2022 Local Partnership Program Guidelines Development Workshop

September 21, 2021
Welcome
and
Introductions

CHRISTINE GORDON
Associate Deputy Director | Local Partnership Program
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Agenda Review

• Program Objective and Current 2020 Cycle Overview
• Lessons Learned from Previous Cycles
• Proposed 2022 Program Schedule
• General Guidelines Changes
• Discussion Workshop Format and Structure
• Key Topics for Subsequent Workshops
• Closing and Next Steps
LOCAL PARTNERSHIP PROGRAM

Program Objective:
• Provide funding to counties, cities, districts, and regional transportation agencies in which voters have approved
  • fees or taxes dedicated solely to transportation improvements, or
  • have imposed fees, including uniform developer fees, dedicated solely to transportation improvements.
LOCAL PARTNERSHIP PROGRAM

• Funding: $200 million per year
  o 2020 Cycle (adopted December 2020)
    o 3 years of programming - $600 million
    o FYs 2020-21, 2021-22, 2022-23

• Program Distribution
  o 60% Formulaic - $108 million
  o 40% Competitive - $72 million
  o Incentive Set-Aside - $20 million
Lessons Learned from Previous Programming Cycles

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# Programming Cycle Years

<table>
<thead>
<tr>
<th>Cycles</th>
<th>Formulaic</th>
<th>Competitive</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 Program</td>
<td>2 Years (FY 2017-18 and 2018-19)</td>
<td>3 Years (FY 2017-18 through 2019-20)</td>
</tr>
<tr>
<td>2019 Program</td>
<td>1 Year (FY 2019-20)</td>
<td>N/A</td>
</tr>
<tr>
<td>2020 Program</td>
<td>3 Years (FY 2020-21 through 2022-23)</td>
<td>3 Years (FY 2020-21 through 2022-23)</td>
</tr>
</tbody>
</table>
# Program Schedule

<table>
<thead>
<tr>
<th>Cycles</th>
<th>Formulaic</th>
<th>Competitive</th>
</tr>
</thead>
</table>
| 2018 Program | • Guideline adoption – October 2017  
• Applications due – December 2017  
• Program adoption – January 2018  
(Duration: 3 months) | • Guideline adoption – October 2017  
• Applications due – January 2018  
• Program adoption – May 2018  
(Duration: 7 months) |
| 2019 Program | • Guideline adoption – June 2018  
• Applications due – August 2018  
• Program adoption – October 2018  
(Duration: 4 months) |                                           |
| 2020 Program | • Guideline adoption – March 2020  
• Applications due – June 2020  
• Program adoption – December 2020  
(Duration: 9 months) | • Guideline adoption – March 2020  
• Applications due – June 2020  
• Program adoption – December 2020  
(Duration: 9 months) |
Guideline Interpretation

- Formatting
- Clarity of language (ex. Eligibility)
- Any other areas
# Evaluation Criteria

<table>
<thead>
<tr>
<th>Cycles</th>
<th>Competitive</th>
</tr>
</thead>
</table>
| 2018 Program | • Cost-effective  
               • Deliverability  
               • Leverage more committed funds per program dollar  
               • Quantifiable air quality improvements, including a significant reduction in vehicle-miles traveled  
               • Regional and community project support  
               • Further implement the sustainable communities strategy. |
| 2020 Program | • Cost-effective  
               • Deliverability  
               • Leverage more committed funds above required matching amount  
               • Air Quality & Greenhouse Gases  
               • Vehicle-miles traveled  
               • Regional and community project support  
               • Safety  
               • System Preservation  
               • Regional and Local Transportation, Land Use, and Housing |
Project Delivery and Reporting

- Project Amendments
- Project Progress Report
- Completion and Final Delivery Reports
- Audits of Project Expenditures and Outcomes
Other Areas of Lessons Learned?
Questions and Comments
Proposed 2022 Program Schedule

ANJA AULENBACHER
Assistant Deputy Director | Local Partnership Program
## Proposed Program Schedule

### Competitive

<table>
<thead>
<tr>
<th>Draft Guidelines</th>
<th>Adopt Guidelines &amp; Call for Projects</th>
<th>Applications Due</th>
<th>Program Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2022</td>
<td>Summer/Fall 2022</td>
<td>Winter 2022</td>
<td>Summer 2023</td>
</tr>
</tbody>
</table>

### Formulaic

<table>
<thead>
<tr>
<th></th>
<th>Summer/Fall 2022</th>
<th>Winter 2022*</th>
<th>Spring 2023*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2022</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* These deadlines are for the initial program adoption.
### Proposed Programming Cycle

<table>
<thead>
<tr>
<th>Cycle</th>
<th>Duration</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-Year</td>
<td>FYs 2023-24 through 2024-25</td>
<td>$400 million</td>
</tr>
<tr>
<td>(proposed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3-Year</td>
<td>FYs 2023-24 through 2025-26</td>
<td>$600 million</td>
</tr>
<tr>
<td>4-Year</td>
<td>FYs 2023-24 through 2026-27</td>
<td>$800 million</td>
</tr>
</tbody>
</table>
“Office Hours” Sessions

- February - April 2022
- Closed virtual sessions
- Scheduled time for stakeholders
  - (2 to 3-hour blocks)
  - Posted in advanced
  - First come first served basis
- Discuss technical questions regarding proposed project(s)
- Sessions will not be used to discuss guideline development
General Guideline
Changes
General Guideline Changes

• Separating guidelines
• Formatting changes
• Clarifying language
• Consistent with other SB1 programs
• Any other changes?
Questions and Comments
Discussion Workshop Format and Structure

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Discussion Workshop Format

• Workshop agendas may be posted up to 10 calendar days before each workshop.

• Workshop presentations and recordings will be posted after each workshop.

• Staff will make recommendations based on the consensus reached over the course of about 2 workshops.

• Decisions made in a workshop will be shared with the group after the workshop.

• Staff will aim to limit additional time on any one topic so that all scheduled topics may be covered during a given workshop.

• Previously covered topics may not be readdressed at subsequent workshop.
Discussion Workshop Structure

• **#1 Workshop (September 2021)**
  - Key topics that cross both programs (formulacal and competitive)

• **#2 and #3 Workshops (October and November 2021)***
  - Focus specifically on the individual programs
    - ✅ Formulaic Program (October 2021)
    - ✅ Competitive Program (November 2021)

• **#4 Workshop (December 2021)***
  - Key topics carried over from workshops #2 and #3
  - Key topics that cross both programs (formulacal and competitive)

* Dates subject to change
Key Topics for Subsequent Workshops

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Key Topics for Subsequent Workshops

- Match requirements
- Cost savings
- Funding restrictions
- Evaluation criteria
- Project nominations
- Performance metrics guidebook
- Other key topics
Questions and Comments
Closing and Next Steps

• Discussion Recap
• Next Workshop Date:
  ✓ October 19, 2021, 1:00 – 4:00 pm
  ✓ Save the Date Announcement
  ✓ Workshop Agenda
Questions or Comments after the workshops

Email LPP@catc.ca.gov

For latest updates, visit the Commission’s website at www.catc.ca.gov and follow the Commission on Twitter or Facebook.
Local Partnership Program
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SB 1 Programming
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Thank You!