



# Chicago Metropolitan Agency for Planning

## Agenda Item No. 5.0

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### MEMORANDUM

**To:** STP Project Selection Committee

**From:** CMAP Staff

**Date:** August 29, 2019

**Re:** STP – Shared Fund: Evaluating the Lessons Learned

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Having completed the first call for projects cycle for the STP-Shared Fund, CMAP staff and the Project Selection Committee (PSC) are committed to evaluating the successes and lessons learned throughout the process in order to consider improvements for the next cycle, which will begin in January 2021.

#### Near term discussion items

The discussion items below have the potential to change the focus of the overall program and/or to change how applicants prepare for the next call for projects, therefore staff recommends discussion at the next STP PSC meeting in order to provide project sponsors with enough lead time to identify and prepare projects for consideration.

- Reaffirm the goals of this program: Any adjustments to the overall goals should be made before discussing other changes. Potential discussion items include the desire to fill, not create, funding gaps through this program and the balance between ON TO 2050's principles of Inclusive Growth, Resilience, and Prioritized Investment and the region's commitment to meeting federal performance targets.
- Rolling focus: The mix of applications received should be evaluated to determine if implementation of rolling focus would better prepare the region to address the goals of this program. Alternatives to limiting project applications, such as providing additional points for applications of a certain type, may also be discussed.
- Phase 1 Engineering requirements: Having a deadline for project eligibility which occurs several months after applications are received and analysis has begun presented significant challenges that staff would like to discuss. Additionally, better definition of requirements for transit projects to be equivalent to highway projects should be explored.

### Project scoring and program development

During both applicant review of preliminary scores and the recommended program public comment period, there were numerous questions and comments regarding how projects were scored. Staff proposes compiling these comments into a memo for committee discussion throughout the first quarter of 2020. In general, topics to be considered for further discussion include:

- Balance of points across categories (readiness, transportation impact, and planning factors)
- Commitment points (related to program development partial funding issue)
- Application of planning factors (across project types and specific methodologies)
- Council Bonus Points
- Iterative math required to evaluate projects in multiple categories and to remove projects found to be ineligible due to missing the deadline for Phase 1 Engineering completion
- Methodology for building a fiscally constrained multi-year program, including consideration of partial funding, consideration of programming funds in later years than those requested by applicants, and the impacts of active reprogramming of projects selected in the prior call for projects on the next call.

Staff also intends to conduct an internal review of the evaluation process by the end of 2019 to determine if changes to the data used for evaluation, the format of data provided by applicants, or the processes used to calculate scores should be considered. The results of this internal review may lead to recommendations to modify the scoring structure in early 2020.

### Application Process

Staff recommends surveying project applicants before the end of 2019 regarding the application process in order to make adjustments and improvements for the next call for projects. In particular, staff is interested in applicants' experiences using eTIP and the application workbook, the usefulness of the application booklet and the usefulness and timing of training webinars.

### Proposed 2019 and 2020 agenda items.

The table on the next page summarizes staff's proposal for process and methodology review over the next year. Items in italics are not related to evaluating the lessons learned, but are included for completeness.

STP PSC Meeting (exact dates TBD)	Agenda items
October/November 2019	<ul style="list-style-type: none"> <li>• Reaffirm program goals</li> <li>• Discuss rolling focus</li> <li>• Discuss phase 1 engineering requirements</li> <li>• <i>Discuss staff proposal(s) for recalibrating the distribution of funds for the local programs to account for improved performance, as required by the MOA (due 12/31/2019)</i></li> </ul>
January/February 2020	<ul style="list-style-type: none"> <li>• Discuss scoring and program development memo and set schedule for in-depth discussions in coming months</li> <li>• Discuss results of application process survey</li> <li>• <i>Update on Contingency Program</i></li> <li>• <i>Update on December status updates and active reprogramming actions for STP-Shared Fund projects</i></li> </ul>
April/May 2020	<ul style="list-style-type: none"> <li>• TBD: In-depth scoring discussions</li> <li>• <i>Update on March status updates for STP-Shared Fund projects, active reprogramming actions, and requests for obligation deadline extensions</i></li> </ul>
June/July 2020	<ul style="list-style-type: none"> <li>• TBD: In-depth scoring discussions</li> <li>• <i>Update on June status updates and active reprogramming actions for STP-Shared Fund projects</i></li> </ul>
August/September 2020	<ul style="list-style-type: none"> <li>• Review draft FFY 2022-2026 Application Booklet incorporating changes discussed at previous meetings</li> </ul>
October/November 2020	<ul style="list-style-type: none"> <li>• Review final FFY 2022-2026 Application Booklet &amp; Training Materials</li> <li>• <i>Update on September status updates and active reprogramming actions for STP-Shared Fund projects</i></li> <li>• <i>Update on end of FFY carryover of funds</i></li> </ul>

ACTION REQUESTED: Discussion

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