



Orange County Transportation Authority

Transit Committee Agenda

Thursday, November 13, 2025 at 9:00 a.m.

Board Room, 550 South Main Street, Orange, California

Committee Members

Fred Jung, Chair
Vicente Sarmiento, Vice Chair
Valerie Amezcua
Stephanie Klopfenstein
Carlos A. Leon
Janet Nguyen
Tam T. Nguyen

Accessibility

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the Orange County Transportation Authority (OCTA) Clerk of the Board's office at (714) 560-5676, no less than two business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

Agenda Descriptions

Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

Public Availability of Agenda Materials

All documents relative to the items referenced in this agenda are available for public inspection at www.octa.net or through the Clerk of the Board's office at the OCTA Headquarters, 600 South Main Street, Orange, California.

Meeting Access and Public Comments on Agenda Items

Members of the public can either attend in-person or access live streaming of the Committee meetings by clicking this link: <https://octa.legistar.com/Calendar.aspx>

In-Person Comment

Members of the public may attend in-person and address the Board regarding any item within the subject matter jurisdiction of OCTA. Please complete a speaker's card and submit it to the Clerk of the Board and notify the Clerk regarding the agenda item number on which you wish to speak. Speakers will be recognized by the Chair at the time of the agenda item is to be considered by the Board. Comments will be limited to three minutes. The Brown Act prohibits the Board from either discussing or taking action on any non-agendized items.

Written Comment

Written public comments may also be submitted by emailing them to ClerkOffice@octa.net, and must be sent by 5:00 p.m. the day prior to the meeting. If you wish to comment on a specific

TRANSIT COMMITTEE MEETING AGENDA

agenda Item, please identify the Item number in your email. All public comments that are timely received will be part of the public record and distributed to the Board. Public comments will be made available to the public upon request.

Call to Order

Pledge of Allegiance

Vice Chair Sarmiento

Closed Session

There are no Closed Session items scheduled.

Special Calendar

1. Metrolink Service Performance Report

Megan Taylor/Johnny Dunning, Jr.

Overview

The Southern California Regional Rail Authority is a five-member joint powers authority that operates the 400-mile regional rail system known as Metrolink. In October 2024, Metrolink launched its 'Metrolink Reimagined' that aims to serve a broader market, transitioning to a regional rail service. The Orange County Transportation Authority is one of five member agencies that fund operations, rehabilitation and capital initiatives for Metrolink. The report will summarize one year of performance from the 'Metrolink Reimagined' service, initiatives, and financial sustainability measures for the Metrolink regional rail system.

Attachments:

[Presentation](#)

Consent Calendar (Items 2 through 6)

All items on the Consent Calendar are to be approved in one motion unless a Committee Member or a member of the public requests separate action or discussion on a specific item.

2. Approval of Minutes

Clerk of the Board

Recommendation(s)

Approve the minutes of the October 9, 2025 Transit Committee meeting.

Attachments:

[Minutes](#)

TRANSIT COMMITTEE MEETING AGENDA

3. **Contract Change Orders for Construction of the OC Streetcar Project**

Jeff Mills/James G. Beil

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar Project. Contract change orders are required for additional pavement modifications and restoration as required by the City of Santa Ana, maintenance and storage facility electrical grounding modifications, special trackwork bonding, emergency walkway modifications, and earthwork inefficiencies caused by differing site conditions.

Recommendation(s)

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 77.5 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, for pavement modifications and restoration.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 189.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$50,000, for maintenance and storage facility electrical grounding modifications.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 238 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$600,000, for special trackwork bonding.
- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 296.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$800,000, for emergency walkway modifications.
- E. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 302 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,603,812, for earthwork inefficiencies caused by differing site conditions.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

TRANSIT COMMITTEE MEETING AGENDA

4. **Consultant Selection for Construction Management Services for the Inland Slope Rehabilitation Phase II Project**

Jason Lee/James G. Beil

Overview

The Orange County Transportation Authority Board of Directors approved the construction of the Inland Slope Rehabilitation Phase II Project as part of the Orange County Transportation Authority Fiscal Year 2025-26 Budget. On November 18, 2024, a request for proposals was released for construction management services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendation(s)

- A. Approve the recommended selection of Fulcrum Consultants, Inc. as the firm to provide construction management services for the Inland Slope Rehabilitation Phase II Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2582 between the Orange County Transportation Authority and Fulcrum Consultants, Inc., in the amount of \$624,802, to provide construction management services for the Inland Slope Rehabilitation Phase II Project.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Attachment D](#)

5. **Amendment to Cooperative Agreement with the Southern California Regional Rail Authority for the San Juan Creek Bridge Replacement Project**

Jason Lee/James G. Beil

Overview

On April 14, 2020, the Orange County Transportation Authority entered into a cooperative agreement with the Southern California Regional Rail Authority for construction capital and construction support services for the San Juan Creek Bridge Replacement Project. Board of Directors' approval is requested to amend the cooperative agreement to reallocate \$2,760,000 of existing contingency funds for construction support services and allocate \$1,194,039 of SB 125 (Chapter 54, Statutes of 2023) Transit Program accrued interest funds for construction capital and construction support services.

Recommendation(s)

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-0-2540 between the Orange County Transportation Authority and the Southern California Regional Rail Authority, to reallocate \$2,760,000 in contingency funds and \$1,194,039 in new funding, for construction support services related to the San Juan Creek Bridge Replacement Project.

TRANSIT COMMITTEE MEETING AGENDA

- B. Authorize the use of up to \$1,194,039 in SB 125 Transit Program accrued interest funds for the San Juan Creek Bridge Replacement Project.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

6. Acceptance of Grant Award from Department of Homeland Security Transit Security Grant Program

Jason Huang/Rose Casey

Overview

The Orange County Transportation Authority has been awarded \$431,327 in Federal Emergency Management Agency funding by the Department of Homeland Security through the Transit Security Grant Program. Recommendations for acceptance of these funds are presented for Board of Directors' review and approval.

Recommendation(s)

- A. Authorize the Chief Executive Officer, or designee, to accept the award of \$431,327 in Federal Emergency Management Agency funding from the Department of Homeland Security through the Transit Security Grant Program and execute grant-related agreements and documents with the Department of Homeland Security.
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program, as well as execute any necessary agreements to facilitate the recommendation above.

Attachments:

[Staff Report](#)

[Attachment A](#)

Regular Calendar

7. OC Streetcar Project Quarterly Update

Jeff Mills/James G. Beil

Overview

The Orange County Transportation Authority is implementing the OC Streetcar Project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar Project activities from August 2025 through October 2025.

TRANSIT COMMITTEE MEETING AGENDA

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Presentation](#)

8. Radio Communications Equipment Replacement for OC ACCESS Fleet

Josh Duke/Andrew Oftelie

Overview

Board of Directors' authorization is requested for the purchase of hardware and services to complete the radio communications equipment replacement on the OC ACCESS vehicle fleet.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C255013 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$2,876,847, for the purchase of hardware and services necessary to replace 242 Integrated Vehicle Unit 2100s with the advanced Integrated Vehicle Unit 4000P for the Orange County Transportation Authority's paratransit fleet.

Attachments:

[Staff Report](#)

Discussion Items

9. Bimonthly Transit Performance Report

Kim Tucker/Johnny Dunning, Jr.

Overview

Staff will provide an update on the OC Bus and OC ACCESS services.

Attachments:

[Presentation](#)

10. Public Comments

11. Chief Executive Officer's Report

12. Committee Members' Reports

13. Adjournment

The next regularly scheduled meeting of this Committee will be held:

9:00 a.m. on Thursday, December 11, 2025

OCTA Headquarters, 550 South Main Street, Orange, California



**Materials for this item will provided under
separate cover prior to the meeting.**



Committee Members Present

Fred Jung, Chair
Valerie Amezcua
Stephanie Klopfenstein
Carlos Leon
Janet Nguyen
Tam T. Nguyen

Staff Present

Darrell E. Johnson, Chief Executive Officer
Jennifer L. Bergener, Deputy Chief Executive Officer
Andrea Clark, Clerk of the Board
Gina Ramirez, Assistant Clerk of the Board
Martin Browne, Employee Rotation Participant
Cassie Trapesonian, Assistant General Counsel
OCTA Staff

Committee Members Absent

Vicente Sarmiento, Vice Chair

Call to Order

The October 9, 2025, meeting of the Transit Committee was called to order by Committee Chair Jung at 9:00 a.m.

Consent Calendar (Items 1 through 4)

All items on the Consent Calendar are to be approved in one motion unless a Committee Member or a member of the public requests separate action or discussion on a specific item.

1. Approval of Minutes

A motion was made by Director Tam T. Nguyen, seconded by Chair Jung, and approved by the members present to approve the minutes of the September 11, 2025, Transit Committee meeting.

Director Leon was not present to vote on this item.

2. Contract Change Orders for Construction of the OC Streetcar Project

A motion was made by Director Tam T. Nguyen, seconded by Chair Jung, and approved by the members present to:

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 89.2 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$350,000, for maintenance and storage facility access control system installation support.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 248 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$350,000, for maintenance and storage facility service and inspection pit safety enhancements.



- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 251.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,100,000, for additional work to implement an accelerated schedule.
- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 252.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, for public conveyance and safety enhancements.
- E. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 255.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$350,000, for overhead contact system modifications.
- F. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 266.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, for modifications to miscellaneous maintenance and storage facility systems.
- G. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 277 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$425,000, for maintenance and storage facility mezzanine fall protection modifications.
- H. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 291.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$160,000, for overhead contact system span wire to contact wire changes.
- I. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 301 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,000,000, for train signal control modifications.

Director Janet Nguyen voted in opposition to this item.

Director Leon was not present to vote on this item.

3. Amendment to the Agreement for Same-Day Taxi Service

A motion was made by Director Tam T. Nguyen, seconded by Chair Jung, and approved by the members present to:

- A. Approve a pilot to expand the Same-Day Taxi service model and the per-trip subsidy to accommodate trips up to seven miles.



- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Agreement No. C-3-2396 between the Orange County Transportation Authority and OCY Management LLC to exercise the option term, in the amount of \$2,440,758, to continue providing Same-Day Taxi service effective December 1, 2025, through November 30, 2027. This amendment will increase the maximum cumulative obligation of the agreement to a total contract value of \$5,041,901.

Director Leon was not present to vote on this item.

4. Programming Recommendation for the City of Newport Beach Project V Service

A motion was made by Director Tam T. Nguyen, seconded by Chair Jung, and approved by the members present to:

- A. Approve Project V funding in the amount of \$2,624,060 for the City of Newport Beach's Balboa Island/Corona del Mar Local Area Transit Service.
- B. Authorize the Chief Executive Officer to negotiate and execute a cooperative funding agreement with the City of Newport Beach to support implementation of its proposed new Project V service.

Director Leon was not present to vote on this item.

Regular Calendar

5. Agreement for the Construction of the Inland Slope Rehabilitation Phase II Project

A motion was made by Director Amezcua, seconded by Director Klopfenstein, and approved by the members present to authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2666 between the Orange County Transportation Authority and Bosco Constructors, Inc., the lowest responsive, responsible bidder, in the amount of \$4,450,000, for construction of the Inland Slope Rehabilitation Phase II Project.

Director Leon was not present to vote on this item.



6. Cooperative Agreement with the City of Newport Beach for the Newport Transportation Center Relocation Feasibility Study

Dan Phu, Director, Strategic Planning, provided a presentation.

A motion was made by Director Janet Nguyen, seconded by Director Amezcua, and approved by the members present to:

- A. Authorize the Chief Executive Officer to negotiate and execute a Cooperative Agreement between the Orange County Transportation Authority and the City of Newport Beach for the Newport Transportation Center Relocation Feasibility Study.
- B. Bring back the findings of the Newport Transportation Center Relocation Feasibility Study to the Board of Directors within 12 months.
- C. Remove the discussion of the co-location of the Newport Transportation Center and the City of Newport Beach's fire station.
- D. Focus the Newport Transportation Center Relocation Feasibility Study primarily on how the relocation will impact the Orange County Transportation Authority and not the City of Newport Beach's fire station response times.

Discussion Items

7. Public Comments

There were no public comments received.

8. Chief Executive Officer's Report

Darrell E. Johnson, Chief Executive Officer, reported on the following:

- Rideshare Week
- Wave card launch, October 15, 2025
- Open House at OCTA Headquarters, October 13, 2025

9. Committee Members' Reports

There were no Committee Members' reports received.



10. Adjournment

The meeting was adjourned at 9:24 a.m.

The next regularly scheduled meeting of this Committee will be held:

9:00 a.m. on Thursday, November 13, 2025

OCTA Headquarters
550 South Main Street
Orange, California



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Contract Change Orders for Construction of the OC Streetcar Project

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar Project. Contract change orders are required for additional pavement modifications and restoration as required by the City of Santa Ana, maintenance and storage facility electrical grounding modifications, special trackwork bonding, emergency walkway modifications, and earthwork inefficiencies caused by differing site conditions.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 77.5 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, for pavement modifications and restoration.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 189.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$50,000, for maintenance and storage facility electrical grounding modifications.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 238 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$600,000, for special trackwork bonding.
- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 296.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$800,000, for emergency walkway modifications.

- E. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 302 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,603,812, for earthwork inefficiencies caused by differing site conditions.

Discussion

On September 24, 2018, the Orange County Transportation Authority (OCTA) Board of Directors (Board) awarded the contract to construct the OC Streetcar Project (Project) to Walsh Construction Company II, LLC (Walsh). The Notice to Proceed with construction was issued to Walsh on March 4, 2019. The construction of the Project is approximately 95 percent complete. The project alignment is referenced in Attachment A.

Staff is requesting Board authorization of the following contract change orders (CCO).

Pavement Modifications and Restoration

Pavement modifications and restoration were needed at various project locations, including Fourth Street, Fifth Street, and Mortimer Street. This work was a result of utility trenching and other work that damaged the pavement or additional paving to match existing conditions as required by the City of Santa Ana (City). The additional paving work was not anticipated in the original design. CCO No. 77.5, in the amount of \$250,000, will provide compensation to the contractor for the additional pavement modifications and restoration.

Maintenance Storage Facility (MSF) Electrical Grounding Modifications

Design modifications were required to ensure sufficient electrical grounding in various areas in the MSF. These modifications include additional measures to safely ground the electrical current related to the overhead contact system in the MSF and train wash. CCO No. 189, in the amount of \$178,283, was previously issued to compensate the contractor for these modifications to begin work and avoid delays to the contract. However, the contractor has since provided additional supporting documentation to support its request for additional labor efforts that were not accounted for in the previously negotiated amount. CCO No. 189.1, in the amount of \$50,000, is needed to fully compensate for the electrical grounding modifications at the MSF.

Special Trackwork Bonding

The streetcar trackwork requires special bonding between the tracks in certain situations to maintain the electrical continuity to maintain the safe operations of the streetcar when changing track locations. The required special trackwork bonding was not included in the original design at numerous locations, including at the MSF, Ross Street intersection, Sasser Park area, MSF, Mortimer Street and Santa Ana Boulevard intersection, and Harbor Boulevard. CCO No. 238, in the amount of \$600,000, is required for completion of the special trackwork bonding at the additional locations.

Emergency Walkway Modifications

Under advisement from the California Public Utilities Commission (CPUC) during pre-certification inspection walks, OCTA modified the section of ballasted track within the Pacific Electric Right-of-Way (PEROW) to include wider emergency walkways adjacent to the streetcar tracks in order to bring the Project into compliance with CPUC requirements. The modifications to the emergency walkways are safety and accessibility improvements required for CPUC certification and were not anticipated in the original design. CCO No. 296, in the amount of \$208,000, was issued to cover initial costs and has now been fully expended. CCO No. 296.1, in the amount of \$800,000, is required to complete the emergency walkway modifications.

Earthwork Inefficiencies Caused by Differing Site Conditions and Foreman Overtime

The Project experienced schedule and cost impacts due to the discovery of contaminated materials along the alignment. While contract changes were issued to address direct impacts, the contractor asserted that the contamination further affected their ability to efficiently perform base contract earthwork activities. Additionally, but separately, the contractor asserted that the overtime for a construction foreman was compensable pursuant to the contract. These issues were disputed but were recently resolved as part of ongoing mediation efforts.

The earthwork impacts were difficult to fully anticipate due to the ongoing discovery of contamination and underground utility conflicts. To manage the contaminated materials, stockpiles were placed within the PEROW until the testing and disposal locations could be determined. Some of these stockpiles remained in place and limited the contractor's access to work areas, disrupting earthwork operations and requiring changes to planned construction methods. The contractor tracked its work using daily time-and-materials reports, submitted

as extra work bills. However, these bills often combined base contract work with potential CCO work, making it difficult for the project team to separate and validate costs. Following extensive discussions and review of supporting documentation recently provided by the contractor, the project team has reached an agreement as part of the ongoing mediation efforts. CCO No. 302, in the amount of \$1,603,812, is needed to compensate Walsh for inefficiencies in performing earthwork caused by differing site conditions, resolve numerous disputed extra work bills including foreman overtime hours, as well as any associated interest claims. This will result in closing 1,883 previously disputed extra work bills.

Procurement Approach

The initial procurement was handled in accordance with OCTA's Board-approved procedures for public works projects. These procedures, which conform to both federal and state requirements, require that contracts are awarded to the lowest responsive, responsible bidder after a sealed bidding process. On September 24, 2018, the Board authorized Agreement No. C-7-1904 with Walsh, in the amount of \$220,538,649, for construction of the Project.

Proposed CCO nos. 77.5, 189.1, 238, 296.1, and 302, in the amount of \$3,303,812, will increase the cumulative value of the contract to \$359,795,237, as shown in Attachment B. Board approval is required for CCO nos. 77.5, 189.1, 238, 296.1, and 302 pursuant to the State of California Public Contracting Code Section 20142. The CCOs will be issued with a reservation of rights to advance the Project, pending resolution of disputes between OCTA and Walsh. The statements in this report are made in the context of, and subject to, OCTA's reservation of rights.

Fiscal Impact

Funding for these changes was included in the revised Federal Transit Administration Full Funding Grant Agreement approved by the Board on February 24, 2025, and is included in OCTA's Fiscal Year 2025-26 Budget, Capital Programs Division, account nos. 0051-TS010-9017-Z47 (CCO No. 77.5), 0051-TS010-9017-Z32 (CCO No. 189.1), 0051-TS010-9017-Z1A (CCO No. 238), 0051-TS010-9017-Z1B (CCO No. 296.1), and 0051-TS010-9017-Z41 (CCO No. 302), and is funded with Federal Transit Administration Section 5309 New Starts grant funds and local Measure M2 funds. The cost of the work associated with the CCOs noted above will be funded by, and are included in, the project budget that was previously approved by the Board on February 24, 2025.

Summary

Staff recommends the Board authorize the Chief Executive Officer to negotiate and execute CCO No. 77.5, in the amount of \$250,000, for pavement modifications and restoration, CCO No. 189.1, in the amount of \$50,000, for MSF electrical grounding modifications, CCO No. 238, in the amount of \$600,000, for special trackwork bonding, CCO No. 296.1, in the amount of \$800,000, for emergency walkway modifications, and CCO No. 302, in the amount of \$1,603,812, for earthwork inefficiencies caused by differing site conditions to Agreement No. C-7-1904 between OCTA and Walsh for the construction of the Project.

Attachments

- A. Project Alignment Map
- B. Walsh Construction Company II, LLC, Agreement No. C-7-1904, Contract Change Order (CCO) Log

Prepared by:



Jeff Mills, P.E.
Director, Capital Project Delivery
(714) 560-5925

Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646

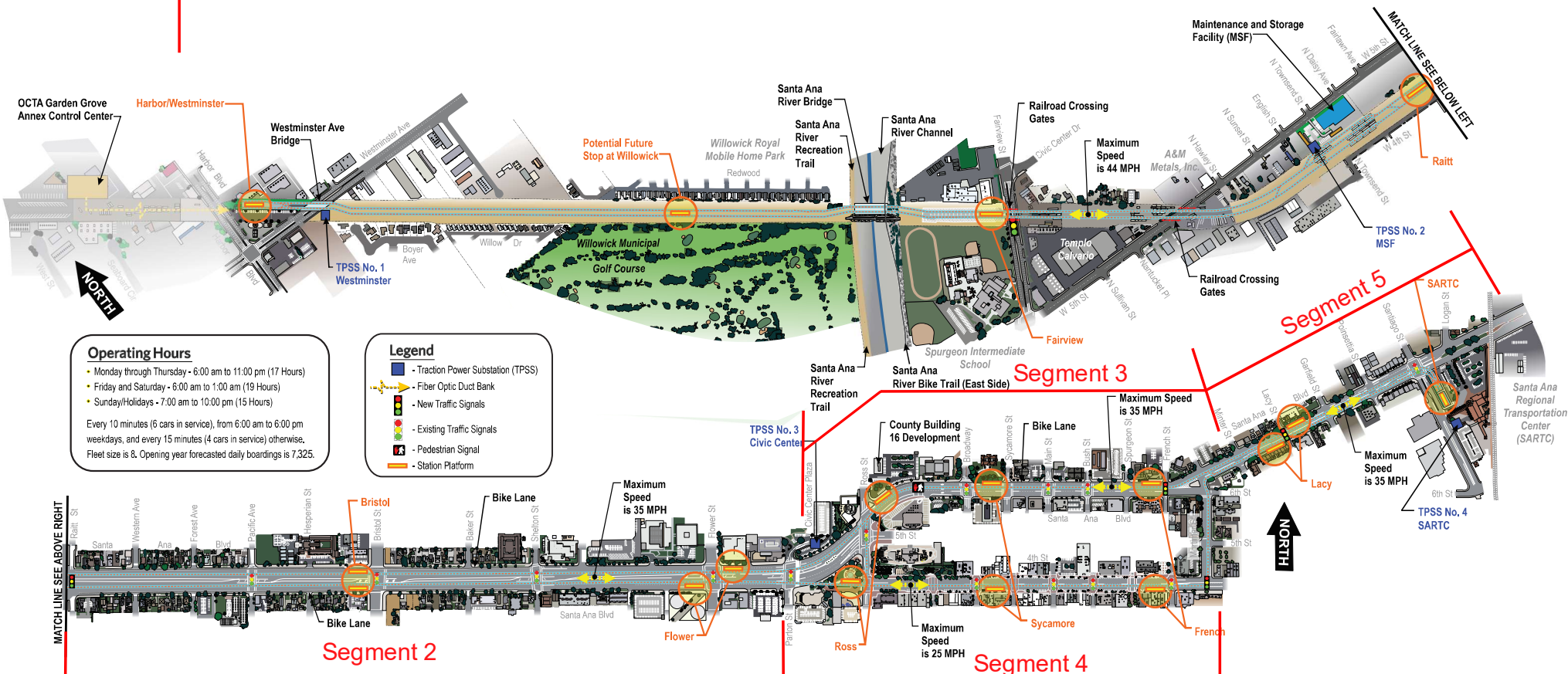


Pia Veasapen
Director, Contracts Administration and
Materials Management
(714) 560-5619

Project Alignment



Segment 1



**Walsh Construction Company II, LLC
Agreement No. C-7-1904
Contract Change Order (CCO) Log**

CCO No.	Title	Status	Date Executed	Cost
1	Maintenance and Storage Facility (MSF) Removals	Approved	6/20/2019	\$199,749.00
1.1	MSF Removals Additional Funding	Approved	6/25/2019	\$113,884.77
1.2	Time Impact Evaluation (TIE) 01 - Schedule Impacts Associated with Change Directive (CD)-001 and CD-003	Approved	6/17/2020	\$0.00
1.3	Schedule Impacts Associated with TIE 01	Approved	10/17/2022	\$2,100,000.00
2	MSF Removal of Additional Hazardous Materials	Approved	6/25/2019	\$200,000.00
2.1	MSF Removal of Additional Hazardous Materials Additional Funding	Approved	8/15/2019	\$160,000.00
3	Removal and Disposal of Contaminated Materials within the Orange County Transit District (OCTD)-Owned Pacific Electric Right-of-Way (PEROW)	Approved	9/12/2019	\$1,600,000.00
3.1	Removal and Disposal of Contaminated Materials Additional Funding	Approved	2/25/2020	\$7,278,795.00
3.2	Removal and Disposal of Contaminated Materials Additional Funding	Approved	10/18/2021	\$1,100,000.00
3.3	Removal and Disposal of Contaminated Materials Additional Funding	Approved	4/18/2023	\$1,500,000.00
3.4	Removal and Disposal of Contaminated Materials Additional Funding	Approved	4/21/2025	\$657,000.00
4	Work Related to Existing Utility Conflicts	Approved	8/27/2019	\$200,000.00
4.1	Work Related to Existing Utility Conflicts Additional Funding	Approved	2/25/2020	\$833,300.00
4.2	Work Related to Existing Utility Conflicts Additional Funding	Approved	6/9/2020	\$2,426,000.00
4.3	Work Related to Existing Utility Conflicts Additional Funding	Approved	6/21/2021	\$2,000,000.00
4.4	Work Related to Existing Utility Conflicts Additional Funding	Approved	11/19/2021	\$3,500,000.00
4.5	Work Related to Existing Utility Conflicts Additional Funding	Approved	6/3/2025	\$250,000.00
5	Tree Trimming and Removal	Approved	6/9/2020	\$129,215.52
5.1	Tree Trimming and Removal Additional Funding	Approved	12/29/2023	\$300,000.00
7	Orange County Sanitation District Specifications Revisions	Approved	6/9/2020	\$82,445.00
8	Orange County Flood Control District Maintenance Path Profile Revisions	Approved	6/9/2020	\$6,055.00
9	MSF Vapor Barrier	Approved	12/22/2020	\$395,717.00
10	112 Tram Rail Ultrasonic Testing	Approved	6/10/2020	\$0.00
11	GPS Priority Control System	Approved	6/9/2020	\$40,120.00
12	Santa Ana River Bridge (SARB) Precast Girders	Approved	8/27/2020	\$88,877.00
13	Retaining Wall 544 Reinforcing Steel	Approved	9/3/2020	\$2,321.30
14	Retaining Wall 508	Approved	12/14/2020	\$125,341.00
15	Utility Relocations for Overhead Contact System (OCS) Pole Foundations and Traffic Signal Pole Foundations	Approved	6/17/2020	\$195,723.00
16	OCS and Traffic Signal Pole Foundations Hand Excavation and Survey	Approved	6/23/2020	\$198,808.00
16.1	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	6/26/2020	\$1,400,000.00
16.2	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	4/15/2021	\$1,400,000.00
16.3	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	5/1/2023	\$250,000.00
17	Westminster Bridge OCS Diaphragm	Approved	10/30/2020	\$1,682.00
18	Remove Buried Man-Made Objects	Approved	11/23/2020	\$300,000.00
18.1	Remove Buried Man-Made Objects Additional Funding	Approved	10/25/2021	\$300,000.00
18.2	Remove Buried Man-Made Objects Additional Funding	Approved	5/1/2023	\$600,000.00
19	Removal of Boulders	Approved	11/17/2020	\$160,000.00
20	Removal of Chain Link Fence	Approved	3/9/2021	\$7,316.90
21	Changes to Turnout Geometry	Approved	10/5/2020	\$0.00
22	Railroad Crossing Gate Bells	Approved	10/5/2020	\$0.00
23	SARB, OCS Pole, and OCS Down Guy Diaphragms	Approved	1/19/2021	\$7,419.00
24	OCS Sectionalization – Siemens Portion	Approved	10/5/2020	\$158,941.01
24.1	OCS Sectionalization Additional Funding	Approved	4/27/2021	\$722,253.92
26	Revisions to Station Color Schedule, Glass, and Pylon	Approved	4/19/2021	\$176,419.84
27	Street Lighting	Approved	11/19/2020	\$12,347.91
28	Schedule Impacts Associated with TIE 04 and 07	Approved	12/8/2020	\$0.00
28.1	Schedule Impacts Associated with TIE 07	Approved	10/17/2022	\$1,300,000.00
28.2	Schedule Impacts Associated with TIE 07	Approved	1/17/2024	\$0.00
28.3	Schedule Impacts Associated with TIE 07	Approved	6/4/2024	\$1,425,000.00
29	Revision to MSF, Traction Power Substation (TPSS), and OCS Siemens Portion	Approved	11/19/2020	\$34,216.80
29.1	Revision to MSF, TPSS, and OCS Siemens Portion	Approved	6/22/2023	\$175,730.75
30	SARB Pile, Westminster Bridge, and Demonstration Section Electrical Continuity Testing	Approved	2/1/2021	\$23,928.10
30.1	Electrical Continuity Testing Additional Funding	Approved	3/16/2021	\$320,164.40
31	MSF Building and Southern California Edison (SCE) Design Revisions	Approved	1/17/2022	\$207,367.00
32	Asbestos Survey	Approved	2/1/2021	\$25,000.00
34	OCS Spanwire Modifications	Approved	5/8/2024	\$10,901.00
35	No Sunshade for Variable Message Sign	Approved	12/22/2020	\$0.00
37	Station Platform Power	Approved	5/18/2021	\$58,414.15
38	Modify OCS Foundation Schedule	Approved	6/15/2021	\$32,733.04
39	OCS Revisions Based on Field Walks	Approved	6/17/2021	\$28,088.32
39.1	Additional Revisions to OCS Hardware	Approved	6/26/2023	\$180,709.28
40	MSF Remote Yard Gates	Approved	11/3/2021	\$32,307.66
40.1	MSF Remote Yard Gates	Approved	5/29/2024	\$67,819.03

CCO No.	Title	Status	Date Executed	Cost
41	Auxiliary Feeder Pullbox Sizes- Segment 3A	Approved	11/23/2021	\$61,041.24
42	Department Acceptance Testing for Gamma-Gamma Logging of Cast-In-Drilled-Hole (CIDH) Piles	Approved	10/22/2021	\$35,138.00
43	End of Life Communication Equipment	Approved	5/3/2021	\$372,136.38
44	Design of Temporary Traffic Signals Segment 2A - Stages 1 and 2	Approved	4/26/2021	\$41,967.00
44.1	Design of Temporary Traffic Signals Segment 3A	Approved	11/24/2021	\$50,813.00
44.2	Design of Temporary Traffic Signals and Video Detections	Approved	10/4/2022	\$907,220.00
45	Thickened Asphalt Concrete (AC) Pavement	Approved	1/19/2021	\$60,000.00
46	MSF Video Servers from Garden Grove Bus Annex to MSF	Approved	10/13/2021	\$40,267.30
47	Archaeological Security and Data Recovery at MSF	Approved	1/19/2021	\$110,000.00
47.1	Archaeological Security and Data Recovery at MSF Additional Funding	Approved	5/8/2023	\$98,000.00
48	Thickened AC Pavement	Approved	4/27/2021	\$1,177,362.00
49	Retaining Wall 501 Encroachment	Approved	6/17/2021	\$181,802.77
50	MSF Street and Yard Utility Conflicts	Approved	5/25/2021	\$200,000.00
51	MSF Yard Light Connection Details	Approved	2/17/2023	\$193,803.00
52	Over Excavation of Unsuitable Soils	Approved	6/21/2021	\$209,500.00
52.1	Over Excavation of Unsuitable Soils Additional Funding	Approved	6/21/2021	\$540,000.00
53	SARB Bridge Decking	Approved	6/17/2021	\$9,002.94
54	Revisions to the Traction and Power Substation Site Plan	Approved	5/18/2022	\$1,200,000.00
55	Bid Item 24 - Earthwork Credit	Approved	5/3/2022	(\$659,666.73)
56	Exploratory Potholing Allowance	Approved	4/26/2021	\$200,000.00
56.1	Exploratory Potholing Allowance	Approved	9/8/2021	\$1,100,000.00
56.2	Exploratory Potholing Allowance	Approved	5/8/2023	\$500,000.00
58	Vehicle Platform Tolerances	Approved	12/6/2021	\$0.00
59	Direct Fixation Fasteners	Approved	6/7/2021	\$0.00
60	Base Contract Utility Credits	Approved	5/25/2021	(\$1,842,680.00)
61	Loop Relocation and Block Out	Approved	10/25/2021	\$80,000.00
61.1	Train-to-Wayside Communications Loop Installation in Embedded Track	Approved	6/3/2025	\$233,582.27
62	Backfill of OCS Foundations	Approved	11/8/2021	\$200,000.00
63	Graffiti Removal	Approved	5/18/2021	\$100,000.00
64	SCE Meter Switchgear Engineering and Submittal Costs	Approved	5/18/2021	\$17,618.00
64.1	SCE Meter Switchgear Additional Funding	Approved	10/13/2021	\$191,950.00
64.2	SCE Meter Switchgear Additional Funding	Approved	1/19/2022	\$669,573.00
65	Additional Environmental Soil Investigation on West Santa Ana Boulevard/ Bristol Street Station Stop (Stage 1)	Approved	5/18/2021	\$9,840.60
66	Ground Penetrating Radar Investigation	Approved	9/1/2021	\$208,000.00
67	City of Garden Grove Driveway Standard Update	Approved	11/24/2021	\$20,637.83
68	Ross Street Intersection Traffic Signal Conduit Installation	Approved	6/7/2021	\$18,000.00
69	Optical Backbone Network System Redundancy	Approved	2/25/2022	\$520,582.00
71	Traffic Signal Interconnect	Approved	4/12/2022	\$208,000.00
71.1	Traffic Signal Interconnect Additional Funding	Approved	5/31/2022	\$500,000.00
71.2	Traffic Signal Interconnect Additional Funding	Approved	3/4/2025	\$165,802.56
71.3	Traffic Signal Interconnect - Ethernet Switches	Approved	6/16/2025	\$171,122.00
72	Cathodic Protection at MSF and Car Wash	Approved	11/30/2023	\$292,745.56
77	Pavement Modification at Street Intersections	Approved	12/28/2021	\$208,000.00
77.1	Pavement Modifications Along Embedded Tracks and Grade Crossings	Approved	5/3/2022	\$400,000.00
77.2	Pavement Modifications Along Embedded Tracks and Grade Crossings	Approved	9/22/2023	\$480,000.00
77.3	Pavement Modifications and Restoration Along Embedded Tracks and Grade Crossings	Approved	6/7/2023	\$1,300,000.00
77.4	Pavement Modifications and Restoration Additional Funding	Approved	5/28/2025	\$350,000.00
77.5	Pavement Modifications and Restoration Additional Funding	Pending		\$250,000.00
79	MSF Permit Drawings and Revisions	Approved	6/24/2022	\$3,000,000.00
80	Contract Language Modifications Escrow Documents	Approved	4/12/2022	\$0.00
82	Third-Party Utility Work - Southern California Gas: Expose Abandoned Gas Lines	Approved	6/9/2022	\$100,000.00
82.1	Third-Party Utility Work - AT&T	Approved	6/21/2022	\$108,000.00
83	Additional Storage of Four TPSS Units at Factory	Approved	6/21/2022	\$208,000.00
86	OCS Pole Grounding Conduit Routing at PEROW	Approved	5/24/2022	\$200,000.00
86.1	OCS and Platform Grounding Conduit Additional Funding	Approved	4/18/2023	\$300,000.00
88	Traction Power Sub-Station Grounding Revisions	Approved	6/6/2022	\$209,839.49
89	Equipment and Security Upgrades	Approved	6/22/2022	\$2,200,000.00
89.1	Additional Security Modifications	Approved	6/11/2025	\$750,000.00
89.2	MSF Access Control Supplemental	Pending		\$350,000.00
90	Contract Language Modifications - Electronic Compliance Auditing Tool Disadvantaged Business Enterprise Reporting	Approved	11/17/2022	\$0.00
91	Customer Information Center Enclosure and Component Modifications	Approved	6/20/2022	\$1,650,000.00
91.1	Additional Customer Information Center Enclosure and Component Modifications	Pending		\$1,000,000.00
92	Changes to Platform SCE Meter Pedestals	Approved	6/28/2023	\$208,613.05
93	Wheel Turing Pit Modifications	Approved	2/2/2024	\$318,486.42
93.1	MSF Jib Cranes	Approved	8/18/2025	\$96,938.87
94	Traffic Signal Pole Modifications	Approved	6/22/2022	\$800,000.00
96	Relocate Bumping Posts and Train Signal Cabinet at Harbor Station	Approved	6/22/2022	\$400,000.00
104	MSF Ductwork and Louvers Revised Plans	Approved	8/1/2025	\$48,934.50
105	Modifications to the Track Slab Detail to Clear Utility Conflicts	Approved	5/18/2023	\$3,500,000.00
108	Traffic Signal and Pedestrian Crossing Equipment Modifications	Approved	9/17/2024	\$253,851.23
108.1	Traffic Signal and Pedestrian Crossing Modifications	Pending		\$21,946.41

CCO No.	Title	Status	Date Executed	Cost
110	Malcom and Spectrum Utility Concurrent Impacts (Claim 09)	Approved	12/30/2021	\$123,714.20
117	Manual Train Control Override	Approved	4/29/2022	\$208,000.00
117.1	Manual Train Control Override Additional Funding	Approved	6/9/2022	\$700,000.00
118	Added Pedestrian Crossing and Updated City Standard Signage	Approved	6/6/2024	\$64,411.79
130	Drainage and Traction Power Underground Conflicts	Approved	10/11/2023	\$138,724.00
133	MSF Western Concrete Masonry Unit Wall Modifications	Approved	1/27/2023	\$208,000.00
139	Soundwall #2 CIDH Foundation Adjustments	Approved	7/24/2023	\$29,570.95
140	TPSS Additional Rear Doors	Approved	9/28/2023	\$64,275.10
145	Structural Steel Quality Control Inspection and Testing	Approved	5/31/2022	\$350,000.00
146	Train Signal Modifications	Approved	6/14/2022	\$850,000.00
148	Emergency Communication Devices	Approved	2/17/2023	\$195,000.00
150	Fourth Street Extended Work Hours and Public Safety	Approved	9/28/2022	\$500,000.00
150.1	Fourth Street Extended Work Hours and Public Safety Additional Funding	Approved	12/15/2022	\$800,000.00
150.2	Fourth Street Extended Work Hours Additional Funding	Approved	6/18/2024	\$250,000.00
157	Traffic Control Allowance Extension (Bid Item 33)	Approved	2/6/2023	\$208,000.00
157.1	Traffic Control Allowance Extension (Bid Item 33)	Approved	9/21/2023	\$300,000.00
158	Station Canopy Glass Price Escalation	Approved	10/17/2022	\$72,607.09
161	Contract Language Modification - Article 9 - Notices	Approved	11/17/2022	\$0.00
164	Station Platform, Parking Lot, and Sasser Park Lights	Approved	5/18/2023	\$300,000.00
169	Traffic Signal Systems Spare Equipment for City of Santa Ana	Approved	3/28/2025	\$56,626.20
170	Station Spare Parts	Approved	1/2/2025	\$518,592.05
173	Buried OCS Pole Grounding	Approved	8/22/2024	\$209,500.00
173.1	Buried OCS Pole Grounding	Approved	8/27/2024	\$123,643.00
175	Additional Fence and Gates to Minimize Trespassing in PEROW	Approved	5/6/2025	\$198,210.15
175.1	Additional Fence and Gates to Minimize Trespassing in PEROW	Pending		\$200,000.00
177	Traffic Signal Plan Revisions: Utilizing Different Anchor Bolt Patterns	Approved	1/27/2023	\$208,000.00
177.1	Traffic Signal Pole Revisions Additional Funding	Approved	5/5/2025	\$100,000.00
178	Station Standby Lighting	Approved	12/16/2024	\$127,795.00
180	Miscellaneous Minor Changes at MSF	Approved	8/29/2025	\$51,406.77
182	Homeless Security and Cleanup	Approved	2/16/2023	\$208,000.00
183	Track Switch Indication Lights	Approved	2/28/2023	\$480,000.00
184	Santa Ana Boulevard Extended Hours	Approved	12/14/2022	\$208,000.00
185	Additional Builder Risk Insurance	Approved	2/8/2023	\$550,000.00
186	MSF Catenary Interlock System	Approved	2/17/2023	\$208,000.00
186.1	MSF Interlock System Additional Funding	Approved	12/27/2024	\$781,619.17
187	Schedule Impacts Associated with TIE 08	Approved	10/24/2022	\$0.00
187.1	Schedule Impacts Associated with TIE 08	Approved	6/22/2023	\$2,847,000.00
188	Relocation of the Traction Power Track Connection Boxes in Segment 4	Approved	5/23/2024	(\$102,757.22)
189	MSF Grounding Additions	Approved	3/28/2025	\$178,283.21
189.1	MSF Grounding Additions Supplemental	Pending		\$50,000.00
190	Track Bumping Post Modifications	Approved	6/13/2024	\$206,920.32
191	Four-Fold and Coiling Doors at the MSF	Approved	6/20/2023	\$300,902.44
193	Embedded Track Transition to Paved Ballasted Track	Approved	2/20/2024	\$182,498.67
194	Malcom's Differing Site Condition Impacts for CIDH Pile Installation (Claim 10)	Approved	3/16/2023	\$209,999.00
195	Schedule Impacts Associated with TIE 12	Approved	3/27/2023	\$0.00
195.1	Schedule Impacts Associated with TIE 12	Approved	6/20/2023	\$1,249,403.38
195.2	Schedule Impacts Associated with TIE 12	Approved	5/3/2024	\$245,501.00
195.3	Schedule Impacts Associated with TIE 12	Approved	5/6/2024	\$940,580.78
196	Shore Power at the MSF	Approved	8/13/2024	\$363,651.56
197	OCS Pole and Foundation Revisions	Approved	6/19/2023	\$128,706.34
198	Fourth Street Planter Lighting, Irrigation Wiring, and Power Modifications	Approved	9/16/2024	\$85,247.00
199	Improvements at Civic Center Plaza	Approved	3/16/2023	\$208,000.00
200	Infrastructure for Electric Vehicle Charger at Santa Ana Regional Transportation Center	Approved	8/21/2023	\$25,000.00
201	Intumescent Fireproof Coating on Structural Steel at the MSF	Approved	12/29/2023	\$450,000.00
201.1	Intumescent Fireproof Coating on Structural Steel at the MSF	Approved	5/29/2024	\$123,039.00
203	Sidewalk Paver Material and Labor Escalation	Approved	6/19/2023	\$209,730.72
204	MSF Pedestal Track Spacing M1-M2	Approved	12/28/2023	\$20,325.88
206	Track Isolation at end of Embedded Track	Approved	6/6/2024	\$119,790.41
207	Sewer Ejector Changes at MSF	Approved	2/1/2024	\$208,221.98
208	Ultrasonic Cleaner Model Changes	Approved	6/7/2024	\$44,401.70
209	Harbor OCS Modifications	Approved	2/4/2025	\$205,657.98
210	MSF Extended Work Hours	Approved	1/3/2024	\$209,500.00
211	OCS Pole Re-Raking and Adjustment	Approved	6/4/2024	\$208,000.00
212	Restraining Rail Conflicts at M1, M2, M3 and Y1 Tracks	Approved	5/8/2024	\$35,426.59
213	Various Sidewalk and Brick Restoration Work	Approved	8/12/2024	\$209,500.00
214	SCE Switchgear Breaker Setting and Commissioning	Approved	4/30/2024	\$143,986.69
215	Emergency Walkway Track Crossing at Raitt and Fairview Platform	Approved	12/28/2023	\$113,812.10
217	Improvements at Sasser Park	Approved	5/8/2024	\$209,298.00
220	Ross Street Intersection Modifications	Approved	8/30/2024	\$140,421.07
221	Electrical Modifications at Sasser Park	Approved	8/30/2024	\$128,045.06
222	SCE Electrical and Service Connections at Various Intersections	Approved	12/27/2024	\$368,980.95
225	Train Control Battery Backup	Approved	9/17/2024	\$349,848.89
226	Traffic Signal Pole and Mast Arm Adjustments at Santiago Street, Shelton Street, and Bristol Street	Approved	9/26/2024	\$52,702.00
227	Traffic Signal and Striping Modifications Due to the City of Santa Ana Bike Lane Project	Approved	8/30/2024	\$45,088.00
228	OCS Feeder Cable Theft Protection	Approved	10/14/2024	\$243,904.68
230	Traffic Signal Cabinet Relocation Sycamore Street and Santa Ana Boulevard	Approved	9/16/2024	\$93,878.89

CCO No.	Title	Status	Date Executed	Cost
231	Bid Item 61 (Utility Service Fee) Extension	Approved	6/7/2024	\$185,000.00
232	Platform Modifications	Approved	11/13/2024	\$70,648.35
232.1	Platform Modifications	Approved	7/21/2025	\$122,857.93
233	MSF Information Technology Room and Data Port and Communication Device Changes	Approved	11/18/2024	\$1,519,579.00
233.1	MSF IT Upgrades Supplemental	Pending		\$417,576.00
234	Schedule Impacts Associated with TIE 18	Approved	5/8/2024	\$0.00
235	Diesel Particulate Filter	Approved	10/11/2024	\$77,050.69
237	Garfield & Sycamore SCE Services Pedestals and Foundation Changes	Approved	9/30/2024	\$56,300.78
238	Special Trackwork Bonding	Pending		\$600,000.00
239	TPSS #01 Alternative Installation Method	Approved	12/12/2024	\$40,000.00
240	MSF Emergency Eyewash/Shower	Pending		\$143,260.28
241	Modifications to the East and West Gates at MSF	Approved	6/9/2025	\$366,813.41
242	OCS Pole Ground Repair in PEROW	Approved	2/4/2025	\$148,044.06
243	Overhead Utility Conflicts at Mortimer and Santa Ana Boulevard - Traffic Signal Pole No.'s 02 and 03	Approved	12/12/2024	\$38,498.93
244	Sump Pump Removal from Elevator	Approved	7/31/2025	\$45,697.23
245	Parton Street-Santa Ana Boulevard Sidewalk Restoration	Approved	11/14/2024	\$22,763.02
246	Modifications to Signage, Push Buttons and Signal Heads	Approved	11/13/2024	\$76,618.35
248	MSF Service and Inspection Pit Access Controlled Gate Revisions	Pending		\$350,000.00
249	Lacy Platform Landscape Changes	Approved	7/31/2025	\$49,908.54
250	Modify Pumps in the Wheel Truing and Service and Inspection Pit	Approved	5/7/2025	\$325,000.00
250.1	Modify Pumps in the Wheel Truing and Service and Inspection Pit	Pending		\$50,000.00
251	Accelerated Schedule Agreement	Approved	9/30/2024	\$40,338,054.00
251.1	Accelerated Schedule Agreement	Pending		\$1,100,000.00
252	Public Conveyance and Safety Enhancements	Approved	2/12/2025	\$150,000.00
252.1	Public Conveyance and Safety Enhancements	Pending		\$250,000.00
253	SCE Invoices for Relocations due to General Order 95 Conflicts	Approved	2/4/2025	\$150,000.00
254	Fairview Street Crossing Traffic Signal Poles Conflict with Overhead SCE Lines	Approved	2/4/2025	\$21,225.37
255	OCS Modifications	Approved	1/21/2025	\$200,000.00
255.1	OCS Modifications	Pending		\$350,000.00
256	SARB Landscape Revisions	Pending		\$60,000.00
258	Harbor Boulevard Station Adjustments	Approved	4/11/2025	\$200,000.00
260	MSF Finishes	Approved	3/13/2025	\$200,000.00
261	OCS Cross Contact Assemblies on Hand	Approved	3/4/2025	\$200,000.00
262	Auxiliary Contact Wire at Easbount Track 5	Approved	8/29/2025	\$76,182.28
263	Communication Interface Cabinet Battery Replacement	Approved	5/6/2025	\$202,329.50
264	MSF Room 124 Added Fan Coil Units	Approved	7/31/2025	\$169,835.00
265	MSF Bridge Crane Conflicts with Mechanical, Electrical, and Plumbing (MEP)	Approved	7/21/2025	\$200,000.00
266	MSF Systems	Approved	3/14/2025	\$200,000.00
266.1	MSF Systems	Pending		\$250,000.00
267	Wheel Truing Machine Testing	Approved	3/28/2025	\$92,397.00
268	MSF Additional Roof and Deck MEP Angle Supports	Approved	5/8/2025	\$199,232.85
268.1	MSF Additional Roof and Deck MEP Angle Supports	Pending		\$59,867.90
270	MSF IT Room Distribution Unit Update	Approved	7/21/2025	\$34,920.17
271	MSF Lactation Room 109 and Breakroom Room 110 Revisions	Approved	7/21/2025	\$62,795.90
273	Fence Modifications	Pending		\$83,258.91
275	OCS Pole Twist and Arm Capacity	Approved	5/25/2025	\$400,000.00
277	MSF Fall Protection Modifications	Pending		\$425,000.00
279	MSF Ejector Pump Manifold and Truing Pit Trench Cover Plate	Pending		\$84,801.39
281	MSF Truing Pit Air Assembly Relocation	Approved	8/21/2025	\$10,317.50
285	MSF Fan in Room 124	Approved	7/21/2025	\$42,389.14
288	PEROW Gate Modifications	Approved	8/1/2025	\$39,630.54
289	OCS – Elastic Arm Assembly Modifications	Approved	5/6/2025	\$100,000.00
290	OCS – Galvanized Steel to Stainless Steel and Kevlar Changes	Approved	5/6/2025	\$205,000.00
291	OCS – Span Wire to Contact Wire Changes	Approved	5/22/2025	\$205,000.00
291.1	OCS – Span Wire to Contact Wire – Supplemental	Pending		\$160,000.00
292	OCS – Feeder Wire & Tap Assembly Modifications	Approved	5/22/2025	\$200,000.00
293	Communications Systems Software and Supervisory Control and Data Acquisition	Pending		\$900,000.00
294	MFS Uninterrupted Power Supply Battery Replacement	Approved	8/29/2025	\$41,841.60
296	Ballast Walkway Modifications	Approved	7/21/2025	\$208,000.00
296.1	Ballast Walkway Modifications Supplemental	Pending		\$800,000.00
300	MSF Yard Section Insulator Relocation	Pending		\$150,000.00
301	Train Signal Control Changes	Pending		\$1,000,000.00
302	Earthwork Inefficiencies due to Differing Site Conditions and Overtime	Pending		\$1,603,811.47
305	MSF Direct Current Bus Duct Modifications	Approved	8/29/2025	\$22,493.16
307	Systems Integration Testing and Start-Up	Approved	8/1/2025	\$200,000.00
310	MSF Hardware Modifications	Pending		\$50,512.28
		Subtotal Executed CCOs		\$128,496,552.82
		Subtotal Pending CCOs		\$10,760,034.64
		TOTAL CCOs		\$139,256,587.46
		ORIGINAL VALUE		\$220,538,649.00
		PROPOSED REVISED VALUE		\$359,795,236.46



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Services for the Inland Slope Rehabilitation Phase II Project

Overview

The Orange County Transportation Authority Board of Directors approved the construction of the Inland Slope Rehabilitation Phase II Project as part of the Orange County Transportation Authority Fiscal Year 2025-26 Budget. On November 18, 2024, a request for proposals was released for construction management services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the recommended selection of Fulcrum Consultants, Inc. as the firm to provide construction management services for the Inland Slope Rehabilitation Phase II Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2582 between the Orange County Transportation Authority and Fulcrum Consultants, Inc., in the amount of \$624,802, to provide construction management services for the Inland Slope Rehabilitation Phase II Project.

Discussion

The Orange County Transportation Authority (OCTA) owns the Orange Subdivision railroad right-of-way (ROW) between the Fullerton Junction and the San Diego County Line. This rail corridor is part of the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor that hosts both intercity and commuter passenger and freight rail service. The LOSSAN Rail Corridor is of state and national importance and is also designated as a national defense

connector line as part of the Strategic Rail Corridor Network by the Department of Defense.

OCTA has secured state SB 1 (Chapter 5, Statutes of 2017) – Local Partnership Program Formula (LPP) funds, matched with local Measure M2 (M2) funds to repair erosion and perform preventative maintenance to avoid slope failures on the railroad right-of-way. Field investigations conducted jointly with the Southern California Regional Rail Authority (SCRRA) identified six sites in the cities of Laguna Niguel, Lake Forest, and Mission Viejo requiring stabilization, as shown in Attachment A. These locations consist of steep embankments, ranging from 200 to 700 linear feet in length, that if left unaddressed, could undermine the track bed and/or deposit debris onto the tracks, potentially disrupting rail operations.

A geotechnical evaluation was completed in July 2022 with site-specific mitigation recommendations, including grading, shotcrete lining, and open channel culverts. Final design plans and specifications for the Inland Slope Rehabilitation Phase II Project (Project) were completed in April 2025 and are now ready to be implemented. OCTA will lead the construction of all six site locations. Construction is anticipated to begin in January 2026 and completed within six months. Work will be coordinated closely with SCRRA to minimize rail service impacts, especially during the rainy season when slope stability risks increase.

Construction management (CM) services are necessary to oversee the construction contractor and perform oversight and monitoring services, such as health and safety compliance observations, management of the contractor's budget and schedule, claims avoidance and change order analysis, inspections, quality assurance testing, labor compliance, and other construction required tasks to keep the Project on schedule and within budget.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for architectural and engineering (A&E) services that conform to both state and federal laws. Proposals are evaluated and ranked in accordance with the qualifications of the firm, staffing and project organization, and work plan. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. Evaluation of the proposals was conducted based on overall qualifications to develop a competitive range of offerors. The highest-ranked firm is requested to submit a cost proposal, and the final agreement is negotiated. Should negotiations fail with the highest-ranked firm, a

cost proposal will be solicited from the second-ranked firm in accordance with Board-approved procurement policies.

On November 18, 2024, Request for Proposals (RFP) 4-2582 was electronically issued on CAMM NET. The Project was advertised on November 15 and November 22, 2024, in a newspaper of general circulation. A pre-proposal conference was held on November 25, 2024, with six attendees representing ten firms. Three addenda were issued to make available the pre-proposal conference registration sheets, provide responses to questions received, and handle administrative issues related to the RFP.

On December 20, 2024, seven proposals were received. An evaluation committee consisting of members from OCTA's Capital Project Delivery, Facilities Engineering, and Regional Rail Operations departments met to review all submitted proposals. The proposals were evaluated utilizing the following evaluation criteria and weightings:

- | | |
|-------------------------------------|------------|
| • Qualifications of the Firm | 20 percent |
| • Staffing and Project Organization | 40 percent |
| • Work Plan | 40 percent |

In developing the criteria and weightings, several factors were considered. The firm's qualifications and experience in performing relevant work of similar scope, size, and complexity are important to the success of the Project. The staffing and project organization criteria was assigned a weighting of 40 percent as the qualifications of the construction manager and other key task leaders are critical to understanding project requirements and to the timely delivery and successful performance of the work. Similarly, an equal level of importance was assigned to the work plan, as the technical approach to the Project is critical to the successful performance of the Project.

The evaluation committee reviewed all seven proposals based on the evaluation criteria and found two firms most qualified to perform the required services. The most qualified firms are listed below in alphabetical order:

Firm and Location

Fulcrum Consultants, Inc. (Fulcrum)
Headquarters: Irvine, California
Project Office: Irvine, California

SYRUSA Engineering, Inc. (SYRUSA)
Headquarters: Brea, California
Project Office: Brea, California

On February 11, 2025, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation allowing each team to present their qualifications, highlight their proposal, and respond to evaluation committee questions. Each firm also discussed their staffing plan, work plan, and perceived project challenges. Each firm was asked general questions related to qualifications, relevant experience, project organization, and approach to the work plan, as well as questions specific to their proposal regarding their team's approach to the requirements of the scope of work, management of the Project and the proposed solutions towards achieving project goals.

Based on the evaluation of written proposals and information obtained during the interviews and that the Project's estimated budget was below the threshold requiring Board approval, the evaluation committee recommended to the Contracts Administration and Materials Management (Camm) Department the selection of Fulcrum as the top-ranked firm to provide CM services for the Project. Fulcrum received the highest ranking due to its experience with projects of similar scope and scale, familiarity with the project requirements, comprehensive understanding of the project objectives and constraints, presentation of relevant technical solutions, and overall approach in performing the required CM services. The firm presented a qualified team that met the requirements of the RFP and presented a comprehensive work plan addressing key issues that are critical to the success of the Project. Camm management approved the selection of the recommended firm on February 19, 2025, and a cost proposal was requested.

OCTA's original budgeted amount for this procurement was \$414,893, but it did not assume pre- and post-construction activities. After reviewing the recommended firm's cost proposal and re-evaluation of the hours needed to fulfill the scope of work, Fulcrum's cost proposal, in the amount of \$624,802, is considered by staff to be fair and reasonable. As the negotiated amount exceeds the \$500,000 threshold requiring Board approval, staff is requesting Board approval of the recommended selection of Fulcrum.

The following is a summary of the proposal evaluation results.

Qualifications of Firm

The two short-listed firms are well established with recent and relevant experience and are qualified to perform CM services for the Project.

Fulcrum specializes in project, program, and agency CM and project controls services, and capital program advisory and consulting services. The firm has provided these services to several transportation clients in California, including the Los Angeles County Metropolitan Transportation Authority (LA Metro), California Department of Transportation (Caltrans), and OCTA. Fulcrum's corporate headquarters is in the City of Irvine. The firm's prior experience with OCTA includes work on the Interstate 405 (I-405) Improvement Project and I-405 Sepulveda Pass with LA Metro. The subconsultants have experience working with Fulcrum on past projects of similar size and scope. Positive references were received for the firm.

SYURSA specializes in CM, structure construction inspection, and resident engineering services for transportation infrastructure projects. The firm is based in the City of Brea. The firm has provided services to several transportation clients in California, including the San Bernadino County Transportation Authority (SBCTA), Caltrans, and Orange County Public Works. Relevant experience includes the CM services for SBCTA on the I-10 Corridor Express Lanes Design-Build and Caltrans' Interstate 5 Box Culvert Replacement and Embankment Reconstruction. Additionally, experience with OCTA includes office engineering and construction inspection services on the Laguna Niguel to San Juan Capistrano Passing Siding Project. The subconsultants have experience working with SYRUSA on past projects. Positive references were received for the firm.

Staffing and Project Organization

Both firms proposed experienced construction managers, key personnel, and subconsultants with relevant CM experience in slope stabilization projects.

Fulcrum proposed a qualified project team with relevant experience and understanding of the project issues, risks, and challenges. The team, including subconsultants, are experienced in the various disciplines required for the Project and have relevant experience with railroad projects. The proposed construction manager has 15 years of CM experience that includes recent experience working with OCTA on the I-405 Improvement Project. The proposed resident engineer (RE) has 33 years of CM experience and 25 years of resident engineering experience. The field inspector has over 30 years of CM experience and served as the field inspector on OCTA's Slope Stabilization Phase I Project while with a different firm. The overall team proposed by Fulcrum includes subconsultants that provide a depth of resources such as office engineering/document control, field inspection, safety consulting, soils and materials testing, and quality assurance surveying to address the special needs of the Project.

SYRUSA proposed an experienced project team with each key personnel demonstrating relevant CM experience. The team is proficient in the various disciplines required for the Project. SYRUSA's proposed construction manager has over 27 years of CM experience. Experience includes management of complex infrastructure projects while serving at Caltrans in various roles. The RE has 33 years of experience on highway and bridge construction projects. The field inspectors were not identified as key personnel, as required by the scope of work, and their availability for this Project was unclear. The proposed team includes qualified and experienced subconsultants for electrical inspection, quality assurance, project controls engineer, safety oversight and material testing.

Work Plan

Both short-listed firms met the requirements of the RFP, and each firm adequately discussed its approach to the Project.

Fulcrum presented a comprehensive and viable work plan that demonstrated an understanding of the project requirements and identified project challenges, mitigations, and innovation. The detailed work plan considered long lead items for the entire scope of the Project. The work plan discussed utility coordination, public outreach and impacts, identified conflicts, and technically sound list of process controls for each phase of the Project. The work plan provided a detailed narrative as to how the CM services would be provided based on lessons learned from previous similar successful projects, while maintaining the project schedule. An area of innovation identified in the work plan was to construct the access road at the bottom of the slope instead of the top of the slope to eliminate the need for a retaining wall.

The overall approach described in Fulcrum's work plan highlighted detailed discussions of challenges and mitigations for each area, including access, utilities, public impacts, and constructability. The information presented during the interview demonstrated the firm's knowledge of the scope of work, objectives, and risks associated with the Project. The team provided project-specific responses to all interview questions.

SYRUSA provided a detailed work plan that demonstrated an understanding of the project scope of work, issues, and risks. SYRUSA's overall approach to project execution described in the work plan and presented during the interview identified potential risks accompanied by mitigation plans, detailed approach to complete the tasks, and discussed project challenges. SYRUSA listed considerations for best results on shotcrete, grading, enviro-block, and inlet erosion repair, noting train vibrations. The CM plan was innovative using aerial

images, identifying nearest arterial access points, and summarizing elements of work and adjacent property uses.

SYRUSA's overall approach to project execution described in the work plan and presented during the interview identified potential risks accompanied by mitigation plans, detailed approach to complete the tasks, and discussed project challenges. The interview confirmed the technical knowledge and expertise of SYRUSA. The firm presented an interview with detailed responses from the project manager to the evaluation committee's questions.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, and information obtained during the interviews, the evaluation committee recommended the selection of Fulcrum as the top-ranked firm to provide CM services for the Project. Staff negotiated a final cost proposal, in the amount of \$624,802, and are requesting authorization to execute the final agreement.

Fiscal Impact

The Project is included in OCTA's Fiscal Year 2025-26 Budget, Capital Programs Division, Account No. 0018-9085-C5054-TYR, and is funded by state grant SB 1 LPP and local M2 funds.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to execute Agreement No. C-4-2582 with Fulcrum Consultants, Inc., in the amount of \$624,802, to provide construction management services for the Inland Slope Rehabilitation Phase II Project.

Attachments

- A. Project Location Map
- B. Review of Proposals – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project
- C. Proposal Evaluation Criteria Matrix (Short-Listed Firms) – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project
- D. Contract History for the Past Two Years – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project

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Project Location Map



Review of Proposals
RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project
Presented to Transit Committee - November 13, 2025
Seven proposals received, Two firms were interviewed, One firm is being recommended

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments
1	82	Fulcrum Consultants, Inc. Irvine, California	Ghirardelli Associates, Inc. Guida Surveying Ninyo & Moore Geotechnical & Environmental Sciences Consultants	Firm has recent relevant experience providing construction management services for projects of similar size and scope. Experience working with the Orange County Transportation Authority and Los Angeles County Metropolitan Transportation Authority. Qualified and dynamic team, including construction manager, resident engineer, safety officer, key personnel, technical staff, and subconsultants with experience working together on projects with similar scope. Construction manager has comprehensive experience, which includes slope rehabilitation innovation experience and has demonstrated experience working on similar projects. Work plan proposed enhancements and innovative solutions. Presented a comprehensive and innovative work plan that meets the project requirements and meets all business requirements specified in the scope of work. Demonstrated experience with shotcrete. Proposed technical enhancements to minimize risks, improve project efficiency, and improve document control procedures as well as innovation of eliminating the retaining wall that was very well received. Positive references were received for the firm.
2	77	SYRUSA Engineering, Inc. Brea, California	Dynamic Engineering Services, Inc. Guida Surveying Mammoth Associates, LLC SafeworkCM (Safework) Twining Consulting, Inc.	Firm has relevant experience performing construction management services. Qualified team, including construction manager, key personnel, and subconsultants with experience working together on recent projects. Construction manager is qualified with relevant experience planning, managing, and successfully delivering construction management projects. Work plan proposed value engineering opportunities from their recent experience on railroad corridor projects. Positive references were received for the firm

Evaluation Panel:

Capital Project Delivery (2)
Regional Rail Operations (1)
Facilities Engineering (1)

Proposal Criteria

Qualifications of the Firm
Staffing and Project Organization
Work Plan

Weight Factors

20%
40%
40%

PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed Firms)
RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project

Fulcrum Consultants, Inc.						
Evaluator Number	1	2	3	4	Weights	Criteria Score
Qualifications of Firm	4.00	3.50	4.00	4.00	4	15.5
Staffing/Project Organization	4.00	3.50	4.00	3.50	8	30.0
Work Plan	4.50	4.50	4.50	4.50	8	36.0
Overall Score	84	78	84	80		82
SYRUSA Engineering, Inc.						
Evaluator Number	1	2	3	4	Weights	Criteria Score
Qualifications of Firm	4.00	4.00	4.00	4.00	4	16.0
Staffing/Project Organization	3.50	3.50	4.00	3.50	8	29.0
Work Plan	4.50	4.00	4.00	3.50	8	32.0
Overall Score	80	76	80	72		77

The range of scores for the non-short-listed firms was 61-67.

The original budget was less than \$500,000 and did not require a minimum of five evaluators in accordance with the Contracts Administration and Materials Management Policy manual.

CONTRACT HISTORY FOR THE PAST TWO YEARS**RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project**

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
Fulcrum Consultants, Inc.						
Contract Type: N/A	None	N/A	N/A	N/A	N/A	0.00
Sub Total						0.00
SYRUSA Engineering, Inc.						
Contract Type: N/A	None	N/A	N/A	N/A	N/A	0.00
Sub Total						0.00



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Cooperative Agreement with the Southern California Regional Rail Authority for the San Juan Creek Bridge Replacement Project

Overview

On April 14, 2020, the Orange County Transportation Authority entered into a cooperative agreement with the Southern California Regional Rail Authority for construction capital and construction support services for the San Juan Creek Bridge Replacement Project. Board of Directors' approval is requested to amend the cooperative agreement to reallocate \$2,760,000 of existing contingency funds for construction support services and allocate \$1,194,039 of SB 125 (Chapter 54, Statutes of 2023) Transit Program accrued interest funds for construction capital and construction support services.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-0-2540 between the Orange County Transportation Authority and the Southern California Regional Rail Authority, to reallocate \$2,760,000 in contingency funds and \$1,194,039 in new funding, for construction support services related to the San Juan Creek Bridge Replacement Project.
- B. Authorize the use of up to \$1,194,039 in SB 125 Transit Program accrued interest funds for the San Juan Creek Bridge Replacement Project.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

Discussion

The Orange County Transportation Authority (OCTA), in coordination with the Southern California Regional Rail Authority (SCRRA), is replacing the 100-year-old railroad bridge over San Juan Creek, located in the City of San Juan Capistrano, near the Interstate 5 Camino Capistrano off-ramp (Attachment A). This railroad bridge, built in 1917, is used daily by Metrolink, Amtrak's Pacific Surfliner, and freight trains. The bridge has reached the end of its useful life and is in need of replacement. The San Juan Creek Bridge Replacement Project (Project) will construct a new bridge west of the existing bridge to maintain a state of good repair, enhance safety, reduce maintenance needs, and meet current rail design and load standards. Environmental clearance under the California Environmental Quality Act and National Environmental Policy Act was completed by SCRRA in March 2020.

In April 2020, OCTA and SCRRA executed Cooperative Agreement No. C-0-2540 which initially provided \$36,903,645 for construction capital and support services. Under this cooperative agreement, SCRRA serves as the lead agency for design and construction, and OCTA provides support for property acquisition and public outreach.

Following receipt of the construction bids on September 15, 2023, which came in higher than anticipated due to prevailing market conditions, increased signal construction costs, and updated project contingencies, the funding necessary for the completion of the Project increased from \$41,790,000 to \$65,581,118. Amendment No. 1 to Cooperative Agreement No. C-0-2540 was executed on February 14, 2024, in the amount of \$22,578,258, to increase OCTA's maximum obligation to \$59,481,903. OCTA retained \$6,099,000 for project management, right-of-way, utilities, public outreach, and project contingency.

Construction is progressing as planned, with a major milestone achieved on October 27, 2025, when passenger and freight rail operations transitioned to the newly constructed San Juan Creek Bridge. As the Project advances, funding needs have been reassessed to complete the remaining work, which includes additional wall structures within the creek, demolition of the existing bridge, and construction of new bridge substructures. These activities are scheduled for the 2026 dry season, with project completion expected in early 2027. The remaining work will continue to require construction support services, project management, construction management, design services during construction, and railroad flagging.

Amendment No. 2 to Cooperative Agreement No. C-0-2540 proposes releasing \$2,760,000 in contingency funds for additional construction support services and allocating an additional \$1,194,039 from SB 125 accrued interest. Combined, these adjustments increase the available funding to SCRRA by \$3,954,039, ensuring adequate resources for ongoing construction support.

With this amendment, the maximum obligation under Cooperative Agreement No. C-0-2540 would increase from \$59,481,903 to \$63,435,942 (Attachment B). The use of accrued interest from SB 125 funds is consistent with SB 125 program guidelines. A summary of the recommended programming actions can be found in the Capital Funding Program Report (Attachment C).

While the Project remains on schedule, unforeseen field conditions could result in additional costs as construction continues. Staff will continue to monitor these factors and present any significant impacts to the Board of Directors (Board) through future budget updates or cooperative agreement amendments.

Fiscal Impact

Funding will be programmed in the OCTA Fiscal Year 2026-27 Budget, Capital Programs Division, Account No. 0017-7831-TR022-ODM, in the amount of \$3,954,039, to accommodate Amendment No. 2 to Cooperative Agreement No. C-0-2540.

Summary

Board approval is requested to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-0-2540 between OCTA and SCRRA, in the amount of \$3,954,039, for additional construction support services for the Project. This will increase the maximum obligation of the cooperative agreement to a total contract value of \$63,435,942. Additionally, staff also request authorization to use up to \$1,194.039 in SB 125 accrued interest funds and to process the necessary Federal Transportation Improvement Program amendments and related agreements.

Attachments

- A. San Juan Creek Bridge Replacement Project Location Map
- B. Southern California Regional Rail Authority, Cooperative Agreement No. C-0-2540 Fact sheet
- C. Capital Funding Program Report

Prepared by:

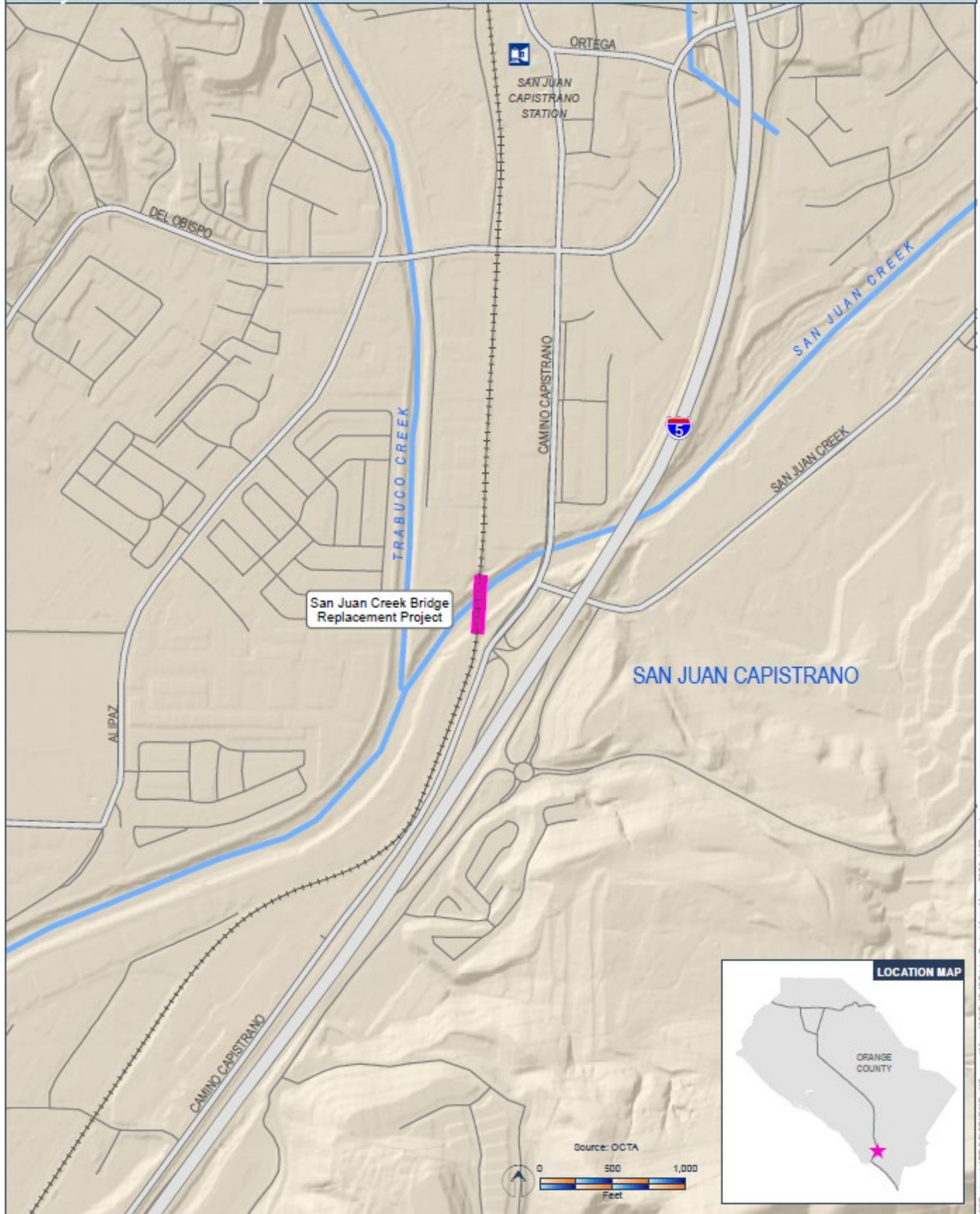


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**Southern California Regional Rail Authority
Cooperative Agreement No. C-0-2540 Fact Sheet**

1. April 14, 2020, Cooperative Agreement No. C-0-2540, in the amount of up to \$36,903,645, approved by the Contracts Administration and Materials Management (CAMP) Department.
 - To replace the existing San Juan Creek Bridge located in the City of San Juan Capistrano near the Camino Capistrano exit of the Interstate 5 (I-5) freeway at Mile Post (MP) 197.9 on the Orange Subdivision.
 - Identify Board of Directors (Board)-authorized funds to be used for this project, including \$35,724,000 in Federal Transit Administration (FTA) Section 5337 Urbanized Area (UZA) 2 and UZA 68 for fiscal year (FY) 2017-18 and FY 2018-19 and UZA 2 for FY 2020-21 to be administered by the Southern California Regional Rail Authority and \$1,179,645 in surplus FTA Section 5337 funds in SCRRA grant CA-54-0043.
2. November 27, 2023, Amendment No. 1 to Cooperative Agreement No. C-0-2540, \$22,578,258, approved by the Board.
 - To increase funding by utilizing \$17,000,000 in SB 125 (Chapter 54, Statutes of 2023) Transit and Intercity Rail Capital Program and \$5,578,258 in SB 1 (Chapter 5, Statutes of 2017) State of Good Repair Program from FY 2024-25 funds for the construction phase.
3. November 13, 2025, Amendment No. 2 to Cooperative Agreement No. C-0-2540, \$3,954,039, pending Board approval.
 - Reallocated funding across SB 125, FTA Section 5337, and Measure M2 to ensure adequate financial support for construction and support services.

Total committed to SCRRA after approval of Amendment No. 2 to Cooperative Agreement No. C-0-2540: \$63,435,942 including the funds drawn directly from FTA.



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 24, 2025

Rail Project											
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds		
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
OC Streetcar (New Starts)	M1/S	\$649,000	\$130,132	\$171,961				\$175,427		\$171,480	
OC Streetcar (non-New Starts)	M1/S	\$16,702		\$342					\$6,904	\$9,313	\$143
OC Streetcar (operations and potential future capital needs)	M1/S	\$0	\$0								
Coastal Rail Infrastructure Resiliency Project Environmental Phase 2	R	\$10,220			\$8,176					\$2,044	
Coastal Rail Stabilization Priority Project	R	\$313,580			\$103,824		\$80,000	\$128,800		\$956	
Cyprus Shore Initial Track Stabilization Projects (MP 206.8)	R	\$8,000								\$7,000	\$1,000
Cyprus Shore Track Stabilization Projects (MP 206.8)	R	\$14,110	\$6,000		\$1,210	\$6,000		\$200		\$700	
Future VSS	R	\$217		\$174							\$43
Inland Slope Rehabilitation Phase II	R	\$8,170					\$2,400			\$5,770	
Irvine Station Improvement Project	R	\$6,330						\$6,330			
Metrolink new capital	R	\$21,977	\$2,121	\$19,856							
Metrolink Operating Subsidy - FY 2023-24 to FY 2027-28	R	\$271,246		\$71,212				\$135,745		\$64,289	
Metrolink rehabilitation/renovation - FY 2021-22 to FY 2025-26	R	\$209,117		\$209,117							
Metrolink station and track improvements, and rehabilitation	R	\$3,063		\$2,617							\$446
MP 204.2 Mariposa Point	R	\$9,200				\$9,200					
OC Maintenance Facility	R	\$91,230				\$20,000		\$71,230			
Placentia Commuter Rail Station	R	\$34,825	\$50			\$2,500		\$400		\$8,000	\$23,875
Rail track and structures	R	\$86,468						\$86,468			
San Clemente Track Protection (MP 204.6)	R	\$5,500				\$3,000	\$2,500				
San Juan Creek Bridge replacement ¹	R	\$65,581	\$945	\$38,513	\$913		\$5,578	\$18,253		\$1,379	
SCRRA operating subsidy assistance	R	\$2,510								\$2,510	
OC Streetcar operations	S	\$164,971	\$18,050					\$74,659		\$40,506	\$31,756
Pacific Coast Highway Coastal Rail Bridge		\$21,263				\$15,000					\$6,263
Pedestrian Audible Warning System (PAWS)		\$2,036						\$1,818			\$218
Rail Project Totals		\$2,015,316	\$157,298	\$513,792	\$114,123	\$55,700	\$90,478	\$699,330	\$6,904	\$313,947	\$63,744
Federal Funding Total		\$785,213									
State Funding Total		\$845,508									
Local Funding Total		\$384,595									
Total Funding (000's)		\$2,015,316									

Rail Project Completed											
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds		
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
Fullerton Transportation Center parking expansion	M1/R	\$33,667				\$11,250		\$11,035	\$9,718		\$1,664
Laguna Niguel-Mission Viejo Station parking improvements and expansion (ADA ramps)	M1/R	\$5,581	\$3,204	\$732					\$1,645		
Metrolink Grade Crossing safety improvements (OCX)	M1/R	\$80,618						\$18,250	\$7,600	\$30,710	\$24,058

1. Authorize the use of up to \$1,194,039 in SB 125 (Chapter 54, Statutes of 2023) Transit Program accrued interest funds for the San Juan Creek Bridge Replacement Project.



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 24, 2025

Rail Project Completed											
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds		
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
Metrolink rolling stock	M1/R	\$158,009	\$42,230	\$35,390				\$36,300	\$44,089		
Metrolink service track expansion	M1/R	\$119,957						\$51,399	\$68,558		
Orange Transportation Center parking structure	M1/R	\$31,003	\$2,555	\$2,644		\$13,762			\$1,850	\$420	\$9,772
Sand Canyon Avenue grade separation	M1/R	\$62,050	\$10,536					\$28,192	\$3,116	\$5,352	\$14,854
M2 Project S Fixed-Guideway Anaheim Rapid connection	M1/S	\$9,924		\$1,516					\$6,000	\$1,286	\$1,122
Anaheim Regional Intermodal Transportation Center (ARTIC) construction	M1/T	\$184,164	\$33,250	\$37,253	\$3,501	\$29,219			\$43,900	\$35,291	\$1,750
Fullerton Transportation Station expansion planning, environmental PSR	M1/T	\$0	\$0						\$0		
Santa Ana grade separation planning and environmental PSR	M1/T	\$1,333	\$1,180						\$153		
Santa Ana Transportation Station planning and environmental PSR	M1/T	\$1,003	\$888						\$115		
17th Street grade separation environmental	R	\$2,476								\$2,476	
Anaheim Canyon Station	R	\$34,200	\$30,432							\$2,000	\$1,768
Control Point at 4th Street	R	\$2,985		\$2,985							
Control Point Stadium crossover	R	\$6,490		\$3,245				\$3,245			
Fullerton Transportation Center stair rehabilitation	R	\$1,065		\$1,030							\$35
Laguna Niguel to San Juan Capistrano passing siding	R	\$35,956	\$24,652	\$1,015		\$3,000		\$6,734			\$555
LOSSAN Corridor grade separations PSR in Anaheim, Orange, and Santa Ana	R	\$2,699								\$2,699	
Metrolink grade crossing safety improvements ROW	R	\$3,025								\$3,025	
North Beach crossings safety enhancements	R	\$348						\$166		\$182	
Positive Train Control (Metrolink)	R	\$39,916		\$4,492	\$1,234			\$34,190			
Rail Crossing signal lights and pedestrian gates	R	\$252						\$252			
Rail station platform safety improvements (Fullerton, Irvine, and Tustin)	R	\$553						\$553			
Safety repairs for San Clemente Pier Station	R	\$122						\$122			
San Clemente Beach Trail crossings safety enhancements	R	\$4,999						\$2,170		\$2,251	\$578
Slope and culvert improvements	R	\$300		\$300							
Slope stabilization Laguna Niguel-Lake Forest	R	\$5,168		\$4,834						\$334	
Tactile tile project	R	\$1,569		\$1,538						\$31	
Ticket vending machines	R	\$6,857									\$6,857
Transit Rail Security (monitors, fencing, video surveillance)	R	\$163						\$163			
VSS at commuter rail stations	R	\$4,409		\$3,594				\$56			\$759
Go Local	S	\$7,730							\$7,730		
M2 Project S Transit extensions to Metrolink (Rubber Tire)	S	\$733								\$733	
ARTIC environmental, ROW, program management support, site plan	M1	\$41,369							\$8,869		\$32,500
Fiber Optics installation (Metrolink)	M1	\$23,183		\$10,903				\$10,479	\$1,801		
Laguna Niguel-Mission Viejo Station parking expansion (south lot)	M1	\$4,135						\$695	\$3,440		
Tustin Rail Station parking expansion	M1	\$15,390				\$1,100		\$7,181	\$7,109		
Rail Project Completed Totals		\$933,401	\$148,927	\$111,471	\$4,735	\$58,331		\$211,182	\$215,693	\$86,790	\$96,272



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 24, 2025

Rail Project Completed											
			Federal Funds			State Funds			Local Funds		
Project Title	M Code	Total Funding	STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
Federal Funding Total		\$265,133									
State Funding Total		\$269,513									
Local Funding Total		\$398,755									
Total Funding (000's)		\$933,401									

Acronyms:

ADA - Americans with Disabilities Act
Board - Board of Directors
CMAQ - Congestion Mitigation Air Quality Improvement Program
FFY - Federal Fiscal Year
FTA - Federal Transit Administration
FY - Fiscal Year
LOSSAN - Los Angeles-San Diego-San Luis Obispo Rail Corridor
M Code - Project Codes in Measure M1 and M2
M1 - Measure M1
M2 - Measure M2
MP - Mile Post
OC - Orange County
OCTA - Orange County Transportation Authority
OCX - Rail-Highway Grade Crossing/Safety Enhancement Project
PSR - Project Study Report
ROW - Right-of-Way
SB 1 - SB 1 (Chapter 5, Statutes of 2017)
SCRRA - Southern California Regional Rail Authority/Metrolink
STBG - Surface Transportation Block Grant
STIP - State Transportation Improvement Program
VSS - Video Surveillance System



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Acceptance of Grant Award from Department of Homeland Security Transit Security Grant Program

Overview

The Orange County Transportation Authority has been awarded \$431,327 in Federal Emergency Management Agency funding by the Department of Homeland Security through the Transit Security Grant Program. Recommendations for acceptance of these funds are presented for Board of Directors' review and approval.

Recommendations

- A. Authorize the Chief Executive Officer, or designee, to accept the award of \$431,327 in Federal Emergency Management Agency funding from the Department of Homeland Security through the Transit Security Grant Program and execute grant-related agreements and documents with the Department of Homeland Security.
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program, as well as execute any necessary agreements to facilitate the recommendation above.

Background

On August 1, 2025, the Department of Homeland Security (DHS) made available the fiscal year (FY) 2025 Transit Security Grant Program (TSGP), which provided \$83,700,000 to eligible public transit systems to promote sustainable, risk-based efforts to protect critical transportation infrastructure and the traveling public from acts of terrorism and other emergencies.

The TSGP is one of four grant programs that constitute DHS' focus on transportation infrastructure security activities. It is part of a comprehensive set of measures authorized by Congress and implemented by DHS to secure the nation's critical infrastructure.

On August 15, 2025, the Orange County Transportation Authority (OCTA) submitted an application requesting support for the Visible Intermodal Prevention and Response (VIPR)/Anti-Terror Anti-Crime (ATAC) and the Transportation Center Surveillance Protection projects. On September 29, 2025, DHS formally announced that OCTA was awarded \$431,327 in TSGP funding.

Discussion

The DHS award to OCTA of \$431,327 in TSGP funding represents partial costs of implementing the VIPR/ATAC and Transportation Center Surveillance Protection projects. Both projects can be scaled to the awarded TSGP funding amount. Additional project details can be found in Attachment A.

The VIPR/ATAC project has been an ongoing project that is scaled annually depending on various grant programs. It is designed to present a “show of force” to the public to deter terrorist acts and potentially interrupt terrorist pre-planning activities targeted towards soft-targets and crowded places. Periodic visible operations demonstrates that the transit system is patrolled on a regular basis, deters terrorist threats, and lowers the likelihood of a successful terrorist attack.

The Transportation Center Surveillance Protection project allows OCTA and its law enforcement partners to monitor the OCTA-owned Fullerton Park-and-Ride property remotely, to improve response times, and provide video evidence of any suspicious activity detected. The project will add video surveillance equipment with access control card readers at the Fullerton Park-and-Ride property. While all the transportation centers and park-and-rides have their own unique challenges, the Fullerton Park-and-Ride property has been facing issues such as the dumping of abandoned vehicles, vehicle trailers, and other miscellaneous trash items, graffiti, and other property damage. With the large size of the property, the project would help OCTA apply mitigation strategies.

Staff is requesting the Board of Directors (Board) to authorize acceptance of this grant and to further authorize the Chief Executive Officer, or designee, to negotiate and enter into a contract with the DHS, allowing OCTA to seek reimbursement for the costs of the project.

Summary

The DHS awarded OCTA \$431,327 in TSGP funding, representing partial costs of implementing the VIPR/ATAC and Transportation Center Surveillance Protection projects. The VIPR/ATAC operations and the Transportation Center Surveillance Protection project can be scaled down from the original scope based on the award amount. Board authorization is requested to accept the grant and enter into a contract with the DHS to seek reimbursement for the cost of the projects.

Attachment

- A. Orange County Transportation Authority (OCTA), Transit Security Grant Program Projects Description

Prepared by:



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Transportation Funding Analyst
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Approved by:



Rose Casey
Executive Director, Planning
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**Orange County Transportation Authority (OCTA)
Transit Security Grant Program Projects Description**

Visible Intermodal Prevention and Response (VIPR)/Anti-Terror Anti-Crime (ATAC)

The VIPR and ATAC will deploy several uniformed and plainclothes officers, as well as an explosives detection canine, to conduct counter-surveillance during both daylight and nighttime hours. The VIPR and ATAC operations also includes a community outreach team that is responsible for making public contact to re-enforce basic counter-terrorism strategies that can be employed by the general public. They will also be responsible for reinforcing a positive relationship between law enforcement and commuters.

Examples of operational activities to be carried out by the VIPR and ATAC teams include:

- Random visual searches of public areas (i.e., parking lots, bicycle storage areas, passenger waiting areas) at train stations and transportation centers
- High visibility foot patrol on the platforms at train stations and transportation centers
- Boarding of both buses and trains and ensuring that passengers are ticketed
- Foot patrol of railroad rights-of-way, concentrating on “choke points” for transcontinental rail traffic
- Foot patrol and searches of OCTA facilities
- Positive identification checks for OCTA facilities

OCTA has conducted VIPR and ATAC operations for OC Bus since 2019, with the level of operations scaled depending on grant availability from year to year.

Transportation Center Surveillance Protection

The project will add video surveillance equipment, including 12 multi-directional panoramic cameras that provide live, uninterrupted monitoring, along with four access control card readers at the Fullerton Park-and-Ride property. The project also includes the installation of a wall-mounted server cabinet, ancillary equipment, locking hardware, an access control panel, and all necessary conduit and camera/reader cabling. This project will enhance the safety, security, and resilience of the property. The proposed system will send immediate alerts via email and to mobile devices based on video recordings. This project will allow OCTA and its law enforcement partners to monitor the property remotely, respond quickly, and provide video evidence of any suspicious, criminal, or terrorism-related activity that is detected.



November 13, 2025

To: Transit Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: OC Streetcar Project Quarterly Update

Overview

The Orange County Transportation Authority is implementing the OC Streetcar Project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar Project activities from August 2025 through October 2025.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA), in cooperation with the cities of Santa Ana and Garden Grove, is implementing a modern streetcar running between the Santa Ana Regional Transportation Center in the City of Santa Ana (City) and the intersection of Harbor Boulevard and Westminster Avenue in the City of Garden Grove. The OC Streetcar Project (Project) will improve transit connectivity and accessibility, increase transit options, relieve congestion, and provide benefits to the community and traveling public. The Project is being implemented as part of Measure M2 Project S – Transit Extensions to Metrolink, approved by Orange County voters in November 2006.

Construction of the 4.15-mile alignment involves complex and specialized work, including the installation of embedded track in existing streets, an overhead contact system (OCS) to supply power to the vehicles, new traffic signals and transit signal priority at intersections, stops with canopies, bridges, and a maintenance and storage facility (MSF). A map of the alignment is included in Attachment A.

The Project includes ten streetcar stops in each direction (four shared center platforms and six side platforms in each direction, for a total of 16 platforms). Each stop includes a canopy, benches, leaning rails, trash cans, lighting, variable message signs, video cameras, a public address system, and ticket vending machines. Platforms will be 14 inches high to enable level boarding to streetcar vehicles.

The MSF can accommodate up to 15 modern streetcar vehicles, as well as all necessary administration, operations, vehicle maintenance, parts storage, and maintenance-of-way needs for the Project. The MSF will also include secured exterior vehicle storage, a wye track for turning vehicles end-for-end, a free-standing vehicle wash, employee parking, and fire department/delivery access.

On March 26, 2018, the OCTA Board of Directors (Board) awarded a contract to Siemens Industries, Inc. (Siemens) for the manufacturing and delivery of eight modern streetcar vehicles, spare parts, and special tools. On September 24, 2018, the Board awarded the construction contract for the Project to Walsh Construction Company II, LLC (Walsh). On November 30, 2018, the Federal Transit Administration (FTA) executed the Full Funding Grant Agreement (FFGA), securing \$149 million in federal New Starts discretionary funding for the Project. In February 2019, the FFGA was funded through the FTA Transit Award Management System, which was the last step necessary to begin the drawdown of federal funding. As of September 2025, \$136.6 million has been drawn from the FFGA. On May 22, 2020, the Board awarded a contract to Herzog Transit Services, Inc. (Herzog), to provide operations and maintenance services for the initial start-up and pre-revenue period, and a five-year revenue term.

Discussion

The following is the status of completed milestones and ongoing project activities related to construction, vehicle manufacturing, operations, and public outreach.

Construction

Progress continues to be made on project construction, nearly 95 percent complete. The bridges over the Santa Ana River and Westminster Avenue are complete, all tracks and OCS poles have been installed, all four traction power substations have been installed and energized, and station platforms and major amenities have been installed.

During the reporting period, construction throughout the Project continued to progress. The activities that are complete or ongoing this quarter include:

Pacific Electric Right-of-Way (PE ROW)

- Emergency walkway construction adjacent to the tracks is ongoing
- Final train signal control programming is ongoing
- OCS wire installation on OCS poles is complete

MSF

- OCS wire installation on OCS poles is complete
- Monorail crane system work is ongoing
- Elevator and other work to achieve permanent certificate of occupancy is ongoing
- Mechanical systems commissioning is ongoing
- Installation of workstations and furniture is ongoing
- Storage racks have been received and installed
- Receipt and turnover of shop equipment, spare parts, and special tools is ongoing

City Streets

- Final blackout signs testing and signal priority coordination with the City is ongoing
- Coordination with utilities to meet California Public Utilities Commission (CPUC) General Order 95 clearance requirements is ongoing
- Final train signal control programming is ongoing
- OCS wire installation on OCS poles from Raitt Street to Ross Street has been completed
- OCS brackets and arms are installed in preparation for stringing OCS wire for the remainder of the alignment in City streets

Streetcar Vehicles

A significant project milestone occurred in September 2025 with the eighth and final vehicle delivered to the MSF. Over a span of several months, all eight vehicles were successfully delivered as a result of significant coordination between OCTA, the City, Siemens Mobility, Inc. (SMI), and Herzog. Each team provided the necessary functions from traffic control and public outreach to safety reviews and operational training to ensure each delivery was safe and seamless. Post-delivery activities commenced during the quarter with the pantographs being installed on all vehicles and bumpers installed on several of the vehicles.

The Siemens commissioning team, in close coordination with Herzog, the Rail Activation Committee, and System Integration Testing (SIT) Committee continue vehicle system testing as facilities become available at the MSF. Most of the special tools, test equipment, and spare parts have been delivered to the MSF. Negotiations progressed with SMI regarding long-term storage of the vehicles, and a contract amendment is anticipated to go to the Board in the coming months.

Operations

SIT activities are ongoing as follows:

- Vehicle and pantograph clearance tests were successfully completed in the MSF shop, yard, and in the PE ROW in October 2025. For this test, the vehicle was successfully towed from Raitt Street to Harbor Boulevard to ensure clearances can be safely achieved through the platforms, at-grade crossings, and the two bridges along the alignment.
- OCTA staff conducted the MSF energization familiarization tour in September 2025, with the Fire Life Safety and Security Committee and local first responders, providing an overview of MSF operations, electrical safety procedures, and emergency protocols in preparation for system energization.
- Siemens conducted vehicle familiarization training for new maintenance technicians.
- Herzog hosted a second recruitment event in the City. The event was well attended and resulted in seven offers for train operator positions.
- Herzog regularly conducted Track Access and Roadway Worker Protection training to maintain compliance with certification requirements for employees, project staff, and construction contractors.
- Herzog continues to participate in operations and maintenance training provided by vendors, including forklift, traction power substation, gear, and bucket truck training.
- Negotiations are ongoing with the City of Garden Grove for the operations and maintenance agreement.

As project construction nears completion and the streetcar vehicles are tested, the Project is required to be reviewed by the FTA and their project management oversight contractors to prepare for the start of revenue service. These reviews are concurrent with the ongoing reviews being conducted by the CPUC to certify that the appropriate safety and security oversight is in place and appropriate testing is completed. As a recipient of an FFGA, OCTA is responsible for demonstrating that the Project is ready for revenue service in four key areas, including SIT, Pre-Revenue Operations Planning, Project System Safety and Security Testing, and Management Capacity and Capability. In addition to these

key areas, OCTA is required to fulfill the requirements of Title VI of the Civil Rights Act of 1964 through an evaluation of the Project and OC Bus service plan and fare structure. During the reporting period, staff continued the development of these plans.

Public Outreach

The following is a status of key public outreach activities:

- Monthly construction activity emails are ongoing
- Bilingual notifications for targeted construction activities, including lane closures and vehicle deliveries have been distributed
- Safety education presentations provided to MOMS Orange County and Carver Elementary School in August 2025 and October 2025
- Safety education materials distributed at seven back-to-school nights, the Hope Culture Festival, and over two days at the Fiestas Patrias community event

Cost and Schedule

The Project's projected revenue service date, which is when it opens to the public, has shifted from spring 2026 to summer 2026. This is a result of ongoing challenges related to system electrification. The project team continues to manage potential further impacts to the schedule resulting from remaining risks, including system electrification, train communication systems, and testing activities.

The project budget remains at \$649 million as approved by the Board in February 2025.

Next Steps

OCTA staff will continue to work closely with Walsh to complete the MSF and OCS contact wire installation and electrification for vehicle testing activities. Testing will continue on the PE ROW and then begin in the city streets in early 2026. The outreach team will continue to provide oversight of construction activities, as well as ongoing project education and safety messaging at community events.

Summary

An OC Streetcar Project update covering August 2025 through October 2025 is provided for the Orange County Transportation Authority Board of Directors' review.

Attachment

A. Map of OC Streetcar Project Alignment

Prepared by:



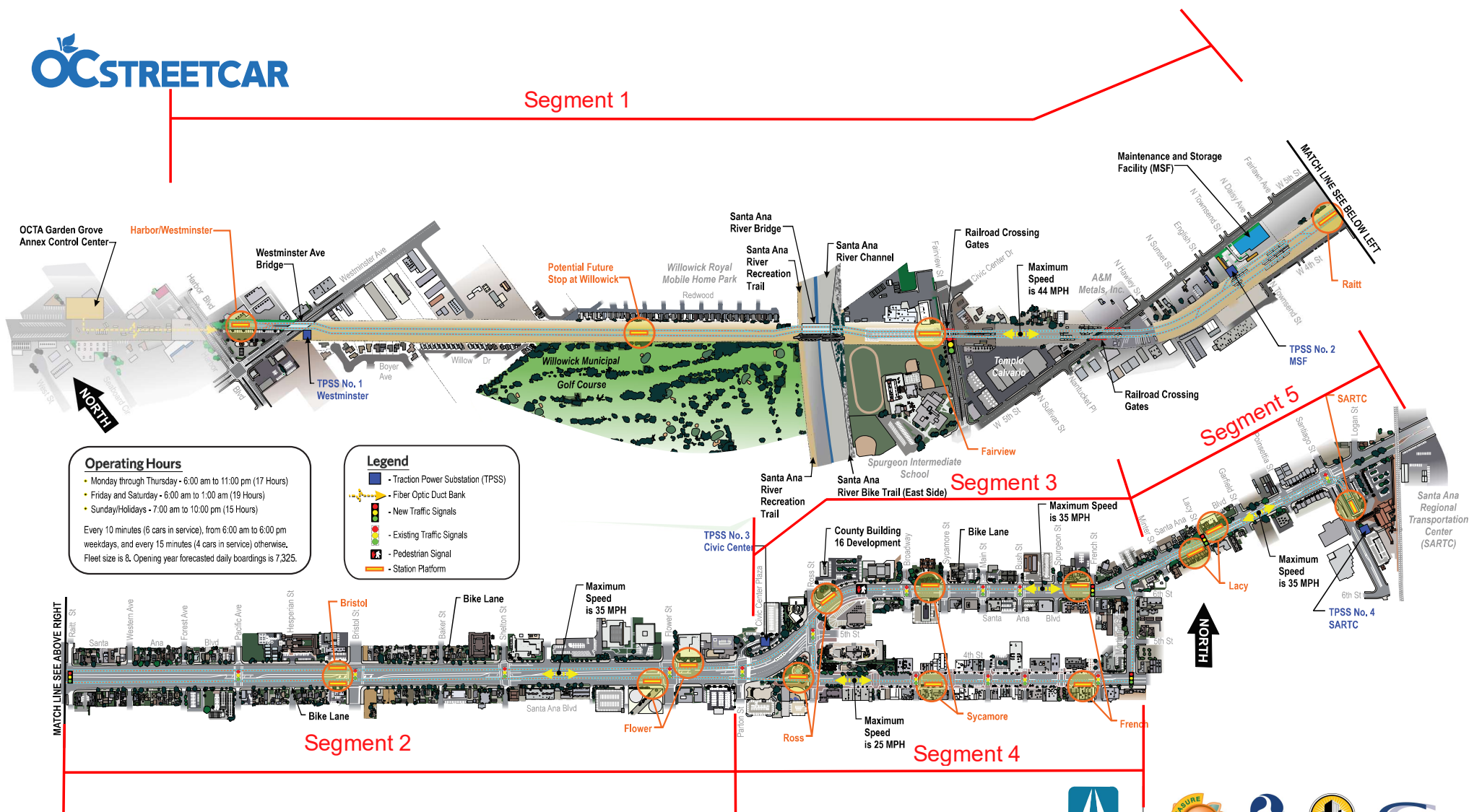
Jeff Mills, P.E.
Director, Capital Project Delivery
(714) 560-5925

Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646

Map of OC Streetcar Project Alignment





OC Streetcar Project Quarterly Update



Construction Progress in Pacific Electric Right-of-Way (PE ROW)



Overhead Contact System (OCS) Wire Installation

Construction Progress at Maintenance and Storage Facility (MSF)



Operations Control Center



Turntable delivered to the MSF

Construction Progress on City Streets



Bristol Street platform punchlist work



Landscaping maintenance at Sasscer Park



- All eight vehicles completed and delivered to MSF
- Siemens Industries, Inc. commissioning team continues vehicle system testing



Testing and Operations

- Completed pantograph installations on all eight vehicles in September 2025
- Completed several bumper installations in September 2025



Pantograph Installation



Vehicle Bumper Installation



Testing and Operations (cont.)

- MSF energization familiarization tour was conducted in September 2025, with the Fire Life Safety and Security Committee and local first responders
- Completion of the first vehicle bump test under OCS power



First responder training



Bump test under OCS power



Testing and Operations (cont.)

- Vehicle and pantograph clearance testing completed at MSF shop/yard and in the PE ROW in October 2025



Clearance testing at Harbor Station



Testing and Operations (cont.)



Pantograph clearance testing



Public Outreach

- Provide bilingual notifications for targeted construction activities
- Ongoing safety education and public awareness campaign underway at schools, community and civic organizations, and other stakeholders
- Events
 - Back-to-School Nights
 - Fiestas Patrias
 - Hope Culture Festival
- Safety education presentations
 - MOMS Orange County
 - Carver Elementary School – August 2025 and October 2025





Next Steps

Milestone Description	Schedule
Initiate testing in city streets	Early 2026
Final completion of construction	Spring 2026
Open to the public (revenue service date)	Summer 2026



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Radio Communications Equipment Replacement for OC ACCESS Fleet

Overview

Board of Directors' authorization is requested for the purchase of hardware and services to complete the radio communications equipment replacement on the OC ACCESS vehicle fleet.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C255013 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$2,876,847, for the purchase of hardware and services necessary to replace 242 Integrated Vehicle Unit 2100s with the advanced Integrated Vehicle Unit 4000P for the Orange County Transportation Authority's paratransit fleet.

Discussion

The Orange County Transportation Authority (OCTA) is actively transitioning its transit operations technology from the obsolete Integrated Vehicle Unit (IVU) 2100s model to the more advanced IVU 4000P model, addressing the critical need for technological updates as the older IVU 2100s model have reached end-of-life and are no longer being produced. OCTA previously completed a full upgrade of its fixed-route fleet, transitioning from the IVU 3100 model to the more advanced IVU 4000 model.

The Board approved a contract in May 2024 to upgrade both the fixed-route fleet and the paratransit fleet with the new IVU 4000 model. However, due to various factors including the timing of receiving new paratransit vehicles, availability of certain components needed for the paratransit units, and the mark-up requested by the bus manufacturer, staff determined it was prudent to execute the

fixed-route portion of the contract and pursue a stand-alone procurement for the entire paratransit fleet.

The updated IVU 4000P model is provided by Conduent Transport Solutions, Inc. (Conduent). Widespread adoption is essential for ensuring compatibility and operational cohesion across the entire fleet, simplifying maintenance, and standardizing training processes for all bus operators who will now use consistent system interfaces on both fixed-route and paratransit fleets.

The Conduent IVU 4000P is the next-generation on-board computer used in OCTA buses to manage real-time communications between each vehicle and the central Computer-Aided Dispatch and Automatic Vehicle Location system. It provides faster processing, improved Global Positioning System accuracy, and enhanced audio and data communications that support real-time tracking, operator messaging, and passenger information. These improvements enhance service reliability, safety monitoring, and overall operational efficiency. The intuitive interface simplifies operator use and training, while the system's ability to integrate with other onboard technologies such as fare collection and passenger information displays creates a platform for future upgrades. Upgrading from the older IVU 2100 will improve system performance, reduce maintenance costs, and position OCTA to continue delivering reliable, efficient transit service.

Given the urgent need to replace the end-of-life IVU 2100s, OCTA is transitioning to the IVU 4000P to ensure continued operational efficiency and passenger satisfaction. By upgrading to the IVU 4000P model, OCTA aims to standardize the entire fleet on a unified technology platform, ensuring consistency across operations. This strategic upgrade not only meets current operational needs but also strengthens OCTA's position for future advancements. In doing so, OCTA anticipates long-term cost savings through reduced maintenance and repair demands, while enhancing reliability and service quality across all transit modes. Standardizing the fleet will also streamline training, support, and integration efforts, ultimately improving efficiency and maintaining OCTA's leadership in delivering dependable, forward-thinking public transportation solutions.

Procurement Approach

The procurement was handled in accordance with OCTA's Board of Directors-approved policies and procedures for a sole source procurement. Conduent is the exclusive owner of the IVU 4000P model. The firm has proprietary rights to its technology and is the sole entity able to market and sell its proprietary technology, as it does not have agreements that allow resale through other

vendors. Therefore, Conduent meets OCTA's criteria for a sole source procurement, and based on its technical ability and financial status, the firm is deemed responsible.

Conduent's proposal was reviewed by staff from the Contracts Administration and Materials Management (CMM) and Information Systems departments to ensure compliance with contract terms, as well as the technical requirements.

In accordance with OCTA's sole source procurement procedures, a sole source over \$50,000 requires OCTA's Internal Audit Department (Internal Audit) to conduct a price review of the vendor's proposed pricing. As is common with these types of vendors, Conduent did not provide a detailed cost breakdown that would be required to perform a price review. Therefore, CMM performed a price analysis using available information, such as past contracts with Conduent, to analyze the reasonableness of the quoted price. Since Conduent would not provide cost documentation to support proposed labor charges and overhead costs sufficient to allow an Internal Audit price review, CMM staff compared the proposed pricing to a previous contract, Agreement No. C-4-2235, between OCTA and Conduent for similar services and found the proposed price per-vehicle for the paratransit upgrade to be lower as shown below. In addition, the quoted price is lower than the OCTA project manager's independent cost estimate. Therefore, the quoted price is deemed fair and reasonable.

Project	Quoted Pricing	Comparable Contract (C-4-2235)
Paratransit	\$11,888/vehicle	\$21,552/vehicle

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2025-26 Budget, Finance and Administration Division/Information Systems Department, Account No. 1288-9027-D1111-3N3 and is funded through local funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C255013 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$2,876,847, for a one-year term, for the purchase of hardware and services necessary to replace the Integrated Vehicle Unit 2100s with the Integrated Vehicle Unit 4000P for Orange County Transportation Authority's paratransit fleet.

Attachment

None.

Prepared by:



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Approved by:



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Materials Management
714-560-5619

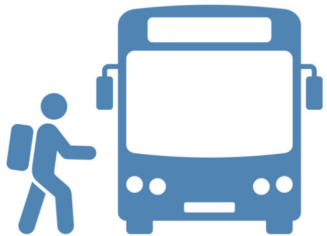


Bimonthly Transit Performance Report

November 2025



What do we measure?



Service Demand

Measures boarding activity on OC Bus and OC Access.



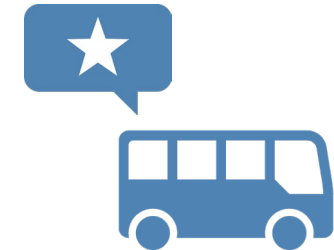
Reliability

Measures the reliability of the service in terms of schedule adherence on-time performance (OTP) and miles between road calls (MBRC).



Safety

Measures the safety of the service in terms of preventable collisions normalized by miles traveled.



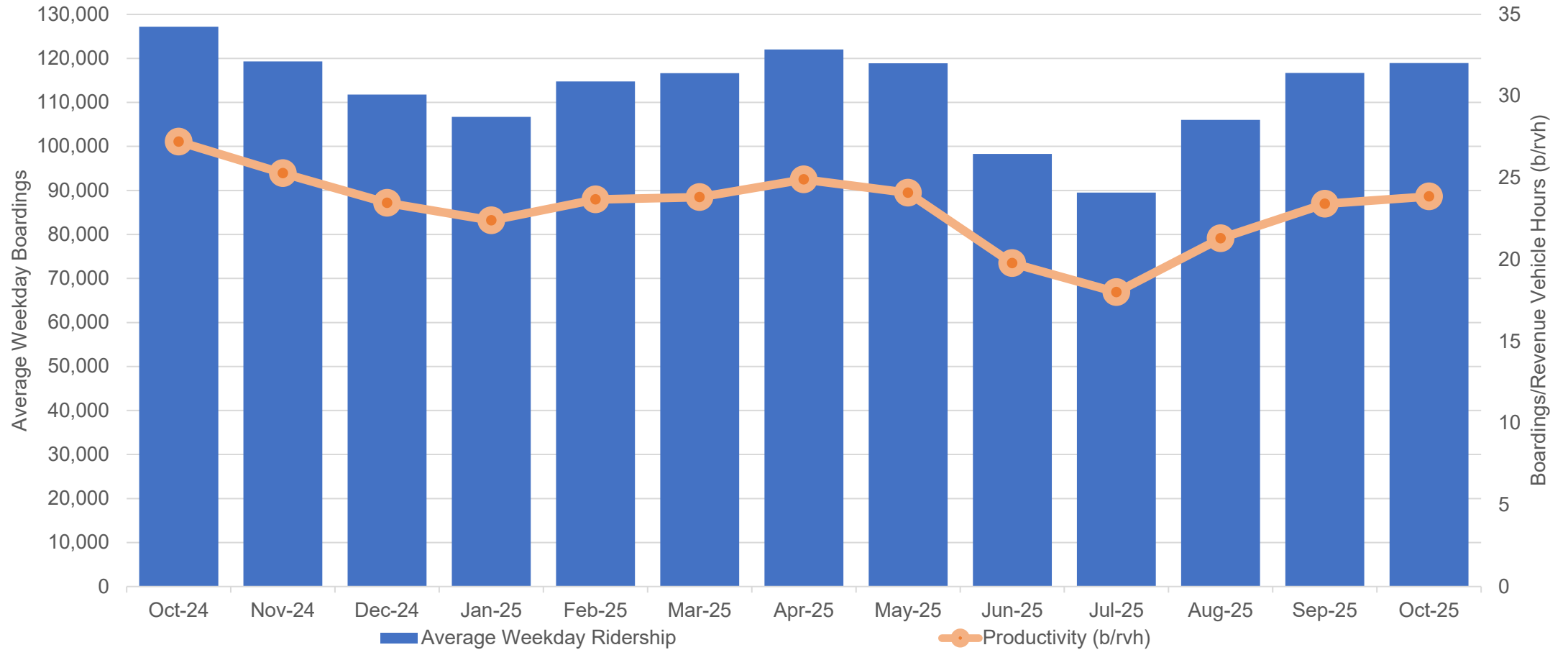
Courtesy

Measures customer feedback and is typically normalized by boardings.



OC BUS

Service Demand - Ridership Snapshot

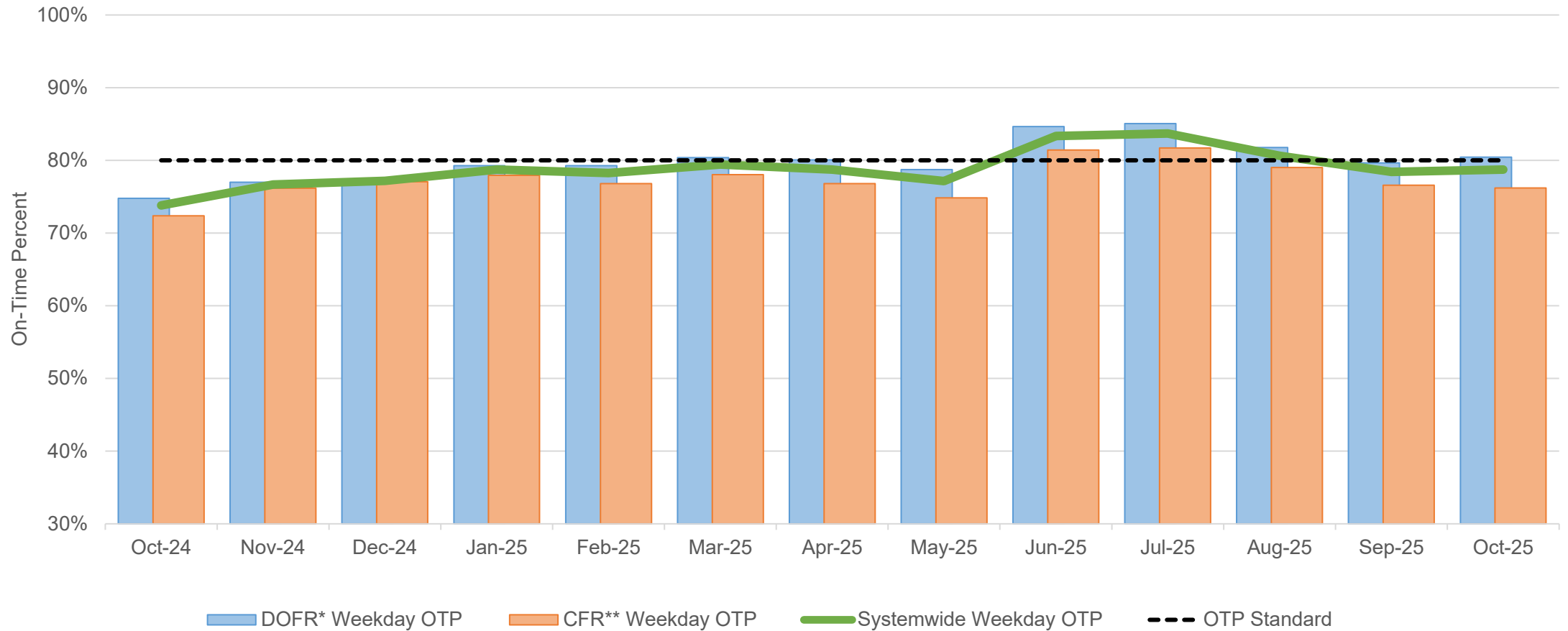


Service Demand: Ridership (or boardings) is the number of rides passengers take using public transit. The average weekday boarding activity is used to measure OC Bus service demand. Productivity is an industry measure that counts the average number of boardings for each revenue vehicle hour (RVH) that is operated.



OC BUS

Service Reliability – On-Time Performance



Service Demand: Ridership (or boardings) is the number of rides passengers take using public transit. The average weekday boarding activity is used to measure OC Bus service demand. Productivity is an industry measure that counts the average number of boardings for each RVH that is operated.

Data reported through October 14, 2025

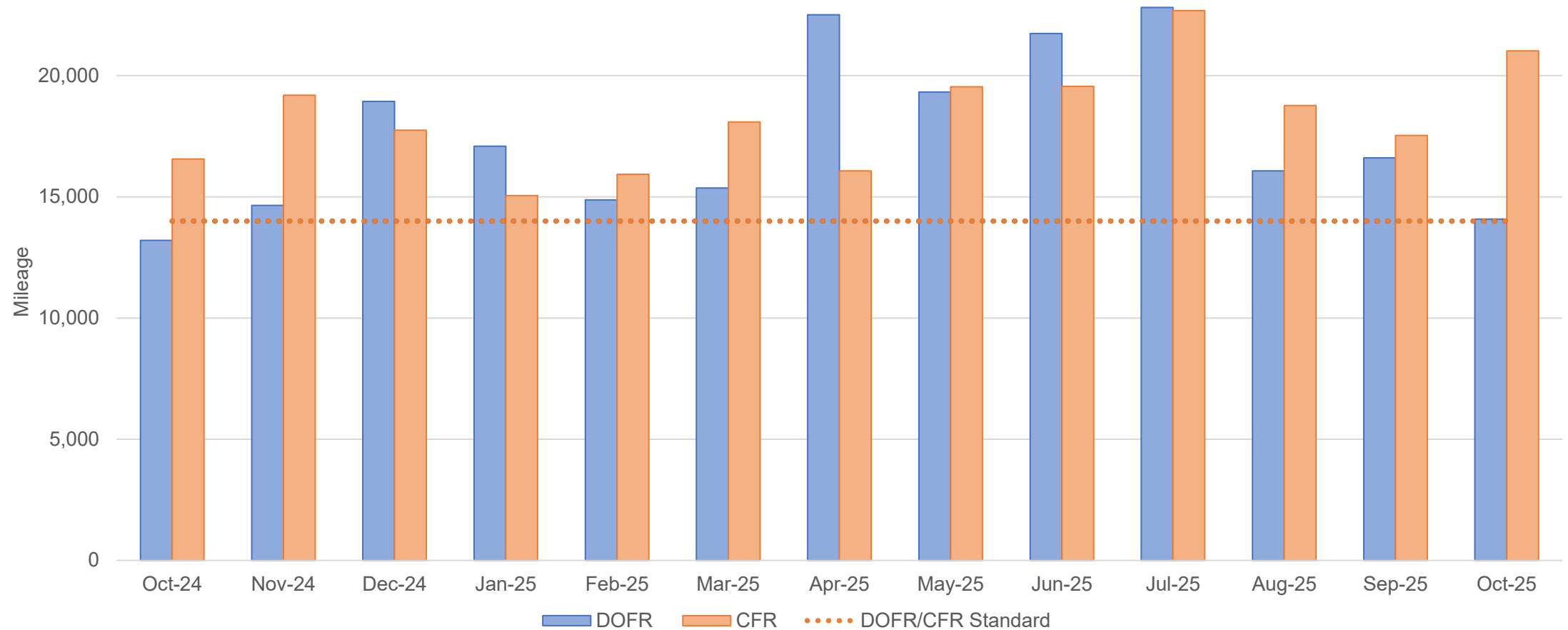
*DOFR – Directly Operated Fixed Route

*CFR – Contracted Fixed Route

Orange County Transportation Authority



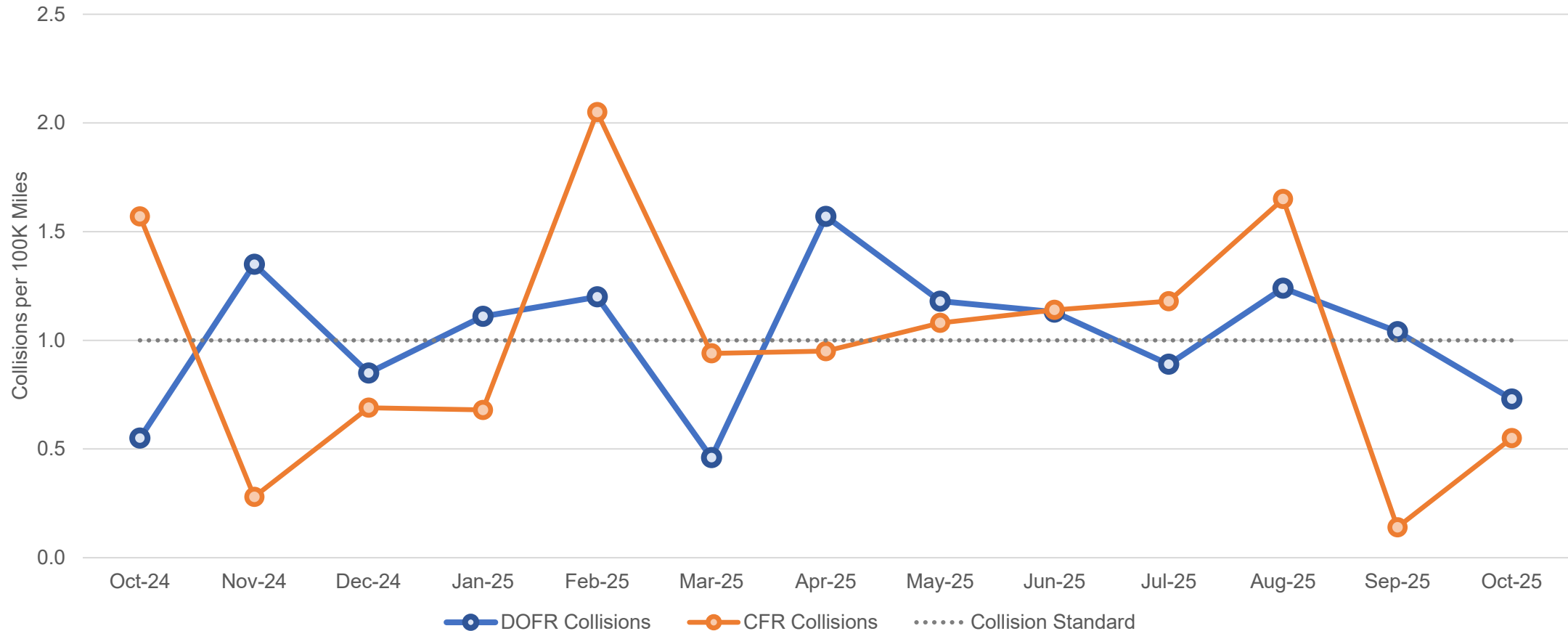
Service Reliability – Vehicle Performance



Miles Between Road Calls: MBRC is determined by the total vehicle mileage divided by the total road calls or disruptions due to mechanical failures in revenue service. The MBRC standard for DOFR and CFR is 14,000 miles.



Safety – Preventable Collisions

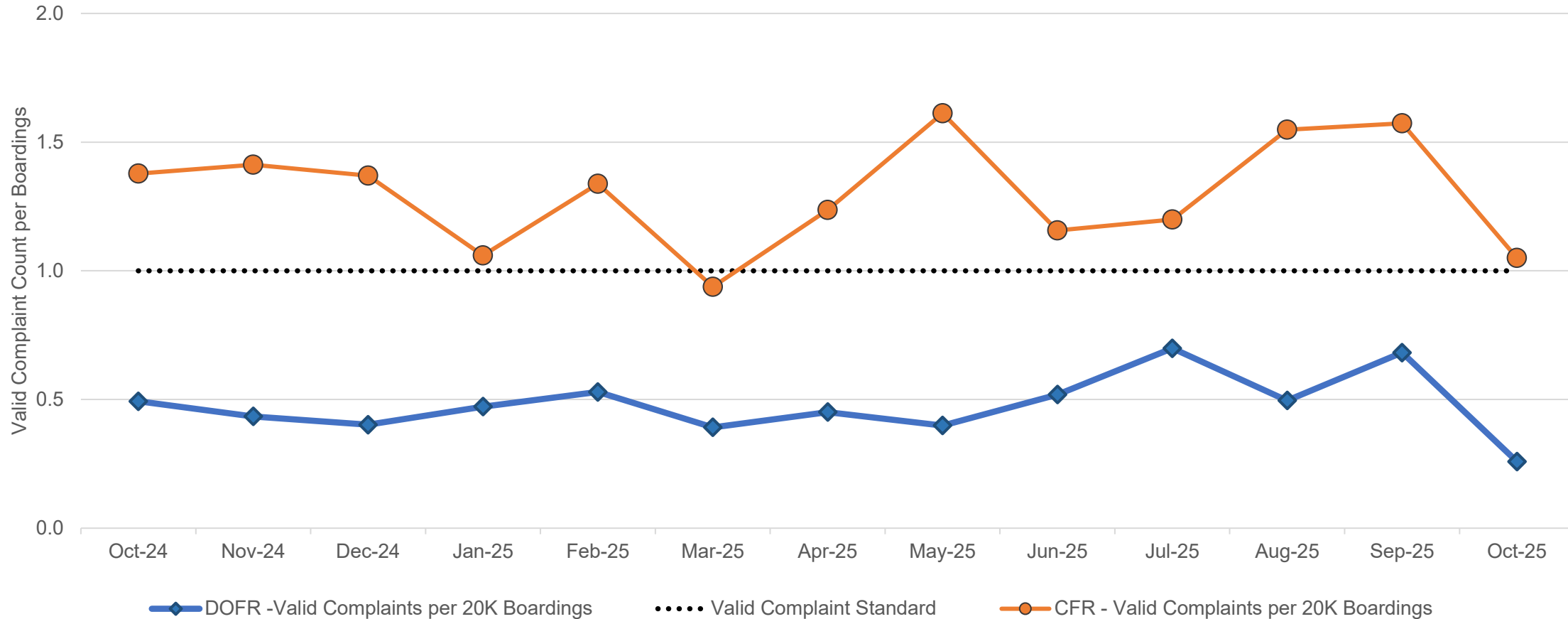


Preventable Collisions: Preventable vehicle accidents are defined as incidents when physical contact occurs between vehicles used for public transit and other vehicles, objects, or pedestrians and where a coach operator failed reasonably to prevent the accident. The performance standard is no more than one vehicle accident per 100,000 miles.

Data reported through October 14, 2025



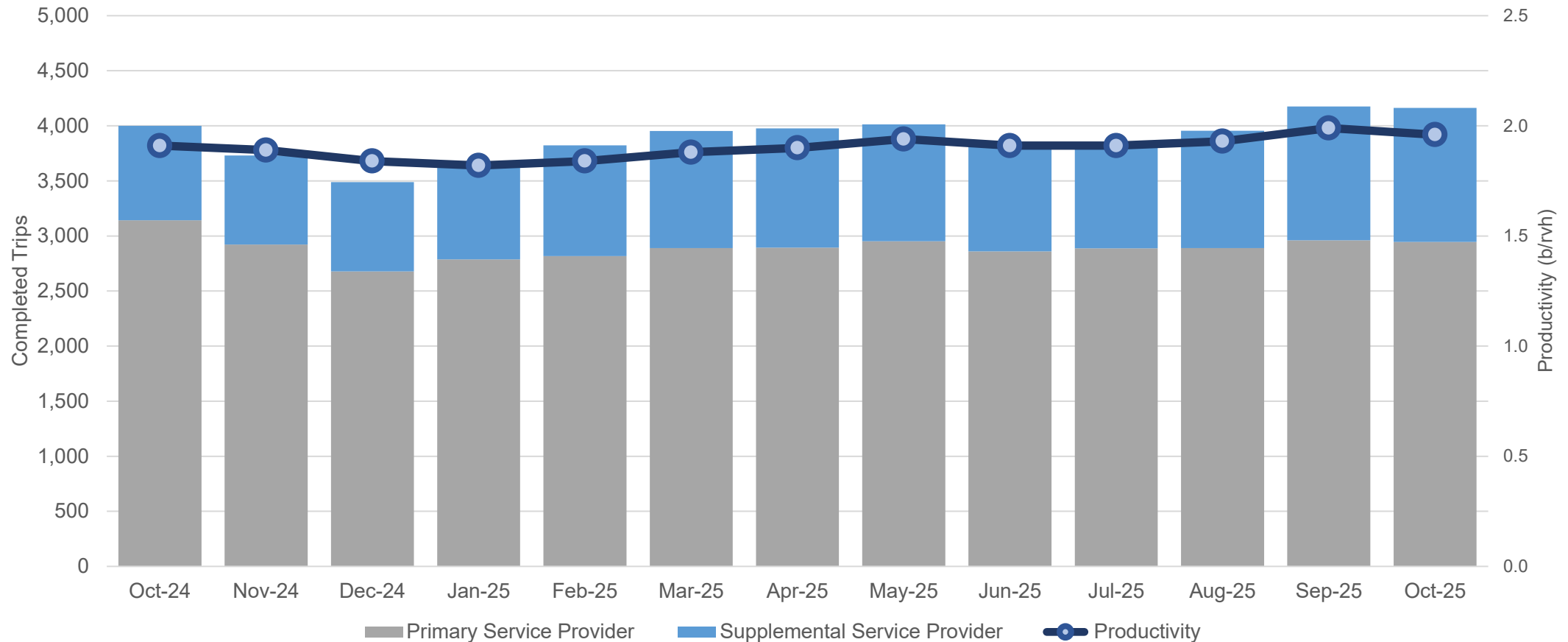
Service Quality – Customer Satisfaction



Customer Satisfaction: The performance standard for customer satisfaction is courtesy, measured by the number of valid complaints received. Customer complaints are the count of incidents when a rider reports dissatisfaction with service. The standard adopted by OCTA for OC Bus is no more than one valid customer complaint per 20,000 boardings.



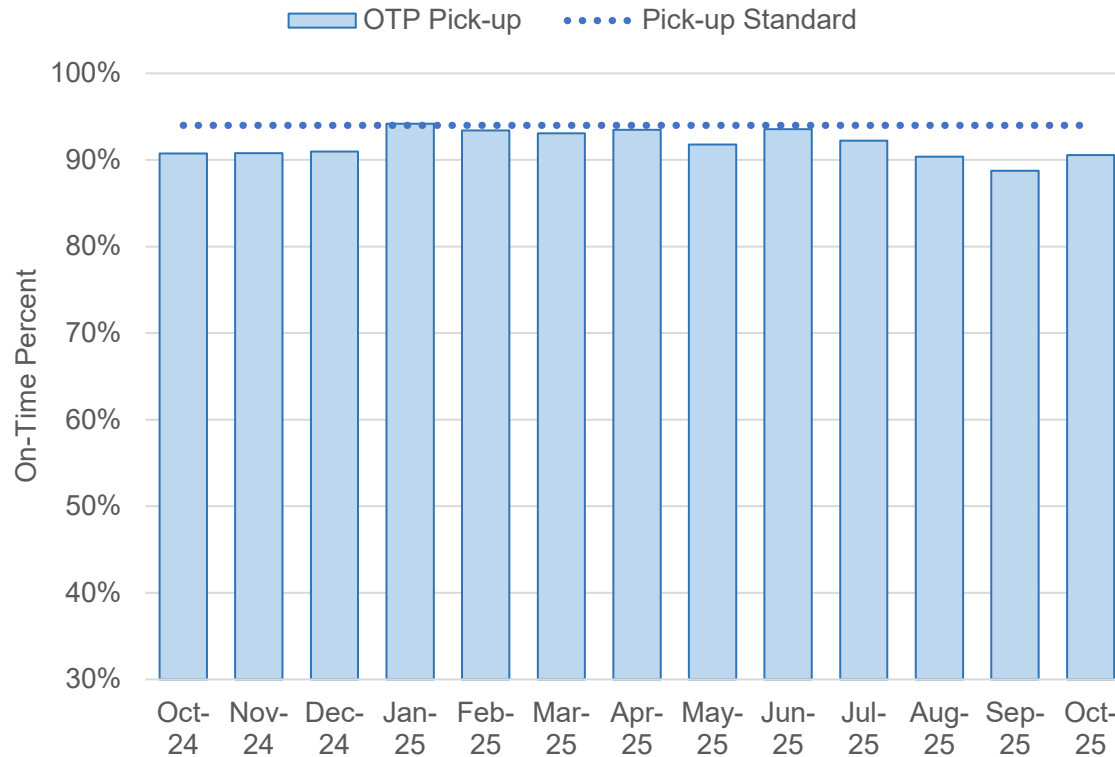
Service Demand – Ridership Snapshot



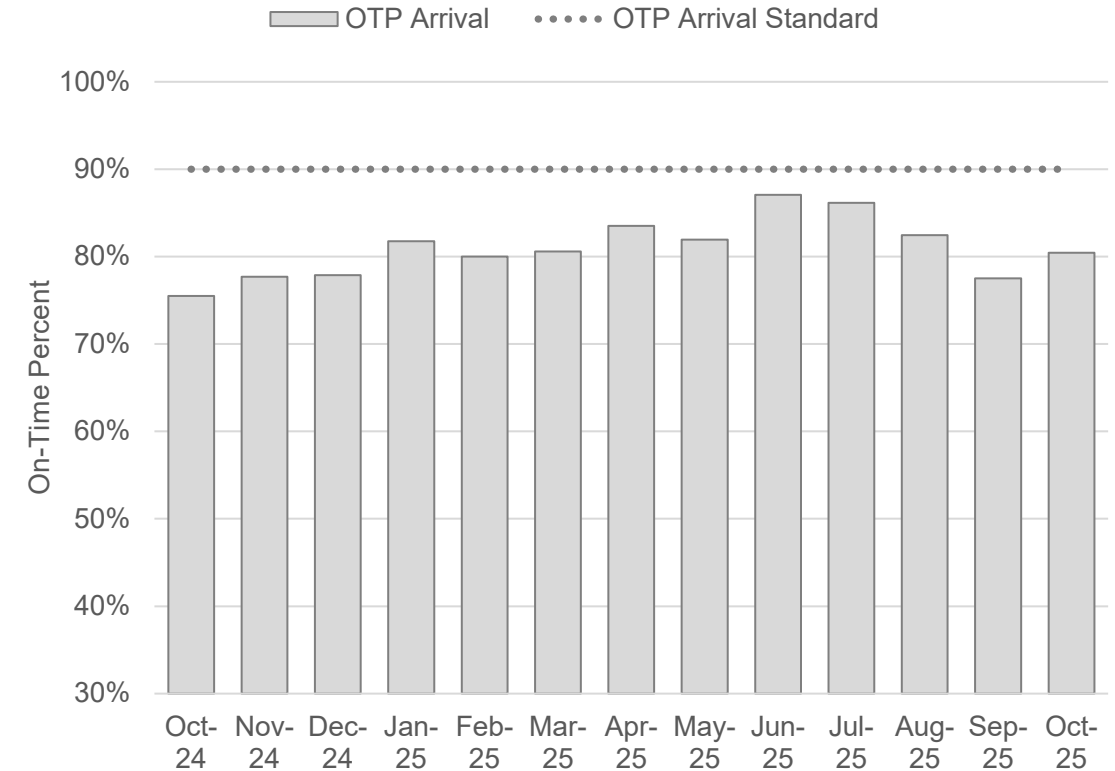
Service Provider Demand: OCTA has a primary service provider, First Transit, Inc., and supplemental providers which are contracted to meet demand on the network.



Service Reliability – On-Time Performance



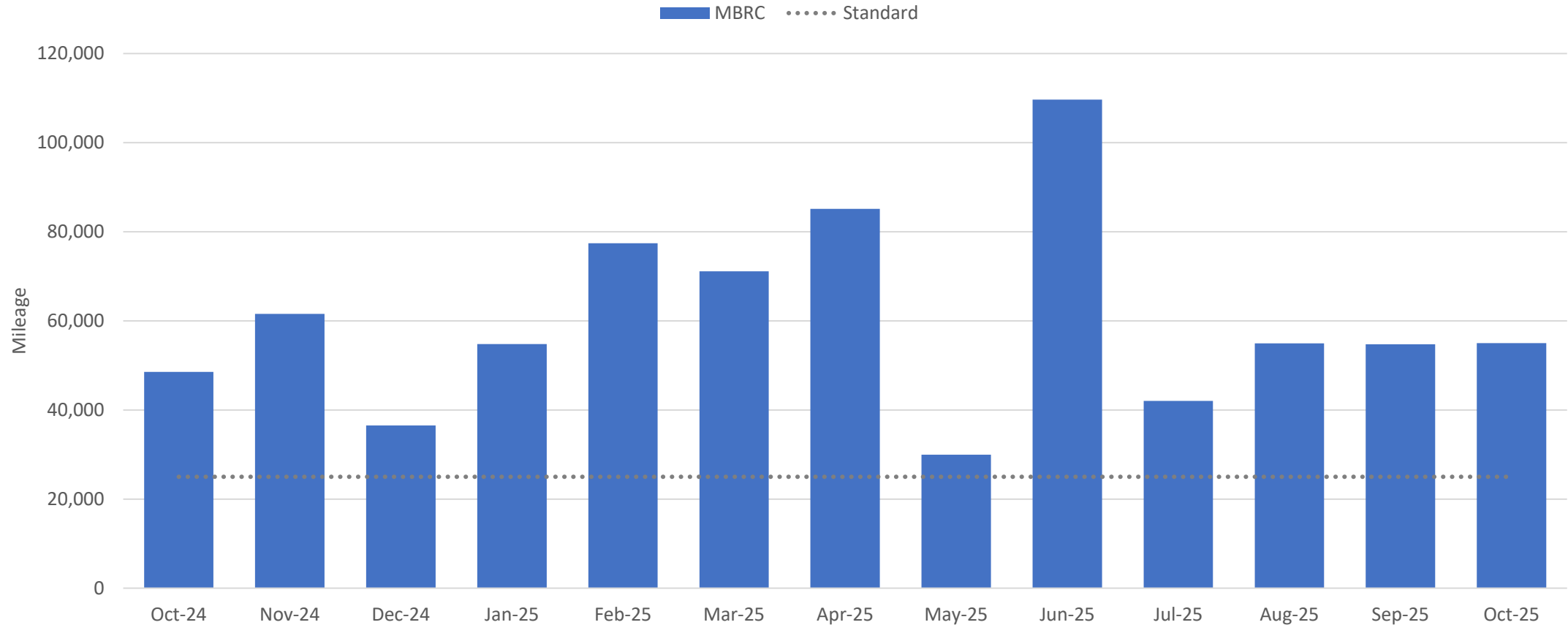
Pick-up OTP: The percentage of trips when the driver arrives within the 30-minute on-time window for scheduled pick-up trips.



Arrival OTP: The percentage of trips when the passenger arrived at their destination by or before the scheduled arrival time.



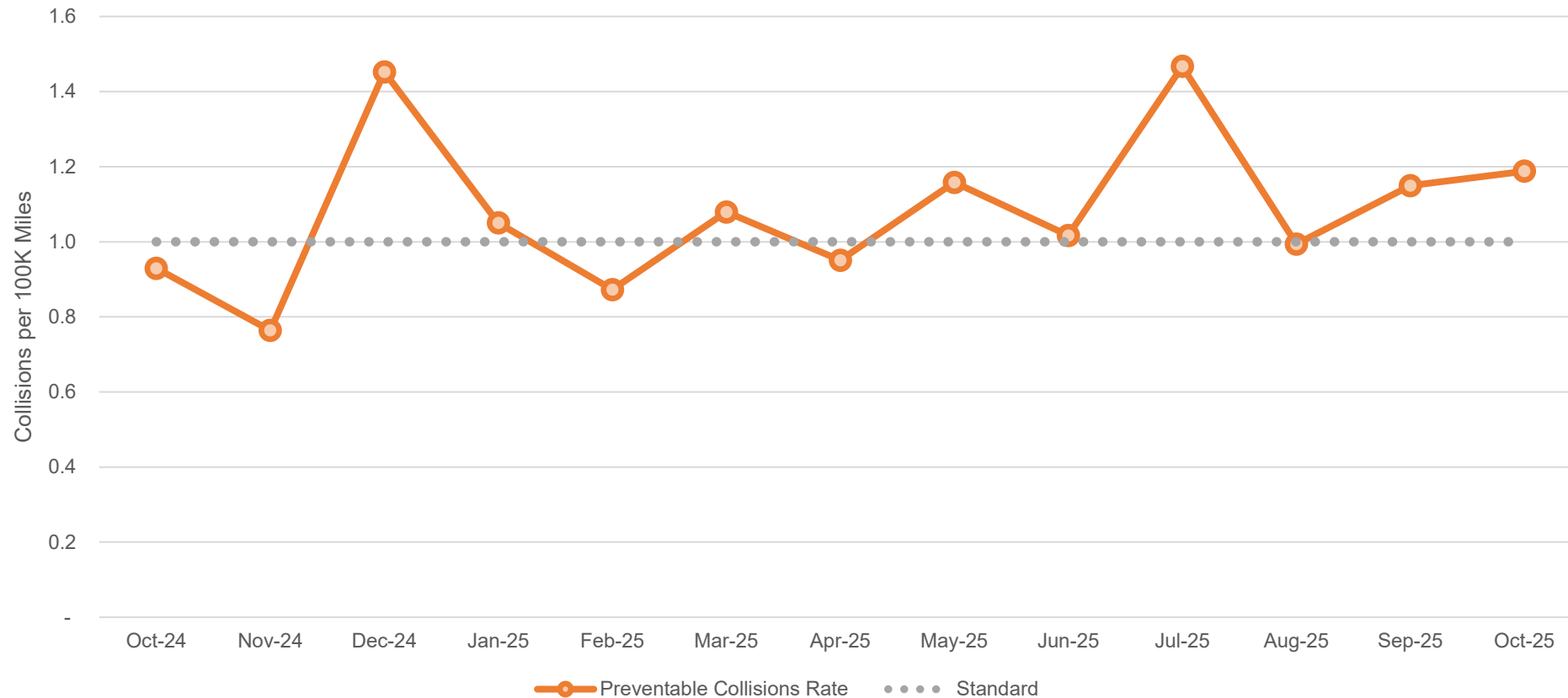
Service Reliability – Miles Between Road Calls



Miles Between Road Calls: MBRC is calculated by dividing the total miles traveled by all OC ACCESS vehicles over the calendar month by the total number of road calls or disruptions due to mechanical failures in revenue service during the same period. The MBRC standard for OC ACCESS is 25,000 miles.



Safety – Preventable Collisions

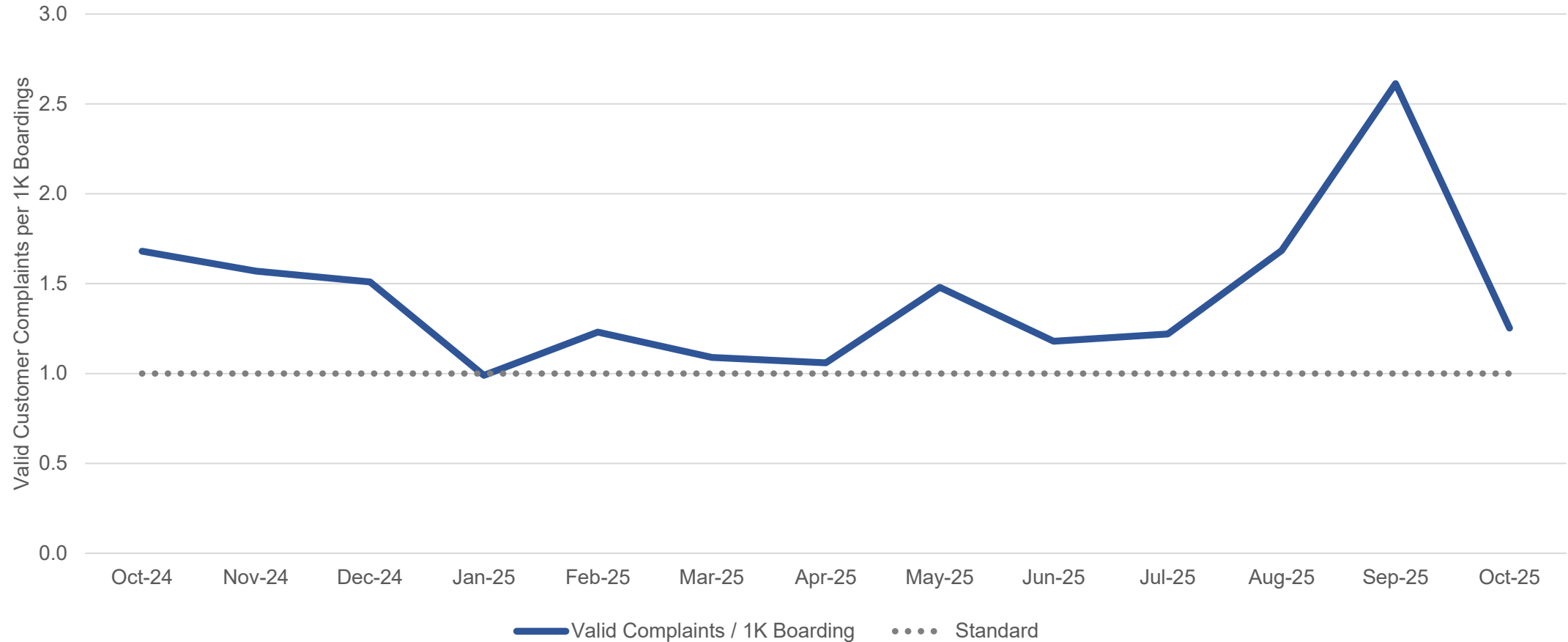


Preventable Collisions: A preventable collision is defined as an event where a driver providing revenue service could have been reasonably avoided by the driver. The performance standard is no more than one vehicle accident per 100,000 miles.

Data reported through October 14, 2025



Service Quality – Customer Satisfaction



Customer Satisfaction: The performance standard for customer satisfaction is courtesy, measured by the number of valid complaints received. The contractual standard for OC ACCESS is no more than one valid complaint per 1,000 boardings.

Data reported through October 14, 2025



Upcoming Activities



Service Changes

- OC Bus Service Change Implementation – February 8, 2026

Future Board of Directors Items

- Bimonthly Performance Report – January 8, 2026