



TECHNICAL MEMORANDUM

TO: South Bay COG Infrastructure Working Group **Date:** October 14, 2010

FROM: Iteris, Inc. **Job No:** 16-J10-1642

SUBJECT: Measure R Draft Project Assessments

Attached is the Draft South Bay Measure R Eligible Project List separated into three groupings (further described in attachment 1). Upon completion of the individual project assessments, it was determined that the assessment alone was insufficient in and of itself to determine the specific programming of projects in the first five years of the South Bay Measure R Highway Program. The feeling is that an additional step using policy and technical judgment is appropriate to further evaluate projects so as to take into account:

- Cities' priorities.
- Geographic equity.
- Corridor-level or area-level impacts of "bundles" of projects.
- Strategic position of projects for future funding cycles.

Three natural groups of project emerged as additional guides in the process to develop a DRAFT first 5-year funding program:

- Category 1: Early Action Program: Projects with an assessment score >3.0 AND could be designed and constructed in the next five years
- Category 2: Strategic Positioning Program: Projects with an assessment score <3.0 OR could be designed but NOT constructed in the next five years
- Category 3: Long-Term Program: Projects greater than \$40 million in cost

Each attached list includes project identification and description data, a summary of status (Green Headings); the DRAFT Project Assessment (Orange Heading), and for the Category 1 and 2 project list, a DRAFT 5-Year allocation.

Each of these lists contains projects listed by their Overall Project Assessments Score (without the funding leverage criteria included). In cases where there are bundles of projects (groups of previously identified individual projects that have a functional relationship), the overall bundle score was used, however individual project scores are also shown.

The DRAFT Project Assessment was based on the criteria developed with and weighted by the IWG. There are two assessment scores: one Without the Measure R Funding Leverage criteria and one With the Measure R Funding Leverage criteria. As shown the presence or absence of the funding leverage criteria did little to alter the relative position of projects so the assessment score WITHOUT funding leverage was used. It should be noted that the intent of the funding leverage criteria was primarily to



encourage the pursuit of state and federal funds in the future, perhaps using some Measure R funds to leverage outside funding sources.

Accompanying the DRAFT Project Assessment in the Category 1: Early Action Program and Category 2: Strategic Positioning Program are DRAFT 5-Year Allocations shown as examples of specific programming values in individual fiscal years—This will be the format of the South Bay Measure R Highway Program submission to the METRO Board for approval in January 2011. The list is a 5-Year list, but will be reviewed and updated annually, therefore the most important year in the allocation is the first year of allocation (fiscal year 2011)—there will be opportunities to revisit funding allocations in the second and beyond years of allocation in the annual South Bay Measure R Highway Program cycle.

The draft grouping results in approximately \$150 million for the design and construction of an early action program of projects that address near-term priorities. It also allocates approximately \$25 million in project development funds for more regionally significant projects from Category 2: Strategic Positioning Program and Category 3: Long-Term Program in a consensus building process that includes the Cities, Metro, and Caltrans.

We ask that you not only review the relative placement of projects on each of the attached lists, but also consider how each of your agencies will be able to accommodate the project development time for one or more projects in development within staffing or other constraints. After the IWG meeting on October 20th, we would like to meet again with each agency to review the process to date as it relates to their priorities and constraints, and develop preferred scheduling of projects with respect to agency needs and constraints. The resulting South Bay Measure R Highway Program 5-Year allocation presented to METRO will ultimately reflect a balance of individual agency and collective South Bay priorities.

We would like to use the October 20th IWG meeting to present the process and logic of producing these groupings and the DRAFT 5-Year allocation and will meet with each of you in the coming weeks to clarify and address specific issues with individual projects.

Attachments:

1. Project Assessment Groupings
2. Draft Category 1: Early Action Program Project List
3. Draft Category 2: Strategic Positioning Program Project List
4. Draft Category 3: Long-Term Program Project List