MPAH road improvement are eligible. However, M2 funds shall not supplant developer funding (see Precept 5). Longitudinal storm drains are eligible for program participation when the storm drain is an incidental part (cost is less than 25 percent (25%) of the total eligible improvement cost) of an eligible improvement. Program participation shall not exceed 10 percent (10%) of the cost of storm drain longitudinal/parallel and main lines. Storm drain inlets, connectors, laterals and cross culverts shall have full participation in ICE improvement category funding. Storm drains outside standard MPAH ROW widths are not eligible, excluding catch basins within reasonable distance and in general proximity to a project intersection (e.g., within ten feet of the curb return). Catch basins and drainage systems extending into adjacent areas (including public streets) shall not be eligible past the first catch basin.

Soundwalls are eligible only if they are required as part of the environmental clearance for the proposed project and shall not exceed 25 percent (25%) of the grant total eligible project costs. Aesthetic enhancements and landscaping in excess of minimum environmental mitigation requirements are subject to limitations described in the "Potentially Eligible Item" section above.

The relocation of detention basins/bioswales/other pollutant discharge mitigation devices are potentially eligible dependent on who has prior rights and will be given consideration on a case-by-case basis (see utility relocations below).

Roadway grading is eligible for structural sections if within the standard MPAH cross section for the facility (inclusive of any TCEs). Rough grading can be considered eligible, so long as it supports MPAH improvement(s) within the ROW and does not supplant developer (or any other project obligations). Any proposed rough grading outside of the MPAH ROW will be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).

Utility Relocations

~~The expenses associated with the relocation of utilities are eligible for RCP reimbursement only when all conditions listed below have been met:~~

- ~~• The relocation is made necessary due to conflict with proposed improvements.~~
- ~~• The facility to be relocated is within the project right-of-way.~~
- ~~• It has been determined that the local agency is legally liable for either a portion of or all of the relocation costs.~~

~~Liability can be determined by property rights, franchise rights/agreements, state and local statutes/ordinances, permits, a finding by the local agency's counsel, or other recorded legal document. Documentation providing proof of the local jurisdiction's liability for the costs of utility relocation must be submitted at the time of a payment request (see Chapter 9). Utilities funded through enterprise funds shall not be eligible for reimbursement.~~

~~If a relocation is eligible to be reimbursed, and to be performed by the utility owner or by the utility owner's contractor, the work should be included in the ROW phase costs and clearly identified in the project application submittal. For eligible relocations to be performed during the construction phase by the local jurisdiction's contractor, the work should be included in the plans and specifications similar to other construction activities. Adjustment of existing utilities to grade (e.g., water valves, manhole frames and covers), due to new roadway cross sections are either eligible or not eligible in the construction phase subject to the limitations previously described (e.g., prior rights). New or relocated fire hydrants are ineligible.~~

~~In all cases, eligible costs shall only include "in-kind" relocation. No reimbursements will be made for betterments above the cost of "in-kind" relocation. Additionally, costs submitted for program reimbursement must include any salvage credits received.~~

Application Process

Project grants are determined through a competitive application process. Local jurisdictions seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below. Detailed instructions and checklists are provided in this chapter.

Complete application

- Funding needs by phase and fiscal year
- Local match funding source, confirmed through city council resolution or minute order
- Supporting technical information (including current arterial link and turning movement counts)
- Project development and implementation schedule
- ROW status and a detailed plan for acquisition/disposal of excess right-of-way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.
- Any additional information deemed relevant by the applicant
- Grants subject to master funding agreement

Calls for projects are expected to be issued on an annual basis, or as determined by the Board. Complete project applications must be submitted by the established due date to be considered eligible for consideration.

Minimum Eligibility Requirements

Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program.

All project roadways must be identified on the MPAH network. Local streets not shown on the MPAH are not eligible for funding through this program.

Other Application Materials

Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local jurisdictions will be required to submit the following materials:

Council Approval: A Council Resolution or Minute Order action authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a *draft* copy of the resolution is provided, the local jurisdiction must also provide the date the resolution will be finalized by the local jurisdiction's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.

Project Documentation: If proposed project has completed initial planning activities (such as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineer-stamped site plan, or other summary information to demonstrate completion or planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information only if

necessary, to adequately evaluate the project application.

Project Summary Information: With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**

Selection Criteria

Specific selection criteria will be used to evaluate competitive program project applications. Emphasis is placed on existing usage, LOS benefits, local match funding, and overall facility importance. Technical categories and point values are shown on Tables 7-3 and 7-4. Data sources and methodology are described below.

Projected/Current Average Daily Trips (ADT): Current ADT is the preferred method of measuring congestion. However, traffic counts projected to the year of opening for the project will be allowed as part of the competitive evaluation. These must be submitted along with current 24-hour traffic counts for the proposed segment for comparison purposes. The local jurisdiction must submit the project's projected ADT, current ADT, the delta, and justification of the increase. Regarding "current" counts, these are defined as those taken for a typical mid-week period within the preceding 12-months. Project applications using projected ADT must use traffic counts taken within the preceding 12 months. Project applications not using projected ADT may use traffic counts taken within the preceding 36 months. Project applications without "current" counts will be deemed incomplete and non-responsive. Average ADT for the east and west legs of the intersection will be added to the average ADT for the north and south legs.

For agencies where event or seasonal traffic presents a significant issue, AADT counts can be used, provided the local jurisdiction gives sufficient justification for the use of AADT.

Current Project Readiness: This category is additive. **Points are earned for each satisfied readiness stage at the time applications are submitted.** The local jurisdiction should select the most current phase of the project.

- Environmental Approvals – applies where all environmental clearances have been obtained on the project.
- Preliminary design (35 percent (35%) level) – will require certification from the City Engineer and is subject to verification.
- Final Design (100 percent (100%) PS&E) – applies where the jurisdiction's City Engineer or other authorized person has approved the final design.

- ROW (all offers issued) – applies where offers have been made for every parcel where acquisition is required and/or offers of dedication or orders of immediate possession have been received by the jurisdiction. Documentation of ROW possession will be required with application submittal.
- ROW (all easements and titles) – applies where no ROW is needed for the project or where all ROW has been acquired/dedicated.

Cost Benefit: Total project cost (included unfunded phases) divided by the existing ADT (or modeled ADT for new segments).

Funding Over-Match: The percentages shown apply to match rates above a jurisdiction's minimum match rate requirement. M2 requires a 50 percent (50%) local match for RCP projects. ~~This minimum match can be reduced by up to 25 percentage points if certain eligible components are met. Pursuant to the M2 Ordinance, this minimum match requirement may be reduced by up to twenty-five (25) percentage points if the following criteria are met:~~

- A ten percent (10%) local match reduction if the local jurisdiction implements, maintains and operates in conformance with the Traffic Signal Synchronization Master Plan.
- A ten percent (10%) local match reduction if the local jurisdiction either: (a) has measurable improvement of paved road conditions during the previous reporting period as determined pursuant to OCTA's method of measuring improvement of road pavement conditions or (b) has road pavement conditions during the previous reporting period which are within the highest twenty percent (20%) of the scale for road pavement conditions as determined pursuant to OCTA's method of measuring improvement of road pavement conditions.
- A five percent (5%) local match reduction if the local jurisdiction does not use any Net Revenues as part of the funds for the local match.

If a jurisdiction's minimum match target is 30 percent (30%) and a local match of 45 percent (45%) is pledged, points are earned for the 15 percent (15%) over-match. The pledged amount is considered the committed match rate and will be required, at a minimum, from the local agency throughout the life of the project.

Coordination with Contiguous project: Projects that complement a proposed arterial improvement project with a similar implementation schedule earn points in this category.

This category is intended to recognize large projects that segregate intersection components from arterial components for funding purposes.

Transportation Significance: Roadway classification as shown in the current MPAH.

Operational Attributes (within the roadway): This category is additive. Each category must be a new feature added as a part of the proposed project. Only one feature can be selected for any qualifying category. For example, installation of a bike lane that is identified in an adopted ATP plan can be awarded points under "Bike Facilities" or "Active Transportation Focused Plan Elements," but not both.

- **Bike Facilities:** Extension of bike facilities through an intersection (Class II or Class IV) **as a complementary feature to the MPAH project. Class I is not eligible.** All proposed bike facilities must be included in an approved transportation plan or circulation element. For bonus points (max 5 total), Class II and Class IV facilities may also describe how improvements will help improve street operations and reduce congestion including how the project will connect a diversity of land- uses, fill gap(s) in existing bicycle facilities, and contribute to the broader bicycling infrastructure network AND/OR a quantitative analysis showing congestion reduction/reduction in vehicle miles traveled. Potential methodology includes the CARB VMT reduction or alternative quantification method, see https://ww2.arb.ca.gov/sites/default/files/auction-proceeds/bicycle%20facilities_summary_032519.pdf
- **Bus Turnouts:** Construction of a bus turnout as a new feature.
- **Lowers density:** Addition of through travel lanes.
- **Channels traffic:** Addition and/or extension of turn pockets (other than free right turn).
- **Free right turn:** installation of new free right or conversion of an existing right turn to free right
- **Protected/permissive left turn:** Convert from protected to protected/permissive
- **Pedestrian Facilities:** Placement of a new sidewalk if none currently exists.
- **Grade separations:** Street to street grade separations and do not apply to rail grade separation projects which are covered by the grade separation program category.
- **Safety Improvements:** Project features that increase the safety of pedestrians. These elements can include the new installation of: median barriers, curb extensions, residential traffic diverters, pedestrian crossing islands, pedestrian activated signals, crosswalk enhancements, safety signage, and the addition, modification, or improvement of existing pedestrian signals. Other elements of safety may be considered on a case-by-case basis.
- **Elements of Approved Active Transportation Plan/Active Transportation Focused Sections of other Types of Mobility Plans:** Incorporate project features that are approved in an active transportation plan or if very focused, in active transportation focused sections of other types of plans that improve mobility. These elements can include bike infrastructure and pedestrian elements. Other elements of an active transportation plan may be considered on a case-by-case basis. Documentation of approved plan will be required with application submittal

and assignment of points for active transportation focused sections of other types of plans will be considered on a case-by-case basis.

- **Sustainability Elements:** Includes the use of multiple complete street elements, the installation of solar lighting within the roadway cross section, or water conservation elements that reduce water consumption, compared to current usage within project limits; such as the replacement of existing landscaping with hardscape and/or "California Native" drought tolerant type landscaping; the replacement of existing sprinklers with drip irrigation systems; the installation of new "grey" or recycled water systems where such does not currently exist. Other elements of sustainability may be considered on a case-by-case basis. Points are awarded at construction phase only.

LOS Improvement: This category is a product of the existing or projected LOS based upon v/c and LOS improvement "with project" using ICU calculation with 1,700 vehicles per lane per hour and a .05 clearance interval. Calculations will be based upon "current" arterial link and turning movement counts projected to opening year. **Projects must meet a minimum existing or projected LOS of "D" (.81 v/c) to qualify for priority consideration for funding.** Existing LOS is determined using peak hour traffic counts/turning movements AM/PM peak periods for the proposed segment utilizing ICU methodology and using 1,700 vehicles per lane/per hour and a .05 clearance interval.

For projects where traffic volumes follow unconventional patterns (e.g. unidirectional congestion, large disparity between AM and PM peaks, etc.) HCM 2010 may be proposed as an alternate methodology for determining LOS. HCM calculations must use SYNCHRO and be supported with complete calculation documentation using standard industry approaches and current signal timing plans. If an alternative methodology is proposed, all analysis **must be submitted to OCTA for review no later than ~~September 10, 2026~~ ~~October 9, 2025~~** for the 2027~~6~~ Call for Projects. OCTA will contract with an independent third-party firm to review the technical analysis. The cost for the review will be charged to the applicant.

Projects that do not meet the minimum LOS "D" can be submitted but are not guaranteed consideration as part of the competitive process.

If during the competitive process, it is determined that additional programming capacity exists after all eligible projects with LOS "D" have been funded, a consideration of projects with a minimum LOS "C" (.71 v/c) may be undertaken. Such consideration will be at the discretion of OCTA. Projects with a LOS better than "C" (.70 v/c) will not be considered.

Application Process

~~Project grants are determined through a competitive application process. Local agencies seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below. Detailed instructions and checklists are provided in this chapter.~~

Complete application

- Funding needs by phase and fiscal year
- Local match funding source, confirmed through city council resolution or minute order
- Supporting technical information (including current arterial link and turning movement counts)
- Project development and implementation schedule
- ROW status and a detailed plan for acquisition/disposal of excess right-of-way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.
- Any additional information deemed relevant by the applicant
- Grants subject to master funding agreement

Calls for projects are expected to be issued on an annual basis, or as determined by the Board. Complete project applications must be submitted by the established due date to be considered eligible for consideration.

Minimum Eligibility Requirements

Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program.

All project roadways must be identified on the MPAH network. Local streets not shown on the MPAH are not eligible for funding through this program.

Matching Funds

Local agencies are required to provide local match funding for each phase of the project. As prescribed by the M2 Ordinance, the minimum local match requirement is 50 percent (50%) with potential to reduce this amount if certain eligibility requirements are met, as described in the Selection Criteria section of this chapter. The amount pledged during the application process is considered the committed match rate and will be required, at a minimum, from the local agency throughout the life of the project. Actual project contributions by the local agency are dependent on final project costs and may not be equal to the committed match rate in the event of cost overruns. OCTA will not increase the funding grant to cover cost overruns. Ineligible expenditures do not contribute to the local match rate. The match must be a monetary contribution and may not be made up of in-kind services.

Other Application Materials

Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local agencies will be required to submit the following materials:

~~Council Approval: A Council Resolution or Minute Order action authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a draft copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.~~

~~Project Documentation: If proposed project has completed initial planning activities (such as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineer-stamped site plan, or other summary information to demonstrate completion or planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information only if necessary, to adequately evaluate the project application.~~

~~Project Summary Information: With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**~~

Reimbursements

~~This program is administered on a progress payment basis, see Chapter 10. reimbursement basis for capital improvements, planning, design, and ROW acquisition. Reimbursements will be disbursed upon review and approval of an acceptable initial payment submittal, final report and consistency with Master Funding Agreement or cooperative agreement. The reimbursement process is more fully described in Chapter 9 of this manual.~~

Project Cancellation

If a local jurisdiction decides to cancel a project, for whatever reason, the agency shall notify OCTA as soon as possible. Projects deemed infeasible during the planning phase shall bring that phase to a logical conclusion, file a final report, and cancel remaining phases so that remaining funds can be reprogrammed without penalty. ROW funding received for property acquisition prior to cancellation shall be repaid upon cancellation even if property has been acquired. Construction funding received prior to cancellation shall be repaid upon cancellation.

Cancelled projects will be eligible for re-application upon resolution of issues that led to original project termination.

Audits

All M2 payments are subject to audit. Local jurisdictions must follow established accounting requirements and applicable laws regarding the use of public funds. Failure to submit to an audit in a timely manner may result in loss of future funding. Misuse or misrepresentation of M2 funding will require remediation which may include repayment, reduction in overall grant, and/or other sanctions to be determined. Audits shall be conducted by OCTA's Internal Audit department or other authorized agent either through the normal annual process or on a schedule to be determined by the Board (see Chapter [1110](#)).

Proceeds from the sale of excess ROW acquired with program funding must be paid back to the project fund as described in Chapter [10 9](#) and the Master Funding Agreement.

Table 7-3
Regional Capacity Program
Intersection Improvement Selection Criteria

Category	Points Possible	Percentage
Facility Usage		25%
Existing ADT	15	15%
Current Project Readiness	10	10%
Economic Effectiveness		20%
Cost Benefit	10	10%
Funding Over-Match	5	5%
Coordination with Contiguous Project	5	5%
Facility Importance		30%
Transportation Significance	10	10%
Operational Efficiency	20	20%
Benefit		25%
LOS Improvement	25	25%
Total	100	100%
Bonus: Additional details and analysis for Class II or Class IV bike facility as complementary feature to the MPAH project, as applicable.	5	

Table 7-4 Intersection Widening Point Breakdown

ICE SCORING CRITERIA Point Breakdown for Intersection Capacity Enhancement Projects Maximum Points = 100

Facility Usage	Points: 25
ADT Range*	Points
60+ thousand	15
55 – 59 thousand	13
50 – 54 thousand	11
45 – 49 thousand	9
40 – 44 thousand	7
35 – 39 thousand	5
30 – 34 thousand	3
25 – 29 thousand	1
*AVG ADT for east and west legs plus AVG ADT for north and south legs of intersection.	
Current Project Readiness	Max Points: 10
ROW (All Easement and Titles)	5
Final Design (PS&E)	4
Environmental Approvals	2
Preliminary Design (35%)	2
ROW (All Offers Issued)	2
Points are additive. Design and ROW limited to highest qualifying designation.	
Economic Effectiveness	Points: 20
Cost Benefit (Total \$/ADT) Range*	Points
< 20	10
21 – 30	9
31 – 50	7
51 – 75	5
76 – 100	3
>100	1
* = Total Cost/Average ADT	
Funding Over-Match (local match/project cost) minus minimum local match requirement.	
Range*	Points
25+%	5
20 – 24%	4
15 – 19%	3
10 – 14%	2
5 – 9%	1
0 – 4%	0
Coordination with Contiguous Project Range	Points
Yes	5
No	0
Coordination with ACE Project with similar implementation schedule.	
Facility Importance	Points: 30
Transportation Significance Range	Points
Principal or CMP Route	10
Major	8
Primary	6
Secondary	4
Collector	2
Operational Attributes (within the roadway)	Max Points: 20
Grade Separations	10
Bike Facilities	5
Pedestrian Facilities (New)	5
Bus Turnouts	4
Free Right	4
Lowers Density	3
Channels Traffic	3
Protected/Permissive Left Turn	2
Safety Improvements	3
Active Transportation Focused Plan Elements	2
Sustainability Elements	2
Benefit	Points: 25
LOS Improvement	Max Points: 25
Calculation: LOS Imp x LOS Starting Point	
Existing LOS (Peak Hour) Range	Points
1.01+	5
.96 – 1.00	4
.91 – .95	3
.86 – .90	2
.81 – .85	1
<.81	0
LOS Reduction w/ Project (existing Volume) Range	Points
.20+	5
.16 – .20	4
.10 – .15	3
.05 – .09	2
.01 – .04	1
<.01	0
Bonus	Points: 5
Additional details and quantitative analysis for Class II and Class IV bike facilities as a complementary feature to the MPAH project, as applicable.	

Freeway Arterial/Streets Transitions (FAST)

Overview

The MPAH serves as the backbone of Orange County's arterial street network. Current and future needs at existing interchanges along MPAH highways and freeways will need to be addressed in order to improve connectivity between freeways and MPAH arterials. The interchange improvement program complements roadway improvement initiatives underway as well, and supplements development mitigation opportunities.

Projects in the FAST improvement category are selected on a competitive basis. Projects must meet specific criteria in order to compete for funding through this program.

Objectives

- Improve transition to and from Orange County freeways with emphasis on MPAH performance
- Provide timely investment of M2 revenues

Project Participation Categories

The FAST category provides capital improvement funding (including planning, design, ROW acquisition and construction) for interchange improvements on the MPAH network for the following:

- MPAH facility interchange connections to Orange County freeways (including on-ramp, off-ramp and arterial improvements)

Eligible Activities

- Planning, environmental clearance
- Design
- ROW acquisition
- Construction (including ramps, intersection and structural improvements/reconstruction incidental to project)
- Signal equipment (as incidental component of the program)
- Rehabilitation and/or resurfacing of existing pavement when necessitated by proposed improvement (such as change in profile and cross section)

Potentially Eligible Items

Below is a list of potentially eligible items. However, ~~initial final~~ determination of the eligibility of all project related costs will be made following Board approval and OCTA will provide a written confirmation of the eligible costs for construction at the time of reimbursement. Prior to the submittal of an application for funding, or at any point in the project life cycle, local agencies may meet with OCTA staff to review the eligibility of

project related costs. **Application review and approval does not guarantee the eligibility of all items.**

- Environmental mitigation for projects funded by FAST (subject to limitations identified in Precept 30) as required in an approved CEQA environmental document details below)
- Storm drains/catch basins/detention basins/bioswales/other pollutant discharge mitigation devices (details below)
- Aesthetic improvements including landscaping within the project ROW (eligible improvements up to 10 percent (10%) of construction grant costs, subject to match requirements, provided costs are reasonable for the transportation benefit)
- Rehabilitation and/or resurfacing of incidental pavement areas within the proposed project limits is eligible but shall not exceed 10 percent (10%) of the ~~M2 construction~~ grant, subject to match requirements.
- Improvements and/or betterments to private property if part of a ROW settlement agreement
- Utility relocation where the serving utility has prior rights as evidenced by a recorded legal document
- ~~Roadway Grading within the ROW is eligible. shall not exceed a depth for normal roadway excavation (e.g. structural section) or as required by TCEs, and/or ROW agreement related improvements. However, a~~ Additional grading will be considered on a case-by-case basis. Agencies must shall provide supporting documentation (e.g. soils reports, ROW agreements) to justify the additional grading, if seeking reimbursement for this component.
- Additional ROW and CON to accommodate pedestrian or bike improvements (including Class II and Class IV bike lanes) **as a complementary feature to the MPAH project** are eligible. Construction of eligible bike facilities shall not exceed 25 percent (25%) of ~~the M2 construction~~ grant, subject to match requirements.
- Auxiliary lanes if necessitated by interchange improvements
- Soundwalls (in conjunction with roadway improvement mitigation measures) as required in an approved CEQA environmental document

Environmental mitigation will be allowed only as required for the proposed roadway improvement, and only as contained in the environmental document. Program participation in environmental mitigation shall not exceed 25 percent (25%) of the grant total eligible project costs.

Storm drain systems required per the hydrology report for the MPAH roadway improvement are eligible. However, M2 funds shall not supplant developer funding (see Precept 5). Longitudinal storm drains are eligible for program participation when the storm drain is an incidental part (cost is less than 25 percent (25%) of the total eligible-

~~improvement cost) of an eligible improvement. Program participation shall not exceed 10 percent (10%) of the cost of storm drain longitudinal/parallel and main lines.~~ Storm drain inlets, connectors, laterals and cross culverts shall have full participation in FAST improvement category funding. Storm drains outside standard MPAH ROW widths are not eligible, excluding catch basins within reasonable distance and in general proximity to a project intersection (e.g. within ten feet of the curb return). Catch basins and drainage systems extending into adjacent areas (including public streets) shall not be eligible past the first catch basin.

Soundwalls are eligible only if they are required as part of the environmental mitigation for the proposed project and shall not exceed 25 percent (25%) of the total eligible project cost. Aesthetic enhancements and landscaping in excess of minimum environmental mitigation requirements are eligible at up to 10 percent (10%) of the total ~~grant eligible construction costs~~, provided costs are reasonable for the transportation benefit.

The relocation of detention basins/bioswales are potentially eligible dependent on prior rights and will be given consideration on a case-by-case basis (see Utility Relocations below).

Roadway grading is eligible for structural sections if within the standard MPAH cross section for the facility (inclusive of any TCEs). Rough grading can be considered eligible, so long as it supports MPAH improvement(s) within the ROW and does not supplant developer (or any other project obligations). Any proposed rough grading outside of the MPAH ROW, will be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).

Utility Relocations

The expenses associated with the relocation of utilities are eligible for RCP reimbursement only when:

- The relocation is made necessary due to conflict with proposed improvements.
- The facility to be relocated is within the project right-of-way.
- It has been determined that the local agency is legally liable for either a portion of or all of the relocation costs.

Liability can be determined by property rights, franchise rights/agreements, state and local statutes/ordinances, permits, a finding by the local agency's counsel, or other recorded legal document. Documentation providing proof of the local agency's liability for the costs of utility relocation must be submitted at the time of a payment request (see Chapter 9). Utilities funded through enterprise funds shall not be eligible for reimbursement.

If a relocation is eligible to be reimbursed, and to be performed by the utility owner or

by the utility owner's contractor, the work should be included in the ROW phase costs and clearly identified in the project application submittal. For eligible relocations to be performed during the construction phase by the local agency's contractor, the work should be included in the plans and specifications similar to other construction activities. Adjustment of existing utilities to grade (e.g. water valves, manhole frames and covers), due to new roadway cross sections are either eligible or not eligible in the construction phase subject to the limitations previously described (e.g. prior rights). New or relocated fire hydrants are ineligible.

In all cases, eligible costs shall only include "in-kind" relocation. No reimbursements will be made for betterments above the cost of "in-kind" relocation. Additionally, costs submitted for program reimbursement must be reduced by any salvage credits received.

Ineligible Items Projects

- Seismic retrofit projects (unless combined with eligible capacity enhancements)
- Grading outside of the roadway ROW not related to a TCE or ROW agreement is generally assumed to be ineligible but can be evaluated by OCTA on a case-by-case basis but must be tied to the MPAH improvement(s) and not supplant developer (or any other project obligations).
- Enhanced landscaping, aesthetics and gateway treatments (landscaping that exceeds that necessary for normal erosion control and ornamental hardscape).
- ROW and/or construction for separated Class I bike facilities, unless a connection into the MPAH roadway is required.
- Street improvements and maintenance activities (e.g., curb and gutter, pavement rehabilitation/restoration, sidewalk reconstruction, or full catch-basin replacement/construction) are not eligible, unless surface repairs are required to restore a funded RCP project area to pre-construction conditions.

Application Process

Project grants are determined through a competitive application process. Local agencies seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below.

Complete application

- Funding needs by phase and fiscal year
- Local match funding source
- Supporting technical information
- Project development and implementation schedule
- ROW status and a detailed plan for acquisition/disposal of excess right-of-way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at

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

- Any additional information deemed relevant by the applicant
- Grants subject to a Master Funding Agreement or cooperative agreement if federal funds are awarded

Calls for projects are expected to be issued on an annual basis, or as determined by the OCTA Board of Directors. Complete project applications must be submitted by the established due date to be considered eligible for consideration.

Minimum Eligibility Requirements

- Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program. Worst peak hour period is used for this evaluation and eligibility purposes.

Other Application Materials

Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local agencies will be required to submit the following materials:

Council Approval: A Council Resolution or minute order authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a *draft* copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.

Project Documentation: If proposed project has completed initial planning activities (such as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineer-stamped site plan, or other summary information to demonstrate completion of planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information only if necessary, to adequately evaluate the project application.

Project Summary Information: With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits, location map, and cost estimate. **OCTA staff will request the PowerPoint file when/if a project is recommended for funding.**

Caltrans Coordination

Caltrans is not eligible to submit applications or receive payment under this program. Only eligible cities or the County of Orange may submit applications and receive funds. This program was designed to benefit local agencies.

Coordination with Caltrans will be essential for most, if not all, of the projects submitted for this program. Local agencies should therefore establish contacts with the Caltrans District 12 Office (Project Development Branch) to ensure that candidate projects have been reviewed and approved by Caltrans. All other affected agencies should be consulted as well.

Agencies submitting projects for this program must have confirmation from Caltrans that the proposed improvement is consistent with other freeway improvements as evidenced by an agreement or other formal document.

Applications should be submitted so that interchange projects are done in conjunction with construction of other freeway improvements whenever possible. However, if the interchange project can be done in advance of the freeway project, verification and/or supporting documentation must be submitted showing the interchange improvement has merit for advanced construction and that it will be compatible with the freeway design and operation. Additionally, the interchange improvements should take into account the ultimate freeway improvements if the interchange is to be improved in advance.

Selection Criteria

Specific selection criteria will be used to evaluate competitive program project applications. Emphasis is placed on existing usage, level of services benefits, local match funding and overall facility importance. Technical categories and point values are shown on Tables 7-5 and 7-6. Data sources and methodology are described below.

Projected/Current Average Daily Trips (ADT): Current ADT is the preferred method of measuring congestion. However, traffic counts and ramp volumes projected to the year of opening for the project will be allowed as part of the competitive evaluation. These must be submitted along with current 24-hour traffic counts for the proposed segment for comparison purposes. The agency must submit the project's projected ADT, current ADT, the delta, and justification of the increase. Regarding "current" counts, these are defined as those taken for a typical mid-week period within the preceding 12 months. Project applications using projected ADT must use traffic counts taken within the preceding 12 months. Project applications not using projected ADT may use traffic counts taken within the preceding 36 months. Project applications without "current" counts will be deemed incomplete and non-responsive. Average ramp intersection volume for each interchange ramp will be used for the current counts. New facilities will rely on projected ramp volume based upon Caltrans approved projection.

For agencies where event or seasonal traffic presents a significant issue, AADT counts can be used, provided the agency gives sufficient justification for the use of AADT.

Current Project Readiness: This category is additive. **Points are earned for each satisfied readiness stage at the time applications are submitted.** The local jurisdiction should select the most current phase of the project.

- Environmental Approvals – applies where all environmental clearances have been obtained on the project.
- Preliminary design (35 percent (35%) level) – will require certification from the City Engineer and is subject to verification.
- Final Design (PS&E) – applies where the jurisdiction’s City Engineer or other authorized person has approved the final design.
- ROW (all offers issued) – applies where offers have been made for every parcel where acquisition is required and/or offers of dedication or orders of immediate possession have been received by the jurisdiction. Documentation of ROW possession will be required with application submittal.
- ROW (all easements and titles) – applies where no ROW is needed for the project or where all ROW has been acquired/dedicated.

Cost Benefit: Total project cost (including unfunded phases) divided by the existing ADT (or modeled ADT for new segments).

Funding Over-Match: The percentages shown apply to match rates above a jurisdiction’s minimum local match requirement. M2 requires a 50 percent (50%) local match for RCP projects. ~~This minimum match can be reduced by up to 25 percentage points if certain eligible components are met.~~ Pursuant to the M2 Ordinance, this minimum match requirement may be reduced by up to twenty-five (25) percentage points if the following criteria are met:

- A ten percent (10%) local match reduction if the local jurisdiction implements, maintains and operates in conformance with the Traffic Signal Synchronization Master Plan.
- A ten percent (10%) local match reduction if the local jurisdiction either: (a) has measurable improvement of paved road conditions during the previous reporting period as determined pursuant to OCTA's method of measuring improvement of road pavement conditions or (b) has road pavement conditions during the previous reporting period which are within the highest twenty percent (20%) of the scale for road pavement conditions as determined pursuant to OCTA's method of measuring improvement of road pavement conditions.
- A five percent (5%) local match reduction if the local jurisdiction does not use any Net Revenues as part of the funds for the local match.

If a jurisdiction's minimum match target is 30 percent (30%) and a local match of 45 percent (45%) is pledged, points are earned for the 15 percent (15%) over-match. The pledged amount is considered the committed match rate and will be required, at a minimum, from the local agency throughout the life of the project.

Coordination with Freeway Project: Interchanges planned to coincide with or accommodate programmed freeway improvements receive points in this category.

Transportation Significance: Roadway classification as shown in the current MPAH.

Operational Attributes (within the roadway): This category is additive. Each category, except Active Transit Routes, must be a new feature added as a part of the proposed project. Only one feature can be selected for any qualifying category. For example, installation of a bike lane that is identified in an adopted ATP plan can be awarded points under "Bike Facilities" or "Active Transportation Focused Plan Elements," but not both.

- Eliminate left turn conflicts: Ramp intersection reconfiguration which does not permit left turns onto ramps.
- Coordinated signal: Ramp intersections within a coordinated corridor where coordination did not previously exist.
- Add turn lanes: Increase in number of turn lanes on arterial.
- Add traffic control: Signalization of ramp intersection
- Enhanced ramp storage: Extension or widening of existing ramp to improve off-street storage capacity.
- Pedestrian facilities: Add crosswalk and/or sidewalk to ramp or bridge crossing within context of interchange improvements.
- Bike Facilities: Installation of new bike facilities (Class II or Class IV) **as a complementary feature to the MPAH project**. Class I facilities are not eligible. All proposed bike facilities must be included in an approved transportation plan or circulation element. For bonus points (max 5 total), Class II and Class IV facilities may also describe how improvements will help improve street operations and reduce congestion including how the project will connect a diversity of land-uses, fill gap(s) in existing bicycle facilities, and contribute to the broader bicycling infrastructure network AND/OR a quantitative analysis showing congestion reduction/reduction in vehicle miles traveled. Potential methodology includes the CARB VMT reduction or alternative quantification method, see https://ww2.arb.ca.gov/sites/default/files/auction-proceeds/bicycle%20facilities_summary_032519.pdf
- Active Transit Route: facility contains a currently active OCTA transit route
- Safety Improvements: Project features that increase the safety of pedestrians. These elements can include the new installation of: intersection median barriers, curb extensions, pedestrian crossing islands, crosswalk enhancements, safety signage, and the addition, modification, or improvement of existing pedestrian signals. Other elements of safety may be considered on a case-by-case basis.

- Elements of Approved Active Transportation Plan/Active Transportation Focused Sections of other Types of Mobility Plans: Incorporate project features that are approved in an active transportation plan or if very focused, in active transportation focused sections of other types of plans that improve mobility. These elements can include bike infrastructure and pedestrian elements. Other elements of an active transportation plan may be considered on a case-by-case basis. Documentation of approved plan will be required with application submittal and assignment of points for active transportation focused sections of other types of plans will be considered on a case-by-case basis.
- Sustainability Elements: Includes the use of multiple complete street elements, the installation of solar lighting within the roadway cross section, or water conservation elements that reduce water consumption, compared to current usage within project limits; such as the replacement of existing landscaping with hardscape and/or "California Native" drought tolerant type landscaping; the replacement of existing sprinklers with drip irrigation systems; the installation of new "grey" or recycled water systems where such does not currently exist. Other elements of sustainability may be considered on a case-by-case basis. Points are awarded at construction phase only.

LOS Improvement: This category is a product of the existing or projected LOS based upon v/c and LOS improvement "with project" for arterial based improvements and ICU for intersection-based improvements. **Projects must meet a minimum existing or projected LOS of "D" (.81 v/c) to qualify for priority consideration for funding.** Existing LOS is determined using current 24-hour traffic counts for arterials and peak hour turning movements at intersections for the proposed segment. However, for projects where traffic volumes follow unconventional patterns (e.g. unidirectional congestion, large disparity between AM and PM peaks, etc.) alternate methodologies for determining LOS can be proposed. If HCM 2010 is proposed for intersections as an alternative methodology, all analysis **must be submitted to OCTA no later than September 10, 2026 ~~October 9, 2025~~** and the cost for independent review shall be reimbursed by the applicant. Projects that do not meet the minimum LOS "D" can be submitted but are not guaranteed consideration as part of the competitive process.

If during the competitive process, it is determined that additional programming capacity exists after all eligible projects with LOS "D" have been funded, a consideration of projects with a minimum LOS "C" (.71 v/c) may be undertaken. Such consideration will be at the discretion of OCTA. Projects with a LOS better than "C" (.70 v/c) will not be considered.

Improvement Characteristics: Select the attribute that best fits your project definition.

- New facility: New interchange where none exists.
- Partial facility: New interchange which does not provide full access.
- Interchange reconstruction: improvement of existing interchange to provide

additional arterial capacity (widening of overcrossing or undercrossing).

- Ramp reconfiguration: Widening of ramp or arterial to improve turning movements or other operational efficiencies.
- Ramp metering: Installation of metering on ramp.

Application Process

~~Project grants are determined through a competitive application process. Local agencies seeking funding must complete a formal application and provide supporting documentation that will be used to evaluate the project proposal as outlined below.~~

~~Complete application~~

- ~~○ Funding needs by phase and fiscal year~~
- ~~○ Local match funding source~~
- ~~○ Supporting technical information~~
- ~~○ Project development and implementation schedule~~
- ~~○ ROW status and a detailed plan for acquisition/disposal of excess right of way. The ROW acquisition/disposal plan must be submitted using the "ROW acquisition/disposal plan" form provided by OCTA and available for download at <https://ocfundtracker.octa.net>.~~
- ~~○ Any additional information deemed relevant by the applicant~~
- ~~○ Grants subject to a Master Funding Agreement or cooperative agreement if federal funds are awarded~~

~~Calls for projects are expected to be issued on an annual basis, or as determined by the OCTA Board of Directors. Complete project applications must be submitted by the established due date to be considered eligible for consideration.~~

Minimum Eligibility Requirements

~~Projects must have an existing or projected LOS "D" (.81 v/c) or worse to qualify for priority consideration for funding in this program. Worst peak hour period is used for this evaluation and eligibility purposes.~~

Matching Funds

Local agencies are required to provide local match funding for each phase of the project. As prescribed by the M2 Ordinance, a 50 percent (50%) minimum local match is required. A lower local match may be permitted if certain eligibility criteria are met, as described in the Selection Criteria section of this chapter. The amount pledged during the application process is considered the committed match rate and will be required, at a minimum, from the local agency throughout the life of the project. Actual project contributions by the local agency are dependent on final project costs and may not be

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equal to the committed match rate in the event of cost overruns. OCTA will not increase the funding grant to cover cost overruns. Ineligible expenditures do not contribute to the local match rate. The match must be a monetary contribution and may not be made up of in-kind services.

Reimbursements

This program is administered on a progress payment basis, see Chapter 10. ~~reimbursement basis for capital improvements, planning, design, and ROW acquisition. Reimbursements will be disbursed upon review and approval of an acceptable initial payment submittal, final report and consistency with Master Funding Agreement. The reimbursement process is described in Chapter 9.~~

~~Caltrans Coordination~~

~~Caltrans is not eligible to submit applications or receive payment under this program. Only eligible cities or the County of Orange may submit applications and receive funds. This program was designed to benefit local agencies.~~

~~Coordination with Caltrans will be essential for most, if not all, of the projects submitted for this program. Local agencies should therefore establish contacts with the Caltrans District 12 Office (Project Development Branch) to ensure that candidate projects have been reviewed and approved by Caltrans. All other affected agencies should be consulted as well.~~

~~**Agencies submitting projects for this program must have confirmation from Caltrans that the proposed improvement is consistent with other freeway improvements as evidenced by an agreement or other formal document.**~~

Applications should be submitted so that interchange projects are done in conjunction with construction of other freeway improvements whenever possible. However, if the interchange project can be done in advance of the freeway project, verification and/or supporting documentation must be submitted showing the interchange improvement has merit for advanced construction and that it will be compatible with the freeway design and operation. Additionally, the interchange improvements should take into account the ultimate freeway improvements if the interchange is to be improved in advance.

Project Cancellation

If a local jurisdiction decides to cancel a project, for whatever reason, the jurisdiction shall notify OCTA as soon as possible. Projects deemed infeasible during the planning phase shall bring that phase to a logical conclusion, file a final report, and cancel remaining phases so that remaining funds can be reprogrammed without penalty. ROW funding received for property acquisition prior to cancellation shall be repaid upon _____

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cancellation even if property has been acquired. Construction funding received prior to cancellation shall be repaid upon cancellation.

Cancelled projects will be eligible for re-application upon resolution of issues that led to original project termination.

Audits

All M2 payments are subject to audit. Local jurisdictions must follow established accounting requirements and applicable laws regarding the use of public funds. Failure to submit to an audit in a timely manner may result in loss of future funding. Misuse or misrepresentation of M2 funding will require remediation which may include repayment, reduction in overall grant, and/or other sanctions to be determined. Audits shall be conducted by OCTA's Internal Audit department or other authorized agent either through the normal annual process or on a schedule to be determined by the Board (see Chapter ~~11~~ 10).

Proceeds from the sale of excess ROW acquired with program funding must be paid back to the project fund as described in Chapter ~~10~~ 9 and Master Funding Agreement.

Other Application Materials

~~Supporting documentation will be required to fully consider each project application. In addition to the funding plan described above, local agencies will be required to submit the following materials:~~

~~Council Approval: A Council Resolution or minute order authorizing request for funding consideration with a commitment of local match funding must be provided with the project application. **If a draft copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's**~~

~~**governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board of Directors.~~

~~Project Documentation: If proposed project has completed initial planning activities (such as PSR or equivalent, EIR, or design), evidence of approval should be included with the application. Satisfactory evidence includes project approval signature page, engineer-stamped site plan, or other summary information to demonstrate completion of planning phases. An electronic copy of the PSR and/or environmental document must be supplied as applicable. The applicant will be asked for additional detailed information only if necessary, to adequately evaluate the project application.~~

~~Project Summary Information: With each application being recommended for funding, the agency shall submit a PowerPoint presentation summarizing the pertinent project information for review and discussion purposes. The presentation shall be no more than three (3) slides and should contain, at a minimum, a project description, project benefits,~~

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location map, and cost estimate. ~~OCTA staff will request the PowerPoint file when/if a project is recommended for funding.~~

**Table 7-5
Freeway/Arterial Street Transitions
Interchange Improvement Selection Criteria**

Category	Points Possible	Percentage
Facility Usage		20%
Existing ADT	10	10%
Current Project Readiness	10	10%
Economic Effectiveness		25%
Cost Benefit	10	10%
Matching Funds	10	10%
Coordination with Freeway Project	5	5%
Facility Importance		25%
Transportation Significance	10	10%
Operational Attributes	15	15%
Benefit		30%
Existing LOS	10	10%
LOS Reduction w/ Project	10	10%
Improvement Characteristics	10	10%
Total	100	100%
Bonus: Additional details and analysis for Class II or Class IV bike facility as complementary feature to MPAH project, as applicable.	5	

Table 7-6 Interchange Improvement Point Breakdown

FAST SCORING CRITERIA Point Breakdown for Freeway/Arterial Street Transitions Projects Maximum Points = 100

Facility Usage	Points: 20	Facility Importance	Points: 25																																																																																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">ADT Range*</th> <th style="text-align: left;">thousand</th> <th style="text-align: right;">Points</th> </tr> </thead> <tbody> <tr><td>55+</td><td></td><td style="text-align: right;">10</td></tr> <tr><td>50 – 54</td><td></td><td style="text-align: right;">9</td></tr> <tr><td>45 – 49</td><td></td><td style="text-align: right;">8</td></tr> <tr><td>40 – 44</td><td></td><td style="text-align: right;">6</td></tr> <tr><td>35 – 39</td><td></td><td style="text-align: right;">4</td></tr> <tr><td>30 – 34</td><td></td><td style="text-align: right;">3</td></tr> <tr><td>25 – 29</td><td></td><td style="text-align: right;">2</td></tr> <tr><td>20 – 24</td><td></td><td style="text-align: right;">1</td></tr> <tr><td><10 – 19</td><td></td><td style="text-align: right;">0</td></tr> </tbody> </table> <p>*Arterial plus daily ramp exit volume</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Current Project Readiness</th> <th style="text-align: right;">Max Points: 10</th> </tr> </thead> <tbody> <tr><td>ROW (All Easement and Titles)</td><td style="text-align: right;">6</td></tr> <tr><td>ROW (All Offers Issued)</td><td style="text-align: right;">4</td></tr> <tr><td>Final Design (PS&E)</td><td style="text-align: right;">4</td></tr> <tr><td>PA/ED</td><td style="text-align: right;">2</td></tr> <tr><td>Project Study Report or Equiv.</td><td style="text-align: right;">1</td></tr> </tbody> </table> <p>Points are additive. ROW is the highest qualifying designation.</p>	ADT Range*	thousand	Points	55+		10	50 – 54		9	45 – 49		8	40 – 44		6	35 – 39		4	30 – 34		3	25 – 29		2	20 – 24		1	<10 – 19		0	Current Project Readiness	Max Points: 10	ROW (All Easement and Titles)	6	ROW (All Offers Issued)	4	Final Design (PS&E)	4	PA/ED	2	Project Study Report or Equiv.	1		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Transportation Significance Range</th> <th style="text-align: right;">Points</th> </tr> </thead> <tbody> <tr><td>Principal or CMP Route</td><td style="text-align: right;">10</td></tr> <tr><td>Major</td><td style="text-align: right;">8</td></tr> <tr><td>Primary</td><td style="text-align: right;">6</td></tr> <tr><td>Secondary</td><td style="text-align: right;">4</td></tr> <tr><td>Collector</td><td style="text-align: right;">2</td></tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Operational Attributes (within the roadway)</th> <th style="text-align: right;">Max Points: 15</th> </tr> </thead> <tbody> <tr><td>Pedestrian Facilities (New)</td><td style="text-align: right;">4</td></tr> <tr><td>Bike Facilities (New)</td><td style="text-align: right;">4</td></tr> <tr><td>Eliminate Left Turn Conflict</td><td style="text-align: right;">3</td></tr> <tr><td>Add Turn Lanes</td><td style="text-align: right;">3</td></tr> <tr><td>Enhanced Ramp Storage</td><td style="text-align: right;">3</td></tr> <tr><td>Coordinated Signal</td><td style="text-align: right;">2</td></tr> <tr><td>Safety Improvements</td><td style="text-align: right;">3</td></tr> <tr><td>Active Transportation Focused Plan Elements</td><td style="text-align: right;">2</td></tr> <tr><td>Sustainability Elements</td><td style="text-align: right;">2</td></tr> <tr><td>Add Traffic Control</td><td style="text-align: right;">1</td></tr> </tbody> </table>	Transportation Significance Range	Points	Principal or CMP Route	10	Major	8	Primary	6	Secondary	4	Collector	2	Operational Attributes (within the roadway)	Max Points: 15	Pedestrian Facilities (New)	4	Bike Facilities (New)	4	Eliminate Left Turn Conflict	3	Add Turn Lanes	3	Enhanced Ramp Storage	3	Coordinated Signal	2	Safety Improvements	3	Active Transportation Focused Plan Elements	2	Sustainability Elements	2	Add Traffic Control	1					
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35 – 39		4																																																																																	
30 – 34		3																																																																																	
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20 – 24		1																																																																																	
<10 – 19		0																																																																																	
Current Project Readiness	Max Points: 10																																																																																		
ROW (All Easement and Titles)	6																																																																																		
ROW (All Offers Issued)	4																																																																																		
Final Design (PS&E)	4																																																																																		
PA/ED	2																																																																																		
Project Study Report or Equiv.	1																																																																																		
Transportation Significance Range	Points																																																																																		
Principal or CMP Route	10																																																																																		
Major	8																																																																																		
Primary	6																																																																																		
Secondary	4																																																																																		
Collector	2																																																																																		
Operational Attributes (within the roadway)	Max Points: 15																																																																																		
Pedestrian Facilities (New)	4																																																																																		
Bike Facilities (New)	4																																																																																		
Eliminate Left Turn Conflict	3																																																																																		
Add Turn Lanes	3																																																																																		
Enhanced Ramp Storage	3																																																																																		
Coordinated Signal	2																																																																																		
Safety Improvements	3																																																																																		
Active Transportation Focused Plan Elements	2																																																																																		
Sustainability Elements	2																																																																																		
Add Traffic Control	1																																																																																		
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Regional Grade Separation Program (RGSP)

Background

Seven rail crossing projects along the MPAH network were identified by the CTC to receive Trade Corridors Improvement Funds (TCIF). These TCIF allocations required an additional local funding commitment. To meet this need, the Board approved the commitment of \$160 million in RCP (Project O) funds to be allocated from M2. The RGSP captures these prior funding commitments.

Future calls for projects for grade separations are not anticipated.