



Metro

Los Angeles County
Metropolitan Transportation Authority

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ATTACHMENT B – ABOUT METRO’S PROPOSED POLICY: EARLY PROJECT DELIVERY STRATEGY

Highlights

- **Establishes uniform criteria.** Guides decision-making about the propensity for early project delivery with uniform, transparent criteria.
- **Promotes cooperation and discipline.** Encourages effective collaboration between Metro and its many partners to promote timely delivery of Measure M projects.
- **Know how to help.** Gives advice on how to maintain project delivery schedules.
- **Protects performing projects.** Because Measure M prohibits accelerating a project schedule to the detriment of any other project, any change to one project schedule does not affect the others.
- **Board of Directors makes the decision.** Changes to a project schedule requires a two-thirds vote of the Board of Directors, following a public noticing period.

Background

During development of the Measure M ordinance in 2016, many stakeholders expressed a desire to have projects delivered earlier. Therefore, Measure M provides flexibility in the use of funds to allow schedule acceleration. The Measure M ordinance includes permissive language for project acceleration, as long as doing so does not delay any other project. The voters approved the Measure M ordinance in November 2016.

Overview

- **What is the proposed Early Project Delivery Strategy?**
This comprehensive policy was prepared to guide decision-making on the propensity for a project to be delivered earlier than scheduled in Measure M. This includes opportunities to accelerate the schedule for an individual Measure M transportation improvement project and opportunities to improve project schedule performance. Four categories encompassing multiple inputs affecting the timing of a project include: Funding, Process, Partnerships and Innovations.

Purpose and Need

- **Why is it needed?**
A clear, uniformly applied set of criteria allows for objective decision-making about the schedule status for an individual project, following a rigorous analysis. This promotes transparency and financial accountability.
- **Why is Metro articulating responsibilities about maintaining project delivery schedules?**
There is much that Metro can do to responsibly and effectively lead and manage the delivery of the Measure M projects. However, Metro needs the support and cooperation of its many partners to deliver the projects the voters understood to be a sacred promise of government when they approved Measure M with 71 percent of the vote. These many partners have permitting authority, influence project design and participate in the environmental review process. Balancing the benefit of engagement by both Metro and its partners within voter-approved budget and schedule requirements takes effective collaboration. This Policy is transparent about how Metro and its many partners can work together within a disciplined framework to deliver the promise and potential of this transformative transportation infrastructure investment program.

Process

- **How does it work?**

The first step is an initial screening review using a streamlined evaluation tool in which every input is posed as a question with a yes-no answer. A point value is assigned to each input based on the strength of the input to accelerate. The higher the point value, the greater the propensity for acceleration. The second step is a detailed staff analysis. A project shown by the screening tool to have low potential does not advance into staff analysis. Moderate and high potential projects do. All staff analyses are reported to the Board, but only high potential projects automatically advance to Board review. Moderate potential projects are considered for Board review following a review of the results in the staff analysis. The third step is Board consideration of the staff analysis. The Board may find that acceleration exists and take action after following the procedural requirements in Measure M. The Board may also direct staff to undertake more analysis, or decline to take any action.

- **Who determines whether a project has the potential for acceleration?**

The Metro Board of Directors is the final decision-maker on project acceleration. The decision must follow the law set forth in Measure M. A two-thirds vote is required to accelerate a project schedule. (*Section 11, Measure M ordinance*)

- **How is the proposed Policy consistent with Measure M?**

Per the Measure M ordinance, a project schedule can be accelerated as long as others are not negatively impacted.

- **If a project is accelerated, do all the other projects get delayed?**

No. Per the Measure M ordinance, a project cannot be accelerated if it delays other projects. Only the individual schedule for the accelerated project changes, when it can be done independently.

- **Are there required inputs that must occur to accelerate a project?**

No. Generally, multiple inputs need to occur for these complex, Measure M projects to accelerate. Therefore, there is no mandatory input out of all the inputs identified in the Policy. An exception is when an acceleration occurrence clearly would result in changing the timing of project delivery (e.g., unexpected full project-specific funding from the federal/state government). However, this is an exceptional circumstance.

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EXAMPLE EARLY PROJECT DELIVERY SCENARIO (FICTITIOUS NAMES USED)

Acceleration

Citius Transit Corridor is scheduled to open in 2035. A new Funding source is allocated from the federal government for 35 percent of the cost and may only be used for this project, if the project can be completed by 2028. The Federal Transit Administration agrees to a streamlined environmental review Process because Metro has demonstrated that it has narrowed the range of alternatives during a feasibility study after significant public engagement. The cities of Collins Fort and Valley Carmel are working in a collaborative Partnership with Metro by initiating the establishment of an Enhanced Infrastructure Financing District to assist in the early funding of stations and project betterments, while the Rockstacker Council of Governments commits five years of a portion of its multi-subregional program funds. An unsolicited proposal for a public-private partnership includes extraordinary Innovations that demonstrate an ability to deliver and operate the project much faster and cheaply, including technological innovations for modular construction techniques. Deputy staff for Board Director Speedy apply the M-PERT screening tool, which returns a moderate potential for acceleration. Metro staff conducts an analysis and finds that the time value of money savings can fund operations and maintenance costs for the seven years of early operation. The Metro Board of Directors accepts the staff recommendation to accelerate the project, public noticing procedures are completed and the Board votes unanimously to accelerate the project to a delivery year of 2028. All other project schedules in the Measure M schedule remain unchanged because the inputs that created the opportunity for an accelerated project completion only affects Citius Transit Corridor.



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MEASURE M PROJECT EVALUATION READINESS TOOL (M-PERT)

Purpose

- The M-PERT tool allows for a streamlined, initial screening review to determine whether an acceleration is likely.

How it Works

- The screening tool includes all of the individual inputs in the Policy, each with a point value relative to the strength of the input to move a project toward acceleration. Multiple inputs are needed for these Measure M projects to potentially be accelerated, unless an exceptional circumstance has occurred.

Users

- Because the tool allows for a streamlined screening-level evaluation of complex information that relies on deep, existing familiarity of individual project information, the M-PERT is for use by Metro staff, Board Directors and their deputy staff. Other stakeholders and the public can ask their Board representative to conduct a screening review using the tool, if there is reason to believe an acceleration is likely.