Inaugural FY2020 I-395/95 Commuter Choice Program Application Process, Project Selection Process, and Technical Evaluation Criteria

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As a part of the agreement between VDOT and 95 Express Lanes, LLC, the Commonwealth secured an annual payment for transit services of $15 million per year, escalating by 2.5 percent per year, beginning on the commencement of tolling through the life of the 70-year agreement. Approved by NVTC and PRTC at their November 2017 meetings, and by the Commonwealth Transportation Board (CTB) at its December 2017 meeting, the I-395/95 Memorandum of Agreement with NVTC and PRTC allocates $15 million/year plus escalation to NVTC and PRTC to fund multimodal projects along the I-395/95 Express Lanes Corridor. The resulting program is the I-395/95 Commuter Choice program.

Eligible applicants for the I-395/95 Commuter Choice program include all NVTC and PRTC jurisdictions and any public transit providers that serve those jurisdictions. Similar to the Transform I-66 Memorandum of Agreement between the Commonwealth and NVTC, eligible I-395/95 Commuter Choice projects include transit capital and operations, park and ride lots, Transportation Demand Management (i.e., carpool/vanpool, transit incentives), and roadway operational improvements. Metrorail, Metrobus and the Virginia Railway Express operations and capital are specifically called out as eligible projects in the proposed agreement.

This document details the program application process, the project selection process and the technical evaluation criteria for the Inaugural I-395/95 Commuter Choice program, scheduled for implementation to select projects to be operational on or near toll day one, scheduled for late October 2019.

Background

The I-395/95 Memorandum of Agreement between the Commonwealth and NVTC/PRTC specifically requires key elements of the project selection process:

1. A request for projects from all jurisdictions that are members of either NVTC or PRTC and other public transportation providers providing services in those jurisdictions.

2. The selection and technical evaluation of projects by NVTC/PRTC, the development of a funding strategy for each proposed project, and the submission of each proposed projects by NVTC/PRTC to the CTB.

In addition, the MOA requires NVTC and PRTC to hold a public hearing held prior to NVTC/PRTC's selection of projects for submission to the CTB.

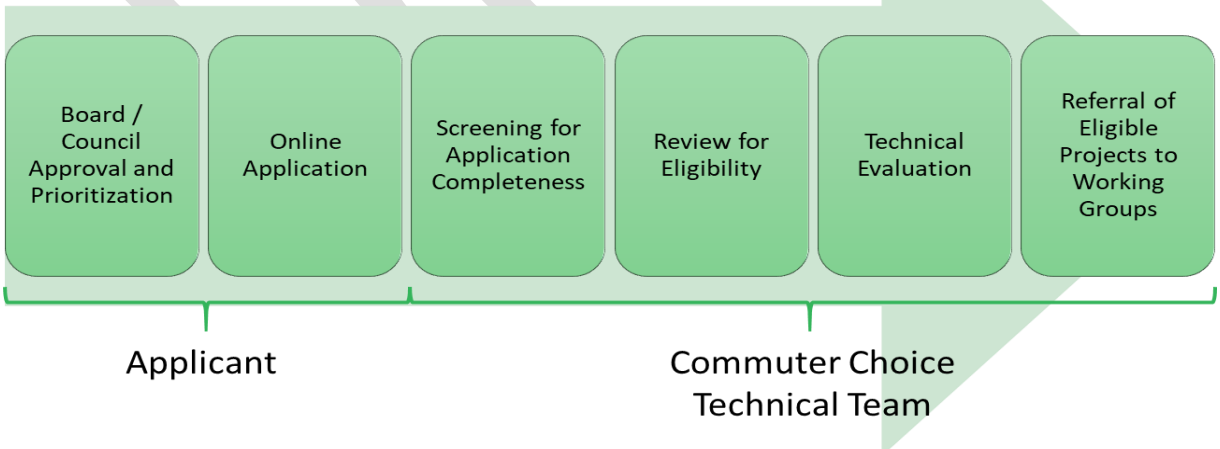
The I-395/95 Commuter Choice program and I-66 Commuter Choice program, while different in geography, are nearly identical in program goals, criteria, and reporting. Both programs must fund projects that benefit toll payers of the respective corridor and must be used to fund multimodal projects that demonstrate their ability to meet the improvement goals. As such, the approach and criteria for the I-395/95 Commuter Choice program are modeled after the I-66 Commuter Choice program.

As resolved in the Memorandum of Agreement between NVTC and PRTC for distribution and Allocation of I-395 Annual Transit Investment Funds, approved by NVTC and PRTC in January 2019, NVTC staff will be administering the I-395/95 Commuter Choice program. The proposed program of projects will be jointly approved by the two Commissions prior to submission to the Commonwealth Transportation Board. A I-395/95 Commuter Choice Joint Commission Working Group, made up of representatives from NVTC and PRTC jurisdictions and chaired by Jeff McKay, was established to help facilitate the development of the various decision documents prior to submission to the Commissions for approval.

A. Application Process

The application process is a joint effort between the applicant and the Commuter Choice Technical Team. The application process outlined below (Figure 1) articulates the roles and responsibilities during the application process.

Figure 1. I-395/95 Commuter Choice Application Process



The Applicant (*eligible applicant per the MOA*) is responsible for the following tasks and ongoing communication with the Commuter Choice Technical Team:

- Facilitating internal coordination with planning, operations, budget, leadership, etc.
- Obtaining the following from governing body:
  - Approval of project(s)
  - Authorization to apply and execute grant agreement(s) – if project is awarded funding
  - Prioritized list of projects (if more applications than one)
- Completing online application
- Responding to questions from the Technical Team regarding application details

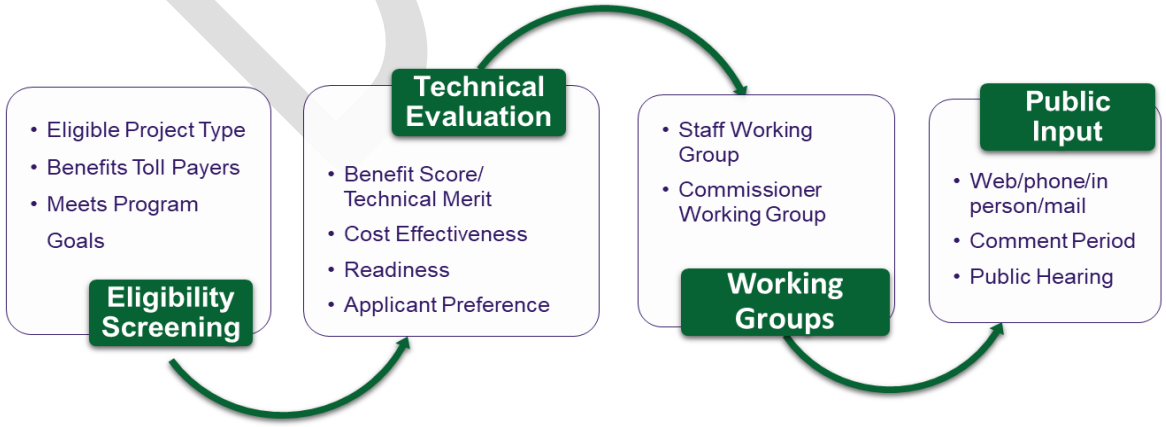
The Commuter Choice Technical Team (*composed of staff from NVTC and PRTC, with consultant support*) is responsible for the following tasks and ongoing communication with applicants:

- Ongoing coordination with and resource for applicants and awardees
- Determining project eligibility
- Performing technical evaluation and generate project scoring
- Coordination with the staff working group, Joint Commission Working Group, Program Advisory Committee (NVTC), and Commissions
- Execution of SPAs (Standard Project Agreements)

B. Project Selection Process

To meet the accelerated schedule noted above and to align the two Commuter Choice programs, the I-395/95 Commuter Choice program uses existing technical materials and procedures developed and vetted through the I-66 Commuter Choice program to expedite the delivery of the I-395/95 Commuter Choice FY2020 Inaugural Program. Figure 2 denotes the project selection process.

Figure 2. I-395/95 Commuter Choice Project Selection Process



The first step in the application review process is a **screening for eligibility.** NVTC screens submitted projects to determine if each project meets the following eligibility criteria as established by **Section II.D.1** of the MOA with the Commonwealth:

A. Must reasonably relate to or benefit the toll-paying users of the I-395/95 project.

B. Must have the capacity to attain one or more of the following Improvement Goals:

   i. Maximize person throughput in the corridor, and

   ii. Implement multi-modal improvements to:

      - Improve mobility along the corridor,
      - Support new, diverse travel choices, and
      - Enhance transportation safety and reliability.

C. Must be one of the following types of multi-modal transportation improvements serving the corridor (including adjacent and nearby routes):

   i. New or enhanced local and commuter bus service, including capital and operating expenses (e.g. fuel, tires, maintenance, labor, and insurance), and transit priority improvements;

   ii. Expansion or enhancement of transportation demand management strategies, including without limitation, vanpool, and formal and informal carpooling programs and assistance;

   iii. Capital improvements for expansion or enhancement of WMATA rail and bus service, including capital and operating expenses, and improved access to Metrorail stations and Metrobus stops;

   iv. New or enhanced park and ride lot(s) and access or improved access thereto;

   v. New or enhanced VRE improvements or services, including capital and operating expenses;

   vi. Roadway improvements in the corridor (including adjacent and nearby routes);

   vii. Transportation Systems Management and Operations as defined in 23 USC § 101(a)(30) on September 30, 2017; or

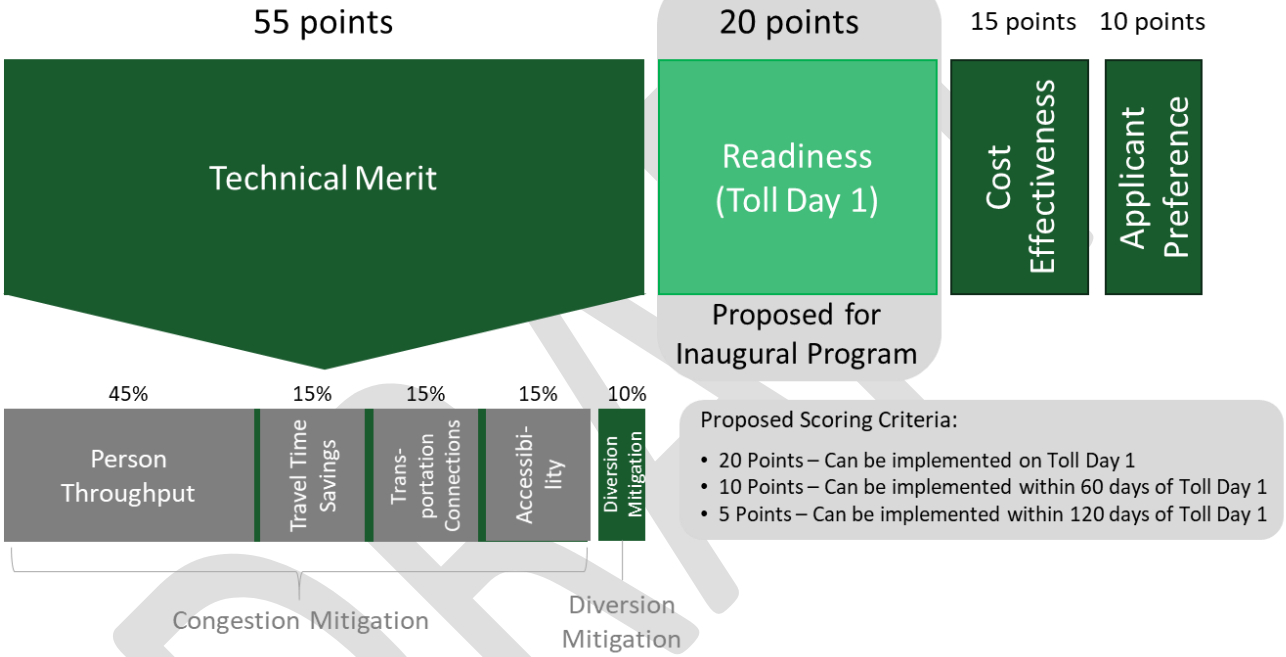
   viii. Projects identified in Commonwealth studies and plans or projects in the region's constrained long-range plan (including without limitation the I-95/395 Transit and TDM Study) or regional transportation planned approved by the Northern Virginia Transportation Authority (NVTA), as any such plan may be updated from time to time.

D. Must demonstrate that the ATI-Funded projects will be in compliance with all applicable laws, rules, and regulations and have or will receive all required regulatory approvals.

C. Technical Evaluation Criteria

As the I-395/95 Commuter Choice program and I-66 Commuter Choice program are nearly identical in program goals, criteria, and reporting, the I-395/95 technical evaluation criteria and weighting are similar to the I-66 Commuter Choice program. Priorities for scoring focus on technical merit (congestion and diversion mitigation) and cost effectiveness, as well as the priority for a given project by the applicant. In addition, a project will score higher if it can be ready on or near toll day one (readiness).

Figure 3. Inaugural I-395/95 Commuter Choice Program Technical Evaluation Criteria



As documented in Figure 3, the technical evaluation process calculates a quantitative project score (with a maximum possible 100 points) using the following criteria:

- Technical Merit (i.e. expected ability of the project to address some or all of the I-395/95 Improvement Goals) – maximum 55 points
- Cost Effectiveness (i.e. the impact created per million dollars of toll revenue investment) – maximum 15 points
- Toll Day One Ready (i.e. points to be assigned based on readiness on or shortly after toll day one) – maximum 20 points
- Applicant Preference (i.e. how the project ranks in priority or preference among the other projects submitted by each specific applicant) – maximum 10 points

Each element of the project score is calculated relative to the other projects in the application year. The intent is to provide an assessment of which potential projects will have greater impacts compared to the other submitted projects, and to align with processes used by other discretionary programs.

A. TECHNICAL MERIT

The weighted criteria used to evaluate the technical merit of a project are noted in the table below. Projects are evaluated based on the degree to which they satisfy each technical merit criteria (e.g. higher satisfaction of the criteria, medium satisfaction of the criteria, or lower satisfaction of the criteria).

Table 1. Inaugural I-395/95 Commuter Choice Program Technical Merit Criteria

Evaluation Category	Technical Merit Criteria Objective	Maximum Score
Congestion Relief	**Person Throughput** To move people through the corridor efficiently	45
	Peak Period Travel Time To provide consistent travel time during congested period for users of the corridor and improve operational efficiency in the transportation network.	15
	Connectivity To create, complete, or link transportation network elements and/or modes	15
	Accessibility To provide access to opportunity	15
Diversion Mitigation	To mitigate impacts of trips diverted from I-395/95 as a result of tolling and/or HOV restrictions	10

i. Congestion Relief – Person Throughput (45 points)

The objective of the person throughput technical merit criteria is to assess the number of people and vehicles moved through the corridor by, or resulting from, a submitted project.

Numerically, the person throughput technical criteria score represents approximately 45 percent of the technical merit score.

For projects primarily affecting non-motorized travel modes (e.g. bike, walk, and some TDM strategies), the project will be given a "Lower" score if the project can be reasonably assumed to increase person throughput. If there are no expected changes to throughput, the project will be given "No Score."

This scoring recognizes the throughput benefits of projects geared towards non-motorized modes, but also realizes those benefits may not be within the same scale as the throughput benefits potentially realized by projects geared towards motorized travel. However, if the project

can be demonstrated to result in a strong increase in the corridor's person throughput, the scoring methodology described for motorized travel modes may be applied.

For projects primarily affecting motorized travel modes (e.g. vehicular, transit, and some TDM strategies), the project will be assessed based on the calculated increase in person throughput divided by the number of vehicles involved in that increase. "Higher" and "Medium," and "Lower" scores will be distributed among projects based on this calculated result. The top third highest persons per vehicle will be scored "Higher", the 2nd highest third will be scored "Medium", and the remaining third will be scored "Lower."

ii. Congestion Relief – Peak Period Travel Time (15 points)

The objective of the peak period travel time technical merit criteria is to assess how well a project is suited to provide or support consistent travel time during congested periods for users of the corridor as well as to improve the operational efficiency of the transportation network.

Each project will be assigned a score of "Higher," "Medium," Lower," or "No Score" based on the likelihood of significant, moderate, minimal, or no reductions in per person congested travel time compared to a similar commute without the project.

> Higher – project is likely to result in reductions (30 percent or greater) in peak direction total travel time per person
> Medium – project is likely to result in reductions (15 to 30 percent) in peak direction total travel time per person
> Lower – project is likely to result in reductions (5 to 15 percent) in peak direction total travel time per person
> No Score – project is likely to result in no change (less than 5 percent) in peak direction peak hour travel time.

Each project will be categorized by project type, travel time of a comparable trip (including a non-tolled vehicular trip), and serviced population. Projects that move more people through the corridor, faster and more efficiently, in the peak directions during the peak period will be identified as having a higher likelihood for moderate or significant travel time reductions.

iii. Congestion Relief – Connectivity (15 points)

The objective of the connectivity criteria is to assess how well a project is suited to create, complete, or link transportation network elements and/or modes. The measurement of this criteria is based on the number of created or enhanced connections between modes and the promotion of transportation choice in daily travel.

Each project will be assessed for potential impacts on modal interaction and transportation choice in the corridor and assigned a score of "Higher," "Medium," "Lower," or "No Score."

> Higher – project provides or enhances connections between two or more travel modes

Medium – project provides new modal connections AND/OR further promotes transportation choice AND/OR completes a significant existing gap in the transportation network
Lower – project has minimal or no impact on connectivity
No Score – project creates a barrier between modes OR results in a loss of travel options

iv. Congestion Relief – Accessibility (15 points)

The objective of the accessibility criteria is to evaluate the project's ability to provide people with opportunities along the corridor. This measure is based on the connections created or enhanced between people and activity centers.

Each project is assigned a score of "Higher," "Medium," "Lower," or "No Score" based on an assessment of the projects improvement to transportation options and connect people with their destinations.

Higher – project connects travelers to two or more activity centers
Medium – project connects travelers to at least one activity center
Lower – project addresses, improves, OR enhances "first/last mile" travel between home/employment locations and transit or carpool/vanpool facilities
No Score – project does not connect travelers to activity centers nor improve "first/last mile" travel

Projects that support travel to one or more of the activity centers will be considered for the high or medium evaluation scores. Activity centers are based on locations identified on the maps at the end of this document:

- Figure 4: Fredericksburg Area Metropolitan Planning Organization (FAMPO) Long Range Transportation Plan Activity Centers (projected for 2045).
- Figure 5: Metropolitan Washington Council of Governments Regional Activity Centers (projected for 2045).

Projects will also be assessed on how well they address, improve, or enhance "first/last mile" travel between transit or multimodal hubs (such as park-and-ride lots with transit service) and home or work locations.

v. Diversion Mitigation (10 points)

The objective of the diversion mitigation criteria is to assess how well a project is suited to mitigate the impacts of trips that are diverted from I-395/95 onto parallel routes because of tolling and/or the high occupancy vehicle restrictions. This measure reflects jurisdictions' concerns that tolling policies may negatively impact parallel roadways and neighborhoods in the corridor.

Each project is assigned a score of "Higher," "Medium," "Lower," or "No Score" based on the project type and an assessment of potential for trip diversion mitigation.

> Higher – project provides, supports, or enhances transit service that attracts trips that are diverted from I-395/95 due to tolling or HOV restrictions
> Medium – project provides, supports, or enhances carpool or vanpool services that attracts trips that are diverted from I-395/95 due to tolling or HOV restrictions
> Lower – project provides, supports, or enhances operational or geometric improvements along a roadway in the corridor that may be used by trips that are diverted from I-395/95 due to tolling or HOV restrictions OR otherwise is another project type not specified in the "Higher" or "Medium" categories that can be demonstrated to mitigate diversion from I-395/95 due to tolling or HOV restrictions
> No Score – project does not mitigate the impacts of diversion

Consideration will be given to locations where trip diversion is expected based on most-recently available I-395/95 traffic analysis at the time of the technical evaluation.

B. COST EFFECTIVENESS

The objective of cost effectiveness is to identify solutions to multimodal issues that can be achieved with a responsible application of available tolling revenue. This measure is based on a comparison of the technical merit criteria scores with the requested program funding.

For each project, the cost effectiveness score will be calculated as the sum of the technical merit criteria scores divided by funding request. Cost effectiveness will be expressed as technical merit score per million dollars of funding.

Projects will be ranked according their cost effectiveness. The top third will be given a "Higher" score, the middle third will be given a "Medium" score, and the bottom third will be given a "Lower" score.

C. READINESS

For the initial I-395/95 Commuter Choice program and due to the compressed timeframe to implement the inaugural program, "Toll Day One Ready" will replace the scoring category of "Regional Priorities" used in the ongoing I-66 Commuter Choice program. For subsequent I-395/95 Commuter Choice call for projects, "Regional Priorities" would be restored to ensure a thorough discussion regarding program priorities within the NVTC and PRTC districts.

Projects would be assigned the following point values based on project readiness:

- 20 Points – Ready by Toll Day 1
- 10 Points – Ready by Toll Day 1 + 60 Days
- 5 Points – Ready by Toll Day 1 + 120 Days

D. APPLICANT PREFERENCE

As part of the application, each applicant is required to rank their application submissions in priority order. Application materials must include board or counsel certification of project ranking. The top ranked project for each applicant will be given 10 points. Should a project that is ranked highest be determined ineligible or otherwise withdrawn by the applicant during the application period, the 10 points will be assigned to the next highest-ranking project for that applicant.

Figure 4. Fredericksburg Area Metropolitan Planning Organization (FAMPO) Long Range Transportation Plan Activity Centers (Projected for 2045)

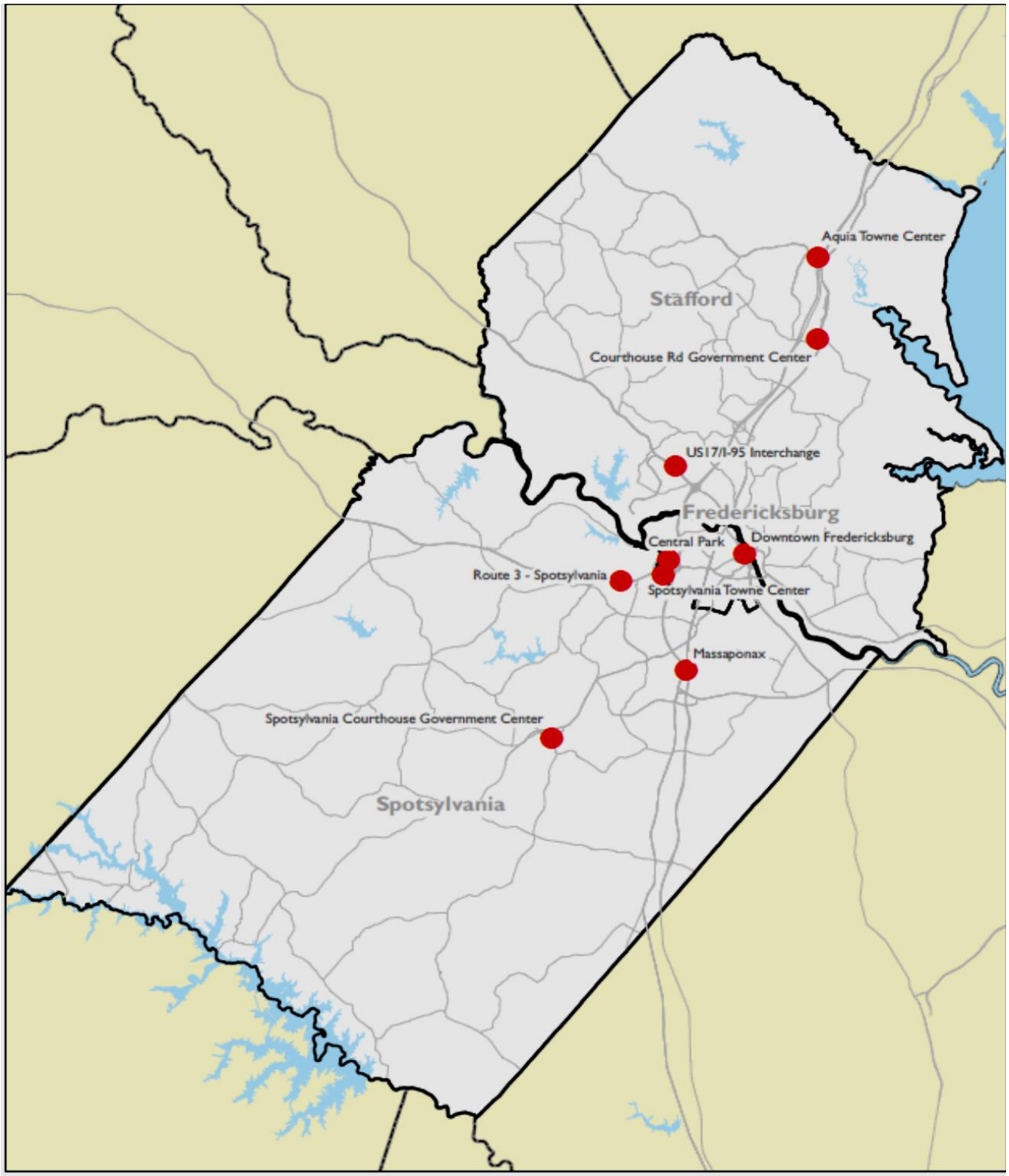


Figure 5. Metropolitan Washington Council of Governments Regional Activity Centers (projected for 2045)