



BOARD AGENDA

Orange County Transportation Authority Board Meeting
Orange County Transportation Authority Headquarters
Board Room - Conference Room 07-08
550 South Main Street
Orange, California
Monday, February 8, 2021 at 9:00 a.m.

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the OCTA Clerk of the Board, telephone (714) 560-5676, no less than two (2) business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

Agenda Descriptions

The 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 Board of Directors 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.

Guidance for Public Access to the Board of Directors/Committee Meeting

On March 12, 2020 and March 18, 2020, Governor Gavin Newsom enacted Executive Orders N-25-20 and N-29-20 authorizing a local legislative body to hold public meetings via teleconferencing and make public meetings accessible telephonically or electronically to all members of the public to promote social distancing due to the state and local State of Emergency resulting from the threat of Novel Coronavirus (COVID-19).

In accordance with Executive Order N-29-20, and in order to ensure the safety of the Orange County Transportation Authority (OCTA) Board of Directors (Board) and staff and for the purposes of limiting the risk of COVID-19, in person public participation at public meetings of the OCTA will not be allowed during the time period covered by the above referenced Executive Orders.



BOARD AGENDA

Guidance for Public Access to the Board of Directors/Committee Meeting (Continued)

Instead, members of the public can listen to AUDIO live streaming of the Board and Committee meetings by clicking the below link:

<http://www.octa.net/About-OCTA/Who-We-Are/Board-of-Directors/Live-and-Archived-Audio/>

Public comments may be submitted for the upcoming Board and Committee meetings by emailing them to ClerkOffice@octa.net.

If you wish to comment on a specific 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.

In order to ensure that staff has the ability to provide comments to the Board Members in a timely manner, please submit your public comments **30 minutes prior to the start time of the Board and Committee meeting date.**



BOARD AGENDA

Call to Order

Roll Call

Invocation

Director Delgleize

Pledge of Allegiance

Director Hernandez

Special Calendar

Orange County Local Transportation Authority Special Calendar Matters

1. **Adopt Resolutions of Necessity for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5**
Joe Gallardo/James G. Beil

Overview

The Orange County Transportation Authority is implementing the State Route 55 Improvement Project between Interstate 405 and Interstate 5. The project requires acquisition of property rights from public and private parties adjacent to the existing freeway and city streets. On September 11, 2017, the Board of Directors approved acquiring right-of-way for this project. At this time, staff has been unable to reach an agreement to purchase required property rights from the subject properties. It is now necessary for the Board of Directors to exercise its power of eminent domain by adopting resolutions of necessity in order to acquire these necessary property rights in time to make the properties available to meet the project delivery and construction schedules.

Recommendation

Adopt Resolutions of Necessity Nos. 2021-003, 2021-004, 2021-005, and 2021-006, and authorize and direct General Counsel to prepare, commence, and prosecute a proceeding in eminent domain for the purpose of acquiring necessary right-of-way and real property interests for the for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.



BOARD AGENDA

Orange County Transportation Authority Special Calendar Matters

2. Presentation of Resolutions of Appreciation for Employees of the Year for 2020

The Chief Executive Officer will present the Orange County Transportation Authority Employees of the Year for 2020.

Consent Calendar (Items 3 through 14)

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

Orange County Transportation Authority Consent Calendar Matters

3. Approval of Minutes

Approval of the Orange County Transportation Authority and affiliated agencies' regular meeting minutes of January 25, 2021.

4. Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512

Gabriel Tang/Janet Sutter

Overview

The Internal Audit Department of the Orange County Transportation Authority has completed an audit of oversight and reporting controls related to the Comprehensive Transportation Funding Program. Based on the audit, oversight and reporting controls are adequate; however, one recommendation has been made to ensure that all performance requirements of community-based transit circulator projects are incorporated into local agency agreements and monitored for compliance to standards.

Recommendation

Direct staff to implement one recommendation provided in Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512.



BOARD AGENDA

5. Coronavirus Update Darrell E. Johnson

Overview

The Orange County Transportation Authority continues to take proactive measures in response to the impacts of the coronavirus pandemic in relation to transportation services, programs, and projects. The response efforts are centered around agency core values, helping to ensure the health and safety of the public and employees while continuing to provide essential transportation services and deliver critical infrastructure improvements. An overview and update on these efforts is presented.

Recommendation

Receive and file as an information item.

6. Recruitment for Public Member Appointment Andrea West/Jennifer L. Bergener

Overview

In accordance with Public Utilities Code Section 130052(c), members of the Orange County Transportation Authority Board of Directors, representing cities and the County of Orange, appoint two public members to the Orange County Transportation Authority Board of Directors. Direction is requested to guide the recruitment and selection process for filling the current public member vacancy for a four-year term.

Recommendation

Direct the Chief Executive Officer to follow the past Board of Directors' process when there is a public member vacancy to include publicly noticing the vacancy and announce the recruitment of a public member to serve on the Orange County Transportation Authority Board of Directors through media outlets, notifications to cities, community organizations, and to the County of Orange.



BOARD AGENDA

7. Fiscal Year 2020-21 Proposed Budget Amendment

Victor Velasquez/Andrew Oftelie

Overview

Staff proposes a budget amendment to update the Orange County Transportation Authority's Fiscal Year 2020-21 Approved Budget. This amendment better aligns the budget with anticipated revenue and expenditures through the balance of the fiscal year by reducing bus program revenues and expenditures based on reduced service levels, increasing the Express Lanes Expense budget, and adjusting the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Deputy Managing Director from salary grade V to salary grade X.

Recommendations

- A. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 approved budget increasing the revenue and expense budget in the amount of approximately \$4.7 million to accommodate updated budget assumptions for both revenue and expense items.
- B. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 Personnel and Salary Resolution and budget to adjust the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Deputy Managing Director position from a salary grade V to a salary grade X.

8. Second Quarter Fiscal Year 2020-21 Procurement Status Report

Pia Veasapen/Andrew Oftelie

Overview

The second quarter procurement status report summarizes the procurement activities for information purposes to the Orange County Transportation Authority Board of Directors. This report focuses on procurement activity from October 1 through December 31, 2020, that was approved by the Board of Directors during this period. The second quarter procurement status report also projects future procurement activity for the third quarter as identified in the fiscal year 2020-21 budget.



BOARD AGENDA**8. (Continued)****Recommendation**

Receive and file as an information item.

9. Orange County Transportation Authority Investment and Debt Programs Report - December 2020

Robert Davis/Andrew Oftelie

Overview

The Orange County Transportation Authority has a comprehensive investment and debt program to fund its immediate and long-term cash flow demands. Each month, the Treasurer submits a report detailing investment allocation, performance, compliance, outstanding debt balances, and credit ratings for the Orange County Transportation Authority's debt program. This report is for the month ending December 31, 2020. The report has been reviewed and is consistent with the investment practices contained in the Investment Policy.

Recommendation

Receive and file as an information item.

Orange County Local Transportation Authority Consent Calendar Matters**10. Capital Programs Division - Second Quarter Fiscal Year 2020-21 Capital Action Plan Performance Metrics**

James G. Beil

Overview

Staff has prepared a quarterly progress report on capital project delivery for the period of October 2020 through December 2020 for review by the Orange County Transportation Authority Board of Directors. This report highlights the Capital Action Plan for project delivery, which is used as a performance metric to assess delivery progress on highway, transit, and rail projects.



BOARD AGENDA**10. (Continued)****Recommendation**

Receive and file as an information item.

11. Amendment to Agreement for Program Management Consultant Services for Highway Programs

Rose Casey/James G. Beil

Overview

On April 11, 2016, the Orange County Transportation Authority Board of Directors approved an agreement with Mott MacDonald, LLC (formerly known as Hatch Mott MacDonald, LLC) to provide program management consultant services for the Highway Programs Department, for a term of five years, with one, two-year option term. An amendment to the existing agreement to exercise the two-year option term is requested for continued program management consultant services.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 11 to Agreement No. C-5-3767 between the Orange County Transportation Authority and Mott MacDonald, LLC, to exercise the two-year option term for program management consultant services for the Highway Programs Department, in the amount of \$14,900,000, and extend the term of the agreement through August 23, 2023. This will increase the maximum obligation of the agreement to a total contract value of \$39,680,661.

12. Capital Programming Update

Ben Ku/Kia Mortazavi

Overview

The Orange County Transportation Authority uses various funding sources to implement planning efforts, capital projects, and transit operations. Project costs can vary from the programmed amount, which may require funding revisions and Board of Directors' approval to meet funding requirements. Board of Directors' authorization is required to provide funding for new and ongoing projects as further described herein.



BOARD AGENDA

12. (Continued)

Recommendations

- A. Authorize the use of \$10.579 million in Measure M2 funds for the Interstate 5 improvements from Interstate 405 to Yale Avenue (Segment 1).
- B. Authorize the use of \$3.240 million in Highway Infrastructure Program funds for the State Route 57 Improvement Project from Orangewood Avenue to Katella Avenue.
- C. Authorize the use of \$4.766 million in Federal Surface Transportation Block Grant or Congestion Mitigation and Air Quality Improvement funds for the following transit projects:
 - \$4.500 million in Congestion Mitigation and Air Quality Improvement funds for the rideshare and vanpool programs.
 - \$0.266 million in Surface Transportation Block Grant funds for the Orange County Mobility Hub Strategy.
- D. 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.

13. Award of Agreement for Regional Modeling Traffic Operations On-Call Support Staffing

Alicia Yang/Kia Mortazavi

Overview

On October 6, 2020, the Orange County Transportation Authority released a request for proposals for on-call support staffing services for the Regional Modeling Traffic Operations section. One proposal was received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.



BOARD AGENDA**13. (Continued)****Recommendations**

- A. Approve the selection of W.G. Zimmerman Engineering, Inc., as the firm to provide on-call support staffing services for the Regional Modeling Traffic Operations section.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2608 between the Orange County Transportation Authority and W.G. Zimmerman Engineering, Inc., in the amount of \$400,000, for a two-year initial term with two, two-year option terms.

14. Measure M2 Environmental Cleanup Program - Project X Tier 1 Grant Program Call for Projects

Alfonso Hernandez/Kia Mortazavi

Overview

The Measure M2 Environmental Cleanup Program provides grants for projects that protect Orange County waterways and beaches from roadway runoff. Staff has updated the program implementation guidelines and is seeking authorization to release the next Environmental Cleanup Program Tier 1 call for projects.

Recommendations

- A. Approve the proposed revisions to the Comprehensive Transportation Funding Programs Guidelines for the Environmental Cleanup Program Tier 1 Program.
- B. Authorize staff to issue the fiscal year 2021 Environmental Cleanup Program Tier 1 call for projects.



BOARD AGENDA

Regular Calendar

Orange County Transportation Authority Regular Calendar Matters

15. South Orange County Multimodal Transportation Study Update

Warren Whiteaker/Kia Mortazavi

Overview

The Orange County Transportation Authority is conducting a long-range multimodal transportation study for the south Orange County area. Objectives of the study are to document transportation issues and opportunities, engage with key stakeholders, partner agencies, and the public to identify potential long-term multimodal solutions. A status report on the study is provided for Board of Directors' consideration.

Recommendation

Receive and file as an information item.

Discussion Items

16. Public Comments

17. Chief Executive Officer's Report

18. Directors' Reports

19. Closed Session

There are no Closed Sessions scheduled.

20. Adjournment

The next regularly scheduled meeting of this Board will be held at **9:00 a.m. on Monday, February 22, 2021**, at the Orange County Transportation Authority Headquarters, Board Room - Conference Room 07-08, 550 South Main Street, Orange, California.



February 8, 2021

To: Members of the Board of Directors

From: Darrell E. Johnson, Chief Executive Officer

Subject: Adopt Resolutions of Necessity for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5

Overview

The Orange County Transportation Authority is implementing the State Route 55 Improvement Project between Interstate 405 and Interstate 5. The project requires acquisition of property rights from public and private parties adjacent to the existing freeway and city streets. On September 11, 2017, the Board of Directors approved acquiring right-of-way for this project. At this time, staff has been unable to reach an agreement to purchase required property rights from the subject properties. It is now necessary for the Board of Directors to exercise its power of eminent domain by adopting resolutions of necessity in order to acquire these necessary property rights in time to make the properties available to meet the project delivery and construction schedules.

Recommendation

Adopt Resolutions of Necessity Nos. 2021-003, 2021-004, 2021-005, and 2021-006, and authorize and direct General Counsel to prepare, commence, and prosecute a proceeding in eminent domain for the purpose of acquiring necessary right-of-way and real property interests for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.

Background

The acquisition of public and private properties is often required to implement transportation projects, even though extensive efforts are made during the planning and design process to avoid or minimize the impacts to public and private properties. Cooperative Agreement Nos. C-7-1753 and C-7-1936 between the Orange County Transportation Authority (OCTA) and the California Department of Transportation (Caltrans) was approved by the Board of Directors (Board) on June 12, 2017 and September 11, 2017, respectively. These documents defined the roles and responsibilities of

OCTA and Caltrans for final design and right-of-way (ROW) acquisition for the State Route 55 (SR-55) Improvement Project between Interstate 405 (I-405) and Interstate 5 (I-5) (Project). Pursuant to the cooperative agreements, OCTA is the lead implementing agency for final design and ROW acquisition for the Project. The environmental document and project report were approved by Caltrans on August 31, 2017 and September 11, 2017, respectively.

Discussion

Construction of the Project will impact 33 properties between I-405 and I-5, including three multi-residential properties, 20 commercial/industrial properties, one hotel, three vacant properties, five public properties, and one railroad property. There are 31 properties identified as partial acquisitions and two properties identified as full acquisitions. The Project may require the displacement of tenants/occupants from a multi-residential complex and may cause the displacement of several businesses. Those displaced will be provided relocation assistance in accordance with OCTA and Caltrans' policies and procedures. The real property requirements for the Project include the acquisition of the two full fee interests, partial fee interests (FEE), permanent highway easements (PHE), permanent footing easements (PFE), permanent utility easements (PUE), tie-back easements, temporary construction easements (TCE), and access control rights needed to construct the proposed highway and high-occupancy vehicle lane improvements. The partial FEEs, PHEs, PFEs, PUEs, and TCEs are required for roadway construction, soundwalls, retaining walls, drainage systems, and for the installation of above-ground and underground facilities, including electrical, telecommunication, water, sewer, and storm drain systems.

Resolution Nos. 2021-003 through 2021-006 pertain to OCTA's acquisition of several FEEs, PHE interests, and TCEs in the City of Santa Ana to accommodate widening of the freeway and provide sufficient work area to construct the freeway widening improvements. These proposed acquisition interests impact the common areas over four separate parcels within the business and office park complex known as the Brookhollow Office Park Association (Association). The Association is a common interest development with rights over all four parcels pursuant to certain covenants, conditions, and restrictions, including management and maintenance responsibilities over the common areas. One of the parcels subject to resolution is owned by three separate owners and is improved with four multi-tenant office/quasi-industrial/retail buildings. Two of the other parcels are owned by separate individual owners and each parcel is improved with one multi-tenant office building. The fourth parcel is owned by a single owner and is vacant land.

The following is a breakdown of the ownership interests impacted by the four separate parcels subject to resolution:

Resolution No. 2021-003 pertains to the acquisition of two partial FEEs and one TCE over a portion of the property owned by Moda Rentals, LLC. The acquisition of the subject partial FEEs is needed to realign the southbound off-ramp to Dyer Road. The acquisition of the subject TCE is needed to provide sufficient work area to construct the freeway improvements.

Resolution No. 2021-004 pertains to the acquisition of one partial FEE and one TCE over a portion of the property owned by DL Investments SA, LLC. The acquisition of the subject partial FEE is needed to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road. The acquisition of the subject TCE is needed to provide sufficient work area to construct the freeway improvements.

Resolution No. 2021-005 pertains to the acquisition of one partial FEE, two PHEs, and three TCEs over a portion of the property owned by 1560 E. Warner Avenue Limited Partnership, a California limited partnership. The acquisition of the subject partial FEE and PHEs is needed to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road. The acquisition of the subject TCE is needed to provide sufficient work area to construct the freeway improvements.

Resolution No. 2021-006 pertains to the acquisition of one partial FEE, one PHE, and one TCE over a portion of the property owned by WTW Properties, LLC, a California Limited Liability Company; McFadden-Dale Industrial Hardware, LLC, a California limited liability company; and B & C Properties, Inc., a California corporation. The acquisition of the subject partial FEE and PHE is needed to accommodate the widening of the SR-55. The acquisition of the subject TCE is needed to provide sufficient work area to construct the freeway improvements.

The property owners have been given substantially more time than the 30 days required by the Federal Highway Administration to consider OCTA's written purchase offer and have been contacted multiple times as described in Attachment A. These contacts include OCTA staff requesting a meeting with the property owners to conduct an OCTA policies and procedures first level review to describe the Project design and the need for the property interests to be acquired. In particular, OCTA has been in contact with the Association, which, as noted, has contractual responsibilities over the common area within the entire business park complex.

OCTA must secure possession of the interests in the subject properties by July 2021 to meet Project schedule deadlines. Delay in acquiring the interests in these properties will cause Project delays. Proceeding with these resolutions of necessity (RONs) will ensure that Project schedules are maintained.

The “List of Property Owners” and “Photo Aerial Exhibits,” attachments B and C respectively, provide information on property ownership and locations.

Acquisition of the subject property interests is being conducted in accordance with OCTA’s Real Property Policies and Procedures and Caltrans guidelines. The required property interests were identified, engineered, and appraised by OCTA. The full appraised amount for each respective property interest to be acquired was offered to the property owner under the requirements of Governmental Code Section 7267.2.

In order to proceed with the acquisition of the property interests to be required for the Project and to comply with state and federal laws for ROW acquisition, the Board is requested to adopt the RONs for the subject properties. This action will allow OCTA to commence eminent domain proceedings to acquire the interests in real property needed for the Project.

The following resolutions are recommended:

- Resolution No. 2021-003 (Moda Rentals, LLC) – Action is recommended for acquisition of two partial FEEs and one TCE over a portion of the property to realign the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements.
- Resolution No. 2021-004 (DL Investments SA, LLC) – Action is recommended for an acquisition of one partial FEE and one TCE over a portion of the property to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements.
- Resolution No. 2021-005 (1560 E. Warner Avenue Limited Partnership, a California limited partnership) – Action is recommended for an acquisition of one partial FEE, two PHEs, and three TCEs over a portion of the property to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements.

- Resolution No. 2021-006 (WTW Properties, LLC, a California limited liability company; McFadden-Dale Industrial Hardware, LLC, a California limited liability company; and B & C Properties, Inc., a California corporation) – Action is recommended for an acquisition of one partial FEE, one PHE, and one TCE over a portion of the property to accommodate the widening of the SR-55 and provide sufficient working area to construct the freeway improvements.

Eminent domain proceedings commence with action by the Board to adopt a RON in accordance with the California Code of Civil Procedure Section 1245.240, which requires an affirmative vote of two-thirds of the Board Members. The Board is requested to determine whether the following criteria have been met:

1. The public interest and necessity require the Project;
2. The Project is planned and located in the manner that will be most compatible with the greatest public good and the least private injury;
3. The property interest(s) sought to be acquired is necessary for the Project; and
4. The offer required by Section 7267.2 of the Governmental Code has been made to the owner or owners of record.

Any property owner and/or its designated representative affected by a RON may request an appearance to speak to the Board when the RON is considered on matters of Project design and the impact to the subject property. The issue regarding compensation for the value of the property or interests to be acquired affected by the RON should not be discussed. In the event the Board approves the RONs (attachments D through G), OCTA's General Counsel will proceed with litigation in order to obtain possession and ultimate use of the property interests. Staff will continue negotiations with the property owners throughout the eminent domain process with the objective of reaching an agreement on the acquisition without the necessity of trial.

Summary

The acquisition of specified real property interests is required for the construction of the Project. Statutory offers have been made to the property owners and negotiations are ongoing. Adopting these RONs and commencing eminent domain proceedings are requested to maintain the Project delivery schedule.

Attachments

- A. Correspondence/Contact Summary with Property Owners
- B. List of Property Owners, State Route 55 Improvement Project Between Interstate 405 and Interstate 5, Board of Directors Exhibit Matrix
- C. Photo Aerial Exhibits
- D. Resolution No. 2021-003
- E. Resolution No. 2021-004
- F. Resolution No. 2021-005
- G. Resolution No. 2021-006

Prepared by:



Joe Gallardo
Manager, Real Property
(714) 560-5546

Approved by:



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

Correspondence/ Contact Summary with Property Owners

Resolution No. 2021-003

**Moda Rentals, LLC
(CPN 103724)**

| Date | Reason for Contact |
|-----------------|--|
| May 28, 2019 | The Orange County Transportation Authority (OCTA) sent Notice of Decision to Appraise to property owner. |
| August 1, 2019 | OCTA right-of-way (ROW) agent contacted representative of Brookhollow Office Park Association (Association) regarding OCTA appraisal, potential property acquisitions within business park, and impact on common areas, which Association has control over and responsibility to maintain. |
| August 8, 2019 | OCTA ROW agent contacted representative of Association regarding the appraisal, potential property acquisitions within business park, and impacted common areas. |
| March 16, 2020 | OCTA ROW agent left message for property owner regarding offer presentation. OCTA ROW agent reached out to the Association representative as well regarding the offer. Association representative requested that offer be e-mailed to her. |
| March 17, 2020 | E-mail correspondence between OCTA ROW agent and Association representative regarding offer. Per the Association representative, she will wait to receive all offers (for CPN 103721, 103722 & 103723) before she will review/respond to the offers. |
| March 18, 2020 | Property owner representative emailed OCTA ROW agent asking for an in-person meeting to discuss project/offer and the impacts to their future development plans for subject site. |
| April 2, 2020 | E-mail and telephone conversation between property owner's representative and OCTA ROW consultant regarding setting up meeting. |
| April 16, 2020 | OCTA ROW agent and owner's representative conversed via telephone regarding offer and project impacts to the proposed site developments. |
| June 4, 2020 | OCTA ROW agent and OCTA staff met with property owner and discussed project, impacts to the property, and offer. |
| June 23, 2020 | OCTA ROW agent called property owner to follow-up on the offer and owner's concerns. OCTA ROW agent requested the counteroffer that owner stated that he will submit. OCTA ROW agent and owner discussed the project. |
| June 25, 2020 | OCTA ROW agent followed up via telephone call with owner regarding offer and counteroffer. |
| July 22, 2020 | OCTA ROW agent left message for owner asking for an update on the counteroffer. |
| August 19, 2020 | OCTA ROW agent left message for owner's representative asking for an update on the counteroffer. Owner's representative left message for OCTA ROW agent to call back. |
| August 20, 2020 | OCTA ROW agent spoke with property owner's representative regarding the owner's concerns with the project and the need for a variance from the City of Santa Ana. |

Resolution No. 2021-004

**DL Investments SA, LLC
(CPN 103723)**

| Date | Reason for Contact |
|----------------|---|
| May 28, 2019 | OCTA sent Notice of Decision to appraise to property owner. |
| August 1, 2019 | OCTA ROW agent contacted representative of Association regarding OCTA appraisal, potential property acquisitions within business park, and impact on common areas, which Association has control over and responsibility to maintain. |
| August 8, 2019 | OCTA ROW agent contacted representative of Association regarding the appraisal, potential property acquisitions within business park, and impacted common areas. |
| March 16, 2020 | OCTA ROW agent called property owner asking for a call back to discuss project and offer. OCTA ROW agent spoke with representative Association regarding offer, and she requested that a copy be sent to her via email and mail. OCTA ROW agent called owner's assistant to schedule a meeting with owner to present offer. Owner's assistant requested that offer be mailed since owner is out of the country. Offer was mailed and e-mailed to property owner and Association representative. |
| March 17, 2020 | Telephone conversation between OCTA ROW agent and owner/owner's representative regarding offer package. |
| April 2, 2020 | Telephone conversation between OCTA ROW agent and owner's representative regarding offer package. |
| April 15, 2020 | OCTA ROW agent left voice message to property owner regarding offer, questions, and appraisal. |
| April 22, 2020 | OCTA ROW agent left message to property owner regarding offer. Owner texted OCTA ROW agent back asking to call later. |

Resolution No. 2021-005

**1560 E. Warner Avenue Limited Partnership, a California limited partnership
(CPN 103722)**

| Date | Reason for Contact |
|--------------------|--|
| July 18, 2019 | OCTA sent Notice of Decision to Appraise to property owner. |
| August 1, 2019 | OCTA ROW agent contacted representative of Association regarding OCTA appraisal, potential property acquisitions within business park, and impact on common areas, which Association has control over and responsibility to maintain. |
| August 8, 2019 | OCTA ROW agent contacted representative of Association regarding the appraisal, potential property acquisitions within business park, and impacted common areas. |
| March 16, 2020 | OCTA ROW agent spoke with the Association's representative regarding upcoming offers for this parcel. |
| September 9, 2020 | OCTA ROW agent left message for Association's representative that offer package is ready for presentation. |
| September 10, 2020 | OCTA ROW agent received email from Association representative confirming receipt of phone message a day earlier and requesting that the offer be e-mailed to her with a hard copy sent via mail. Association representative requested a call as well. |
| September 11, 2020 | OCTA ROW agent e-mailed offer to Association representative and prepared hard copies of the offer to be sent to the property owner and Association representative. A phone call was scheduled for September 14, 2020, with Association representative to discuss project and mitigation. |
| September 14, 2020 | OCTA ROW agent discussed offer with Association representative via phone call. Association representative had questions regarding mitigation. |
| September 15, 2020 | OCTA ROW agent sent FedEx packages of the offer letter and attachments to all three owners listed on the offer and Association. |
| November 18, 2020 | OCTA ROW agents and OCTA staff had a virtual meeting and discussed mitigation report and impacts of the project to the subject site. |

Resolution No. 2021-006

**WTW Properties, LLC, a California Limited Liability Company; McFadden-Dale
Industrial Hardware, LLC, a California Limited Liability Company; and
B & C Properties, Inc., a California Corporation
(CPN 103721/103761/103762)**

| Date | Reason for Contact |
|-------------------|---|
| July 29, 2019 | OCTA sent Notice of Decision to Appraise to property owner. |
| August 1, 2019 | OCTA ROW agent contacted representative of Association regarding OCTA appraisal, potential property acquisitions within business park, and impact on common areas, which Association has control over and responsibility to maintain. |
| August 8, 2019 | OCTA ROW agent contacted representative of Association regarding the appraisal, potential property acquisitions within business park, and impacted common areas. |
| December 12, 2019 | OCTA appraiser inspected subject property. |
| March 1, 2020 | OCTA appraiser performed a second inspection of the subject property. |
| November 6, 2020 | OCTA ROW agent left message for Association representative to schedule a meeting to present offer package. |
| November 9, 2020 | OCTA ROW agent left message with Association representative at Brookhollow to present offer package. OCTA ROW representative also sent an e-mail follow up. |
| November 10, 2020 | OCTA ROW agent received a call back and an e-mail from Association representative requesting that the offer package be e-mailed to her. OCTA ROW agent had placed all offer packages to all parties into FedEx packages for delivery on November 11, 2020. |
| November 11, 2020 | OCTA ROW agent received confirmation that all hard copies of the offer packages were received by all parties on November 11, 2020, via FedEx. A meeting was scheduled to discuss the offer package on November 18, 2020 with Association representative, Shirin, and OCTA representatives |
| November 18, 2020 | OCTA ROW agents and OCTA staff had a virtual meeting via Microsoft Teams. Shirin Zarkesh and Gary Griffith attended for the owners. Discussions surrounded the mitigation plan. |
| November 19, 2020 | E-mail correspondence between OCTA, OCTA ROW agent, and Association representative regarding the mitigation plan. |
| November 20, 2020 | OCTA ROW agent followed up via e-mails regarding the mitigation plan between OCTA staff, OCTA ROW agent, and Association representative. |

**List of Property Owners
State Route 55 Improvement Project Between Interstate 405 and Interstate 5
Board of Directors Exhibit Matrix**

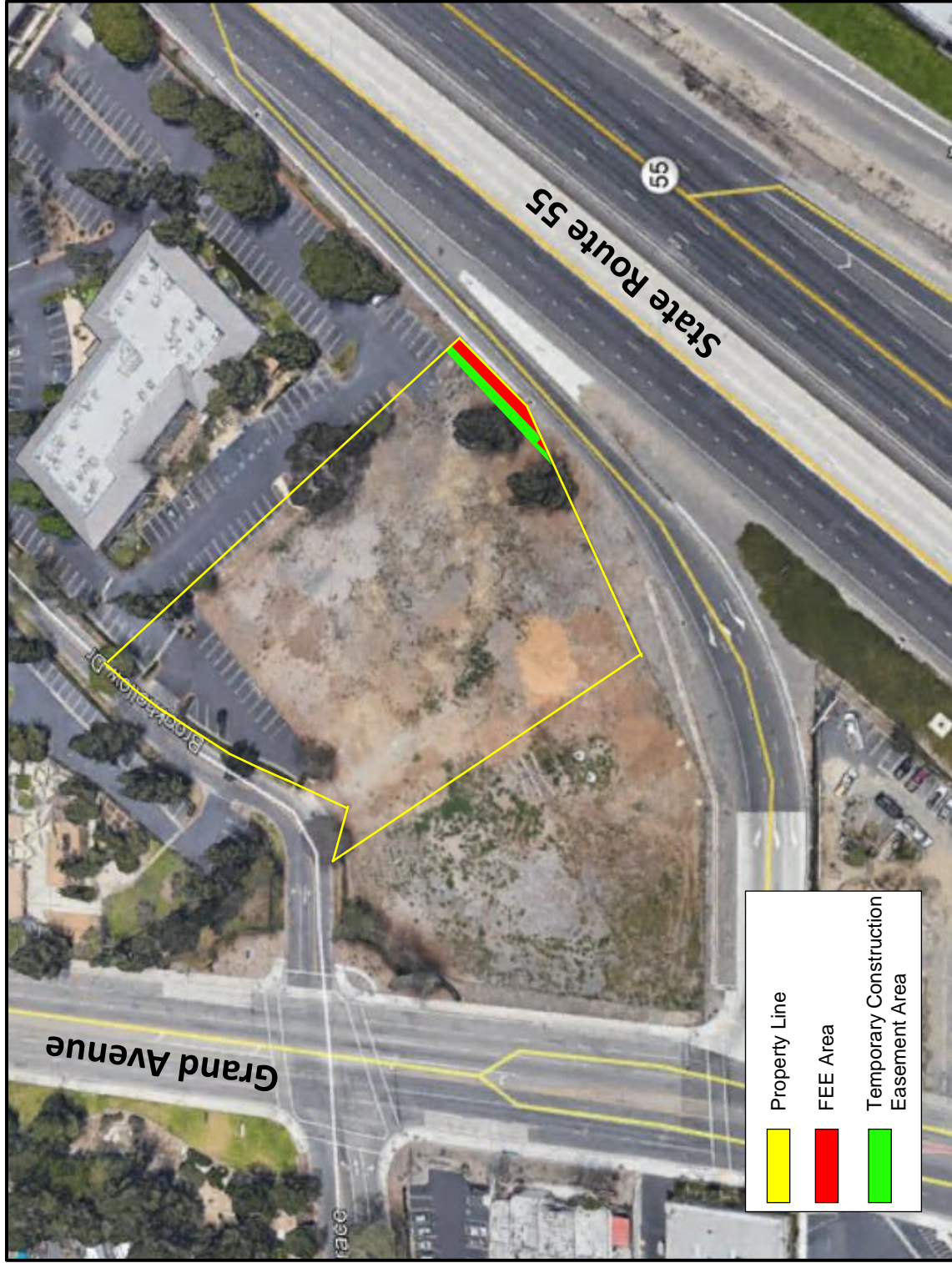
| Resolution No. | APN | CPN | Owner | Property Address | Area Needed | Type of Acquisition | Reason for Acquisition |
|-----------------|---|----------------------------|---|--|--|--|---|
| 2021-003 | 016-221-27 | 103724 | Moda Rentals, LLC | 1580 East Warner Ave. Santa Ana, CA 92705 | 6 sq. ft. 450 sq. ft. 428 sq. ft. | FEE FEE TCE | Two partial FEEs and one TCE over a portion of the property to realign the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements. |
| 2021-004 | 016-221-14 | 103723 | DL Investments SA, LLC | 1570 Brookhollow Dr. Santa Ana, CA 92705 | 1,160 sq. ft. 1,714 sq. ft. | FEE TCE | One partial FEE and one TCE over a portion of the property to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements. |
| 2021-005 | 016-221-13 | 103722 | 1560 E. Warner Avenue Limited Partnership | 1560 E Warner Ave. Santa Ana, CA 92705 | 4,077 sq. ft. 163 sq. ft. 599 sq. ft. 1,129 sq. ft. 893 sq. ft. 1,533 sq. ft. | FEE PHE PHE TCE TCE TCE | One partial FEE, two PHEs, and three TCEs over a portion of the property to accommodate the widening of the SR-55 and realignment of the southbound off-ramp to Dyer Road and provide sufficient work area to construct the freeway improvements. |
| 2021-006 | 016-221-42 (Condominium Units: 932-111-38, -39, -40, -41, -42, -43, -44, and -45) | 103721 103761 103762 | WTW Properties, LLC; McFadden-Dale Industrial Hardware, LLC; B & C Properties, Inc. | 1540 through - 1554 E. Warner Ave. Santa Ana, CA 92705 | 7,254 sq. ft. 1,291 sq. ft. 2,611 sq. ft. | FEE PHE TCE | One partial FEE, one PHE, and one TCE over a portion of the property to accommodate the widening of the SR-55 and provide sufficient work area to construct the freeway improvements. |

Legend

APN = Assessor's Parcel Number
CPN = Caltrans Parcel Number
FEE = Partial Fee
PHE = Permanent Highway Easement
TCE = Temporary Construction Easement
SR-55 = State Route 55

Photo Aerial Exhibits

Resolution No. 2021-003 (Moda Rentals)



Resolution No. 2021-004 (DL Investments SA)



Not to Scale,
For Presentation
Purposes Only

Resolution No. 2021-005 (1560 E. Warner Ave LP)



Not to Scale,
For Presentation
Purposes Only

Resolution No. 2021-006
(WTW Properties; McFadden-Dale Industrial Hardware; B & C Properties)



Not to Scale,
For Presentation
Purposes Only

RESOLUTION NO. 2021-003

A RESOLUTION OF THE ORANGE COUNTY TRANSPORTATION AUTHORITY FINDING AND DETERMINING THAT THE PUBLIC INTEREST AND NECESSITY REQUIRE THE ACQUISITION BY EMINENT DOMAIN OF INTERESTS IN CERTAIN REAL PROPERTY FOR PUBLIC USE AND AUTHORIZING AND DIRECTING CONDEMNATION OF PORTIONS OF ASSESSOR PARCEL NO. 016-221-27.

WHEREAS, the Orange County Transportation Authority (the "Authority") is undertaking the State Route 55 ("SR-55") Improvement Project between Interstate 405 and Interstate 5, a right-of-way for freeway purposes and all public uses appurtenant thereto (the "Project"); and

WHEREAS, the Project is intended to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

WHEREAS, the Project requires the acquisition of property interests from public and private parties; and

WHEREAS, the Project will be a transportation improvement project serving the public interest; and

WHEREAS, subsection (a) of the California Public Utilities Code section 130220.5, authorizes the Authority to exercise the power of eminent domain to acquire these property interests for public use by condemnation; and

WHEREAS, portions of the real property located at 1580 E. Warner Avenue (effectively vacant site located at the Southeast corner of Brookhollow Drive and Grand Avenue), in the City of Santa Ana, California (the "Subject Property") are required for the Project. The specific portions of the Subject Property required for the Project are two partial fee acquisitions as described and depicted collectively in Exhibit "A" attached hereto, and one temporary construction easement as legally described and depicted in Exhibit "B" attached hereto (the "Property Interests"); and

WHEREAS, if such access currently exists, reasonable vehicular and pedestrian access to and from the Subject Property will be maintained at all times; and

WHEREAS, the Authority communicated an offer of compensation to the owner or owners of record for the acquisition of the Property Interests; and

WHEREAS, in accordance with section 1245.235 of the California Code of Civil Procedure on January 8, 2021, the Authority mailed a Notice of Hearing on the Intent of the Authority to Adopt a Resolution of Necessity for acquisition by eminent domain of the Property Interests. The Notice of Hearing was mailed to the listed address of all persons whose names appear on the last equalized county assessment roll as having an interest in the Subject Property; and

WHEREAS, the Authority provided written notice to the City of Santa Ana as required by subsection (c) of California Public Utilities Code section 130220.5; and

WHEREAS, the Project, including all amendments thereto, together with the staff reports, environmental documents and all other evidence presented to the Authority's Board of Directors at the times the Project and the amendments thereto were adopted, are incorporated herein by this reference and made a part hereof as though fully set forth herein; and

WHEREAS, pursuant to section 1245.235 of the California Code of Civil Procedure, the Authority scheduled a hearing for February 8, 2021 at 9:00 a.m. and gave to each person whose property is to be acquired by eminent domain and whose name and address appears on the last equalized county assessment roll a reasonable opportunity to be heard; and

WHEREAS, said hearing has been held by the Authority's Board of Directors; and

WHEREAS, the Authority may adopt a Resolution of Necessity pursuant to section 1240.040 of the California Code of Civil Procedure.

NOW, THEREFORE, BE IT RESOLVED, by at least a two-thirds vote of the Authority's Board of Directors under Code of Civil Procedure sections 1240.030 and 1245.230, the Authority does hereby find and determine as follows:

Section 1. Incorporation of Findings and Recitals. The above findings and recitals are true and correct and are incorporated herein in full by this reference.

Section 2. Compliance with California Code of Civil Procedure. There has been compliance by the Authority with the requirements of section 1245.235 of the California Code of Civil Procedure regarding notice and hearing.

Section 3. Public Use. The public use for which the Property Interests are to be acquired is for the construction and future maintenance of the Project, a public transportation improvement, as more fully described hereinabove. Subsection (a) of California Public Utilities Code section 130220.5 authorizes the Authority to acquire by eminent domain property and interests in property necessary for such purpose and for all uses incidental or convenient thereto.

Section 4. Necessity.

(a) The proposed Project is necessary to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

(b) The public interest and necessity require the acquisition by eminent domain proceedings of the Property Interests.

Section 5. Description of Property Interests. The Property Interests sought to be acquired are more particularly described and depicted in Exhibits "A" and "B" attached hereto and incorporated herein by reference.

Section 6. Findings. The Authority hereby finds, determines and declares each of the following:

(a) The public interest and necessity require the proposed Project;

(b) The proposed Project is planned or located in the manner that will be most compatible with the greatest public good and least private injury;

(c) The Property Interests sought to be acquired are necessary for the proposed Project; and

(d) The offer required by section 7267.2 of the California Government Code has been made to the owner or owners of record.

Section 7. Existing Public Use(s). Pursuant to sections 1240.510 and 1240.610 of the Code of Civil Procedure, to the extent that any of the Property Interests are already devoted to a public use, the use proposed by this Project is a more necessary public use than the use to which the Property Interests, or any portion thereof, are already devoted, or, in the alternative, is a compatible public use which will not unreasonably interfere with or impair the continuance of the public use to which the Property Interests, or any portion thereof, are already devoted.

Section 8. Acquisition of Substitute Property. To the extent portions of the real property to be acquired for the Project are currently devoted to or held for some public use, the Authority intends to acquire substitute property pursuant to California Code of Civil Procedure sections 1240.320 and 1240.330. The requirements of said Code sections have been satisfied and the acquisition of said substitute property is necessary for the Project. The substitute property may be conveyed by the Authority to the owner(s) of the necessary property.

Section 9. Authority to Exercise Eminent Domain. The Authority is hereby authorized and empowered to acquire the Property Interests, including the improvements thereon, if any, by eminent domain for the proposed Project.

Section 10. Further Activities. The Authority's legal counsel ("Counsel") is hereby authorized and empowered to acquire the Property Interests in the name of and on behalf of the Authority by eminent domain, and is authorized to institute and prosecute such legal proceedings as may be required in connection therewith. Counsel is further authorized to take such steps as may be permitted and required by law, and to make such security deposits as may be required by law and/or order of court, to permit the Authority to take possession of the Property Interests at the earliest possible time.

Section 11. Effective Date. This Resolution of Necessity shall take effect upon adoption.

PASSED, APPROVED, and ADOPTED on this _____ day of _____, 2021.

ANDREW DO, CHAIRMAN
ORANGE COUNTY
TRANSPORTATION AUTHORITY

APPROVED AS TO FORM:

JAMES M. DONICH
GENERAL COUNSEL

ATTEST:

I, Andrea West, Interim Clerk of the Board of Directors of the Orange County Transportation Authority, do hereby certify that the foregoing Resolution No. 2021-003, by the following votes:

AYES:

NOES:

ABSENT:

ANDREA WEST
INTERIM CLERK OF THE BOARD

EXHIBIT "A"

EXHIBIT "A"
LEGAL DESCRIPTION

Parcel 103724-1: FEE

That portion of Parcel 5, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 126, Pages 45 and 46 of Parcel Maps, in the office of the County Recorder of said County, described as follows:

COMMENCING at the most easterly corner of said Parcel 5; thence along the southeasterly and southerly lines of said Parcel 5 the following two courses;

(1) South 44°21'40" West 55.70 feet

(2) South 63°26'19" West, 26.61 feet to the **POINT OF BEGINNING**;

thence continuing along said southerly line South 63°26'19" West, 6.46 feet;

thence leaving said southerly line North 45°31'06" East, 6.15 feet; thence

South 44°28'54" East, 1.99 feet to the **POINT OF BEGINNING**.

This conveyance is made for the purpose of a freeway and the GRANTOR hereby releases and relinquishes to the GRANTEE any and all abutter's rights including access rights, appurtenant to GRANTOR's remaining property, in and to the freeway.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

Parcel 103724-2: FEE

That portion of Parcel 5, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 126, Pages 45 and 46 of Parcel Maps, in the office of the County Recorder of said County, lying southeasterly of the following described line:

BEGINNING at a point on the northeasterly line of said Parcel 5, distant thereon North 36°08'41" West 6.11 feet from the most easterly corner of said Parcel 5; thence leaving said northeasterly line, South 45°31'06" West, 78.76 feet to the southerly line of said Parcel 5.

This conveyance is made for the purpose of a freeway and the GRANTOR hereby releases and relinquishes to the GRANTEE any and all abutter's rights including access rights, appurtenant to GRANTOR's remaining property, in and to the freeway.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyors' Act.

Signature: V. T. Davis
Vincent T. Davis, PLS

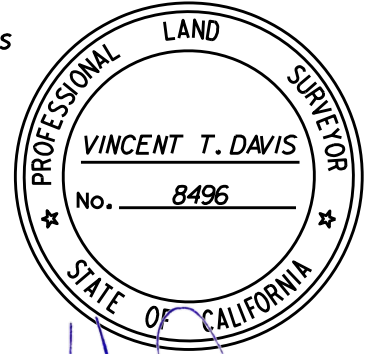
Date: 19 FEB 2020



DATUM: NAD83 EPOCH 1991.35 ORANGE COUNTY SURVEYOR ADJUSTMENT.
 COORDINATE SYSTEM: CCS83 ZONE 6, COORDINATES, BEARINGS, DISTANCES
 COMBINED FACTOR: 0.99997834 (GROUND - GRID/COMBINED FACTOR)



Not to scale



Vincent T. Davis

VINCENT T. DAVIS

17 Dec 2020

DATE

CITY OF SANTA ANA
 BROOKHOLLOW DR
 BROOKHOLLOW DR
 PMB 126/46-47
 PARCEL 5

MM 843/10-21
 LOT 16

LEGEND:

| | |
|--------|-------------------------|
| | = ACCESS PROHIBITED |
| P.O.B. | = POINT OF BEGINNING |
| P.O.C. | = POINT OF COMMENCEMENT |

LINE DATA:

| NO. | BEARING | DISTANCE |
|-----|-------------|----------|
| L1 | S44°21'40"W | 55.70' |
| L2 | N63°26'19"E | 26.61' |
| L3 | S63°26'19"W | 6.46' |
| L4 | N45°31'06"E | 6.15' |
| L5 | S44°28'54"E | 1.99' |
| L6 | N63°26'19"E | 3.29' |
| L7 | N45°31'06"E | 78.76' |
| L8 | S36°08'41"E | 6.11' |
| L9 | N63°26'19"E | 23.32' |

FEE
 103724-1
 6 SQFT

DETAIL
 N.T.S

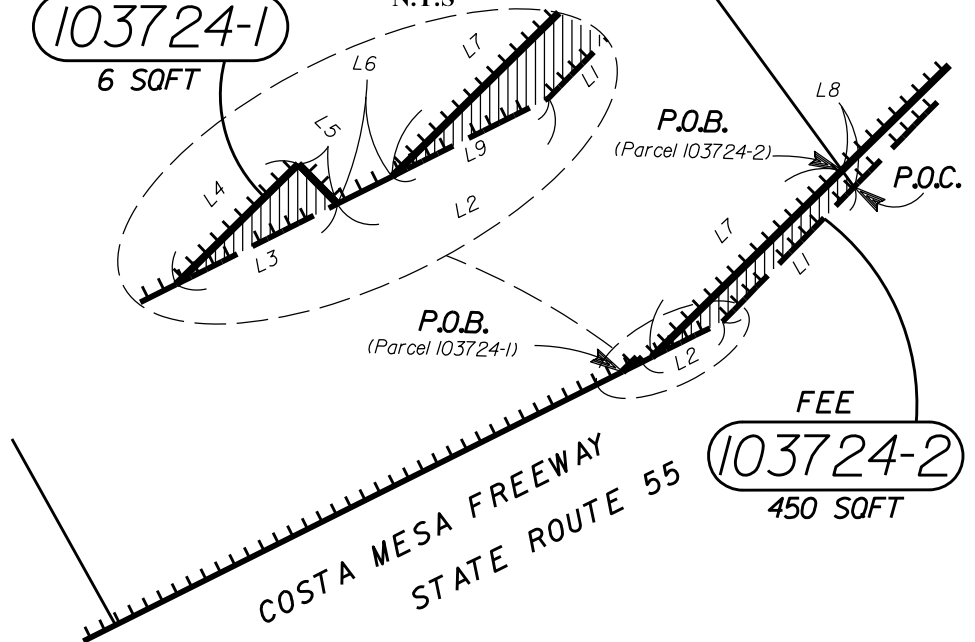


EXHIBIT "A1"

(Page 1 of 1)

COUNTY: ORA
 RTE: 55
 P.M.: 8.1

NOT TO SCALE
 DATE: DEC 2020

PARCELS:
103724-1 ; -2
 APN: 016-221-27

EXHIBIT "B"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION
Assessor Parcel No.: 016-221-27
Caltrans Parcel No.: 103724-3**

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "B1" and depicted in Exhibit "B2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of twenty-four (24) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining thirty-six (36) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Access to the TCE area by OCTA shall be from the public right of way.
- Improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "B1"
LEGAL DESCRIPTION

CALTRANS PARCEL NO. 103724-3

TEMPORARY CONSTRUCTION EASEMENT

APN 016-221-27

THAT PORTION OF PARCEL 5, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 126, PAGES 46 AND 47, OF PARCEL MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST NORTHERLY CORNER OF SAID PARCEL 5;

THENCE ALONG THE NORTHEASTERLY LINE OF SAID PARCEL 5 SOUTH 36°08'41" EAST, 363.73 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE LEAVING SAID NORTHEASTERLY LINE SOUTH 45°31'06" WEST, 78.76 FEET TO THE SOUTHEASTERLY LINE OF SAID PARCEL 5;

THENCE ALONG SAID SOUTHEASTERLY LINE SOUTH 63°26'19" WEST, 3.29 FEET;

THENCE LEAVING SAID SOUTHEASTERLY LINE NORTH 44°28'54" WEST, 1.99 FEET;

THENCE SOUTH 45°31'06" WEST, 5.00 FEET;

THENCE SOUTH 44°28'54" EAST, 0.37 FEET TO SAID SOUTHEASTERLY LINE;

THENCE ALONG SAID SOUTHEASTERLY LINE SOUTH 63°26'19" WEST, 7.70 FEET;

THENCE LEAVING SAID SOUTHEASTERLY LINE NORTH 45°31'06" EAST, 94.96 FEET TO SAID NORTHEASTERLY LINE;

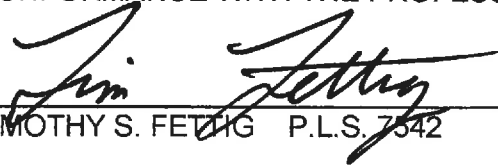
THENCE ALONG SAID NORTHEASTERLY LINE SOUTH 36°08'41" EAST, 5.05 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCEL CONTAINS A GRID AREA 428 SQUARE FEET OR 0.010 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "B2", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.


TIMOTHY S. FETTING P.L.S. 7542

6/27/19
DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION

NOTE:

SEE SHEET 2 FOR
DETAIL 'A' AND
LINE TABLE

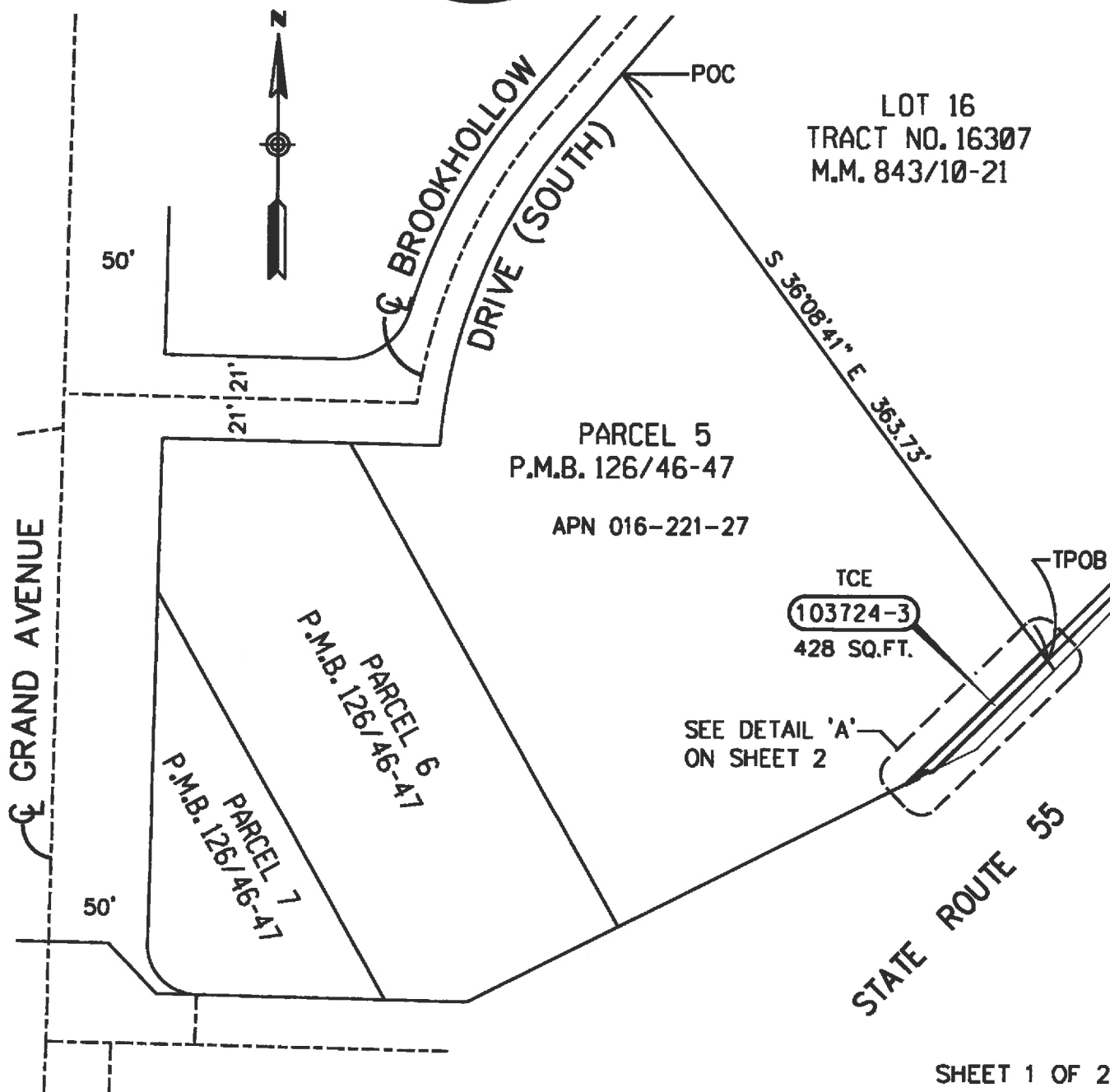


PREPARED BY ME OR UNDER MY DIRECTION:

Tim Fetting
TIMOTHY S. FETTING

6/27/19

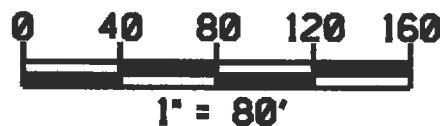
P.L.S. 7542 DATE

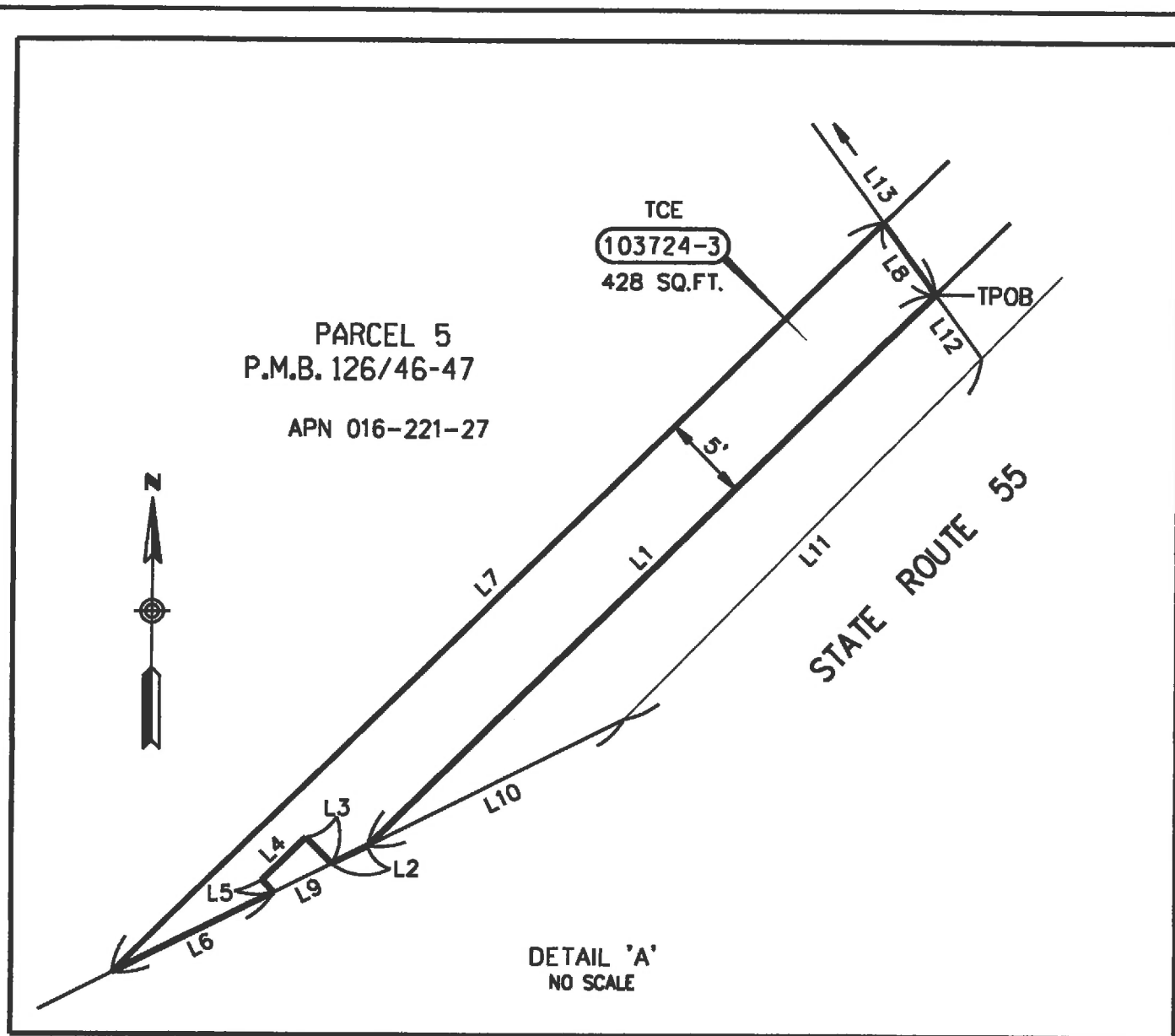


THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).
ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

EXHIBIT "B2"

103724-3





| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | S 45°31'06" W | 78.76' |
| L2 | S 63°26'19" W | 3.29' |
| L3 | N 44°28'54" W | 1.99' |
| L4 | S 45°31'06" W | 5.00' |
| L5 | S 44°28'54" E | 0.37' |
| L6 | S 63°26'19" W | 7.70' |
| L7 | N 45°31'06" E | 94.96' |
| L8 | S 36°08'41" E | 5.05' |
| L9 | N 63°26'19" E | 5.25' |
| L10 | N 63°26'19" E | 23.32' |
| L11 | N 44°21'47" E | 55.70' |
| L12 | N 36°08'41" W | 6.12' |
| L13 | S 36°08'41" E | 363.73' |

SHEET 2 OF 2

EXHIBIT "B2"
103724-3

NOTE:
SEE SHEET 1 FOR
BOUNDARY

RESOLUTION NO. 2021-004

A RESOLUTION OF THE ORANGE COUNTY TRANSPORTATION AUTHORITY FINDING AND DETERMINING THAT THE PUBLIC INTEREST AND NECESSITY REQUIRE THE ACQUISITION BY EMINENT DOMAIN OF INTERESTS IN CERTAIN REAL PROPERTY FOR PUBLIC USE AND AUTHORIZING AND DIRECTING CONDEMNATION OF PORTIONS OF ASSESSOR PARCEL NO. 016-221-14.

WHEREAS, the Orange County Transportation Authority (the "Authority") is undertaking the State Route 55 ("SR-55") Improvement Project between Interstate 405 and Interstate 5, a right-of-way for freeway purposes and all public uses appurtenant thereto (the "Project"); and

WHEREAS, the Project is intended to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

WHEREAS, the Project requires the acquisition of property interests from public and private parties; and

WHEREAS, the Project will be a transportation improvement project serving the public interest; and

WHEREAS, subsection (a) of the California Public Utilities Code section 130220.5, authorizes the Authority to exercise the power of eminent domain to acquire these property interests for public use by condemnation; and

WHEREAS, portions of the real property located at 1570 Brookhollow Drive, in the City of Santa Ana, California (the "Subject Property") are required for the Project. The specific portions of the Subject Property required for the Project are a partial fee acquisition as described and depicted in Exhibit "A" attached hereto, and a temporary construction easement as legally described and depicted in Exhibit "B" attached hereto (the "Property Interests"); and

WHEREAS, if such access currently exists, reasonable vehicular and pedestrian access to and from the Subject Property will be maintained at all times; and

WHEREAS, the Authority communicated an offer of compensation to the owner or owners of record for the acquisition of the Property Interests; and

WHEREAS, in accordance with section 1245.235 of the California Code of Civil Procedure on January 8, 2021, the Authority mailed a Notice of Hearing on the Intent of the Authority to Adopt a Resolution of Necessity for acquisition by eminent domain of the Property Interests. The Notice of Hearing was mailed to the listed address of all persons whose names appear on the last equalized county assessment roll as having an interest in the Subject Property; and

WHEREAS, the Authority provided written notice to the City of Santa Ana as required by subsection (c) of California Public Utilities Code section 130220.5; and

WHEREAS, the Project, including all amendments thereto, together with the staff reports, environmental documents and all other evidence presented to the Authority's Board of Directors at the times the Project and the amendments thereto were adopted, are incorporated herein by this reference and made a part hereof as though fully set forth herein; and

WHEREAS, pursuant to section 1245.235 of the California Code of Civil Procedure, the Authority scheduled a hearing for February 8, 2021 at 9:00 a.m. and gave to each person whose property is to be acquired by eminent domain and whose name and address appears on the last equalized county assessment roll a reasonable opportunity to be heard; and

WHEREAS, said hearing has been held by the Authority's Board of Directors; and

WHEREAS, the Authority may adopt a Resolution of Necessity pursuant to section 1240.040 of the California Code of Civil Procedure.

NOW, THEREFORE, BE IT RESOLVED, by at least a two-thirds vote of the Authority's Board of Directors under Code of Civil Procedure sections 1240.030 and 1245.230, the Authority does hereby find and determine as follows:

Section 1. Incorporation of Findings and Recitals. The above findings and recitals are true and correct and are incorporated herein in full by this reference.

Section 2. Compliance with California Code of Civil Procedure. There has been compliance by the Authority with the requirements of section 1245.235 of the California Code of Civil Procedure regarding notice and hearing.

Section 3. Public Use. The public use for which the Property Interests are to be acquired is for the construction and future maintenance of the Project, a public transportation improvement, as more fully described hereinabove. Subsection (a) of California Public Utilities Code section 130220.5 authorizes the Authority to acquire by eminent domain property and interests in property necessary for such purpose and for all uses incidental or convenient thereto.

Section 4. Necessity.

(a) The proposed Project is necessary to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

(b) The public interest and necessity require the acquisition by eminent domain proceedings of the Property Interests.

Section 5. Description of Property Interests. The Property Interests sought to be acquired are more particularly described and depicted in Exhibits "A" and "B" attached hereto and incorporated herein by reference.

Section 6. Findings. The Authority hereby finds, determines and declares each of the following:

(a) The public interest and necessity require the proposed Project;

(b) The proposed Project is planned or located in the manner that will be most compatible with the greatest public good and least private injury;

(c) The Property Interests sought to be acquired are necessary for the proposed Project; and

(d) The offer required by section 7267.2 of the California Government Code has been made to the owner or owners of record.

Section 7. Existing Public Use(s). Pursuant to sections 1240.510 and 1240.610 of the Code of Civil Procedure, to the extent that any of the Property Interests are already devoted to a public use, the use proposed by this Project is a more necessary public use than the use to which the Property Interests, or any portion thereof, are already devoted, or, in the alternative, is a compatible public use which will not unreasonably interfere with or impair the continuance of the public use to which the Property Interests, or any portion thereof, are already devoted.

Section 8. Acquisition of Substitute Property. To the extent portions of the real property to be acquired for the Project are currently devoted to or held for some public use, the Authority intends to acquire substitute property pursuant to California Code of Civil Procedure sections 1240.320 and 1240.330. The requirements of said Code sections have been satisfied and the acquisition of said substitute property is necessary for the Project. The substitute property may be conveyed by the Authority to the owner(s) of the necessary property.

Section 9. Authority to Exercise Eminent Domain. The Authority is hereby authorized and empowered to acquire the Property Interests, including the improvements thereon, if any, by eminent domain for the proposed Project.

Section 10. Further Activities. The Authority's legal counsel ("Counsel") is hereby authorized and empowered to acquire the Property Interests in the name of and on behalf of the Authority by eminent domain, and is authorized to institute and prosecute such legal proceedings as may be required in connection therewith. Counsel is further authorized to take such steps as may be permitted and required by law, and to make such security deposits as may be required by law and/or order of court, to permit the Authority to take possession of the Property Interests at the earliest possible time.

Section 11. Effective Date. This Resolution of Necessity shall take effect upon adoption.

PASSED, APPROVED, and ADOPTED on this _____ day of _____, 2021.

ANDREW DO, CHAIRMAN
ORANGE COUNTY
TRANSPORTATION AUTHORITY

APPROVED AS TO FORM:

JAMES M. DONICH
GENERAL COUNSEL

ATTEST:

I, Andrea West, Interim Clerk of the Board of Directors of the Orange County Transportation Authority, do hereby certify that the foregoing Resolution No. 2021-004 by the following votes:

AYES:

NOES:

ABSENT:

ANDREA WEST
INTERIM CLERK OF THE BOARD

EXHIBIT "A"

EXHIBIT "A"
LEGAL DESCRIPTION

Parcel 103723-1: FEE

That portion of Lot 16 of Tract No. 16307, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 843, Pages 10 through 21 of Miscellaneous Maps, in the office of the County Recorder of said County, lying southeasterly of the following described line:

BEGINNING at a point on the southwesterly line of said Lot 16, distant thereon North 36°08'41" West 6.11 feet from the most southerly corner of said Lot 16; thence leaving said southwesterly line, North 45°31'06" East, 93.11 feet; thence North 44°28'54" West, 3.00 feet; thence North 45°31'06" East, 5.00 feet; thence South 44°28'54" East, 3.00 feet; thence North 45°31'06" East, 154.33 feet; thence North 42°42'15" East, 16.89 feet; thence North 47°17'45" West, 8.00 feet; thence North 42°42'15" East, 8.00 feet; thence South 47°17'45" East, 8.00 feet; thence North 42°42'15" East, 64.79 feet to the northeasterly line of said Lot 16.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This conveyance is made for the purpose of a freeway and the GRANTOR hereby releases and relinquishes to the GRANTEE any and all abutter's rights including access rights, appurtenant to GRANTOR's remaining property, in and to the freeway.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyors' Act.

Signature: _____

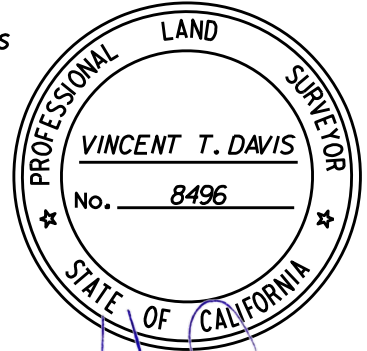
Vincent T. Davis, PLS

Date: _____

19 FEB 2020



DATUM: **NAD83 EPOCH 1991.35 ORANGE COUNTY SURVEYOR ADJUSTMENT.**
 COORDINATE SYSTEM: **CCS83 ZONE 6, COORDINATES, BEARINGS, DISTANCES**
 COMBINED FACTOR: **0.99997834 (GROUND - GRID/COMBINED FACTOR)**



VINCENT T. DAVIS

17 Dec 2020
DATE

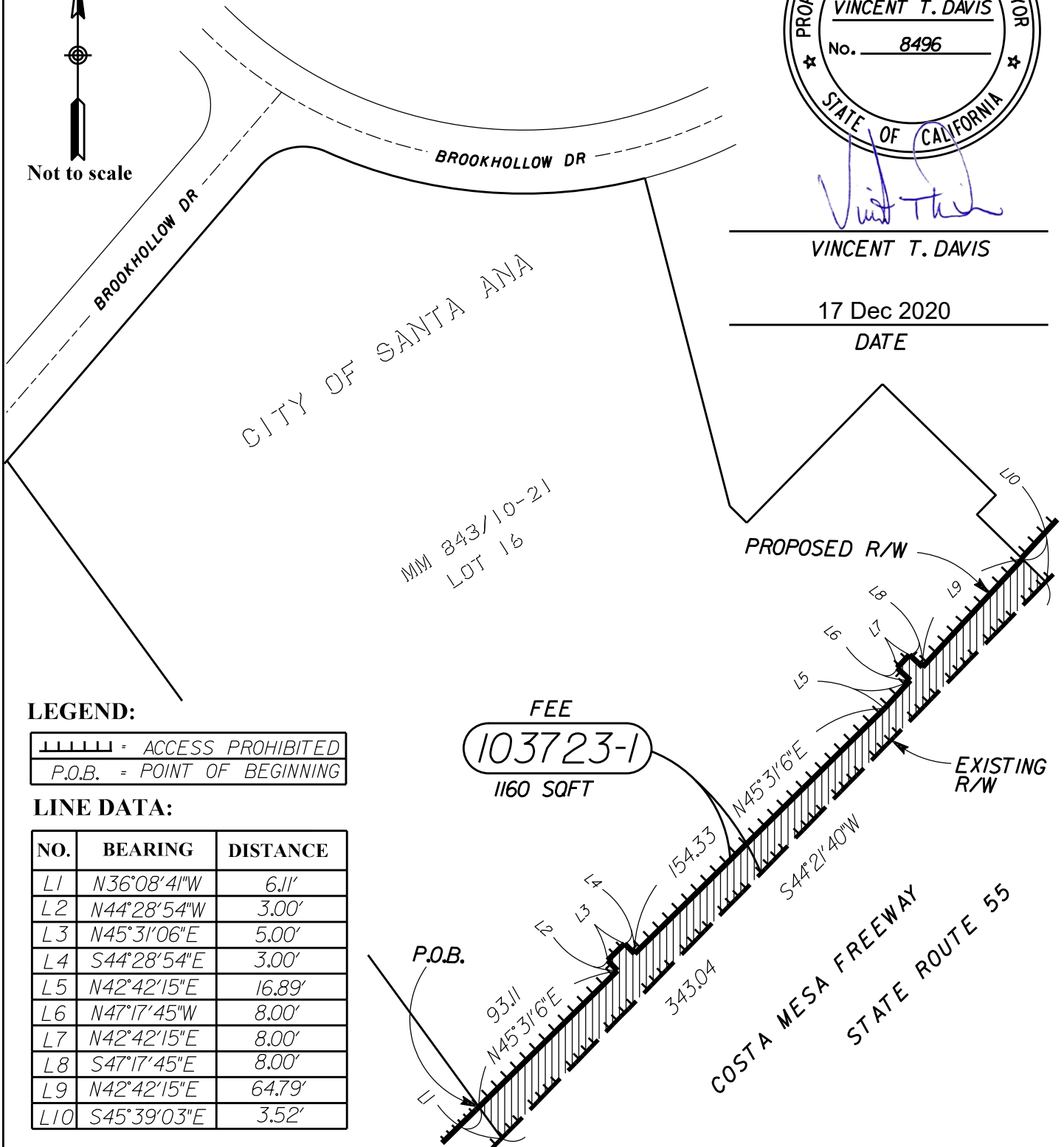
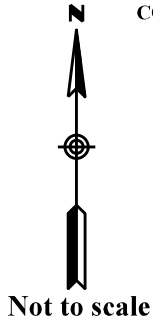


EXHIBIT "A1"

(Page 1 of 1)

COUNTY: ORA
 RTE: 55
 P.M.: 8.1

NOT TO SCALE
 DATE: DEC 2020

PARCEL:
103723-1
 APN: 016-221-14

EXHIBIT "B"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION**

Assessor Parcel No.: 016-221-14

Caltrans Parcel No.: 103723-2

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "B1" and depicted in Exhibit "B2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of twenty-four (24) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining thirty-six (36) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Access to the TCE area by OCTA shall be from the public right of way.
- Improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "B1"
LEGAL DESCRIPTION

CALTRANS PARCEL NO. 103723-2

TEMPORARY CONSTRUCTION EASEMENT

APN 016-221-14

THAT PORTION OF LOT 16 OF TRACT NO. 16307, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 843, PAGES 10 THROUGH 21, OF MISCELLANEOUS MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST WESTERLY CORNER OF SAID LOT 16;

THENCE ALONG THE SOUTHWESTERLY LINE OF SAID LOT 16 SOUTH 36°08'41" EAST, 363.73 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE LEAVING SAID SOUTHWESTERLY LINE NORTH 45°31'06" EAST, 93.11 FEET;

THENCE NORTH 44°28'54" WEST, 3.00 FEET;

THENCE NORTH 45°31'06" EAST, 5.00 FEET;

THENCE SOUTH 44°28'54" EAST, 3.00 FEET;

THENCE NORTH 45°31'06" EAST, 154.33 FEET;

THENCE NORTH 42°42'15" EAST, 16.89 FEET;

THENCE NORTH 47°17'45" WEST, 8.00 FEET;

THENCE NORTH 42°42'15" EAST, 8.00 FEET;

THENCE SOUTH 47°17'45" EAST, 8.00 FEET;

THENCE NORTH 42°42'15" EAST, 64.79 FEET TO THE GENERALLY NORTHEASTERLY LINE OF SAID LOT 16;

THENCE ALONG SAID GENERALLY NORTHEASTERLY LINE NORTH 45°39'03" WEST, 5.00 FEET;

THENCE LEAVING SAID GENERALLY NORTHEASTERLY LINE SOUTH 42°42'15" WEST, 61.94 FEET;

THENCE NORTH 47°17'45" WEST, 6.00 FEET;

THENCE SOUTH 42°42'15" WEST, 14.00 FEET;

THENCE SOUTH 47°17'45" EAST, 6.00 FEET;

THENCE SOUTH 42°42'15" WEST, 13.76 FEET;

THENCE SOUTH 45°31'06" WEST, 251.58 FEET TO SAID SOUTHWESTERLY LINE;

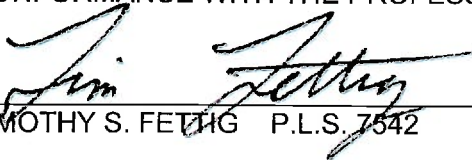
THENCE ALONG SAID SOUTHWESTERLY LINE SOUTH 36°08'41" EAST, 5.05 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCEL CONTAINS A GRID AREA 1,714 SQUARE FEET OR 0.039 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "B2", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.


TIMOTHY S. FETTING P.L.S. 7542

6/27/19

DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION

NOTE:

SEE SHEET 2 FOR
LINE TABLE

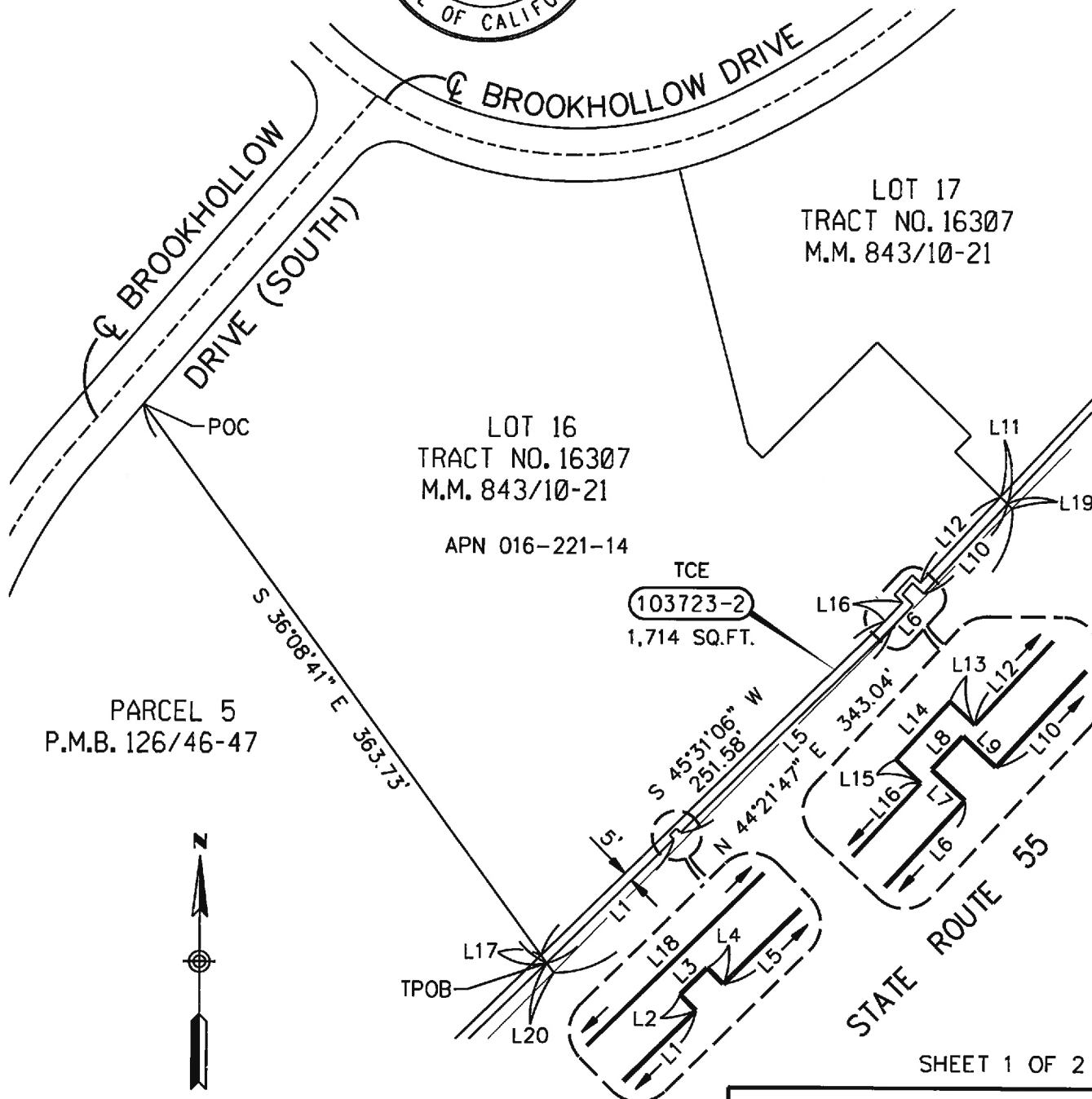


PREPARED BY ME OR UNDER MY DIRECTION:

Tim Fetting
TIMOTHY S. FETTING P.L.S.

6/27/19

TIMOTHY S. FETTIC P.L.S. 7542 DATE



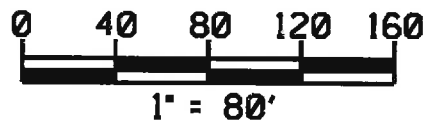
SHEET 1 OF 2

THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).

ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

EXHIBIT "B2"

103723-2



| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | N 45°31'06" E | 93.11' |
| L2 | N 44°28'54" W | 3.00' |
| L3 | N 45°31'06" E | 5.00' |
| L4 | S 44°28'54" E | 3.00' |
| L5 | N 45°31'06" E | 154.33' |
| L6 | N 42°42'15" E | 16.89' |
| L7 | N 47°17'45" W | 8.00' |
| L8 | N 42°42'15" E | 8.00' |
| L9 | S 47°17'45" E | 8.00' |
| L10 | N 42°42'15" E | 64.79' |
| L11 | N 45°39'03" W | 5.00' |
| L12 | S 42°42'15" W | 61.94' |
| L13 | N 47°17'45" W | 6.00' |
| L14 | S 42°42'15" W | 14.00' |
| L15 | S 47°17'45" E | 6.00' |
| L16 | S 42°42'15" W | 13.76' |
| L17 | S 36°08'41" E | 5.05' |
| L18 | S 45°31'06" W | 251.58' |
| L19 | N 45°39'03" W | 3.54' |
| L20 | N 36°08'41" W | 6.12' |

SHEET 2 OF 2

EXHIBIT "B2"
103723-2

NOTE:
SEE SHEET 1 FOR
BOUNDARY

RESOLUTION NO. 2021-005

A RESOLUTION OF THE ORANGE COUNTY TRANSPORTATION AUTHORITY FINDING AND DETERMINING THAT THE PUBLIC INTEREST AND NECESSITY REQUIRE THE ACQUISITION BY EMINENT DOMAIN OF INTERESTS IN CERTAIN REAL PROPERTY FOR PUBLIC USE AND AUTHORIZING AND DIRECTING CONDEMNATION OF PORTIONS OF ASSESSOR PARCEL NO. 016-221-13.

WHEREAS, the Orange County Transportation Authority (the "Authority") is undertaking the State Route 55 ("SR-55") Improvement Project between Interstate 405 and Interstate 5, a right-of-way for freeway purposes and all public uses appurtenant thereto (the "Project"); and

WHEREAS, the Project is intended to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

WHEREAS, the Project requires the acquisition of property interests from public and private parties; and

WHEREAS, the Project will be a transportation improvement project serving the public interest; and

WHEREAS, subsection (a) of the California Public Utilities Code section 130220.5, authorizes the Authority to exercise the power of eminent domain to acquire these property interests for public use by condemnation; and

WHEREAS, portions of the real property located at 1560 E. Warner Avenue, in the City of Santa Ana, California (the "Subject Property") are required for the Project. The specific portions of the Subject Property required for the Project are a partial fee acquisition as described and depicted in Exhibit "A" attached hereto, two highway easement interests as legally described and depicted in Exhibit "B" attached hereto and three temporary construction easements as legally described and depicted in Exhibits "C", "D" and "E" respectively, attached hereto (the "Property Interests"); and

WHEREAS, if such access currently exists, reasonable vehicular and pedestrian access to and from the Subject Property will be maintained at all times; and

WHEREAS, the Authority communicated an offer of compensation to the owner or owners of record for the acquisition of the Property Interests; and

WHEREAS, in accordance with section 1245.235 of the California Code of Civil Procedure on January 8, 2021, the Authority mailed a Notice of Hearing on the Intent of the Authority to Adopt a Resolution of Necessity for acquisition by eminent domain of the Property Interests. The Notice of Hearing was mailed to the listed address of all persons whose names appear on the last equalized county assessment roll as having an interest in the Subject Property; and

WHEREAS, the Authority provided written notice to the City of Santa Ana as required by subsection (c) of California Public Utilities Code section 130220.5; and

WHEREAS, the Project, including all amendments thereto, together with the staff reports, environmental documents and all other evidence presented to the Authority's Board of Directors at the times the Project and the amendments thereto were adopted, are incorporated herein by this reference and made a part hereof as though fully set forth herein; and

WHEREAS, pursuant to section 1245.235 of the California Code of Civil Procedure, the Authority scheduled a hearing for February 8, 2021 at 9:00 a.m. and gave to each person whose property is to be acquired by eminent domain and whose name and address appears on the last equalized county assessment roll a reasonable opportunity to be heard; and

WHEREAS, said hearing has been held by the Authority's Board of Directors; and

WHEREAS, the Authority may adopt a Resolution of Necessity pursuant to section 1240.040 of the California Code of Civil Procedure.

NOW, THEREFORE, BE IT RESOLVED, by at least a two-thirds vote of the Authority's Board of Directors under Code of Civil Procedure sections 1240.030 and 1245.230, the Authority does hereby find and determine as follows:

Section 1. Incorporation of Findings and Recitals. The above findings and recitals are true and correct and are incorporated herein in full by this reference.

Section 2. Compliance with California Code of Civil Procedure. There has been compliance by the Authority with the requirements of section 1245.235 of the California Code of Civil Procedure regarding notice and hearing.

Section 3. Public Use. The public use for which the Property Interests are to be acquired is for the construction and future maintenance of the Project, a public transportation improvement, as more fully described hereinabove. Subsection (a) of California Public Utilities Code section 130220.5 authorizes the Authority to acquire by eminent domain property and interests in property necessary for such purpose and for all uses incidental or convenient thereto.

Section 4. Necessity.

(a) The proposed Project is necessary to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

(b) The public interest and necessity require the acquisition by eminent domain proceedings of the Property Interests.

Section 5. Description of Property Interests. The Property Interests sought to be acquired are more particularly described and depicted in Exhibits "A" through "E" attached hereto and incorporated herein by reference.

Section 6. Findings. The Authority hereby finds, determines and declares each of the following:

(a) The public interest and necessity require the proposed Project;

(b) The proposed Project is planned or located in the manner that will be most compatible with the greatest public good and least private injury;

(c) The Property Interests sought to be acquired are necessary for the proposed Project; and

(d) The offer required by section 7267.2 of the California Government Code has been made to the owner or owners of record.

Section 7. Existing Public Use(s). Pursuant to sections 1240.510 and 1240.610 of the Code of Civil Procedure, to the extent that any of the Property Interests are already devoted to a public use, the use proposed by this Project is a more necessary public use than the use to which the Property Interests, or any portion thereof, are already devoted, or, in the alternative, is a compatible public use which will not unreasonably interfere with or impair the continuance of the public use to which the Property Interests, or any portion thereof, are already devoted.

Section 8. Acquisition of Substitute Property. To the extent portions of the real property to be acquired for the Project are currently devoted to or held for some public use, the Authority intends to acquire substitute property pursuant to California Code of Civil Procedure sections 1240.320 and 1240.330. The requirements of said Code sections have been satisfied and the acquisition of said substitute property is necessary for the Project. The substitute property may be conveyed by the Authority to the owner(s) of the necessary property.

Section 9. Authority to Exercise Eminent Domain. The Authority is hereby authorized and empowered to acquire the Property Interests, including the improvements thereon, if any, by eminent domain for the proposed Project.

Section 10. Further Activities. The Authority's legal counsel ("Counsel") is hereby authorized and empowered to acquire the Property Interests in the name of and on behalf of the Authority by eminent domain, and is authorized to institute and prosecute such legal proceedings as may be required in connection therewith. Counsel is further authorized to take such steps as may be permitted and required by law, and to make such security deposits as may be required by law and/or order of court, to permit the Authority to take possession of the Property Interests at the earliest possible time.

Section 11. Effective Date. This Resolution of Necessity shall take effect upon adoption.

PASSED, APPROVED, and ADOPTED on this _____ day of _____, 2021.

ANDREW DO, CHAIRMAN
ORANGE COUNTY
TRANSPORTATION AUTHORITY

APPROVED AS TO FORM:

JAMES M. DONICH
GENERAL COUNSEL

ATTEST:

I, Andrea West, Interim Clerk of the Board of Directors of the Orange County Transportation Authority, do hereby certify that the foregoing Resolution No. 2021-005 by the following votes:

AYES:

NOES:

ABSENT:

ANDREA WEST
INTERIM CLERK OF THE BOARD

EXHIBIT "A"

EXHIBIT "A"
LEGAL DESCRIPTION

Parcel 103722-1

FEE

That portion of Lot 17 of Tract No. 16307, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 843, Pages 10 through 21 of Miscellaneous Maps, in the office of the County Recorder of said County, lying southeasterly of the following described line:

BEGINNING at a point on that certain course shown as having a bearing of North 45°38'14" West and a length of 42.50 feet in the southwesterly line of said Lot 17, distant thereon South 45°39'03" East 38.46 feet from the northwesterly terminus of said certain course; thence leaving said certain course, North 42°42'15" East, 108.86 feet; thence North 47°17'45" West, 2.50 feet; thence North 42°42'15" East, 5.00 feet; thence South 47°17'45" East, 2.50 feet; thence North 42°42'15" East, 127.97 feet; thence North 40°38'58" East, 271.09 feet to the northeasterly line of said Lot 17.

This conveyance is made for the purpose of a freeway and the GRANTOR hereby releases and relinquishes to the GRANTEE any and all abutter's rights of access, appurtenant to GRANTOR's remaining property, in and to the freeway.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyor's Act.

Signature: Teri Kahlen
Teri Kahlen, PLS




Date: 10/17/19

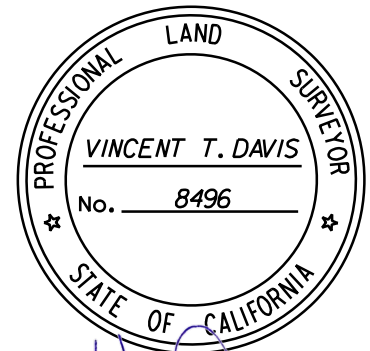
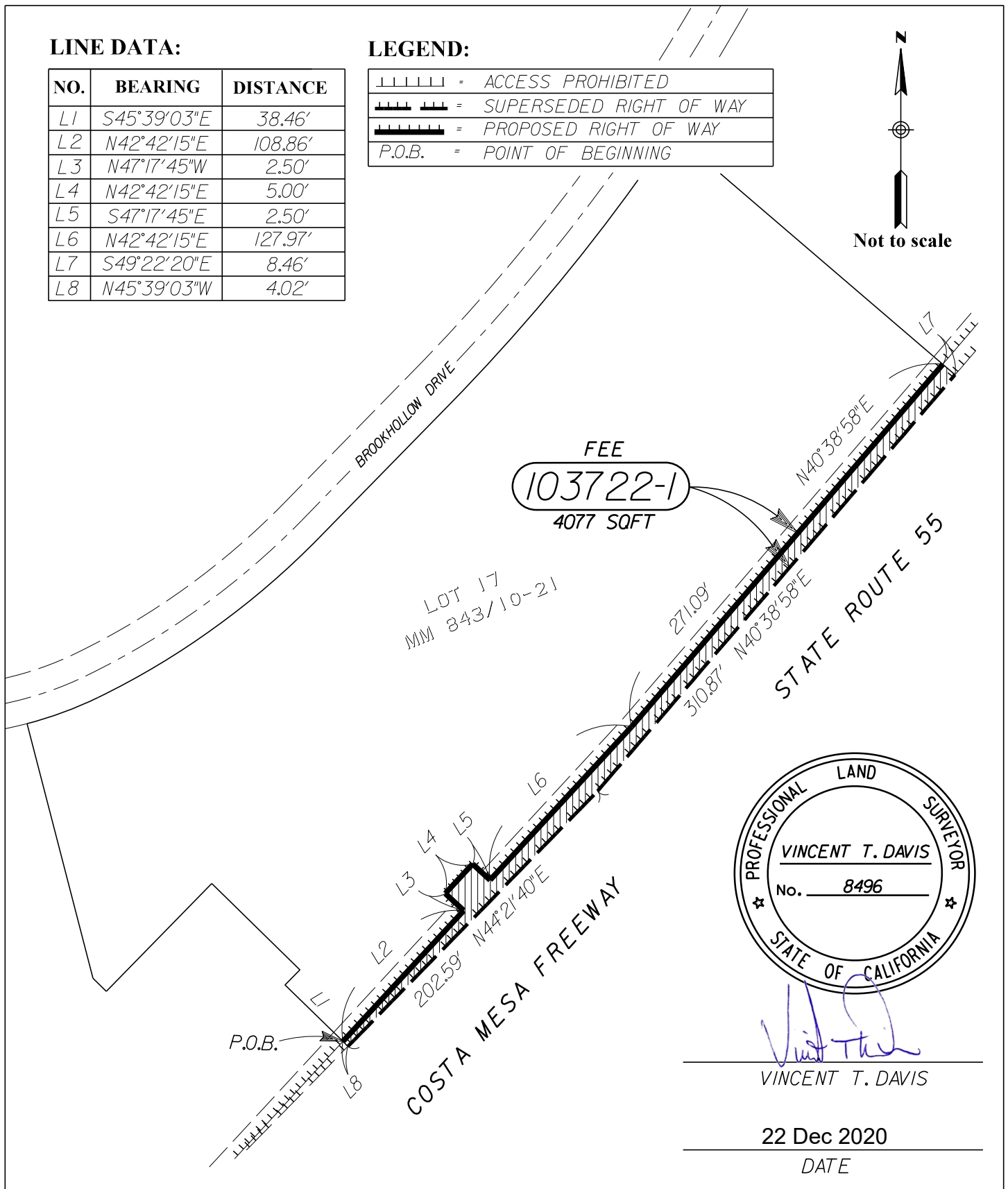
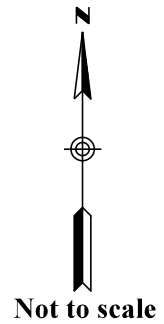


LINE DATA:

| NO. | BEARING | DISTANCE |
|-----|-------------|----------|
| L1 | S45°39'03"E | 38.46' |
| L2 | N42°42'15"E | 108.86' |
| L3 | N47°17'45"W | 2.50' |
| L4 | N42°42'15"E | 5.00' |
| L5 | S47°17'45"E | 2.50' |
| L6 | N42°42'15"E | 127.97' |
| L7 | S49°22'20"E | 8.46' |
| L8 | N45°39'03"W | 4.02' |

LEGEND:

| | |
|---|---------------------------|
|  | = ACCESS PROHIBITED |
|  | = SUPERSEDED RIGHT OF WAY |
|  | = PROPOSED RIGHT OF WAY |
| P.O.B. | = POINT OF BEGINNING |



Vincent T. Davis

22 Dec 2020

DATE

EXHIBIT "A1"

(Page 1 of 1)

COUNTY: ORA
RTE: 55
P.M.: 8.3

NOT TO SCALE
DATE: DEC 2020

PARCEL:
103722-1
APN: 016-221-13

EXHIBIT "B"

HIGHWAY EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION
Assessor Parcel No.: 016-221-13
Caltrans Parcel No.: 103722-2 and 103722-3

This non-exclusive highway easement shall be in, on, over, under, and across that certain real property described in Exhibit "B" attached hereto, subject to the rights and limitations described herein ("Highway Easement"). The Highway Easement shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") for purposes of constructing, compacting, maintaining, removing, and replacing, as applicable, compacted material thereto in connection with the construction of the SR 55 Improvement Project.

The owner and occupant(s) of the real property subject to the Highway Easement shall not landscape or construct any improvements within the easement area described in the attached Exhibit "B". OCTA will install compacted material, within that portion of the Highway Easement area affected by OCTA's work. The owner and occupant(s) shall not excavate within the Highway Easement area or disturb any compacted material installed within the Highway Easement area. The owner and occupant(s) of the real property subject to the Highway Easement will have the right to use the surface of the easement area described in the attached Exhibit "B" for access or automobile parking purposes, once the compacted material is in place.

The rights and obligations of OCTA and the owner of the real property subject to the Highway Easement shall run with the land and be binding upon and/or inure to the benefit of OCTA's and the property owner's respective heirs, successors and assigns.

OCTA expressly reserves the right to convey, transfer, or assign the Highway Easement subject to the same rights and limitations described herein.

EXHIBIT "B"
LEGAL DESCRIPTION

Parcel 103722-2: HIGHWAY EASEMENT

That portion of Lot 17 of Tract No. 16307, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 843, Pages 10 through 21 of Miscellaneous Maps, in the office of the County Recorder of said County, described as follows:

BEGINNING at a point on that certain course shown as having a bearing of North 45°38'14" West and a length of 42.50 feet in the southwesterly line of said Lot 17, distant thereon South 45°39'03" East 36.96 feet from the northwesterly terminus of said certain course; thence leaving said certain course, North 42°42'15" East, 108.81 feet; thence South 47°17'45" East, 1.50 feet; thence South 42°42'15" West, 108.86 feet to said certain course; thence along said certain course, North 45°39'03" West 1.50 feet to the **POINT OF BEGINNING**.

Parcel 103722-3: HIGHWAY EASEMENT

That portion of Lot 17 of Tract No. 16307, in the City of Santa Ana, County of Orange, State of California, as shown on a map filed in Book 843, Pages 10 through 21 of Miscellaneous Maps, in the office of the County Recorder of said County, described as follows:

BEGINNING at a point on that certain course shown as having a bearing of North 49°21'22" West and a length of 204.54 feet in the northeasterly line of said Lot 17, distant thereon South 49°22'20" East 194.62 feet from the northwesterly terminus of said certain course; thence leaving said certain course, South 40°38'58" West, 271.07 feet; thence South 42°42'15" West 127.95 feet; thence South 47°17'45" East, 1.50 feet; thence North 42°42'15" East, 127.97 feet; thence North 40°38'58" East 271.09 feet to said certain course; thence along said certain course North 49°22'20" West 1.50 to the **POINT OF BEGINNING**.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyors' Act.

Signature: _____

Vincent T. Davis, PLS

Date: _____

04 FEB 2020

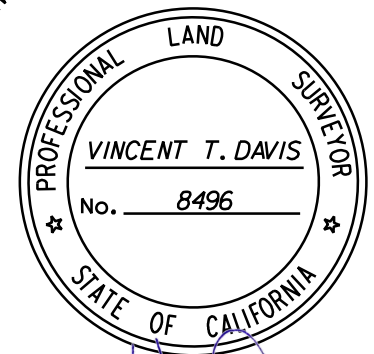
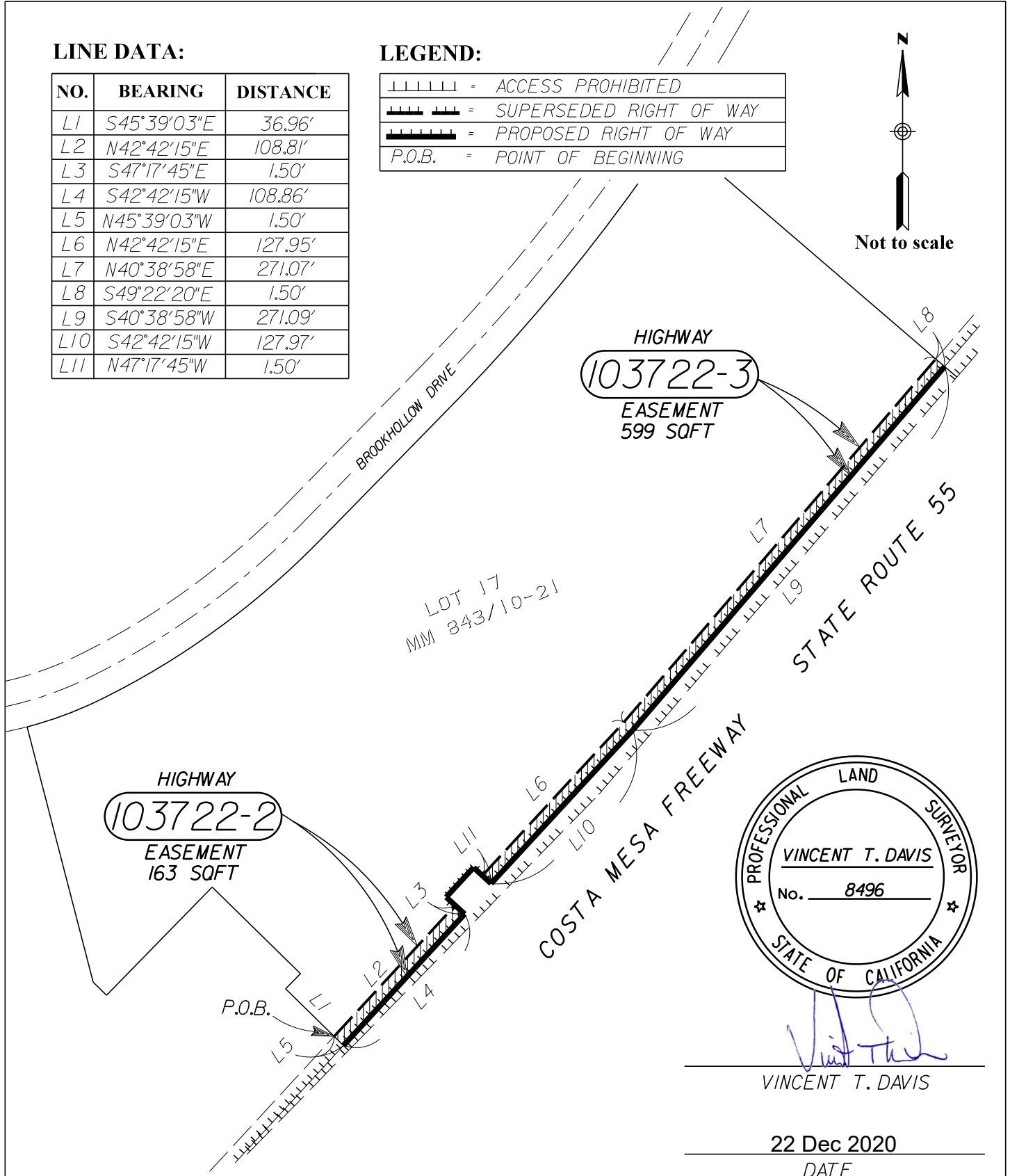
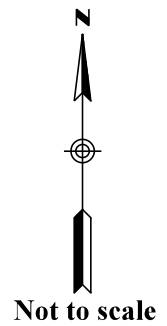


LINE DATA:

| NO. | BEARING | DISTANCE |
|-----|-------------|----------|
| L1 | S45°39'03"E | 36.96' |
| L2 | N42°42'15"E | 108.81' |
| L3 | S47°17'45"E | 1.50' |
| L4 | S42°42'15"W | 108.86' |
| L5 | N45°39'03"W | 1.50' |
| L6 | N42°42'15"E | 127.95' |
| L7 | N40°38'58"E | 271.07' |
| L8 | S49°22'20"E | 1.50' |
| L9 | S40°38'58"W | 271.09' |
| L10 | S42°42'15"W | 127.97' |
| L11 | N47°17'45"W | 1.50' |

LEGEND:

| | |
|--------|---------------------------|
| | = ACCESS PROHIBITED |
| | = SUPERSEDED RIGHT OF WAY |
| | = PROPOSED RIGHT OF WAY |
| P.O.B. | = POINT OF BEGINNING |



VINCENT T. DAVIS

22 Dec 2020
DATE

EXHIBIT "B1"

(Page 1 of 1)

COUNTY: ORA
RTE: 55
P.M.: 8.3

NOT TO SCALE
DATE: DEC 2020

PARCELS:
103722-2 ; -3
APN: 016-221-13

EXHIBIT "C"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION**

Assessor Parcel No.: 016-221-13

Caltrans Parcel No.: 103722-4

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "C1" and depicted in Exhibit "C2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of two (2) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining fifty-eight (58) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Access to the TCE area by OCTA shall be from the public right of way.
- Except as to those improvements identified below as being protected in place, improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
 - Flagpole to be protected in place.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted. Functionally equivalent pavement material will be installed by OCTA to restore the TCE area to a similar condition that existed prior to commencement of the construction activities.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "C1"
LEGAL DESCRIPTION

CALTRANS PARCEL NO. 103722-4

TEMPORARY DEMOLITION EASEMENT

APN 016-221-13

THAT PORTION OF LOT 17 OF TRACT NO. 16307, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 843, PAGES 10 THROUGH 21, OF MISCELLANEOUS MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST NORTHERLY CORNER OF SAID LOT 17;

THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 17 SOUTH 49°22'20" EAST, 191.62 FEET;

THENCE LEAVING SAID NORTHEASTERLY LINE SOUTH 40°38'58" WEST, 23.00 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE CONTINUING SOUTH 40°38'58" WEST 43.39 FEET;

THENCE NORTH 49°21'02" WEST, 26.02 FEET;

THENCE NORTH 40°38'58" EAST 43.39 FEET;

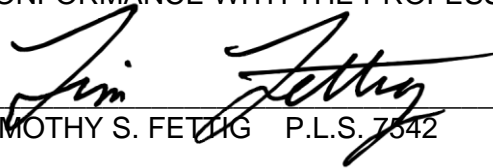
THENCE SOUTH 49°21'02" EAST, 26.02 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCEL 103722-4 CONTAINS A TOTAL GRID AREA 1,129 SQUARE FEET OR 0.026 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "C2", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.

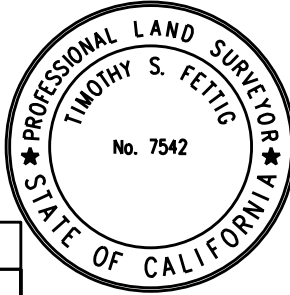

TIMOTHY S. FETTING P.L.S. 7542

2/13/20

DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION



PREPARED BY ME OR UNDER MY DIRECTION:

Tim Fetting
TIMOTHY S. FETTING P.L.S. 7542

2/13/2020

DATE

| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | N 49°22'20" W | 3.00' |
| L2 | N 49°22'20" W | 9.96' |
| L3 | S 40°38'58" W | 23.00' |
| L4 | S 40°38'58" W | 43.39' |
| L5 | N 49°21'02" W | 26.02' |
| L6 | N 40°38'58" E | 43.39' |
| L7 | S 49°21'02" E | 26.02' |
| L8 | S 42°42'15" W | 241.76' |

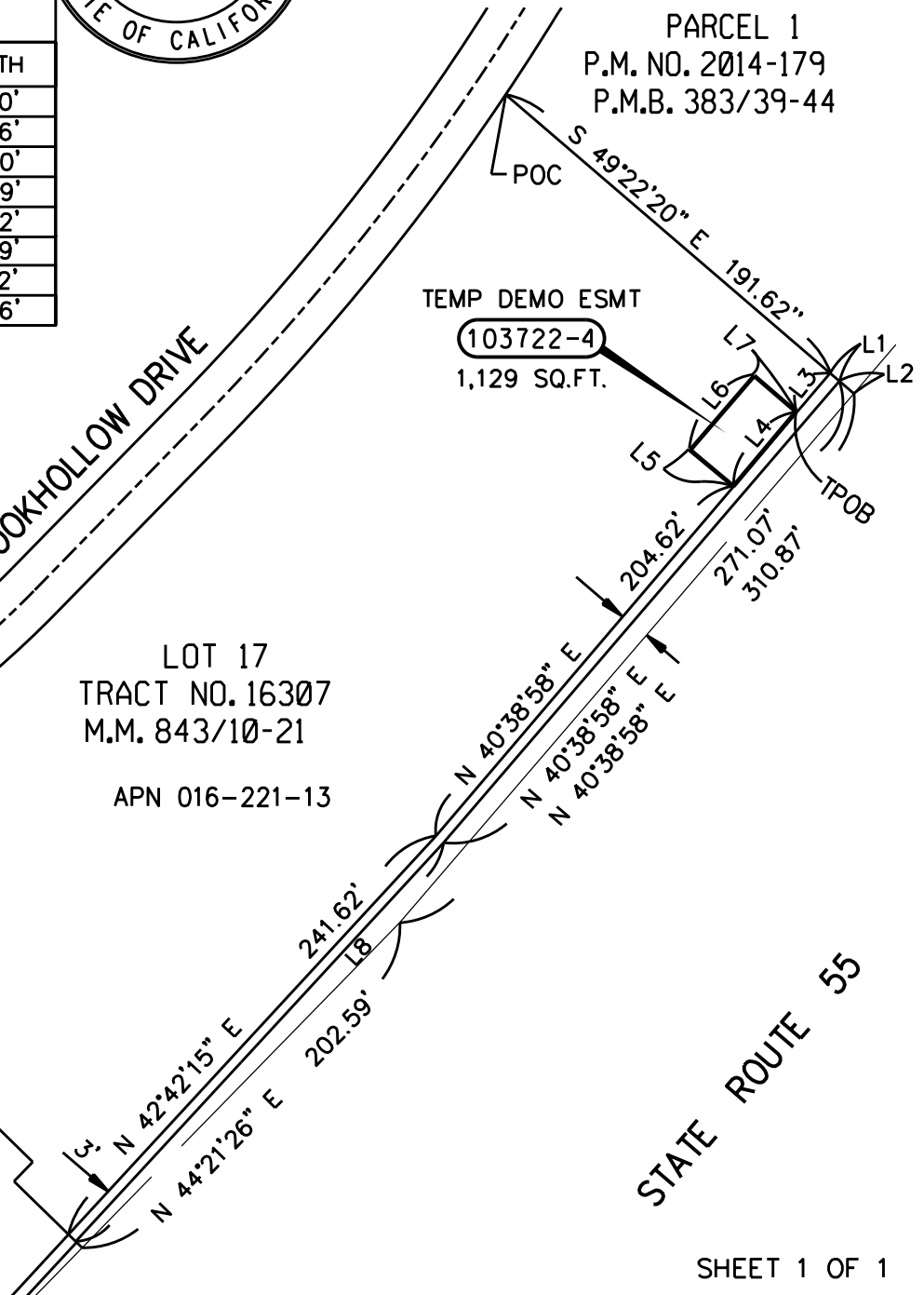


BROOKHOLLOW DRIVE

LOT 17
TRACT NO. 16307
M.M. 843/10-21

APN 016-221-13

LOT 16
TRACT NO. 16307
M.M. 843/10-21



SHEET 1 OF 1

THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).

ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

EXHIBIT "C2"

103722-4

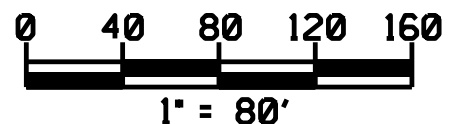


EXHIBIT "D"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION**

Assessor Parcel No.: 016-221-13

Caltrans Parcel No.: 103722-5

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "D1" and depicted in Exhibit "D2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of two (2) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining fifty-eight (58) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Access to the TCE area by OCTA shall be from the public right of way.
- Improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted. Functionally equivalent pavement material will be installed by OCTA to restore the TCE area to a similar condition that existed prior to commencement of the construction activities.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "D1"
LEGAL DESCRIPTION

CALTRANS PARCEL NO. 103722-5

TEMPORARY DEMOLITION EASEMENT

APN 016-221-13

THAT PORTION OF LOT 17 OF TRACT NO. 16307, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 843, PAGES 10 THROUGH 21, OF MISCELLANEOUS MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST NORTHERLY CORNER OF SAID LOT 17;

THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 17 SOUTH 49°22'20" EAST, 194.62 FEET;

THENCE LEAVING SAID NORTHEASTERLY LINE SOUTH 40°38'58" WEST, 271.07 FEET;

THENCE SOUTH 42°42'15" WEST, 241.76 FEET TO THE GENERALLY SOUTHWESTERLY LINE OF SAID LOT 17;

THENCE ALONG SAID GENERALLY SOUTHWESTERLY LINE NORTH 45°39'03" WEST, 3.00 FEET;

THENCE LEAVING SAID GENERALLY SOUTHWESTERLY LINE NORTH 42°42'15" EAST, 63.48 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE CONTINUING NORTH 42°42'15" EAST, 40.55 FEET;

THENCE NORTH 49°14'23" WEST, 22.01 FEET;

THENCE SOUTH 42°42'15" WEST, 40.59 FEET;

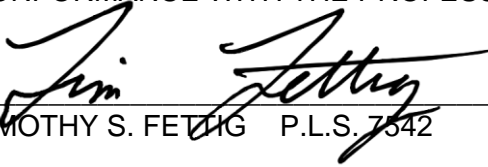
THENCE SOUTH 49°20'46" EAST, 22.01 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCEL 103721-6 CONTAINS A TOTAL GRID AREA 893 SQUARE FEET OR 0.020 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "D2", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.

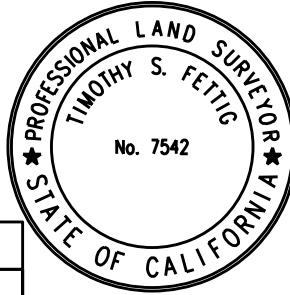

TIMOTHY S. FETTING P.L.S. 7542

2/13/20

DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION



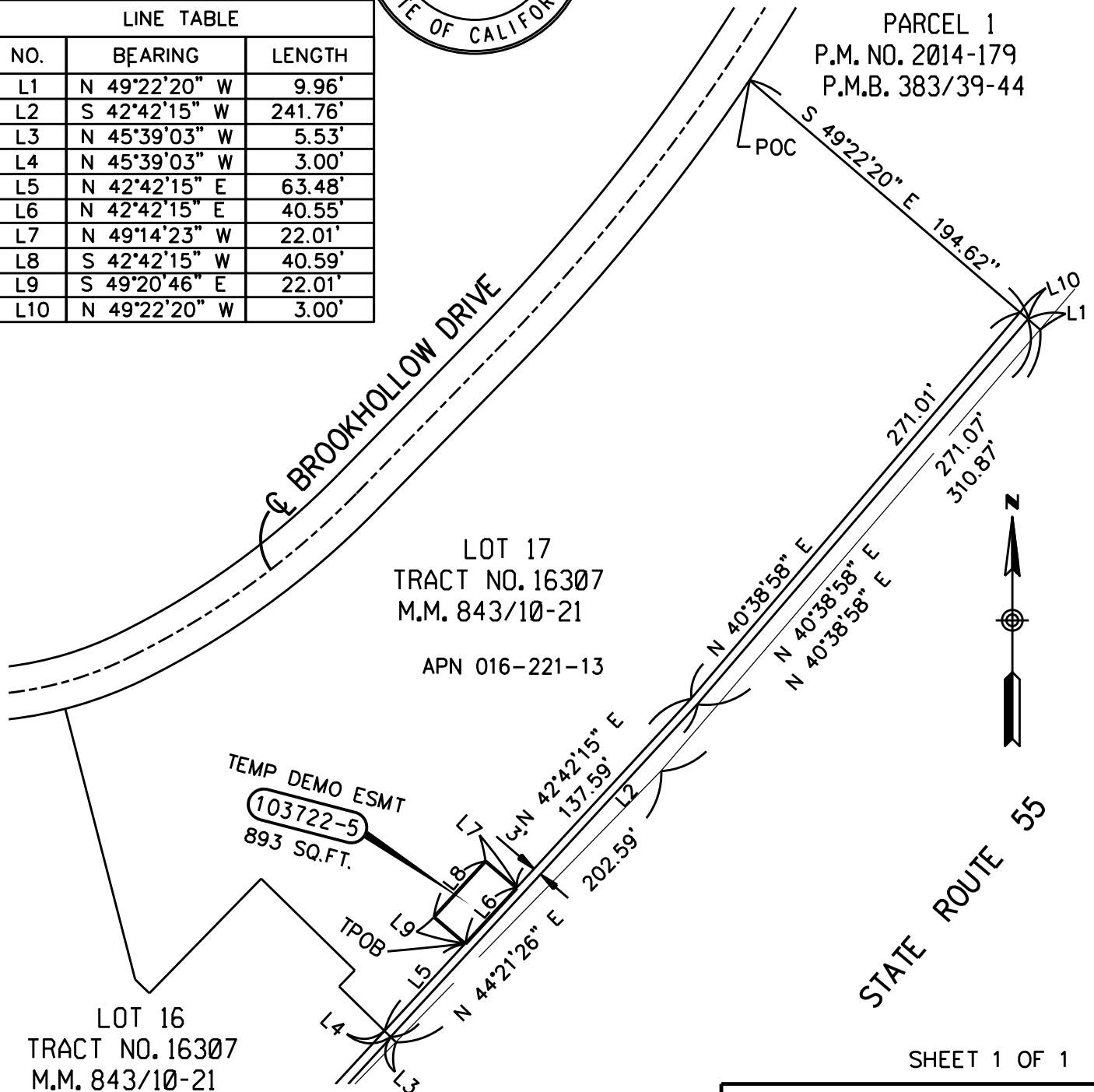
PREPARED BY ME OR UNDER MY DIRECTION:

Tim Fetting
TIMOTHY S. FETTING P.L.S. 7542

2/13/2020

DATE

| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | N 49°22'20" W | 9.96' |
| L2 | S 42°42'15" W | 241.76' |
| L3 | N 45°39'03" W | 5.53' |
| L4 | N 45°39'03" W | 3.00' |
| L5 | N 42°42'15" E | 63.48' |
| L6 | N 42°42'15" E | 40.55' |
| L7 | N 49°14'23" W | 22.01' |
| L8 | S 42°42'15" W | 40.59' |
| L9 | S 49°20'46" E | 22.01' |
| L10 | N 49°22'20" W | 3.00' |



SHEET 1 OF 1

THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).
ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

EXHIBIT "D2"

103722-5

0 40 80 120 160

1" = 80'

EXHIBIT "E"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION**

Assessor Parcel No.: 016-221-13

Caltrans Parcel No.: 103722-6

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "E1" and depicted in Exhibit "E2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of twenty-four (24) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining thirty-six (36) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Reasonable pedestrian access to the property shall be maintained at all times.
- Access to the TCE area by OCTA shall be from the public right of way.
- Improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "E1"
LEGAL DESCRIPTION

CALTRANS PARCEL NO. 103722-6

TEMPORARY CONSTRUCTION EASEMENT

APN 016-221-13

THAT PORTION OF LOT 17 OF TRACT NO. 16307, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 843, PAGES 10 THROUGH 21, OF MISCELLANEOUS MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST NORTHERLY CORNER OF SAID LOT 17;

THENCE ALONG THE NORTHEASTERLY LINE OF SAID LOT 17 SOUTH 49°22'20" EAST, 194.62 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE LEAVING SAID NORTHEASTERLY LINE SOUTH 40°38'58" WEST, 271.07 FEET;

THENCE SOUTH 42°42'15" WEST, 127.95 FEET;

THENCE NORTH 47°17'45" WEST, 1.00 FEET;

THENCE SOUTH 42°42'15" WEST, 5.00 FEET;

THENCE SOUTH 47°17'45" EAST, 1.00 FEET;

THENCE SOUTH 42°42'15" WEST, 108.81 FEET TO THE GENERALLY SOUTHWESTERLY LINE OF SAID LOT 17;

THENCE ALONG SAID GENERALLY SOUTHWESTERLY LINE NORTH 45°39'03" WEST, 3.00 FEET;

THENCE LEAVING SAID GENERALLY SOUTHWESTERLY LINE NORTH 42°42'15" EAST, 241.62 FEET;

THENCE NORTH 40°38'58" EAST, 271.01 FEET TO SAID NORTHEASTERLY LINE;

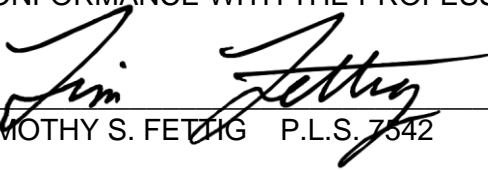
THENCE ALONG SAID NORTHEASTERLY LINE SOUTH 49°22'20" EAST, 3.00 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCEL 103721-6 CONTAINS A TOTAL GRID AREA 1,533 SQUARE FEET OR 0.035 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "E2", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.


TIMOTHY S. FETTING P.L.S. 7542

2/26/20

DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION



PREPARED BY ME OR UNDER MY DIRECTION:

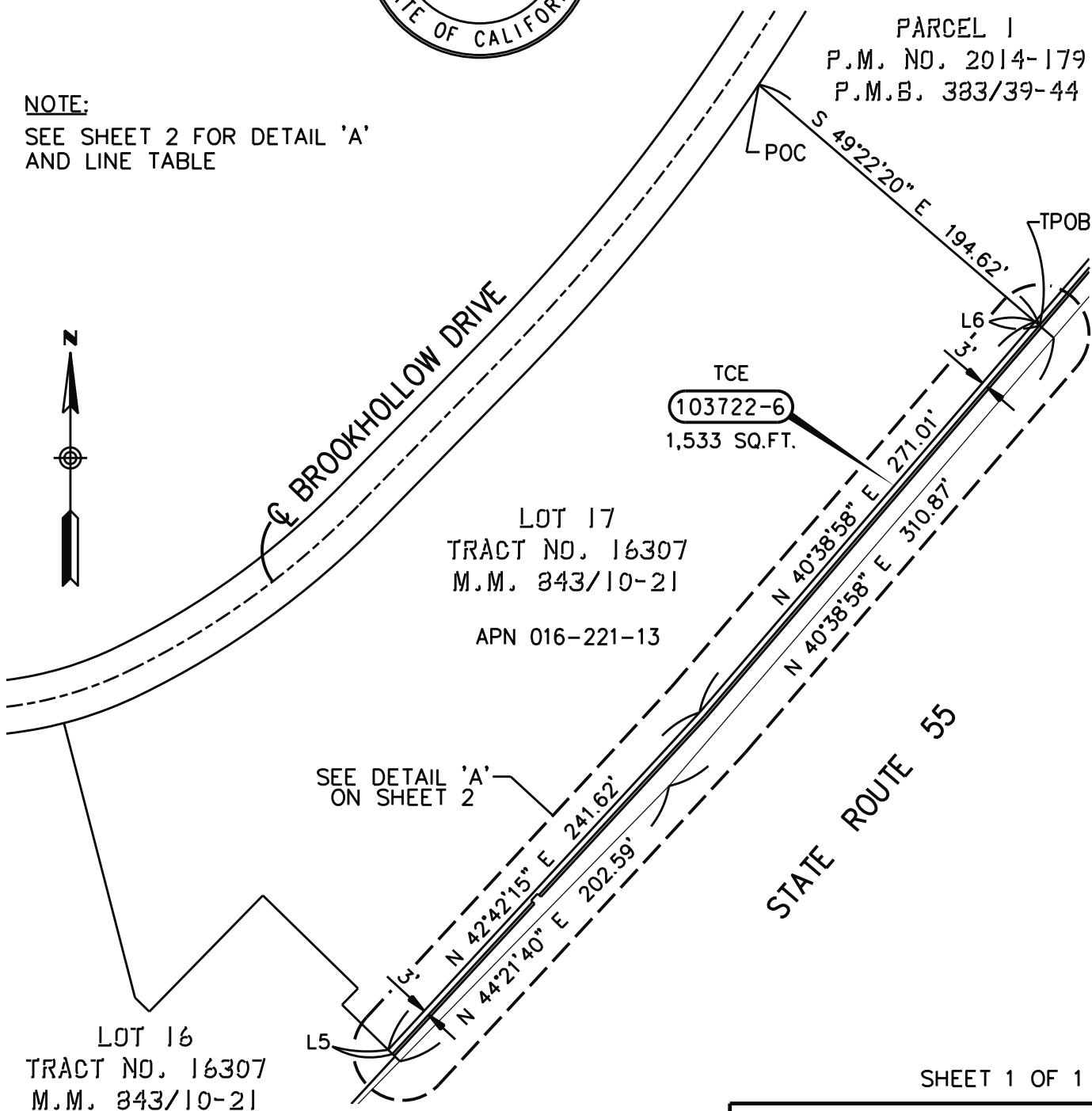
Tim Fetting
TIMOTHY S. FETTING P.L.S. 7542

2/26/2020

DATE

NOTE:

SEE SHEET 2 FOR DETAIL 'A'
AND LINE TABLE



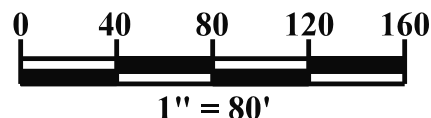
SHEET 1 OF 1

THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).

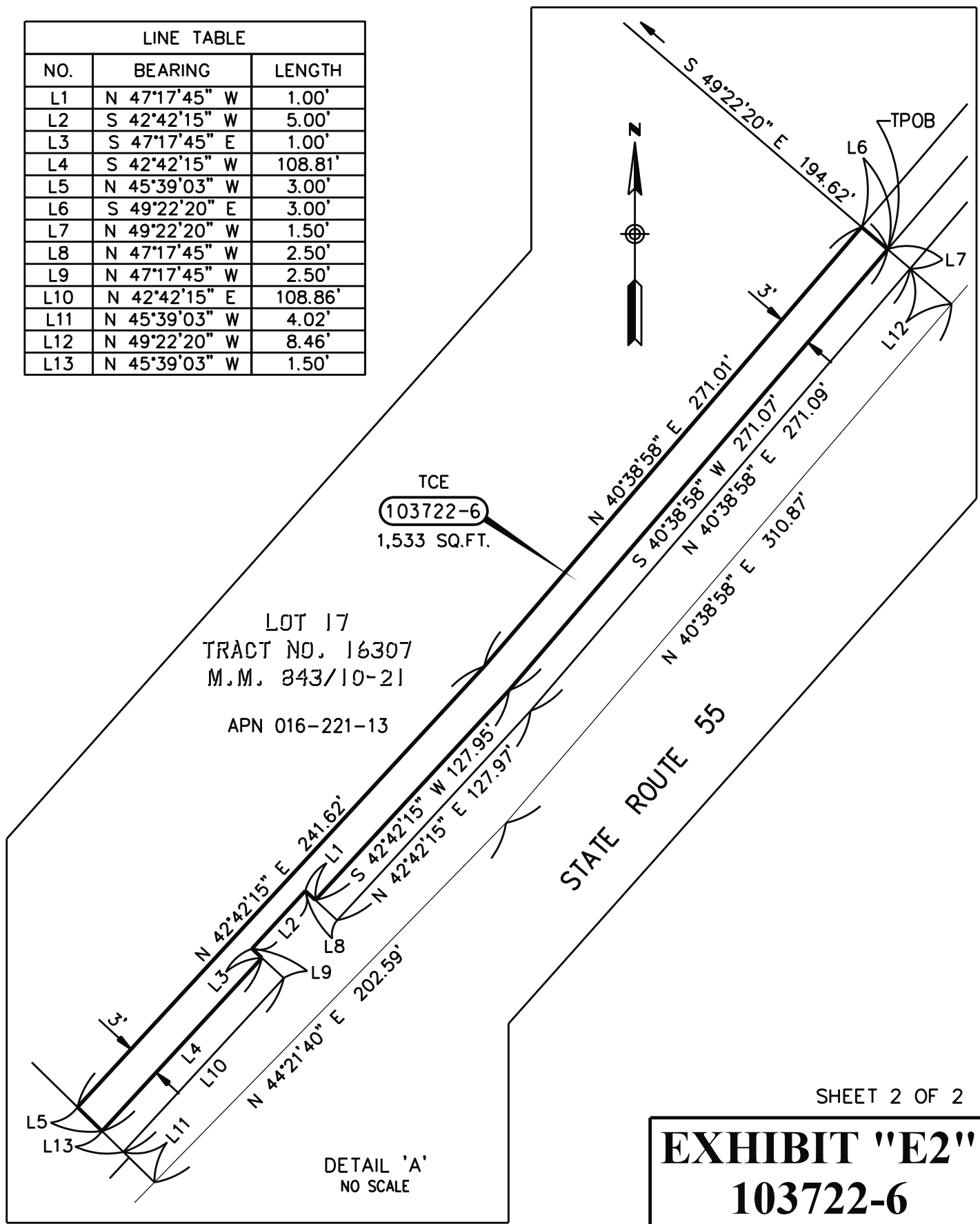
ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

EXHIBIT "E2"

103722-6



| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | N 47°17'45" W | 1.00' |
| L2 | S 42°42'15" W | 5.00' |
| L3 | S 47°17'45" E | 1.00' |
| L4 | S 42°42'15" W | 108.81' |
| L5 | N 45°39'03" W | 3.00' |
| L6 | S 49°22'20" E | 3.00' |
| L7 | N 49°22'20" W | 1.50' |
| L8 | N 47°17'45" W | 2.50' |
| L9 | N 47°17'45" W | 2.50' |
| L10 | N 42°42'15" E | 108.86' |
| L11 | N 45°39'03" W | 4.02' |
| L12 | N 49°22'20" W | 8.46' |
| L13 | N 45°39'03" W | 1.50' |



SHEET 2 OF 2

EXHIBIT "E2"
103722-6

RESOLUTION NO. 2021-006

A RESOLUTION OF THE ORANGE COUNTY TRANSPORTATION AUTHORITY FINDING AND DETERMINING THAT THE PUBLIC INTEREST AND NECESSITY REQUIRE THE ACQUISITION BY EMINENT DOMAIN OF INTERESTS IN CERTAIN REAL PROPERTY FOR PUBLIC USE AND AUTHORIZING AND DIRECTING CONDEMNATION OF PORTIONS OF ASSESSOR PARCEL NUMBER: PARENT PARCEL 016-221-12 (CONDOMINIUM ASSESSOR PARCEL NUMBERS 932-11-138 THROUGH 932-11-145).

WHEREAS, the Orange County Transportation Authority (the "Authority") is undertaking the State Route 55 ("SR-55") Improvement Project between Interstate 405 and Interstate 5, a right-of-way for freeway purposes and all public uses appurtenant thereto (the "Project"); and

WHEREAS, the Project is intended to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

WHEREAS, the Project requires the acquisition of property interests from public and private parties; and

WHEREAS, the Project will be a transportation improvement project serving the public interest; and

WHEREAS, subsection (a) of the California Public Utilities Code section 130220.5, authorizes the Authority to exercise the power of eminent domain to acquire these property interests for public use by condemnation; and

WHEREAS, portions of the real property located at 1540-1554 E. Warner Avenue, in the City of Santa Ana, California (the "Subject Property") are required for the Project. The specific portions of the Subject Property required for the Project are one partial fee acquisition as described and depicted in Exhibit "A" attached hereto, one highway easement interest as legally described and depicted in Exhibit "B" attached hereto and a temporary construction easement as legally described and depicted in Exhibit "C" attached hereto (the "Property Interests"); and

WHEREAS, if such access currently exists, reasonable vehicular and pedestrian access to and from the Subject Property will be maintained at all times; and

WHEREAS, the Authority communicated an offer of compensation to the owner or owners of record for the acquisition of the Property Interests; and

WHEREAS, in accordance with section 1245.235 of the California Code of Civil Procedure on January 8, 2021, the Authority mailed a Notice of Hearing on the Intent of the Authority to Adopt a Resolution of Necessity for acquisition by eminent domain of the Property Interests. The Notice of Hearing was mailed to the listed address of all persons whose names appear on the last equalized county assessment roll as having an interest in the Subject Property; and

WHEREAS, the Authority provided written notice to the City of Santa Ana as required by subsection (c) of California Public Utilities Code section 130220.5; and

WHEREAS, the Project, including all amendments thereto, together with the staff reports, environmental documents and all other evidence presented to the Authority's Board of Directors at the times the Project and the amendments thereto were adopted, are incorporated herein by this reference and made a part hereof as though fully set forth herein; and

WHEREAS, pursuant to section 1245.235 of the California Code of Civil Procedure, the Authority scheduled a hearing for February 8, 2021 at 9:00 a.m. and gave to each person whose property is to be acquired by eminent domain and whose name and address appears on the last equalized county assessment roll a reasonable opportunity to be heard; and

WHEREAS, said hearing has been held by the Authority's Board of Directors; and

WHEREAS, the Authority may adopt a Resolution of Necessity pursuant to section 1240.040 of the California Code of Civil Procedure.

NOW, THEREFORE, BE IT RESOLVED, by at least a two-thirds vote of the Authority's Board of Directors under Code of Civil Procedure sections 1240.030 and 1245.230, the Authority does hereby find and determine as follows:

Section 1. Incorporation of Findings and Recitals. The above findings and recitals are true and correct and are incorporated herein in full by this reference.

Section 2. Compliance with California Code of Civil Procedure. There has been compliance by the Authority with the requirements of section 1245.235 of the California Code of Civil Procedure regarding notice and hearing.

Section 3. Public Use. The public use for which the Property Interests are to be acquired is for the construction and future maintenance of the Project, a public transportation improvement, as more fully described hereinabove. Subsection (a) of California Public Utilities

Code section 130220.5 authorizes the Authority to acquire by eminent domain property and interests in property necessary for such purpose and for all uses incidental or convenient thereto.

Section 4. Necessity.

(a) The proposed Project is necessary to enhance road safety, increase freeway capacity, and improve traffic and interchange operations by adding travel and high occupancy vehicle (HOV) lanes in each direction; and

(b) The public interest and necessity require the acquisition by eminent domain proceedings of the Property Interests.

Section 5. Description of Property Interests. The Property Interests sought to be acquired are more particularly described and depicted in Exhibits "A", "B" and "C" attached hereto and incorporated herein by reference.

Section 6. Findings. The Authority hereby finds, determines and declares each of the following:

(a) The public interest and necessity require the proposed Project;

(b) The proposed Project is planned or located in the manner that will be most compatible with the greatest public good and least private injury;

(c) The Property Interests sought to be acquired are necessary for the proposed Project; and

(d) The offer required by section 7267.2 of the California Government Code has been made to the owner or owners of record.

Section 7. Existing Public Use(s). Pursuant to sections 1240.510 and 1240.610 of the Code of Civil Procedure, to the extent that any of the Property Interests are already devoted to a public use, the use proposed by this Project is a more necessary public use than the use to which the Property Interests, or any portion thereof, are already devoted, or, in the alternative, is a compatible public use which will not unreasonably interfere with or impair the continuance of the public use to which the Property Interests, or any portion thereof, are already devoted.

Section 8. Acquisition of Substitute Property. To the extent portions of the real property to be acquired for the Project are currently devoted to or held for some public use, the Authority intends to acquire substitute property pursuant to California Code of Civil Procedure sections 1240.320 and 1240.330. The requirements of said Code sections have been satisfied and the acquisition of said substitute property is necessary for the Project. The substitute property may be conveyed by the Authority to the owner(s) of the necessary property.

Section 9. Authority to Exercise Eminent Domain. The Authority is hereby authorized and empowered to acquire the Property Interests, including the improvements thereon, if any, by eminent domain for the proposed Project.

Section 10. Further Activities. The Authority's legal counsel ("Counsel") is hereby authorized and empowered to acquire the Property Interests in the name of and on behalf of the Authority by eminent domain, and is authorized to institute and prosecute such legal proceedings as may be required in connection therewith. Counsel is further authorized to take such steps as may be permitted and required by law, and to make such security deposits as may be required by law and/or order of court, to permit the Authority to take possession of the Property Interests at the earliest possible time.

Section 11. Effective Date. This Resolution of Necessity shall take effect upon adoption.

PASSED, APPROVED, and ADOPTED on this _____ day of _____, 2021.

ANDREW DO, CHAIRMAN
ORANGE COUNTY
TRANSPORTATION AUTHORITY

APPROVED AS TO FORM:

JAMES M. DONICH
GENERAL COUNSEL

ATTEST:

I, Andrea West, Interim Clerk of the Board of Directors of the Orange County Transportation Authority, do hereby certify that the foregoing Resolution No. 2021-006 by the following votes:

AYES:

NOES:

ABSENT:

ANDREA WEST
INTERIM CLERK OF THE BOARD

EXHIBIT "A"

EXHIBIT "A"
LEGAL DESCRIPTION

Parcels 103721-1, 103761-1 & 103762-1: FEE

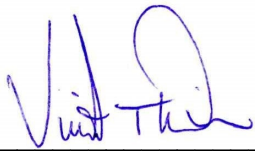
That portion of Parcel 1, in the City of Santa Ana, County of Orange, State of California, as shown on Parcel Map No. 2014-179 filed in book 383, Pages 39 through 44 of Parcel Maps, in the office of the County Recorder of said County, said portion also being a part of the common area belonging to Units 1540 A & B, 1544 A & B, 1548 A & B and 1554 A & B, as shown and described on that certain Condominium Plan recorded September 24, 2015 as Instrument No. 2015000490092 of Official Records in the office of said County Recorder, lying southeasterly of the following described line:

BEGINNING at a point on that certain course shown as having a bearing of North 49°21'29" West and a length of 204.53 in the southwesterly line of said Parcel 1, distant thereon South 49°22'20" East 196.12 feet from the northwesterly terminus of said certain course; thence leaving said southwesterly line, North 40°38'58" East 821.94 feet; thence North 43°30'43" East 39.03 feet to the northeasterly line of said Parcel 1.

This conveyance is made for the purpose of a freeway and the GRANTOR hereby releases and relinquishes to the GRANTEE any and all abutter's rights including access rights, appurtenant to GRANTOR's remaining property, in and to the freeway.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyors' Act.

Signature: 
Vincent T. Davis

Date: 21 Jan 2021

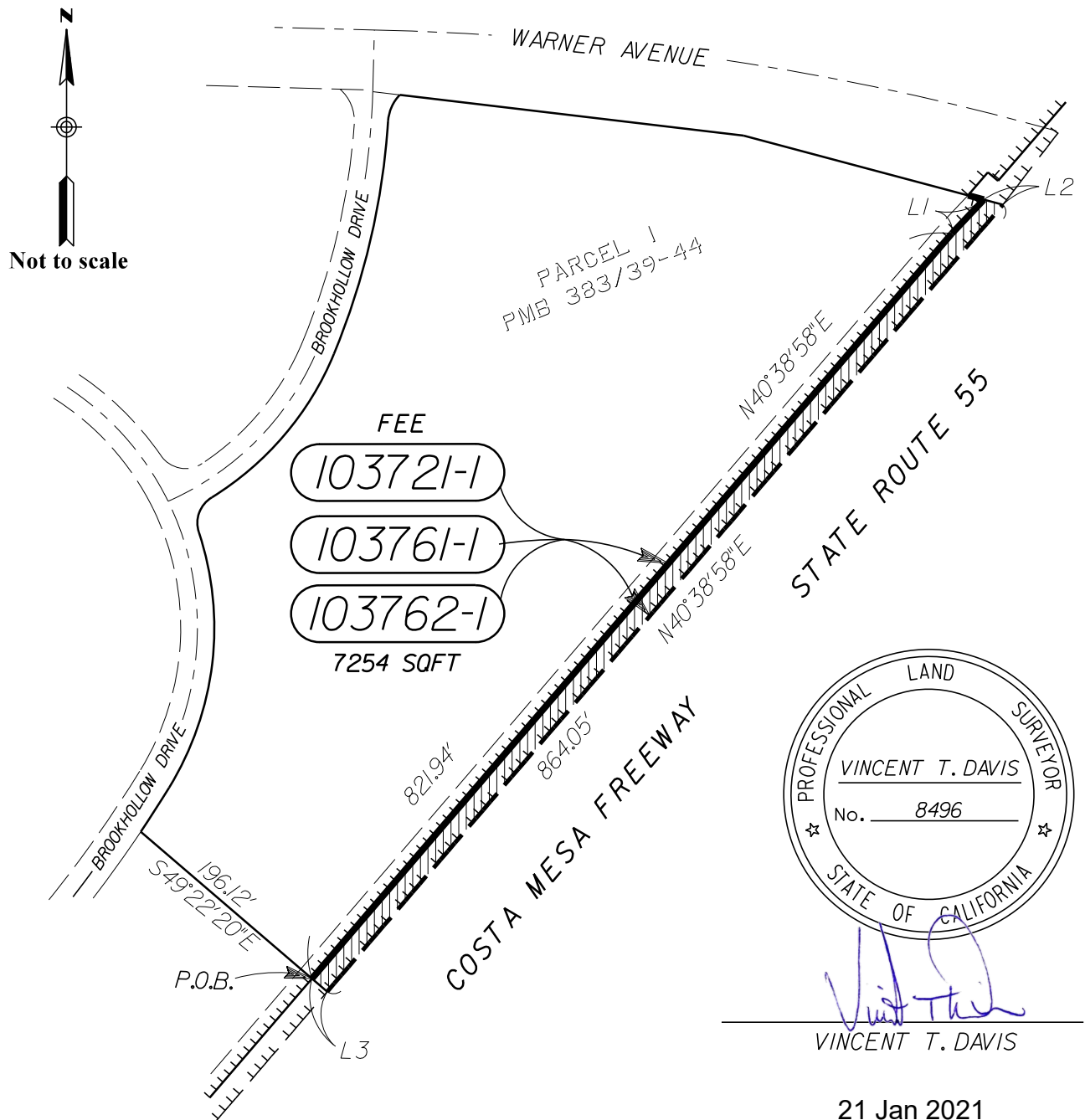


LEGEND:

| | |
|--------|---------------------------|
| | = ACCESS PROHIBITED |
| | = SUPERSEDED RIGHT OF WAY |
| | = PROPOSED RIGHT OF WAY |
| P.O.B. | = POINT OF BEGINNING |

LINE DATA:

| NO. | BEARING | DISTANCE |
|-----|-------------|----------|
| L1 | N43°30'43"E | 39.03' |
| L2 | S75°03'22"E | 7.22' |
| L3 | N49°22'20"W | 8.46' |



21 Jan 2021

DATE

EXHIBIT "A1"

(Page 1 of 1)

COUNTY: ORA
RTE: 55
P.M.: 8.4

NOT TO SCALE
DATE: JAN 2021

PARCELS:
103721-1
103761-1
103762-1

EXHIBIT "B"

HIGHWAY EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION
Assessor Parcel No.: 932-111-38, 932-111-39 and 932-111-140 Thru 932-111-45
Caltrans Parcel No.: 103721-2, 103761-2, and 103762-2

This non-exclusive highway easement shall be in, on, over, under, and across that certain real property described in Exhibit "B" attached hereto, subject to the rights and limitations described herein ("Highway Easement"). The Highway Easement shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") for purposes of constructing, compacting, maintaining, removing, and replacing, as applicable, compacted material thereto in connection with the construction of the SR 55 Improvement Project.

The owner and occupant(s) of the real property subject to the Highway Easement shall not landscape or construct any improvements within the easement area described in the attached Exhibit "B". OCTA will install compacted material, within that portion of the Highway Easement area affected by OCTA's work. The owner and occupant(s) shall not excavate within the Highway Easement area or disturb any compacted material installed within the Highway Easement area. The owner and occupant(s) of the real property subject to the Highway Easement will have the right to use the surface of the easement area described in the attached Exhibit "B" for access or automobile parking purposes, once the compacted material is in place.

The rights and obligations of OCTA and the owner of the real property subject to the Highway Easement shall run with the land and be binding upon and/or inure to the benefit of OCTA's and the property owner's respective heirs, successors and assigns.

OCTA expressly reserves the right to convey, transfer, or assign the Highway Easement subject to the same rights and limitations described herein.

EXHIBIT "B"
LEGAL DESCRIPTION

Parcels 103721-2, 103761-2, & 103762-2: HIGHWAY EASEMENT

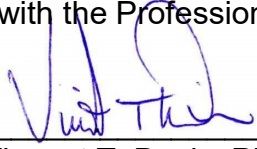
That portion of Parcel 1, in the City of Santa Ana, County of Orange, State of California, as shown on Parcel Map No. 2014-179 filed in book 383, Pages 39 through 44 of Parcel Maps, in the office of the County Recorder of said County, said portion also being a part of the common area belonging to Units 1540 A & B, 1544 A & B, 1548 A & B and 1554 A & B, as shown and described on that certain Condominium Plan recorded September 24, 2015 as Instrument No. 2015000490092 of Official Records in the office of said County Recorder, lying southeasterly of the following described line:

BEGINNING at a point on that certain course shown as having a bearing of North 49°21'29" West and a length of 204.53 in the southwesterly line of said Parcel 1, distant thereon South 49°22'20" East 194.62 feet from the northwesterly terminus of said certain course; thence leaving said southwesterly line, North 40°38'58" East 821.98 feet; thence North 43°30'43" East 38.25 feet to the northeasterly line of said Parcel 1.

EXCEPTING THEREFROM that portion lying southeasterly of the following described line: **BEGINNING** at a point on that certain course shown as having a bearing of North 49°21'29" West and a length of 204.53 in the southwesterly line of said Parcel 1, distant thereon South 49°22'20" East 196.12 feet from the northwesterly terminus of said certain course; thence leaving said southwesterly line, North 40°38'58" East 821.94 feet; thence North 43°30'43" East 39.03 feet to the northeasterly line of said Parcel 1.

The bearings shown herein are based on the California Coordinate System of 1983, Zone VI, North American Datum of 1983 (1991.35 epoch). The distances shown herein are grid distances. Ground distances may be obtained by dividing grid distances by the combination factor of 0.99997834.

This real property description has been prepared by me, or under my direction, in conformance with the Professional Land Surveyors' Act.

Signature: 
Vincent T. Davis, PLS

Date: 21 Jan 2021

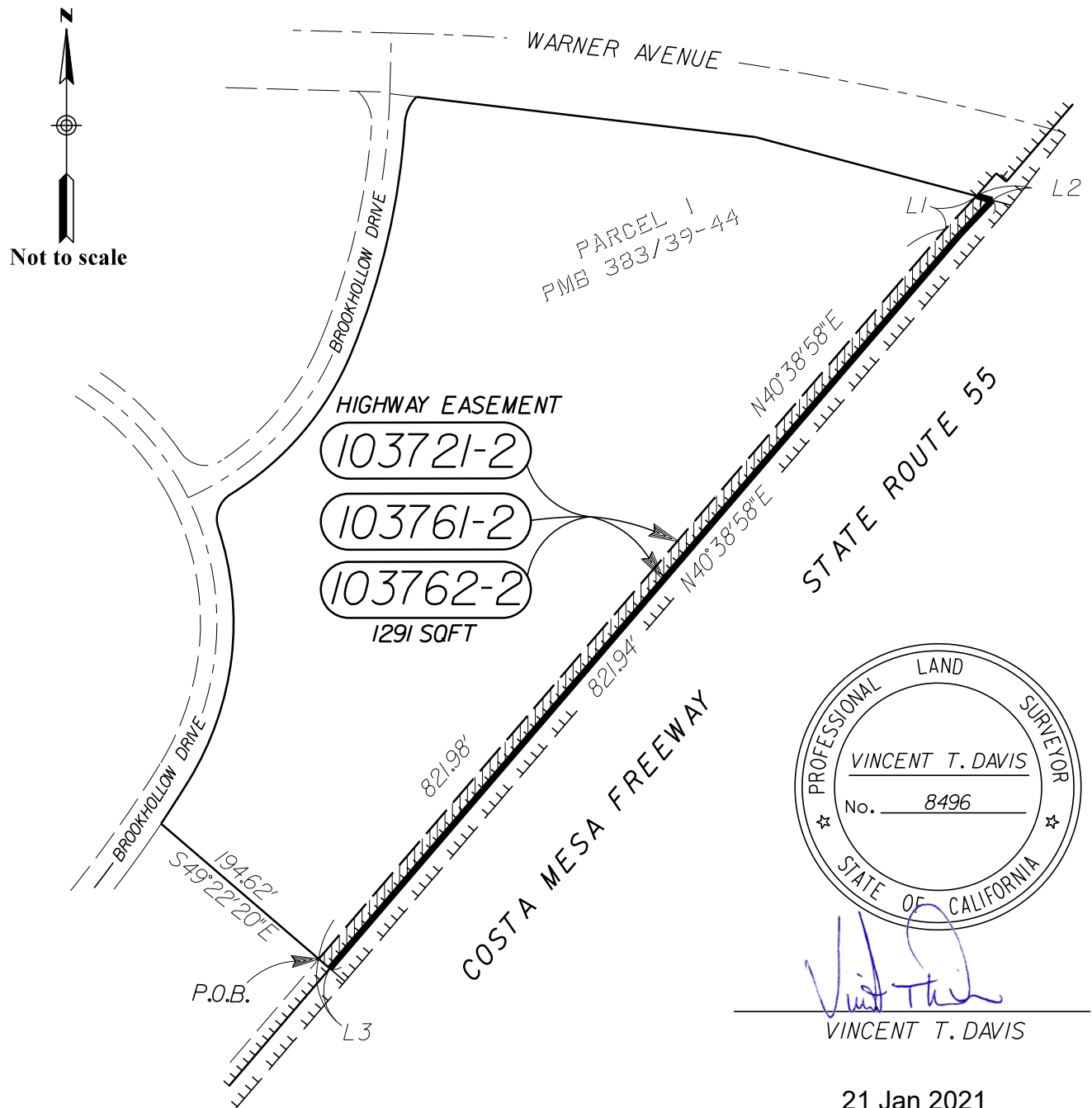


LEGEND:

| | |
|--------|---------------------------|
| | = ACCESS PROHIBITED |
| | = SUPERSEDED RIGHT OF WAY |
| | = PROPOSED RIGHT OF WAY |
| P.O.B. | = POINT OF BEGINNING |

LINE DATA:

| NO. | BEARING | DISTANCE |
|-----|-------------|----------|
| L1 | N43°30'43"E | 38.25' |
| L2 | S75°03'22"E | 1.71' |
| L3 | N49°22'20"W | 1.50' |



Vincent T. Davis

VINCENT T. DAVIS

21 Jan 2021

DATE

EXHIBIT "B1"

(Page 1 of 1)

COUNTY: ORA
RTE: 55
P.M.: 8.4

NOT TO SCALE
DATE: JAN 2021

PARCELS:
103721-2
103761-2
103762-2

EXHIBIT "C"

**TEMPORARY CONSTRUCTION EASEMENT
ATTACHMENT TO LEGAL DESCRIPTION
Assessor Parcel Nos.: 932-111-38 Thru 932-111-45
Caltrans Parcel No.: 103721-3, 103761-3, and 103762-3**

This temporary construction easement shall be in, on, over, under, and across that certain real property described in Exhibit "C1" and depicted in Exhibit "C2" attached hereto, subject to the rights and limitations set forth herein ("TCE"). The TCE shall be used by the Orange County Transportation Authority and its employees, agents, representatives, contractors, successors and assigns (collectively, "OCTA") in connection with the construction of the SR 55 Improvement Project. The TCE shall be for a period of sixty (60) months, a portion of which shall be exclusive (subject to the Rights and Limitations of Use and Occupancy set forth below) and a portion of which shall be non-exclusive. Specifically, the actual physical construction activities within the TCE area shall be limited to a period of twenty-four (24) consecutive months within the sixty (60) month TCE period (the "Construction Period"). During the Construction Period, OCTA's use and occupancy of the TCE will be exclusive, subject to the Rights and Limitations of Use and Occupancy set forth below. OCTA's use and occupancy of the TCE during the remaining thirty-six (36) months of the TCE period will be non-exclusive.

Rights and Limitations of Use and Occupancy of TCE:

- OCTA shall provide the owner(s) and occupant(s) of the property subject to this TCE a minimum of thirty (30)-days' written notice as to when the Construction Period will commence.
- During the Construction Period, OCTA may place a temporary fence around the TCE area.
- Reasonable pedestrian and vehicular access to the property shall be maintained at all times.
- Access to the TCE area by OCTA shall be from the public right of way.
- Improvements within the TCE area will be removed as needed by OCTA to allow for construction activities. Any and all improvements so removed shall be included in the compensation paid by OCTA for this TCE.
- Prior to the termination of the Construction Period, OCTA will remove from the TCE area all construction equipment and materials, any temporary improvements, and all construction-related debris. The TCE area will be graded and compacted.

OCTA expressly reserves the right to convey, transfer, or assign the TCE subject to the same rights and limitations described herein.

EXHIBIT "C"
LEGAL DESCRIPTION

CALTRANS PARCEL NOS. 103721-3, 103761-3 AND 103762-3

TEMPORARY CONSTRUCTION EASEMENT

THAT PORTION OF PARCEL 1 OF PARCEL MAP NO. 2014-179, IN THE CITY OF SANTA ANA, COUNTY OF ORANGE, STATE OF CALIFORNIA, PER MAP FILED IN BOOK 383, PAGES 39 THROUGH 44, OF PARCEL MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCING AT THE MOST WESTERLY CORNER OF SAID PARCEL 1;

THENCE ALONG THE SOUTHWESTERLY LINE OF SAID PARCEL 1 SOUTH 49°22'20" EAST, 194.62 FEET TO THE **TRUE POINT OF BEGINNING**;

THENCE LEAVING SAID SOUTHWESTERLY LINE NORTH 40°38'58" EAST, 821.98 FEET;

THENCE NORTH 43°30'43" EAST, 38.25 FEET TO THE GENERALLY NORTHERLY LINE OF SAID PARCEL 1;

THENCE ALONG SAID GENERALLY NORTHERLY LINE NORTH 75°03'22" WEST, 5.45 FEET;

THENCE LEAVING SAID GENERALLY NORTHERLY LINE SOUTH 40°38'58" WEST, 857.82 FEET TO SAID SOUTHWESTERLY LINE;

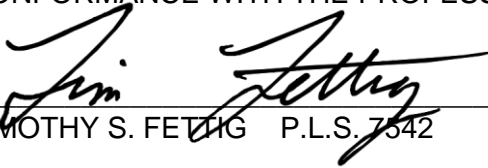
THENCE ALONG SAID SOUTHWESTERLY LINE SOUTH 49°22'20" EAST, 3.00 FEET TO THE TRUE POINT OF BEGINNING.

THE ABOVE DESCRIBED PARCELS CONTAIN A TOTAL GRID AREA 2,611 SQUARE FEET OR 0.060 ACRES, MORE OR LESS.

THE BEARINGS AND DISTANCES USED IN THE ABOVE DESCRIPTION ARE CALIFORNIA COORDINATE SYSTEM (CCS83), ZONE VI, NAD 83 (1991.35 EPOCH OCS ADJUSTMENT), ALL DISTANCES SHOWN ARE GRID, TO OBTAIN GROUND DISTANCES DIVIDE BY 0.99997834.

ALL AS MORE PARTICULARLY SHOWN ON EXHIBIT "C1", ATTACHED HERETO AND MADE A PART HEREOF.

THIS DOCUMENT HAS BEEN PREPARED BY ME, OR UNDER MY DIRECTION, IN CONFORMANCE WITH THE PROFESSIONAL LAND SURVEYOR'S ACT.


TIMOTHY S. FETTING P.L.S. 7542

1/22/21

DATE



PLAT TO ACCOMPANY
LEGAL DESCRIPTION

NOTE:

SEE SHEET 2 FOR
LINE TABLE

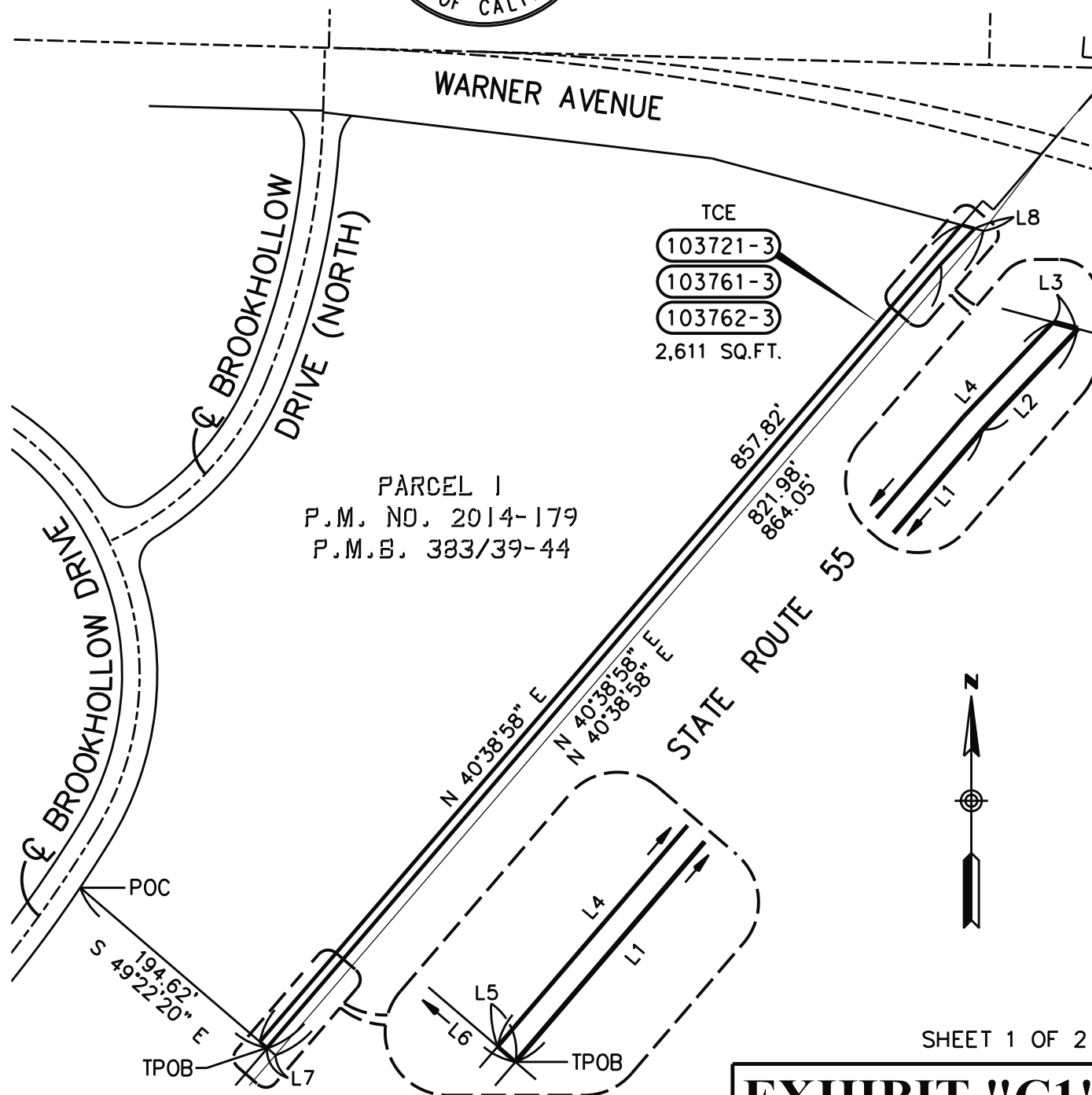


PREPARED BY ME OR UNDER MY DIRECTION:

Tim Fetting
TIMOTHY S. FETTING P.L.S. 7542

1/22/21

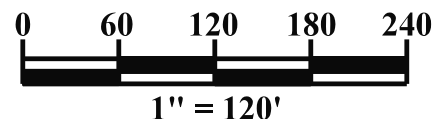
DATE



SHEET 1 OF 2

EXHIBIT "C1"

103721-3 103761-3 103762-3



THE BEARINGS AND DISTANCES SHOWN ARE
CALIFORNIA COORDINATE SYSTEM OF 1983 (CCS83),
ZONE VI, NAD 83 (1991.35 EPOCH
O.C.S. GPS ADJUSTMENT).
ALL DISTANCES SHOWN ARE GRID DISTANCES.
DIVIDE THE GRID DISTANCES SHOWN
BY 0.99997834 TO OBTAIN GROUND DISTANCES.

| LINE TABLE | | |
|------------|---------------|---------|
| NO. | BEARING | LENGTH |
| L1 | N 40°38'58" E | 821.98' |
| L2 | N 43°30'43" E | 38.25' |
| L3 | N 75°03'22" W | 5.45' |
| L4 | S 40°38'58" W | 857.82' |
| L5 | S 49°22'20" E | 3.00' |
| L6 | S 49°22'20" E | 194.62' |
| L7 | N 49°22'20" W | 9.96' |
| L8 | N 75°03'22" W | 8.93' |

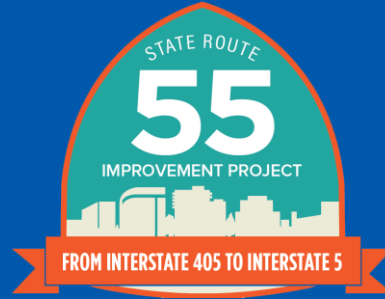
SHEET 2 OF 2

EXHIBIT "C1"

103721-3 103761-3 103762-3

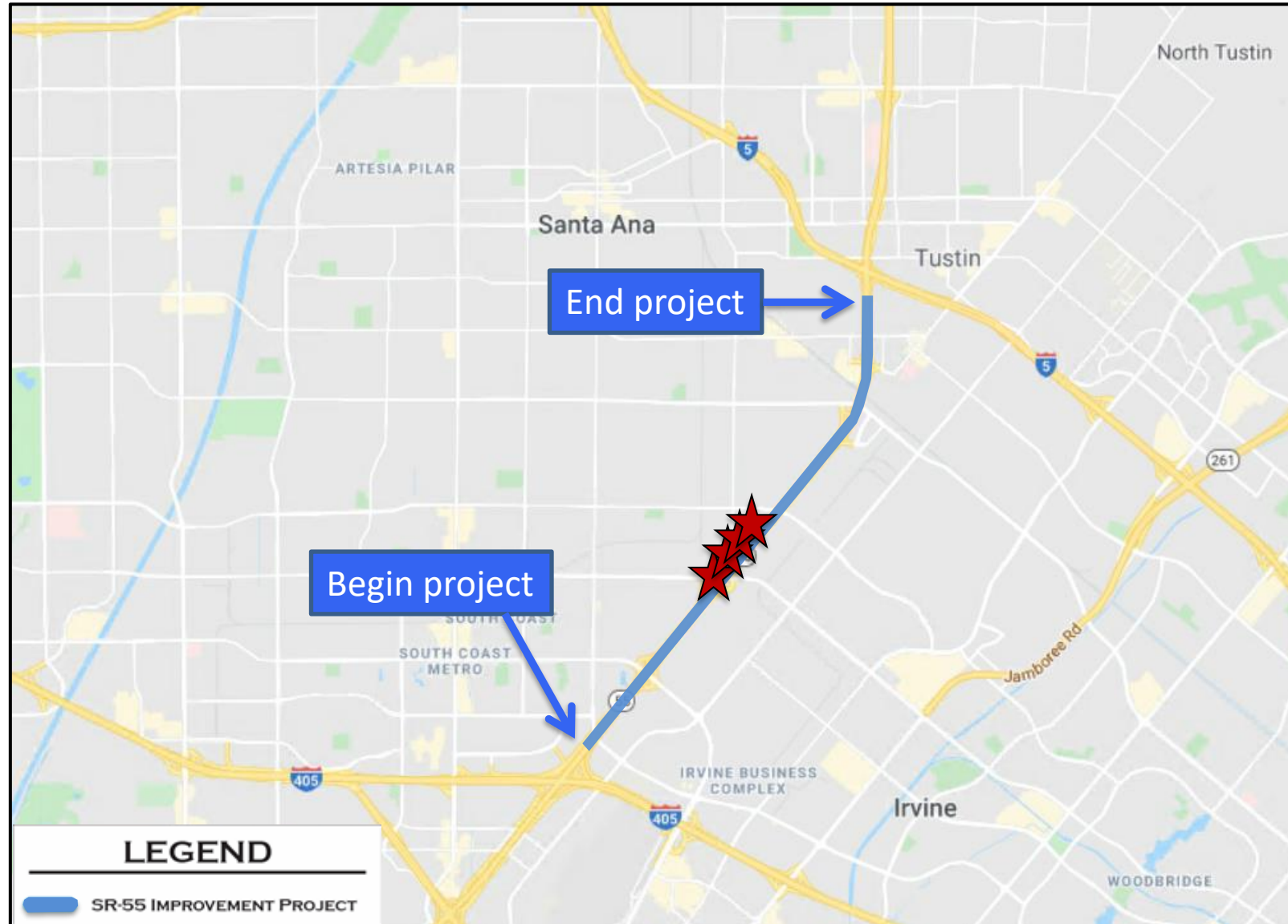
NOTE:

SEE SHEET 1 FOR
BOUNDARY



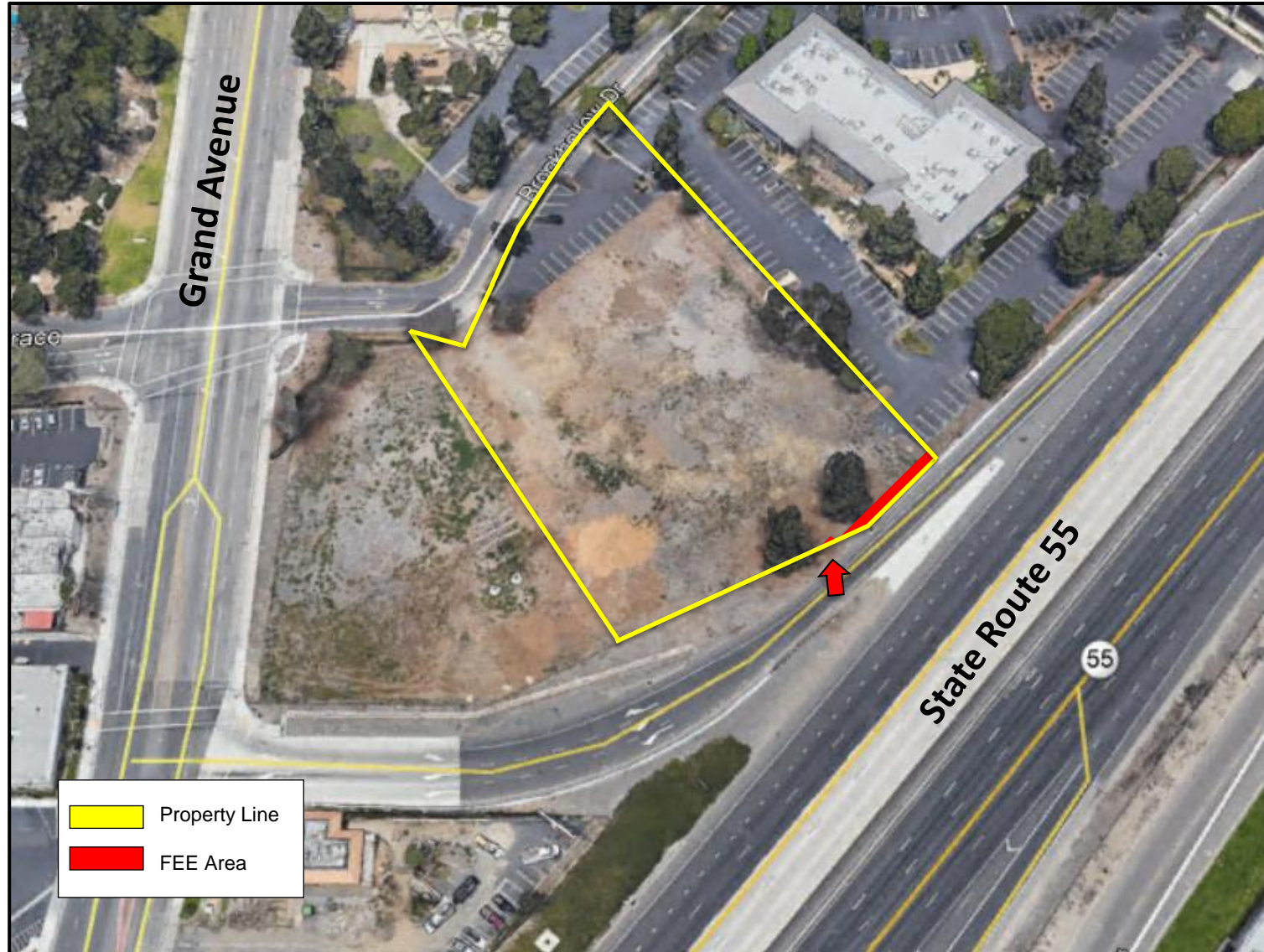
Adopt Resolutions of Necessity for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5

State Route 55 Improvement Project Resolutions of Necessity Locations



Resolution of Necessity No. 2021-003

Moda Rentals



Resolution of Necessity No. 2021-003

Moda Rentals



Resolution of Necessity No. 2021-003

Moda Rentals



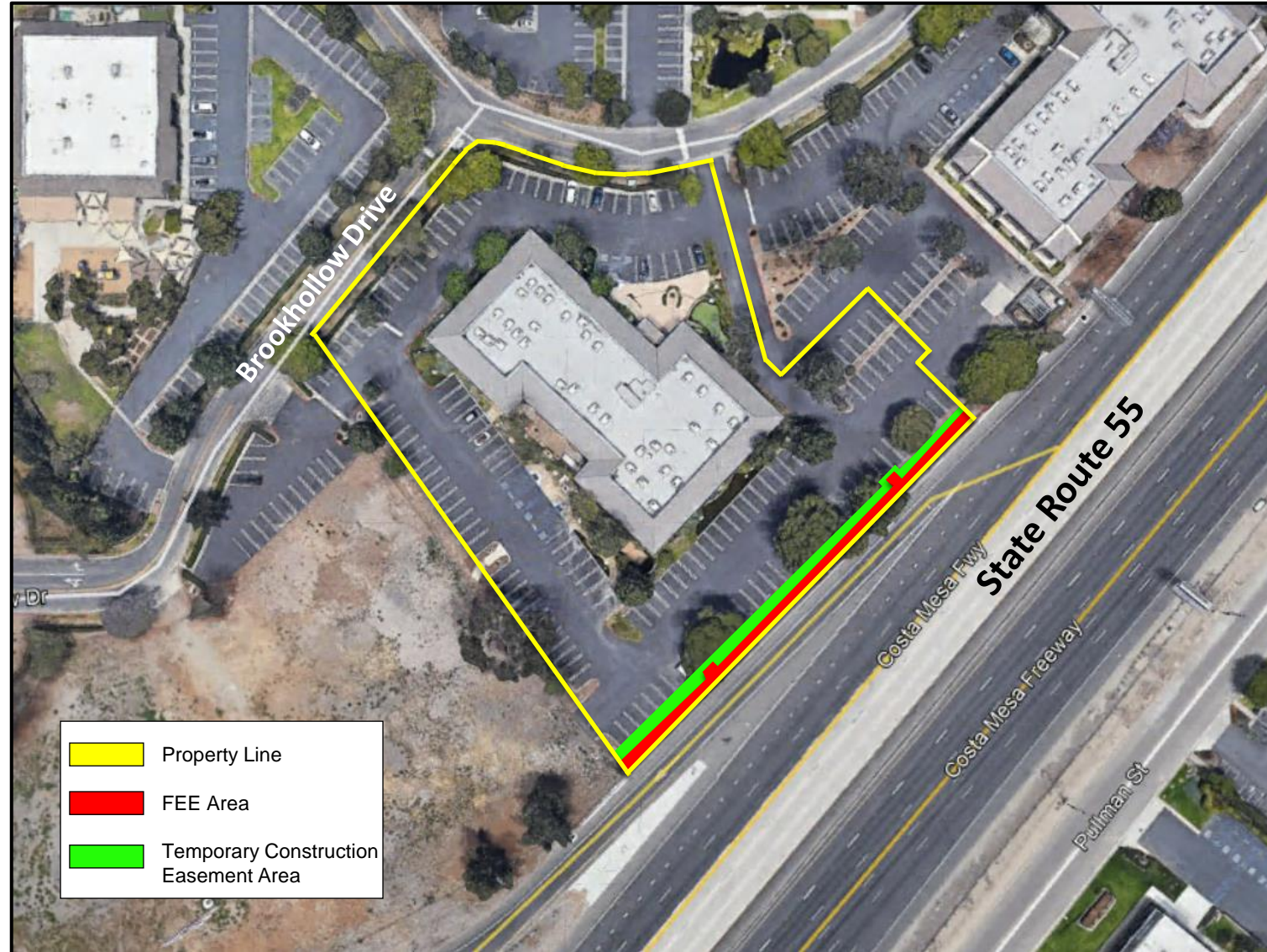
Resolution of Necessity No. 2021-004

DL Investments SA



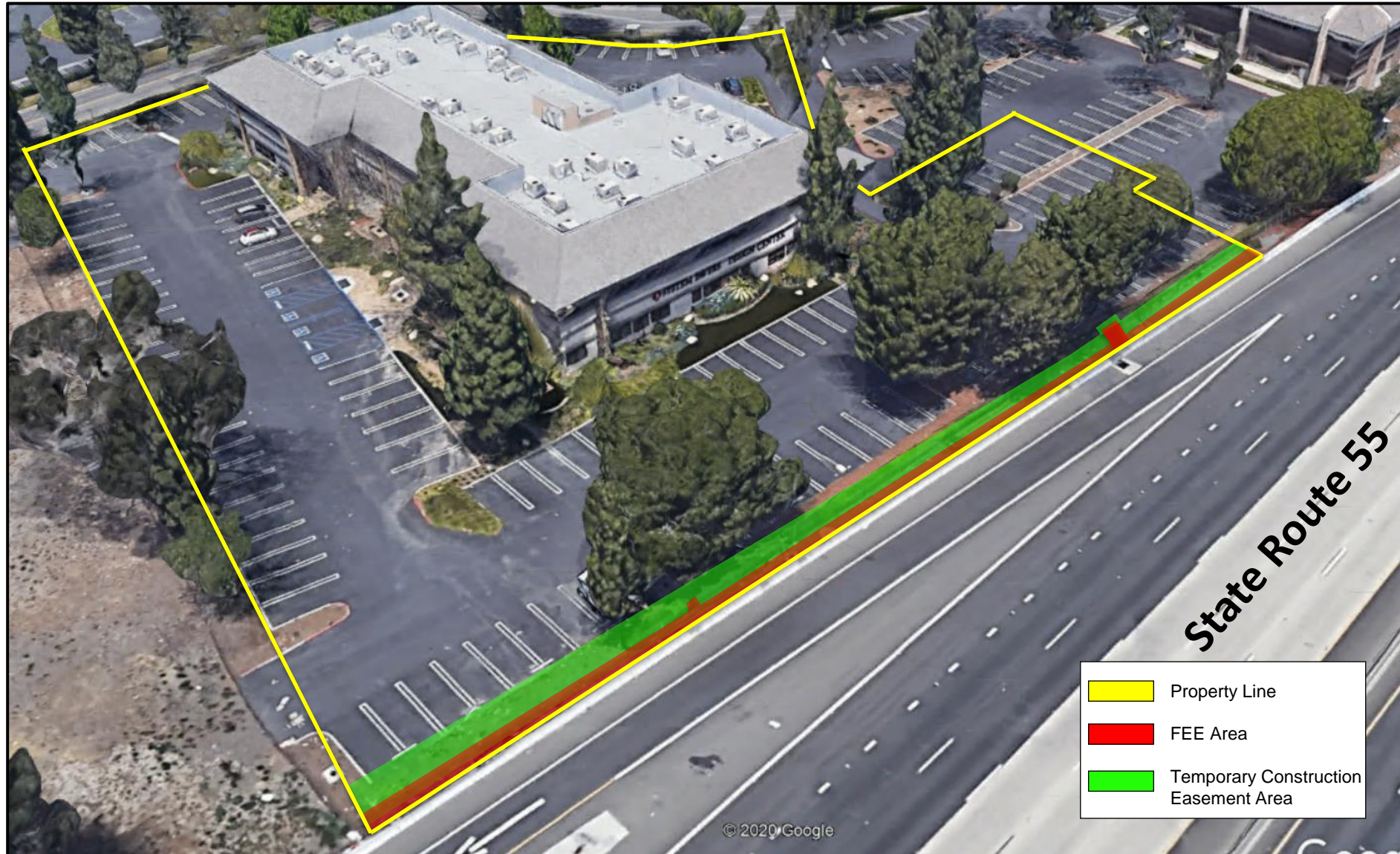
Resolution of Necessity No. 2021-004

DL Investments SA



Resolution of Necessity No. 2021-004

DL Investments SA



Resolution of Necessity No. 2021-005

1560 E. Warner Ave LP



Resolution of Necessity No. 2021-005

1560 E. Warner Ave LP



Resolution of Necessity No. 2021-005

1560 E. Warner Ave LP



Resolution of Necessity No. 2021-005

1560 E. Warner Ave LP



Resolution of Necessity No. 2021-006

WTW Properties; McFadden-Dale Industrial Hardware; B & C Properties



Resolution of Necessity No. 2021-006

WTW Properties; McFadden-Dale Industrial Hardware; B & C Properties



Resolution of Necessity No. 2021-006

WTW Properties; McFadden-Dale Industrial Hardware; B & C Properties



Resolution of Necessity No. 2021-006

WTW Properties; McFadden-Dale Industrial Hardware; B & C Properties



Four Requirements to be Considered to Adopt Resolutions

1. The public interest and necessity require the proposed project.
2. The proposed project is planned in a manner that will be most compatible with the greatest public good and the least private injury.
3. The property is necessary for the proposed project.
4. An offer to acquire the property in compliance with Government Code Section 7267.2 has been made to the owner of record.

**PRESENTATION OF
ORANGE COUNTY
TRANSPORTATION AUTHORITY'S
EMPLOYEES OF THE YEAR
RESOLUTIONS OF APPRECIATION**

Minutes of the
Orange County Transportation Authority
Orange County Transit District
Orange County Local Transportation Authority
Orange County Service Authority for Freeway Emergencies
Board of Directors Meeting

Call to Order

The January 25, 2021, regular meeting of the Orange County Transportation Authority (OCTA) and affiliated agencies was called to order by Chairman Jones at 9:01 a.m. at the OCTA Headquarters, 550 South Main Street, Board Room – Conference Room 07-08, Orange, California.

Roll Call

The Clerk of the Board (COB) conducted an attendance Roll Call and announced there was quorum of the Board of Directors (Board) as follows:

Via teleconference:

Andrew Do, Chairman
Mark. A. Murphy, Vice Chairman
Lisa A. Bartlett
Doug Chaffee
Barbara Delgleize
Brian Goodell
Patrick Harper
Michael Hennessey
Gene Hernandez
Steve Jones
Joseph Muller
Vicente Sarmiento
Tim Shaw
Harry S. Sidhu
Donald P. Wagner

Director Absent: Ryan Chamberlain, District Director
California Department of Transportation District 12

Also Present: Darrell E. Johnson, Chief Executive Officer (CEO)
Jennifer L. Bergener, Deputy CEO/Chief Operating Officer
Gina Ramirez, Deputy Clerk of the Board
Sahara Meisenheimer, Deputy Clerk of the Board
James Donich, General Counsel (via teleconference)

Invocation

Director Bartlett gave the invocation.

Pledge of Allegiance

Director Jones led in the Pledge of Allegiance.

Special Calendar

1. Administration of the Oath of Office to New Orange County Transportation Authority Board of Director

James Donich, General Counsel, administered the Oath of Office to new Board Member Patrick Harper.

2. 2021 Board of Directors and Chief Executive Officer Initiatives and Action Plan

Chairman Do provided opening comments and thanked Vice Chairman Murphy for his input. He highlighted the three 2021 OCTA Board strategic initiatives as follows:

- Financial Stewardship, Sustainability, and Resilience;
- Reliable, Accessible, and Balanced Transportation Choices; and
- Organizational Excellence and Collaboration.

Darrell E. Johnson, Chief Executive Officer (CEO), stated he and staff developed nine CEO initiatives that include an action plan to support the Board's Strategic Initiatives and will be measured through 96 milestones.

To support the Board's Financial Stewardship, Sustainability, and Resiliency Initiative, they will continue to focus on:

- Fiscal Responsibility and Effective Measure M2 Administration;
- Plan and Adapt to a Changing Environment, and;
- Champion Environmental Stewardship and Sustainability.

To support Reliable, Accessible, and Balanced Transportation Choices Initiative, they will continue to focus on:

- Balanced Public Transportation Options and Solutions;
- Deliver Improvements to Fulfill Measure M Promises, and;
- Engage with Diverse and Disadvantaged Communities.

2. (Continued)

To support Organizational Excellence and Collaboration Initiative, they will continue to focus on:

- Enhance Workforce Diversity and Inclusive Work Culture;
- Adapt to a Changing Workplace and Promote Employee Development and Safety;
- Negotiate and renew the Coach Operator and Transportation Communications Union Collective Bargaining Agreement; and
- Modernization for a potential new headquarters and advancing the remote work program.

Mr. Johnson, CEO, stated even with the ongoing challenges of the coronavirus (COVID-19) pandemic, OCTA is moving forward with ambitious plans to evolve and improve transportation. Any further detail on these initiatives' progress is monitored regularly, and updates will be presented to the Board each quarter.

No action was taken on this information item.

Consent Calendar (Items 3 through 16)

3. Approval of Minutes

Approve the Orange County Transportation Authority and affiliated agencies' regular meeting minutes of January 11, 2021.

4. Fiscal Year 2019-20 Annual Financial Statement Audits, Single Audit, and Agreed-Upon Procedures Reports

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file the fiscal year 2019-20 annual financial statement audits, Single Audit, and agreed-upon procedures reports as information items.

Director Wagner was not present to vote on this item.

5. Fiscal Year 2020-21 Internal Audit Plan, Second Quarter Update

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file the second quarter update to the Orange County Transportation Authority Internal Audit Department Fiscal Year 2020-21 Internal Audit Plan as an information item.

Director Wagner was not present to vote on this item.

6. Approval of 2021 Orange County Transportation Authority Board Committees and External Agencies' Assignments

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to:

- A. Approve the Chairman's assignments for the 2021 Orange County Transportation Authority Board Committees comprised of the Executive, Finance and Administration, Legislative and Communications, Regional Planning and Highways, State Route 91 Advisory, Transit, and Environmental Oversight Committees.
- B. Receive the Chairman's assignments for 2021 external agencies comprised of the California Association of Councils of Governments, Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency, Mobile Source Air Pollution Reduction Review Committee, Southern California Association of Governments' Regional Council, Orange County Council of Governments, and Southern California Regional Rail Authority.

Director Wagner was not present to vote on this item.

7. Fiscal Year 2020-21 First Quarter Budget Status Report

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file as an information item.

Director Wagner was not present to vote on this item.

8. Orange County Transportation Authority Investment and Debt Programs Report - November 2020

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file as an information item.

Director Wagner was not present to vote on this item.

9. State Legislative Status Report

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file as an information item.

Director Wagner was not present to vote on this item.

10. Federal Legislative Status Report

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file as an information item.

Director Wagner was not present to vote on this item.

11. Extension of Coronavirus-Related Leaves

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to:

- A. Approve the extension of employees' ability to use Emergency Paid Sick Leave to provide compensation relief for coronavirus-related absences.
- C. Authorize the Chief Executive Officer, or designee, to administer continuation of Emergency Paid Sick Leave and Expanded Family Medical Leave for employees, effective January 1, 2021 until March 31, 2021, and allow program extension beyond that date as necessary to accommodate need and with notification to the Board of Directors.

Director Wagner was not present to vote on this item.

12. Amendment to Agreement for Bus Advertising Revenue Program

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 4 to Agreement No. C-5-3076 between the Orange County Transportation Authority and Outfront Media Group, LLC, to eliminate the minimum annual guarantee and adopt a payment term based solely on a 70 percent revenue-sharing arrangement through December 2021.

Director Wagner was not present to vote on this item.

13. Award of Agreement for the Purchase of Electric Vehicle Chargers and Energy Management System

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to:

- A. Approve the selection of ChargePoint, Inc., as the firm to provide up to 72 electric vehicle charging stations with an energy management system.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2692 between the Orange County Transportation Authority and ChargePoint, Inc., in the amount of \$484,331, to provide up to 72 electric vehicle charging stations with an energy management system, for a five-year initial term effective February 1, 2021 through January 31, 2026, with one, three-year option term.

Director Wagner was not present to vote on this item.

14. Sole Source Agreement for the Operations and Maintenance of Fluid Management System

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-0-2615 between the Orange County Transportation Authority and S&A Systems, Inc., in the amount of \$644,296, for a four-year initial term with one, three-year option term, for the operations and maintenance of the current fluid management system.

Director Wagner was not present to vote on this item.

15. February 2021 Bus Service Change

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to receive and file as an information item.

Director Wagner was not present to vote on this item.

16. Measure M2 Community-Based Transit Circulators Program Project V Ridership Report and Proposed Program Revisions

A motion was made by Director Hernandez, seconded by Director Sidhu, and following a roll call vote, declared passed 14-0, to:

- A. Receive and file the Project V Ridership Report as an information item.
- B. Approve Project V Program revisions related to the impacts of the coronavirus and recent internal audit recommendations.
- D. Authorize the Chief Executive Officer to negotiate, execute, and amend as necessary all existing cooperative agreements for Project V services, in order to implement the recommendation above.

Director Wagner was not present to vote on this item.

17. OC Streetcar Project Quarterly Update

James G. Beil, Executive Director of Capital Programs, Cleve Cleveland, Department Manager of OC Streetcar Operations, and Tresa Oliveri, Principal Community Relations Specialist, co-presented the PowerPoint as follows:

- Agenda;
- OC Streetcar Features;
- Construction – Segment 1;
- Westminster Bridge;
- Santa Ana River Bridge;
- Maintenance and Storage Facility (MSF);
- Construction – Segments 2 through 5;
- Track Installation at Bristol Intersection;
- Upcoming Construction Milestones;
- Project Challenges;
- Vehicles; and
- Outreach.

A lengthy discussion ensued regarding:

- Quality control efforts and the number of issues require more oversight due to the number of unknown field conditions, the volume of requests for information, and staffing the project correctly;
- Clarification on the request for information which is a process defined in the contract;
- Tactics that contractors use to cause a delay;
- Methods for managing the contracts;
- Overview of the Federal Transit Administration (FTA) involvement, reviews, and authority.

17. (Continued)

Director Hennessey requested that staff return to the Board to summarize the various change orders from the beginning to the present that caused significant budget increases on this project.

Mr. Johnson, CEO, responded that the recommendation today is a receive and file, and staff would be returning to the Board in February with an update. Staff will be happy to provide a detailed summary of the change orders. He also noted that the budget has not changed up until now.

Director Delgleize echoed Director Hennessey's remarks and discussed her concerns about Walsh Construction Company II, LLC.

Director Sarmiento thanked the staff for briefing him on this project and stated that the project is like any other that has challenges. These are common issues, and he applauded the staff's efforts to be forward-thinking and making sure that OCTA is prepared to handle any obstacles in the future.

Chairman Do stated that Director Sarmiento raised some excellent points, and many unforeseen challenges have added to the complexities of the project.

Director Wagner concurred with Director Sarmiento's points regarding staff and stated this project is already an expensive one to Orange County taxpayers. He is interested in hearing about the reporting of the unusual items and requested information on rail construction projects in California that have stayed within budget and on-time.

Mr. Johnson, CEO, responded that "rail projects" is a broad term; however, they would be happy to provide an outline of FTA funded projects in the State.

Following the discussion, no action was taken on this receive and file as an information item.

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

Chairman Do queried the Board if a presentation was needed and then asked for a motion to approve.

A motion was made by Director Hernandez, seconded by Director Goddell, and following a roll call vote, declared passed 13-2, to:

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 43 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$372,136, for the acquisition of updated communications equipment.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 48 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,177,362, for removal of thicker asphalt concrete pavement from City of Santa Ana streets.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 16.2 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,400,000, for additional hand digging of overhead contact system, traffic signal, and streetlight pole foundations.

Directors Muller and Wagner voted in opposition.

Discussion Items

19. Public Comments

The DCOB stated that a public comment was received by the COB Department on January 24th from Craig A. Durfey, the Board was emailed the comment on January 25th at 8:19 a.m., and the comment will be retained as part of the record for today's Board meeting.

20. Chief Executive Officer's Report

Mr. Johnson, CEO, reported on the following:

January Employees of the Month Recognition -

- The Operations Employee of the Month is David Duran, a Coach Operator at the Santa Ana base who started his driving career with OCTA in July 2013.
- The Maintenance Employee of the Month is Jose Tamayo, who joined OCTA in May 1989 as an Equipment Parts Clerk at the Garden Grove base.
- The Administrative Employee of the Month is Debbie Sanders, who started as a contractor for OCTA in 1996 and became an employee in April 2002. Debbie has been instrumental in our ongoing effort to host the Board meetings virtually and more recently with the implementation of Zoom for the Board meetings.
- OCTA's January Employees of the Month were congratulated.

Vaccine Update -

- Mr. Johnson, CEO, stated that OCTA is monitoring Orange County's rollout of the COVID-19 vaccine.
- OCTA continues to offer whatever assistance to help ensure as many people receive the vaccine as quickly as possible.
- Last week, OCTA sent a bus to transport a group of medical workers to a senior center in Santa Ana, enabling seniors to receive the vaccine.

21. Directors' Reports

Director Harper inquired about the Public Comments process and if the comments will be provided to the public.

James Donich, General Counsel, responded under the protocols, they are immediately made available to the Board and noted and attached in the minutes.

Director Harper thanked staff for getting him oriented and looks forward to working with the Board on the various Committees.

Director Hennessey stated the Finance and Administration Committee welcomes Director Harper.

Chairman Do discussed the open seat for Director Winterbottom's vacancy and stated he would prepare a memo with more specifics to start recruiting for the Public Member vacancy. The Board is hoping to fill the position by the end of March.

22. Closed Session

James Donich, General Counsel, announced that a Closed Session will be held for:

Pursuant to Government Code Section 54957.6 to discuss negotiations with Teamsters Local 952 (Teamsters) regarding the coach operators. The lead negotiator for the Orange County Transportation Authority is Maggie McJilton, Executive Director of Human Resources and Organizational Development, and the lead negotiator for the Teamsters is to be appointed by the Teamsters.

There was no report out for the above noted Closed Session item.

23. Adjournment

The meeting adjourned at 10:08 a.m.

The next regularly scheduled meeting of this Board will be held at **9:00 a.m. on Monday, February 8, 2021**, at the OCTA Headquarters, 550 South Main Street, Board Room – Conference Room 07-08, Orange, California.

ATTEST:

Gina Ramirez
Deputy Clerk of the Board

Andrew Do
Chairman



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512

Finance and Administration Committee Meeting of January 27, 2021

Present: Directors Goodell, Harper, Hennessey, Hernandez, Jones, and Muller

Absent: None

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendation

Direct staff to implement one recommendation provided in Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512.



January 27, 2021

To: Finance and Administration Committee

From: Darrell E. Johnson, Chief Executive Officer

Janet Sutter, Executive Director
Internal Audit Department

Subject: Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512

Overview

The Internal Audit Department of the Orange County Transportation Authority has completed an audit of oversight and reporting controls related to the Comprehensive Transportation Funding Program. Based on the audit, oversight and reporting controls are adequate; however, one recommendation has been made to ensure that all performance requirements of community-based transit circulator projects are incorporated into local agency agreements and monitored for compliance to standards.

Recommendation

Direct staff to implement one recommendation provided in Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512.

Background

The Comprehensive Transportation Funding Program (CTFP) represents a collection of Measure M2 grant programs offered to local agencies. Each program has specific objectives and requirements, as outlined in CTFP Guidelines (Guidelines). The Orange County Transportation Authority (OCTA) Board of Directors (Board) approves the evaluation criteria and authorizes issuance of the call for projects. Agencies submit applications that are reviewed and ranked by staff. All funding recommendations are then presented to the appropriate subcommittee of the Board (Committee), such as the Regional Planning and Highways Committee or the Transit Committee, and the Board for final approval.

OCTA staff conducts a comprehensive review of CTFP projects on a semi-annual basis. During the semi-annual review process, agencies may request project cancellation, updates to project estimates, adjustments to project delivery schedules, or other pertinent project adjustments. Requests for adjustments to project timelines and minor scope revisions may be approved by staff; however, more significant project adjustments/changes must conform to the Guidelines and must also be approved by the applicable Committee(s) and the Board. Semi-annual review reports are typically presented to the Board in June and December of each year and include project status updates and requests to approve adjustments to projects. During the semi-annual review process, staff will also verify project operations and maintenance requirements of applicable programs.

Discussion

On-time performance and customer satisfaction requirements of the Community-Based Transit Circulators Program are not outlined in agency cooperative agreements and are not monitored by staff. The Guidelines require that local agencies develop strategies to measure ridership satisfaction and on-time performance. According to the Guidelines, agencies must achieve 85 percent on-time performance on an ongoing basis and rider satisfaction of 90 percent. The Internal Audit Department (Internal Audit) noted that these requirements are not detailed in cooperative agreements executed with the cities and results are not being monitored for compliance. Internal Audit recommended management re-evaluate guideline requirements and amend Guidelines, cooperative agreements, and monitoring controls to ensure consistency and proper oversight. Management responded that amended Guidelines will be presented for approval by the Board on January 25, 2021, and upon approval, cooperative agreements and monitoring procedures will be updated to ensure consistency and proper oversight.

Summary

Internal Audit has completed an audit of CTFP oversight and reporting controls.

Attachment

- A. Comprehensive Transportation Funding Program, Oversight and Reporting Controls, Internal Audit Report No. 20-512

Prepared by:



Gabriel Tang
Principal Internal Auditor, Internal Audit
714-560-5746

Approved by:



Janet Sutter
Executive Director, Internal Audit
714-560-5591

ORANGE COUNTY TRANSPORTATION AUTHORITY INTERNAL AUDIT DEPARTMENT



Comprehensive Transportation Funding Program Oversight and Reporting Controls

Internal Audit Report No. 20-512

January 13, 2021



Performed by: Gabriel Tang, CPA, Principal Internal Auditor
Janet Sutter, CIA, Executive Director

Distributed to: Kia Mortazavi, Executive Director, Planning
Kurt Brotcke, Adriann Cardoso, Joseph Alcock

**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

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**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

Conclusion

The Internal Audit Department (Internal Audit) of the Orange County Transportation Authority (OCTA) has completed an audit of oversight and reporting controls related to the Comprehensive Transportation Funding Programs (CTFP). Based on the audit, oversight and reporting controls are adequate; however, one recommendation has been made to ensure that all performance requirements of community-based circulator projects are incorporated into local agency agreements and monitored for compliance to standards.

Background

Comprehensive Transportation Funding Program

The CTFP represents a collection of Measure M2 (M2) grant programs offered to local agencies. OCTA issues calls for projects annually, or on an as needed basis, and selects projects for funding through a defined, competitive process. Programs in the CTFP include the Regional Capacity Program (Project O), the Regional Traffic Signal Synchronization Program (Project P), various transit programs (Projects S, T, V and W), and the Environmental Cleanup Program (Project X). Each program has specific objectives and requirements, as outlined in CTFP Guidelines.

Prior to issuance of a call for projects, OCTA staff develop, document, and present proposed evaluation criteria to be used to score and select projects for funding. The OCTA Board of Directors (Board) approves the evaluation criteria and authorizes issuance of the call for projects. Agencies submit applications that are reviewed and ranked by staff. Funding recommendations under Project O and Project P are first provided to the Technical Advisory Committee (TAC) for approval. The TAC is comprised of 35 representatives, one from each Orange County city, as well as the County of Orange, and a non-voting member from the California Department of Transportation. Similarly, funding recommendations under Project X are first provided to the Environmental Cleanup Allocation Committee (ECAC) for approval. The ECAC includes city managers, professors, city engineers, and water resource engineers from various agencies. All funding recommendations are then presented to the appropriate subcommittee of the Board (Committee), such as the Regional Planning and Highways Committee or the Transit Committee, and the Board for final approval.

For the fiscal year (FY) 2018-19, a total of \$45.8 million in calls for projects were issued under Project O, Project P, the Safe Transit Stops Program, and Project X.

**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

Program Oversight and Reporting

OCTA staff conduct a comprehensive review of CTFP projects on a semi-annual basis. It is during the semi-annual project review (SAR) process that agencies may request project cancellation, updates to project estimates, adjustments to project delivery schedules, and any other pertinent project delivery adjustments. Requests for adjustments to project timelines and minor scope revisions may be approved by staff; however, more significant project adjustments/changes must conform to CTFP guidelines and must be approved by the TAC, as applicable, the appropriate Committee, and the Board. SARs are typically presented to the Board in June and December of each year, and include project status updates and requests to approve adjustments to CTFP projects.

It is also during the SAR process that staff verifies project operations and maintenance (O&M) requirements of applicable programs, such as Project X. Staff reviews documentation submitted by local agencies showing that required minimum maintenance expenditures are being made. O&M for the Community-Based Transit Circulator Program (Project V) is reported semi-annually through a separate (non-SAR) process, which typically occurs in January and July of each calendar year.

Project payments are typically released through an initial advance and a final reimbursement. Payment requests are submitted by agencies through OC Fund Tracker, an online grant application and payment system used by OCTA to administer M2 competitive programs. OCTA staff reviews payment requests to ensure sufficient supporting documentation has been provided. The payment is then provided to management for approval before processing.

**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

Objectives, Scope, and Methodology

The objectives were to assess and test OCTA's monitoring and reporting controls related to CTFP projects.

According to Generally Accepted Government Auditing Standards (GAGAS), internal control is the system of processes that an entity's oversight body, management, and other personnel implement to provide reasonable assurance that the organization will achieve its operational, reporting, and compliance objectives. The five components are control environment, risk assessment, control activities, information and communication, and monitoring.¹ The components and principles that were evaluated as part of this audit are:

- Control Environment
 - OCTA demonstrates a commitment to attract, develop, and retain competent individuals in alignment with objectives.
- Risk Assessment
 - OCTA specifies objectives with sufficient clarity to enable the identification and assessment of risks relating to objectives.
- Control Activities
 - OCTA selects and develops control activities that contribute to the mitigation of risks to the achievement of objectives to acceptable levels.
- Information and Communication
 - OCTA communicates with external parties regarding matters affecting the functioning of internal control.
- Monitoring
 - OCTA evaluates and communicates internal control deficiencies in a timely manner to those parties responsible for taking corrective action, including senior management and the Board, as appropriate.

The methodology consisted of testing a sample of applications to determine they were reviewed and ranked in accordance with Board-approved scoring criteria, were provided to the TAC/ECAC for approval, and were approved by the Committee and the Board; testing a sample of comprehensive semi-annual reviews of CTFP projects to determine if reviews are properly performed and supported, and information is accurately reported to the Board; testing a sample of O&M reviews of CTFP projects for evidence of review by staff in accordance with CTFP guidelines; and testing a sample of payments for evidence of review and authorization by OCTA staff.

¹ See U.S. Government Accountability Office publication, "Standards for Internal Control in the Federal Government," available at <http://www.gao.gov/products/GAO-14-704G>, for more information.

**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

The scope was limited to applications received in response to calls for projects that occurred during FY 2018-19. The judgmental sample of 18 out of 66 applications was selected to provide coverage of different project types (O, P, W and X) and to include both funded and non-funded projects.

The scope also included semi-annual reviews of all active CTFP projects for September 2019 and March 2020. The judgmental sample of 105 out of 535 projects was selected to provide coverage of each type of SAR request, including submissions for no changes, agency requests for cost changes over ten percent, agency requests to amend project delivery dates, requests to transfer funding allocations, and cancellation requests.

The scope also included all active O&M reviews for Project X and Project V, from April 2019 to March 2020. For Project X, the judgmental sample of 24 out of 90 O&M expenditures provided even coverage of all funded projects. For Project V, the judgmental sample of 30 out of 74 projects provided even coverage from the June 2019, September 2019, December 2019, and March 2020 quarterly reviews.

Lastly, the scope included all payments issued in FY 2018-19 and FY 2019-20. The judgmental sample of 30 out of 141 expenditures was selected to provide coverage of different project types (Project O, Project P, Project X, etc.), payment types (Initial and Final), and different phases of the project (Engineering, Construction, Right-of-Way, Implementation, and Operations & Maintenance)

We conducted this performance audit in accordance with GAGAS. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

**ORANGE COUNTY TRANSPORTATION AUTHORITY
INTERNAL AUDIT DEPARTMENT
Comprehensive Transportation Funding Program
Oversight and Reporting Controls
January 13, 2021**

Audit Comment, Recommendation, and Management Response

Project V Performance Requirements

On-time performance and customer satisfaction requirements of Project V are not outlined in agency cooperative agreements and are not monitored by staff.

CTFP guidelines (guidelines) require that local agencies develop strategies to measure ridership satisfaction and on-time performance. Agencies must achieve 85 percent on-time performance on an ongoing basis, and rider satisfaction of 90 percent. Internal Audit noted that these requirements are not detailed in cooperative agreements executed with the cities and results are not being monitored for compliance.

Recommendation 1:

Internal Audit recommends management reevaluate guideline requirements and amend guidelines, cooperative agreements, and monitoring controls to ensure consistency and proper oversight.

Management Response:

The Planning Division will amend the Project V Guidelines to ensure that requirements in the guidelines are aligned with the type of community-based circulator services that have proven to be successful. Further, staff will amend the cooperative agreements to be consistent with the requirements of the updated Project V Guidelines. Staff will also include applicable customer satisfaction and on-time performance elements in the required regular reports in order to oversee this requirement and confirm compliance. An item is planned to go to the Board of Directors on January 25, 2021, that requests authorization to amend cooperative agreement and guidelines consistent with the findings in the audit.



**MATERIALS WILL BE PROVIDED UNDER
SEPARATE COVER PRIOR TO THE
February 8, 2021
BOARD OF DIRECTORS MEETING.**



COMMITTEE TRANSMITTAL

February 8, 2020

To: Members of the Board of Directors
From: Andrea West, Interim Clerk of the Board *Andrea West*
Subject: Recruitment for Public Member Appointment

Executive Committee Meeting of February 1, 2021

Present: Chairman Do, Vice Chairman Murphy, and Directors Bartlett, Hennessey, Jones, and Shaw
Absent: None

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendation

Direct the Chief Executive Officer to follow the past Board of Directors' process when there is a public member vacancy to include publicly noticing the vacancy and announce the recruitment of a public member to serve on the Orange County Transportation Authority Board of Directors through media outlets, notifications to cities, community organizations, and to the County of Orange.



February 1, 2021

To: Executive Committee

From: Andrew Do, Chairman of the Board of Directors

Subject: Recruitment for Public Member Appointment

Overview

In accordance with Public Utilities Code Section 130052(c), members of the Orange County Transportation Authority Board of Directors, representing cities and the County of Orange, appoint two public members to the Orange County Transportation Authority Board of Directors. Direction is requested to guide the recruitment and selection process for filling the current public member vacancy for a four-year term.

Recommendation

Direct the Chief Executive Officer to follow the past Board of Directors' process when there is a public member vacancy to include publicly noticing the vacancy and announce the recruitment of a public member to serve on the Orange County Transportation Authority Board of Directors through media outlets, notifications to cities, community organizations, and to the County of Orange.

Background

The membership of the Orange County Transportation Authority (OCTA) Board of Directors (Board) includes two public member positions that must be filled by the Members of the Board that represent cities and the County of Orange. The term of office for an OCTA Public Member is four years. The qualifications for a Public Member are as follows:

- Resident of Orange County, and
- Not serving currently, or within the last four years, as an elected official of a city, county, any agency, or special district within Orange County.

Unlike the process of selecting the city representatives, the process for selecting the two public members is not specifically outlined in OCTA's enabling legislation. As a result, based on the Chairman's discretion, the procedure regarding the appointment process has varied over the years, depending on whether there is a desire for a reappointment by the sitting Public Member or when there is a vacancy.

Historically, the Board has established guidelines to support recruiting for a public member vacancy. It is recommended that the following steps be taken as part of the recruitment process following the proposed timeline (Attachment A):

- Vacancies were publicly noticed in as outlined in the Communications Plan (Attachment B);
- The Executive Committee (Committee) will be used to assist in the selection process. The Committee will review all applications submitted and create a short-list of applicants to interview utilizing Considerations for Selection of Public Member (Attachment C);
- Members of the Committee will interview considered candidates at a subsequent meeting; and
- The Committee will forward its recommendation to the full Board for final selection and appointment.

Discussion

Public members are selected by majority action of the OCTA Board members representing the cities and the County. Procedures for the selection are determined by the Board and have varied depending on the circumstances.

Staff requests that the process for appointing the vacant public member be determined at this time.

Summary

Direction is requested to guide the recruitment process for the Board of Directors to consider filling the current public member vacancy for a four-year term.

Attachments

- A. Public Member Recruitment Process Timeline
- B. Public Member Recruitment, Communications and Outreach Plan, February 2021
- C. Considerations for Selection of Public Member

Prepared by:



Andrea West
Interim Clerk of the Board
(714) 560-5676

Approved by:



Jennifer L. Bergener
Deputy Chief Executive Officer
(714) 560-5462

Public Member Recruitment Process Timeline

| | |
|--|--|
| February 1, 2021 | Plan of Action Considered by Executive Committee |
| February 8, 2021 | Plan of Action Considered by Board of Directors |
| February 8 to February 26, 2021 | Public Outreach |
| February 26, 2021 | Applications Due |
| March 1, 2021 | Executive Committee Reviews Applications |
| March 15, 2021 | Special Executive Committee to Conduct Applicant Interviews and Potentially Selects Candidate for Recommendation |
| March 29, 2021 | Special Executive Committee (if needed) |
| April 5, 2021 | Executive Committee Selects Candidate for Recommendation (if needed) |
| April 12, 2021 | Candidate Selection by Board of Directors Public Member Sworn-in that Afternoon |

**Public Member Recruitment
Communications and Outreach Plan
February 2021**

BACKGROUND

The Orange County Transportation Authority (OCTA) is dedicated to developing and delivering transportation solutions that enhance quality of life and keep Orange County moving. OCTA is seeking a public member to represent the public on its 18-member Board of Directors (Board) for a four-year term. Voting members include five members of the Orange County Board of Supervisors, ten Orange County city members, and two public members. A non-voting member, representing the California Department of Transportation, also sits on the Board.

Candidates must be residents of Orange County (County) and should have some knowledge of transportation, finance, and OCTA priorities, and an interest in representing the public. A person who is currently serving as an elected official within the County, an elected official of any agency or special district within the County, or an elected official of the County, and who has held any of those positions in the past four years, is not eligible to apply.

The person selected will be asked to devote 15 to 20 hours each month to Board business, including two monthly meetings of the Board and other activities. A stipend is available.

To be considered, candidates must submit an application, letter of interest, resume, and signed disclaimer by 5:00 p.m., Friday, February 26, 2021.

The primary purpose of the Public Member Recruitment Communications and Outreach Plan is to inform the public and stakeholders about this position to attract the best-qualified person to serve the County as a representative of the OCTA Board.

GOAL

- Create awareness of the recruitment for the public member on OCTA's Board targeting all Orange County residents

TARGET AUDIENCES

- General public
- Business organizations
- Transportation industry organizations
- Local, state, and federal government communications channels
- Diverse communities
- Media

STRATEGIES/TACTICS

- Digital Communications:
 - Public Member Recruitment landing page
 - Email blasts
 - Businesses/organizations
 - Local government
 - State and Federal offices
 - Diverse Communities
 - On the Move Blog
 - Social media posts (corporate pages, and cross promote on capital project pages)
 - Online advertising with paid search, display advertising, and social advertising
- Newspapers: mainstream and ethnic markets
- Bus interior advertising
- Outreach:
 - OCTA's Public Committees
 - Business organizations
 - Building Industry Association
 - North Orange County Chamber
 - North Orange County Legislative Alliance
 - OC Association of Realtors
 - OC Bar Association
 - OC Paralegal Association
 - Orange County Taxpayers Association
 - Orange County Business Council
 - South Coast Metro Alliance
 - South Orange County Economic Coalition
 - National Human Resources Association - OC
 - Financial Planning Association of Orange County
 - Business Development Association of Orange County
 - Retired Employees Association of Orange County
 - American Institute of Architects - OC
 - Cal CPA - OC/Long Beach Chapter
 - Local Chambers
 - Environmental Groups
 - Educational Institutions
 - Transportation Industry Organizations
 - American Society of Civil Engineers
 - American Council of Engineering Companies
 - California Association for Coordinated Transportation
 - California Transit Association
 - Women's Transportation Seminar, Orange County
 - International Chinese Transportation Professionals Association
 - American Public Transportation Association
 - Local, state, and federal government

- Association of California Cities - Orange County
- League of California Cities – Orange County
- City Public Information Officers, City Managers, City Clerks
- County of Orange
- Local or District based State and Federal Offices
- Diverse Communities
 - OCTA Diverse Community Leaders
 - Orange County Hispanic Chamber of Commerce
 - Asian Business Association of Orange County
 - Orange County Black Chamber of Commerce
 - Orange County Heritage Council
 - Vietnamese American Chamber of Commerce
- Media: send out press release to various media channels

ESTIMATED BUDGET

| Item | Description | Cost Estimate |
|-------------------------------|--|----------------|
| OC Register (print) | 2/12, Size 1/4 Page, B/W | \$1,515 |
| Excelsior (print) | 2/12, Size 1/4 Page, Color | \$1,640 |
| OC Register (online) | 2/8 – 2/19, digital ads | \$750 |
| LA Times (print) | 2/14, OC Weekend, Size 1/4 Page, B/W | \$800 |
| LA Times (online) | 2/8 – 2/19, digital ads on Business, Politics, Local News, and Homepage (geo-target to OC) | \$1,500 |
| Nguoi Viet Daily News (print) | 2/12, Size 1/4 Page, Color | \$378 |
| Viet Bao | 2/13, Size 1/2 Page, Color | \$800 |
| Facebook, Instagram | 2/8 – 2/19, digital ads | \$300 |
| Total | | \$7,683 |

SCHEDULE

| | |
|---------------------------------|---|
| February 1, 2021 | Plan of Action Considered by Executive Committee |
| February 8, 2021 | Plan of Action Considered by Board |
| February 8 to February 26, 2021 | Public Outreach |
| February 26, 2021 | Applications Due |
| March 1, 2021 | Executive Committee Reviews Applications |
| March 15, 2021 | Special Executive Committee to Conduct Applicant Interviews |
| March 29, 2021 | Special Executive Committee (if needed) |
| April 5, 2021 | Executive Committee Selects Candidate for Recommendation |
| April 12, 2021 | Candidate Selection by Board Public Member Sworn-in that Afternoon |

Considerations for Selection of Public Member

Strategic. A successful Board of Directors (Board) candidate needs to look beyond the short-term goals and envision the long-term vision, mission, and health of the organization. The Board candidate should be able to translate facts, trends, and external realities into strategy. For example, environmental, social, and governance issues are now a top priority and an area where any board candidate should be knowledgeable and provide direction.

Leadership. A Board candidate must have relevant leadership experience, including an understanding of the complex challenges of leadership. An ideal Board candidate will have gained this experience in areas related to public or corporate governance, public transportation, or public service.

Corporate Governance. The Board candidate should have sufficient applicable experience to understand and fully respect the legal and other responsibilities of a public service agency within the context of the organization's responsibility for transportation planning, finance, project delivery, and operations under the umbrella of public transportation.

Compatibility. The Board candidate should be able to develop a good working relationship with other Board members and contribute to the Board's working relationship with the Chief Executive Officer and senior management of the organization.

Individual Characteristics. The Board candidate should have the personal qualities to be able to make a substantial active contribution to Board deliberations. These qualities include intelligence, self-assuredness, a high ethical standard, interpersonal skills, independence, courage, a willingness to ask the difficult question, communication skills, and commitment.

Personal. The Board candidate should be of the highest moral and ethical character. The candidate must exhibit independence and objectivity and serve as a representative of the general public. The Board candidate should have demonstrated a personal commitment to areas aligned with the OCTA's public interest commitments, such as the environment, quality of life, and welfare of local communities served by the organization.

Diversity. In considering candidates for election to the Board, the Board should strive to reflect the diversity of the communities in which the organization operates. The Board candidate should understand the cultural, racial, and gender composition of the County to ensure equality and enhance OCTA's decision making.

Availability. The Board candidate must be willing to commit and have sufficient time available to discharge the duties of Board membership. The Board candidate should not have any prohibited conflict of interest relationships.



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Fiscal Year 2020-21 Proposed Budget Amendment

Finance and Administration Committee Meeting of January 27, 2021

Present: Directors Goodell, Harper, Hennessey, Hernandez, Jones, and Muller

Absent: None

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendations

- A. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 approved budget increasing the revenue and expense budget in the amount of approximately \$4.7 million to accommodate updated budget assumptions for both revenue and expense items.
- B. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 Personnel and Salary Resolution and budget to adjust the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Deputy Managing Director position from a salary grade V to a salary grade X.



January 27, 2021

To: Finance and Administration Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Fiscal Year 2020-21 Proposed Budget Amendment

Overview

Staff proposes a budget amendment to update the Orange County Transportation Authority's Fiscal Year 2020-21 Approved Budget. This amendment better aligns the budget with anticipated revenue and expenditures through the balance of the fiscal year by reducing bus program revenues and expenditures based on reduced service levels, increasing the Express Lanes Expense budget, and adjusting the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Deputy Managing Director from salary grade V to salary grade X.

Recommendations

- A. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 approved budget increasing the revenue and expense budget in the amount of approximately \$4.7 million to accommodate updated budget assumptions for both revenue and expense items.
- B. Amend the Orange County Transportation Authority's Fiscal Year 2020-21 Personnel and Salary Resolution and budget to adjust the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Deputy Managing Director position from a salary grade V to a salary grade X.

Background

The Orange County Transportation Authority (OCTA) Fiscal Year (FY) 2020-21 Budget was approved by the OCTA Board of Directors (Board) on June 8, 2020, in the amount of \$1,427.6 million. At the time the budget was approved by the Board, due to the uncertainty caused by the coronavirus (COVID-19), OCTA budgeted fixed-route service levels of up to 1.6 million revenue hours in order to maintain a state of readiness if ridership returned or social distancing requirements necessitated additional service.

On September 14, 2020, the Board approved a budget amendment that aligned OCTA's budget with ongoing service levels. The amendment reduced the budget from 1.6 million revenue hours to 1.2 million revenue hours through the February 2021 service change. This level of service enabled OCTA to meet ridership demand while meeting social distancing requirements through the February service change. OCTA anticipates continuing to operate this level of service through the June 2021 service change.

Discussion

Staff is requesting the Board authorize amending the FY 2020-21 budget based on updated revenue and expenditure assumptions. Based on the recommended changes, the current OCTA budget would be increased by \$4.7 million. A summary of the recommended changes is provided below.

Bus Program

The FY 2020-21 approved budget assumed pre-COVID-19 service levels of 1.6 million annual revenue hours. The budget was amended on September 14, 2020, based on lower ridership demand and to meet social distancing requirements, to approximately 1.2 million annualized revenue hours through the February 2021 service change. Additionally, paratransit services were amended down by approximately 80 percent through February 2021. This resulted in a \$35.2 million budget savings. Based on current ridership, and stable demand over the last four months, bus service levels are now assumed to remain at the current levels through June 2021. As a result of continuing these current, lower service levels, it is anticipated that bus operating expenditures will decrease by an additional \$5.1 million. This savings is offset by an anticipated decrease in fare revenue (\$3.3 million). Due to lower than anticipated bus expenditures, less Coronavirus Aid, Relief, and Economic Security Act revenue will be needed in the current FY (\$1.8 million) and the funds will be utilized next FY year to support bus service.

91 Express Lanes and 405 Express Lanes

The contract for the back-office system of the 91 Express Lanes was approved by the Board in October 2019, in the amount of approximately \$7.1 million, and a budget amendment in the amount of approximately \$5.4 million is recommended to accommodate this contract.

In addition, the contract for the lane system of the 91 Express Lanes and 405 Express Lanes was approved by the Board in February 2018, in the amount of approximately \$28.7 million, and a budget amendment in the

amount of approximately \$4 million is recommended to accommodate expenditures anticipated to be incurred in this FY on this contract.

In October 2020, the Board authorized staff to move forward with pursuing the Transportation Infrastructure Finance and Innovation Act (TIFIA) Loan interest rate reset for the 405 Express Lanes, which included authorizing the payment of fees and expenses necessary to cover the costs for credit ratings, financial advisory services, bond counsel, and the Bureau's costs for outside legal counsel. OCTA has since submitted a formal loan application to the Bureau, which has been approved, therefore a budget amendment in the amount of approximately \$0.4 million is recommended to cover the costs for credit ratings and the Bureau's outside legal counsel.

Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency (LOSSAN)
Deputy Managing Director

Staff recommends amending the Personnel and Salary Resolution (PSR), as well as the budget to adjust the LOSSAN Deputy Managing Director from salary grade V to salary grade X. This recommendation is based on Human Resources evaluation of responsibilities and tasks assigned to the LOSSAN Deputy Managing Director position. This recommendation poses no fiscal or financial impact and OCTA will be fully reimbursed for the cost of this position.

Summary

The proposed budget amendment increases OCTA's FY 2020-21 Budget by \$4.7 million and better aligns the budget with anticipated revenues and expenditures. This amendment reduces bus service expenditures based on lower levels of service from February through June, increases the 91 and 405 Express Lanes expense budget to support the back-office system, lane system, and the TIFIA interest rate reset, and adjusts the LOSSAN Deputy Managing director grade level in the PSR and the budget. OCTA will continue to evaluate the budget throughout the FY and evolving financial impacts.

Attachment

None.

Prepared by:



Victor Velasquez
Department Manager,
Financial Planning and Analysis
(714) 560-5592

Approved by:



Andrew Oftelie
Chief Financial Officer
Finance and Administration
(714) 560-5649



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors
From: Andrea West, Interim Clerk of the Board *Andrea West*
Subject: Second Quarter Fiscal Year 2020-21 Procurement Status Report

Finance and Administration Committee Meeting of January 27, 2021

Present: Directors Goodell, Harper, Hennessey, Hernandez, Jones, and Muller
Absent: None

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendation

Receive and file as an information item.



January 27, 2021

To: Finance and Administration Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Second Quarter Fiscal Year 2020-21 Procurement Status Report

Overview

The second quarter procurement status report summarizes the procurement activities for information purposes to the Orange County Transportation Authority Board of Directors. This report focuses on procurement activity from October 1 through December 31, 2020, that was approved by the Board of Directors during this period. The second quarter procurement status report also projects future procurement activity for the third quarter as identified in the fiscal year 2020-21 budget.

Recommendation

Receive and file as an information item.

Background

The Board of Directors (Board) approved the Orange County Transportation Authority (OCTA) Fiscal Year (FY) 2020-21 Budget on June 8, 2020, which identifies the goods and services that will be purchased during the FY. A quarterly procurement report has been prepared detailing the procurement activity for line items that were approved by the Board during the second quarter of FY 2020-21. The report also provides a “look-ahead” of upcoming procurement activity by Board committee. The quarterly procurement report identifies contractual activity, not dollars spent.

Discussion

During the second quarter of FY 2020-21, the Contracts Administration and Materials Management Department handled 337 different contractual documents. Of the total, 255 procurements, valued at \$253,858,200, were

completed; the remaining procurements will be executed during the third quarter of FY 2020-21.

In the second quarter, the Board acted on 37 procurements. The procurements were split between 18 new agreements valued at \$159,172,541, five amendments valued at \$12,933,999, seven construction change orders valued at \$5,053,717, one cooperative agreement valued at \$970,000, one amendment to cooperative agreements valued at \$5,023,708, one purchase order valued at \$629,269, three sole source agreements valued at \$459,013, and one option-term amendment valued at \$290,372. Not all procurements are completed within the quarter in which they begin. Often, the procurements require cost and price reviews, and negotiations which can lengthen the procurement process, resulting in the procurement spanning two quarters. Procurements not completed within the second quarter will be completed in the third quarter of FY 2020-21. Attachment A shows a list of Board-approved procurements during the second quarter.

Looking forward to the third quarter of FY 2020-21 (January through March 2021), the Board committees will be asked to take action on several items such as:

- Consultant selection for call box maintenance services;
- Consultant selection for the construction of Anaheim Canyon Metrolink Station improvements;
- Consultant selection for the regional modeling-traffic operations on-call support staffing;
- Consultant selection for the enterprise asset management solution;
- Consultant selection for the bus restructuring study; and
- Consultant selection for the freeway service patrol services.

The estimated value of these upcoming procurements is \$47,456,493. Attachments B through F identify procurement activity anticipated in the third quarter of FY 2020-21 by the committee that will review the items.

Summary

This report provides an update of the procurement activity for the second quarter of FY 2020-21, October through December 2020, as well as a look-ahead at anticipated procurement activity for the third quarter of FY 2020-21. Staff recommends that this report be received and filed as an information item.

Attachments

- A. Board-Approved Contracts – Second Quarter FY 2020-2021
- B. Regional Planning and Highways Committee – Third Quarter Outlook
(January 1, 2021 – March 31, 2021)
- C. Transit Committee – Third Quarter Outlook
(January 1, 2021 – March 31, 2021)
- D. Finance and Administration Committee – Third Quarter Outlook
(January 1, 2021 – March 31, 2021)
- E. Legislative and Communications Committee – Third Quarter Outlook
(January 1, 2021 – March 31, 2021)
- F. Executive Committee – Third Quarter Outlook
(January 1, 2021 – March 31, 2021)

Prepared by:



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

Approved by:



Andrew Oftelie
Chief Financial Officer,
Finance and Administration
(714) 560-5649

Board-Approved Contracts - Second Quarter FY 2020-2021

AGREEMENTS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|-------------------------------------|------------|---|------------|------------|----------------------|
| Climatec, LLC | C02341 | Service and Maintenance of the Orange County Transportation Authority's Security System | 10/29/2020 | 9/30/2025 | \$537,600 |
| Dalke & Sons Construction, Inc. | C02191 | Facility Modifications at the Santa Ana Bus Base for the I-405 Express Lanes Toll Operations Center | 1/18/2021 | 11/30/2021 | \$636,680 |
| GILLIG, INC | C91836 | Purchase of up to 165, 40-foot Compressed Natural Gas-Powered Buses | 12/23/2020 | 12/31/2025 | \$100,371,600 |
| Advanced Civil Technologies | C02335 | Project Report and Environmental Document for the I-5 Improvement Project from the San Diego County Line to Avenida Pico | 2/1/2021 | 1/30/2025 | \$5,500,000 |
| Golden Gate Construction | C02267 | Fullerton Transportation Center Stair Replacement Project | 1/6/2021 | 9/6/2022 | \$705,300 |
| Brown Marketing Strategies, Inc. | C02206 | Rideshare and Vanpool Marketing, Design, and Advertising Services | 11/1/2020 | 10/31/2022 | \$570,000 |
| Topp Strategies, LLC | C02369 | State Legislative Advocacy and Consulting Services | 1/1/2021 | 12/31/2022 | \$420,000 |
| Thomco Construction, Inc. | C02467 | Locker Room Expansion at the Santa Ana Bus Base Maintenance Building | 11/24/2020 | 6/6/2022 | \$339,123 |
| Crosstown Electrical & Data | C02363 | Replace Light Poles and Luminaires at Golden West Transportation Center | 12/21/2020 | 7/1/2022 | \$223,789 |
| TranSystems Corporation | C02371 | Plans, Specifications, and Estimates for the I-5 Widening Project between Yale Avenue and SR-55 | 5/1/2020 | 5/1/2025 | \$13,898,000 |
| Glenn Lukos Associates, Inc. | C02479 | Biological Monitoring of the Acquired Conservation Lands | 12/1/2020 | 11/30/2023 | \$350,000 |
| Iteris, Inc. | C02020 | Traffic and Intelligent Transportation Systems Engineering Services for the Warner Avenue Regional Traffic Signal Synchronization Program Project | 4/1/2121 | 6/30/2025 | \$5,115,000 |
| New Flyer of America, Inc. | C02165 | Purchase of up to Ten (10) 40-foot Plug-In Battery-Electric Buses | 11/18/2020 | 5/31/2022 | \$10,373,229 |
| Web Advanced | C02524 | Website Maintenance Support Services | 12/1/2020 | 11/30/2024 | \$900,000 |
| DeAngelo Brothers LLC | C02433 | Roadway Operations and Maintenance Services for the 91 Express Lanes in Orange County | 1/1/2021 | 12/31/2024 | \$5,848,720 |
| LSA Associates, Inc. | C02523 | 2022 Long-Range Transportation Plan and Program Environmental Impact Report | 1/1/2021 | 4/30/2023 | \$983,500 |
| RECON Environmental, Inc. | C02477 | Maintenance Services for the Measure M2 Environmental Mitigation Program Interim Preserve Maintenance | 12/31/2020 | 12/31/2025 | \$12,000,000 |
| High Level Security Solutions, Inc. | C02492 | Property Patrol Services for the Seven measure M2 Environmental Mitigation Program Properties | 1/1/2021 | 12/31/2025 | \$400,000 |
| TOTAL NUMBER OF CONTRACTS | | | | | 18 |
| TOTAL DOLLAR VALUE | | | | | \$159,172,541 |

AMENDMENTS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|----------------------|------------|---|------------|-----------|-----------|
| Sperry Capital, Inc. | C72137 | Amendment No. 1 Financial Advisory Services for the Interest Rate Reset Transaction | 11/27/2020 | 4/30/2021 | \$170,000 |

Board-Approved Contracts - Second Quarter FY 2020-2021

| | | | | | |
|-----------------------------------|--------|--|------------|------------|---------------------|
| Nossaman LLP | C02021 | Amendment No. 1 Bond Counsel Services for the Interest Rate Reset Transaction | 10/26/2020 | 3/31/2023 | \$65,000 |
| MV Transportation, Inc. | C21865 | Amendment No. 10 Accommodate Expenses Related to the Current Coronavirus Pandemic Based on Revised Variable Hourly Rates | 11/23/2020 | 12/31/2021 | \$10,548,201 |
| MV Transportation, Inc. | C72052 | Amendment No. 5 Extend the Term of the Agreement to Operate the OC Flex Microtransit Pilot | 1/6/2021 | 12/31/2021 | \$330,856 |
| First Transit, Inc. | C41737 | Amendment No. 11 Reimbursement of Specific Expenses Related to the Coronavirus Pandemic | 6/1/2020 | 5/31/2021 | \$1,819,942 |
| TOTAL NUMBER OF AMENDMENTS | | | | | 5 |
| TOTAL DOLLAR VALUE | | | | | \$12,933,999 |

CONTRACT CHANGE ORDERS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|------------------------------------|------------|---|------------|------------|--------------------|
| OC 405 Partners | C53843 | CCO 3.2 Additional Maintenance Work | 12/22/2020 | 12/21/2025 | \$2,200,000 |
| OC 405 Partners | C53843 | CCO 78 Parking Lot Improvements at the United States Postal Service Property | 10/27/2020 | 12/21/2025 | \$537,436 |
| OC 405 Partners | C53843 | CCO 79 Extension of the Third Westbound Lane on Talbert Avenue to Cashew Street | 12/2/2020 | 12/21/2025 | \$270,528 |
| OC 405 Partners | C53843 | CCO 80 Temporary Bypass Waterline for the Goldenwest Street Overcrossing Bridge | 10/30/2020 | 12/21/2025 | \$579,604 |
| Walsh Construction Company II, LLC | C71904 | CCO 18 Increase the Allowance For Removal of Buried Man-Made Objects | 11/17/2020 | 10/8/2022 | \$300,000 |
| Walsh Construction Company II, LLC | C71904 | CCO 24.1 Overhead Contact System Sectionalization | 1/6/2021 | 10/8/2022 | \$845,985 |
| Walsh Construction Company II, LLC | C71904 | CCO 30.1 Conduct Electrical Continuity Testing | 1/22/2021 | 10/8/2022 | \$320,164 |
| TOTAL NUMBER OF CONTRACTS | | | | | 7 |
| TOTAL DOLLAR VALUE | | | | | \$5,053,717 |

COOPERATIVE AGREEMENTS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|---|------------|--|-----------|-----------|------------------|
| California Department of Transportation | C02583 | Right-of-Way Support Services for the SR-91 Improvement Project between SR 57 and SR-55. | 2/26/2021 | 6/30/2024 | \$970,000 |
| TOTAL NUMBER OF CONTRACTS | | | | | 1 |
| TOTAL DOLLAR VALUE | | | | | \$970,000 |

COOPERATIVE AMENDMENTS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|----------------------------------|------------|---|------------|-----------|--------------------|
| City of Fountain Valley | C53613 | Amendment No. 5 Procurement and Installation of Emergency Vehicle Preemption at 28 Proposed Signal Locations as Part of the I-405 Improvement Project | 11/10/2020 | 4/30/2023 | \$5,023,708 |
| TOTAL NUMBER OF CONTRACTS | | | | | 1 |
| TOTAL DOLLAR VALUE | | | | | \$5,023,708 |

Board-Approved Contracts - Second Quarter FY 2020-2021

PURCHASE ORDERS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|---|------------|--|-----------|-----------|------------------|
| Marsh Risk and Insurance Services, Inc. | A46200 | Property Insurance on Behalf of Orange County Transportation Authority with Zurich Insurance Company | 12/1/2020 | 12/1/2021 | \$629,269 |
| TOTAL NUMBER OF CONTRACTS | | | | | 1 |
| TOTAL DOLLAR VALUE | | | | | \$629,269 |

SOLE SOURCE

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|----------------------------------|------------|---|------------|-----------|------------------|
| S&A Systems, Inc. | C02585 | Replacement of 150 Data Loggers on Non-Revenue Vehicles | 12/10/2020 | 6/30/2022 | \$106,355 |
| S&A Systems, Inc. | C02584 | Replacement of 52 Remote Island Head Units | 12/10/2020 | 6/30/2022 | \$315,296 |
| Motorola Solutions, Inc. | A45898 | Three Sets of APX 6500 Enhanced 700/800 Hot Red Encrypted Mobile Radios and Necessary Accessories | 12/14/2020 | 1/31/2021 | \$37,362 |
| TOTAL NUMBER OF CONTRACTS | | | | | 3 |
| TOTAL DOLLAR VALUE | | | | | \$459,013 |

OPTION YEARS

| Prime Vendor | Contract # | Contract Description | Eff Date | Exp Date | Amount |
|-----------------------------------|------------|--|----------|------------|------------------|
| moovel North America, LLC | C53244 | Amendment No 11 to Exercise Option Year for Licensing, Maintenance, and Commission Fees. | 1/1/2021 | 12/31/2021 | \$290,372 |
| TOTAL NUMBER OF AMENDMENTS | | | | | 1 |
| TOTAL DOLLAR VALUE | | | | | \$290,372 |

*Interstate 405 (I-405)
State Route 55 (SR-55)
State Route 91 (SR-91)
Interstate 5 (I-5)

REGIONAL PLANNING and HIGHWAYS COMMITTEE - Third Quarter Outlook (January 1, 2021 through March 31, 2021)

ATTACHMENT B

| <u>Committee Date</u> | <u>Item Description</u> | <u>Estimated Value</u> | <u>Division</u> |
|-----------------------|---|------------------------|------------------|
| January 4, 2021 | Supplemental Contract Change Order for the Interstate 405 Improvement Project from State Route 73 to Interstate 605 - Archaeological Treatment Plan | \$2,500,000 | Capital Programs |
| | Cooperative Agreement with the California Department of Transportation for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5 | \$255,320,000 | Capital Programs |
| <hr/> | | | |
| February 1, 2021 | Request to Exercise option-term for Program Management Consultant Services for the Highway Program | \$15,000,000 | Capital Programs |
| | Award of Agreement for Regional Modeling-Traffic Operations On-Call Support Staffing | \$400,000 | Planning |
| <hr/> | | | |
| March 1, 2021 | Award of Agreements for Freeway Service Patrol Services | \$28,575,552 | Operations |
| | Award of Agreement for Call Box Maintenance Services | \$2,527,862 | Operations |
| | Measure M2 Freeway Environmental Mitigation Program Regulatory Services Support Contract Selection | \$500,000 | Planning |

TRANSIT COMMITTEE - Third Quarter Outlook (January 1, 2021 through March 31, 2021)

| <u>Committee Date</u> | <u>Item Description</u> | <u>Estimated Value</u> | <u>Division</u> |
|-----------------------|---|------------------------|--------------------------|
| January 14, 2021 | Contract Change Orders for the Construction of the OC Streetcar project | \$2,949,498 | Capital Programs |
| | Award of Agreement to Purchase Electric Vehicle Chargers | \$569,560 | Operations |
| | Sole Source Agreement for the Operations and Maintenance of Fluid Management System | \$540,000 | Operations |
| <hr/> | | | |
| February 11, 2021 | Approval to Exercise the First Option Term for Mobile Ticket Validator Extended Warranty Coverage Period | \$290,372 | Finance & Administration |
| | Award of Agreement for the Purchase of an Enterprise Asset Management System | \$5,061,529 | Operations |
| <hr/> | | | |
| March 11, 2021 | Agreement for the Construction of Anaheim Canyon Metrolink Station Improvements | \$10,336,000 | Capital Programs |
| | Bus Restructuring Study Consultant Selection | \$555,550 | Planning |
| | Amendment No. 8 to C-6-0926 Between Orange County Transportation Authority and PGH Wong Engineering, Inc. | \$14,000,000 | Capital Programs |

FINANCE AND ADMINISTRATION COMMITTEE - Third Quarter Outlook (January 1, 2021 through March 31, 2021)

| <u>Committee Date</u> | <u>Item Description</u> | <u>Estimated Value</u> | <u>Division</u> |
|-----------------------|--|------------------------|--------------------------|
| February 10, 2021 | Amendment to Agreement for Renewable Natural Gas | \$9,500,000 | Finance & Administration |

LEGISLATIVE AND COMMUNICATIONS COMMITTEE - Third Quarter Outlook (January 1, 2021 through March 31, 2021)

| <u>Committee Date</u> | <u>Item Description</u> | <u>Estimated Value</u> | <u>Division</u> |
|-----------------------|---|------------------------|------------------|
| January 21, 2021 | Amendment to Agreement for Bus Advertising Revenue Program | Revenue | External Affairs |
| February 18, 2021 | Agreement for On-Call Planning Studies Public Outreach Consultant Services | \$275,000 | External Affairs |

EXECUTIVE COMMITTEE - Third Quarter Outlook (January 1, 2021 through March 31, 2021)

| <u>Committee Date</u> | <u>Item Description</u> | <u>Estimated Value</u> | <u>Division</u> |
|-----------------------|-------------------------|------------------------|-----------------|
| None | | | |



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Orange County Transportation Authority Investment and Debt Programs Report - December 2020

Finance and Administration Committee Meeting of January 27, 2021

Present: Directors Goodell, Harper, Hennessey, Hernandez, Jones, and Muller

Absent: None

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendation

Receive and file as an information item.



January 27, 2021

To: Finance and Administration Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Orange County Transportation Authority Investment and Debt Programs Report – December 2020

Overview

The Orange County Transportation Authority has a comprehensive investment and debt program to fund its immediate and long-term cash flow demands. Each month, the Treasurer submits a report detailing investment allocation, performance, compliance, outstanding debt balances, and credit ratings for the Orange County Transportation Authority's debt program. This report is for the month ending December 31, 2020. The report has been reviewed and is consistent with the investment practices contained in the Investment Policy.

Recommendation

Receive and file as an information item.

Discussion

As of December 31, 2020, the Orange County Transportation Authority's (OCTA) outstanding investments totaled \$2 billion. The portfolio is divided into three managed portfolios: the liquid portfolio for immediate cash needs, the short-term portfolio for future budgeted expenditures, and the bond proceeds portfolio to meet Measure M2 (M2) transportation program needs. In addition to these portfolios, OCTA has funds invested in debt service reserve funds for the 91 Express Lanes Program.

The weighted average book yield for the OCTA portfolio is 1.3 percent. The book yield measures the exact income, or interest, on a bond without regard to market price change. The yield is the income return on an investment, such as the interest received from holding a particular security. The yield is usually expressed as an annual percentage rate based on the investment's cost and market value.

OCTA's month-end balance in the Local Agency Investment Fund was \$10,922,718, with an average monthly effective yield of 0.5 percent. OCTA's month-end balance in the Orange County Investment Pool (OCIP) was \$402,273.49. For the month of November, the monthly gross yield for the OCIP was 0.9 percent. Yields for the month of December will be received in January.

During the month of December, no securities held within OCTA's investment portfolio were downgraded. The total number of securities on the Negative Credit Watch list remained at three securities for the month. Please refer to A-8 (Rating Downgrades and Negative Credit Watch) of Attachment A for further details. As of December 31, 2020, the securities reflected on A-8 still meet the minimum ratings requirements set forth by OCTA's Investment Policy.

OCTA's debt program is separate from its investment program and is comprised of M2 Sales Tax Revenue Bonds, 91 Toll Revenue Bonds, and 2017 Transportation Infrastructure Finance and Innovation Act (TIFIA) Loan. The debt program currently has an outstanding principal balance of \$1 billion as of December 31, 2020. Approximately 63 percent of the outstanding balance is comprised of M2 debt, nine percent is associated with the 91 Express Lanes Program, and 29 percent is for the TIFIA Loan.


Summary

The Treasurer is submitting a copy of the Orange County Transportation Authority Investment and Debt Programs report to the Finance and Administration Committee. The report is for the month ending December 31, 2020.

Attachments

- A. Orange County Transportation Authority Investment and Debt Programs – For the Period Ending December 31, 2020
- B. Orange County Transportation Authority Portfolio Listing as of December 31, 2020

Prepared by:



Robert Davis
Department Manager
Treasury/Public Finance
(714) 560-5675

Approved by:



Andrew Oftelie
Chief Financial Officer
Finance and Administration
(714) 560-5649

**Treasury/Public Finance Department's
Report On**

**Orange County Transportation Authority
Investment and Debt Programs**



**Presented to the
Finance and Administration Committee**

**For The Period Ending
December 31, 2020**

INVESTMENT PROGRAM

OCTA Investment Dashboard

12/31/2020

Safety of Principal

Securities that fell below OCTA's minimum credit quality requirements during the month of December 2020:

Not applicable.

Securities currently held within OCTA's portfolio that fell below OCTA's minimum credit quality requirements during prior reporting periods:

On Thursday, February 20, 2020, Moody's downgraded the long-term debt rating of Nissan to Baa1 from A3. OCTA holds security positions in Nissan Auto/Lease asset backed securities, representing less than 0.01% of the portfolio. However, for asset backed securities, receivables are sold via a legal concept called "true sale" into a bankruptcy-remote issuing trust, therefore isolated from the financial health of the issuer. There has been no negative price action on the asset backed securities on news of the downgrade. The Treasurer reviewed the position and recommended the securities be held for the short-term. The Treasurer presented his recommendation to the Deputy Chief Executive Officer who concurred.

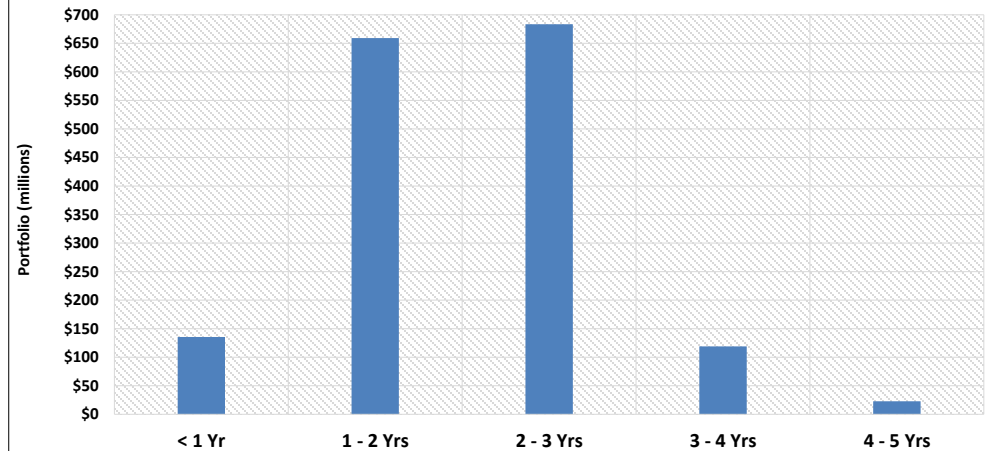
Securities downgraded or placed on Negative Credit Watch during the month of December 2020,

but remain in compliance with OCTA's Investment Policy:

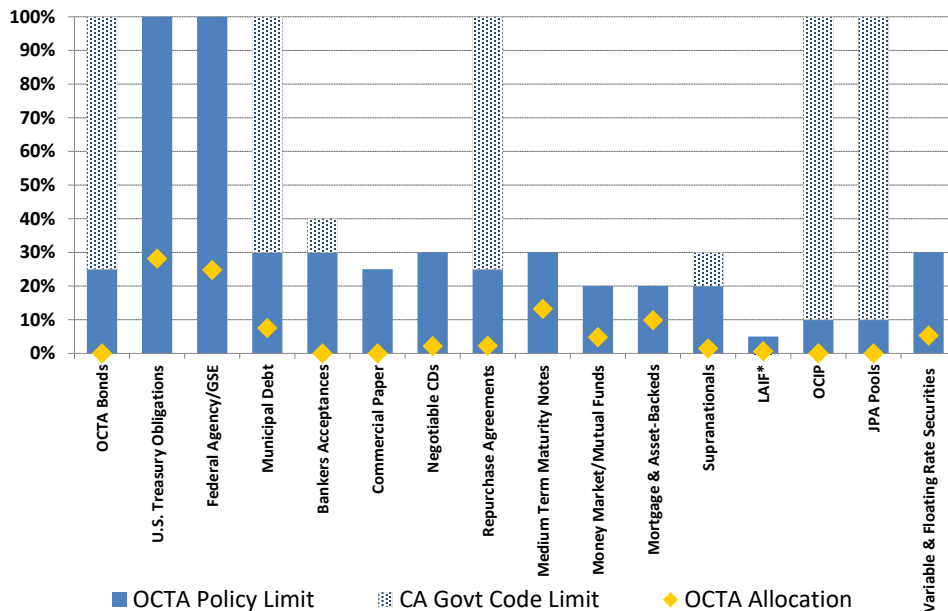
There were no securities held within OCTA's investment portfolio that were downgraded during the month. The total number of securities on the Negative Credit Watch list remained at three securities for the month.

For further details please refer to A-8 of this report.

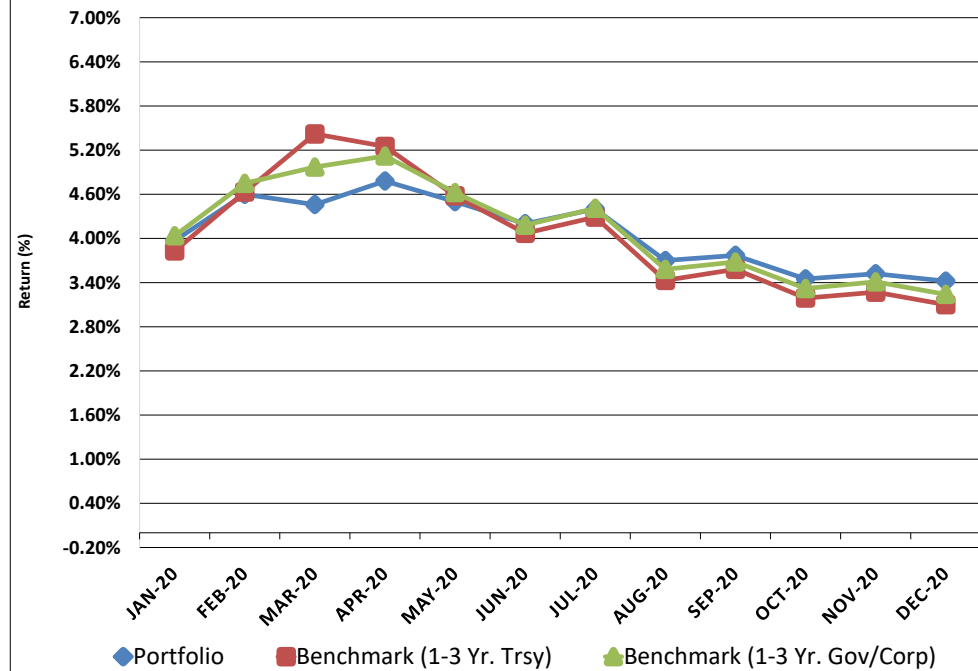
Portfolio Liquidity



Portfolio Diversification



Portfolio Return - 12 Month



*Per CA Government Code LAIF limit is \$75 million

Investment Compliance

12/31/2020

| Portfolio Subject to Investment Policy | | | |
|--|-------------------------|----------------------|---------------------------------------|
| Short-Term/Liquid Portfolio ¹ | Dollar Amount Invested | Percent Of Portfolio | Investment Policy Maximum Percentages |
| U.S. Treasury Obligations | \$ 491,088,240 | 28.1% | 100% |
| Federal Agency/GSE | 432,064,901 | 24.7% | 100% |
| Municipal Debt | 131,035,044 | 7.5% | 30% |
| Commercial Paper | - | 0.0% | 25% |
| Negotiable Certificates of Deposit | 37,602,073 | 2.2% | 30% |
| Repurchase Agreements | 39,322,515 | 2.3% | 25% |
| Medium Term Maturity Notes/Corporates | 230,191,423 | 13.2% | 30% |
| Money Market/Mutual Funds | 83,725,453 | 4.8% | 20% |
| Mortgage & Asset-Backed | 171,662,554 | 9.8% | 20%* |
| Supranationals | 25,584,395 | 1.5% | 20% |
| Local Agency Investment Fund | 10,922,718 | 0.6% | \$ 75 Million |
| Orange County Investment Pool | 402,273 | 0.0% | 10% |
| Joint Powers Authority Pools | - | 0.0% | 10% |
| Bank Deposits | 268,060 | 0.0% | 5% |
| Variable & Floating Rate Securities | 92,073,851 | 5.3% | 30% |
| Total Short-Term/Liquid Portfolio | \$ 1,745,943,500 | 100.0% | |

1. Excludes portion of Liquid Portfolio subject to Indenture

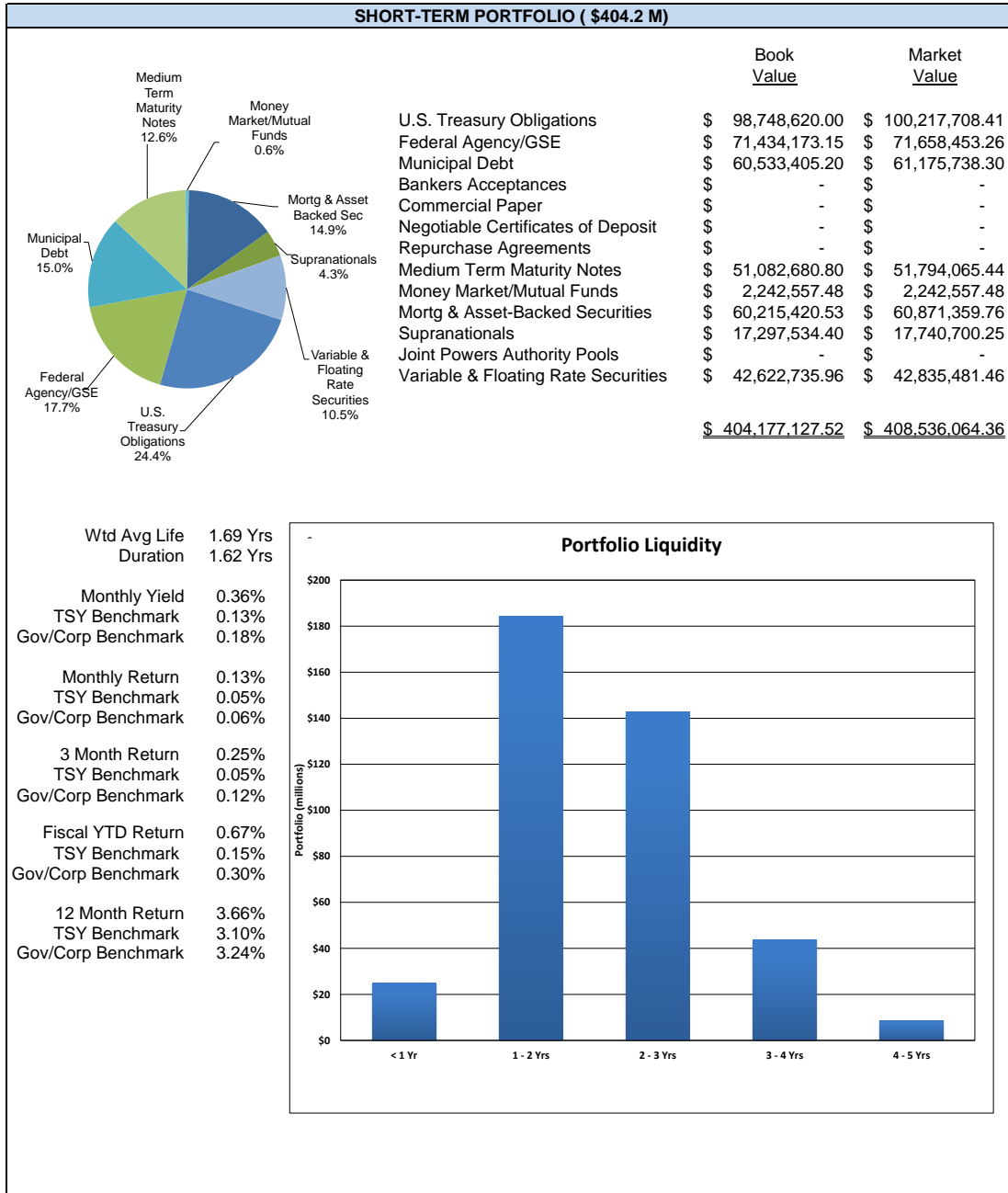
*Asset-backed securities, excluding mortgages, may not exceed 10 percent of the allocation

| Portfolio Subject to Indenture | | | | | | |
|---|-------------------------|----------------|-------------|------------------------|---------------|--|
| | Dollar Amount Invested | Credit Quality | OCTA Term | Indenture Requirements | | |
| | | | | Credit Quality | Term | |
| Liquid Portfolio* | | | | | | |
| Money Market Funds | \$ 65,634,945 | AAA/Aaa | 45 days | Min. A2/A | Max. 4 years | |
| Bond Proceeds Portfolio | | | | | | |
| Money Market Funds | \$ 103,702,920 | AAA/Aaa | 45 days | Min. A2/A | Max. 4 years | |
| Commercial Paper | \$ - | P-1/F-1/A-1 | 60-90 days | Min. A2/A | Max. 4 years | |
| Guaranteed Investment Contract | 67,000,000 | Aa2/AA-/A+ | N/A | Min. A3/A- | N/A | |
| Total Bond Proceeds Portfolio | \$ 170,702,920 | | | | | |
| Reserve Funds Portfolio | | | | | | |
| Commercial Paper | \$ 25,076,772 | P-1/F-1 | 60-150 days | Min. A-1/P-1 | Max. 180 days | |
| Bank Deposits | \$ 213,077 | | | | | |
| US Treasuries Obligations | 515 | AAA/Aaa | 30 days | Min. A2/A | Max. 5 years | |
| Total Reserve Funds Portfolio | \$ 25,290,364 | | | | | |
| Total Portfolio Subject to Indenture | \$ 195,993,283 | | | | | |
| Portfolio Total | \$ 2,007,571,728 | | | | | |

*Reflects portion of Liquid Portfolio subject to Indenture

Investment Manager Diversification and Maturity Schedules

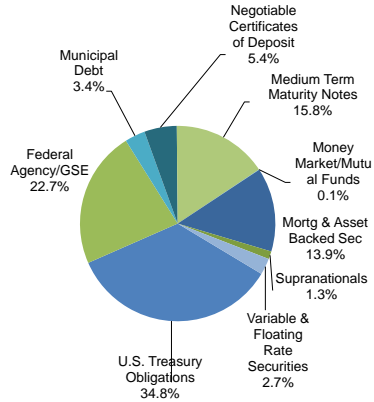
MetLife Investment Management
12/31/2020



Investment Manager Diversification and Maturity Schedules

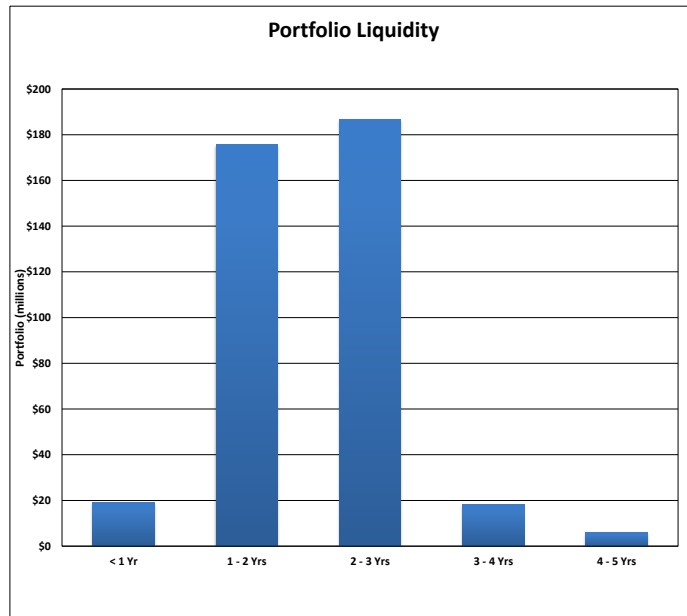
PFM
12/31/2020

SHORT-TERM PORTFOLIO (\$405.5 M)



| | Book Value | Market Value |
|-------------------------------------|--------------------------|--------------------------|
| U.S. Treasury Obligations | \$ 141,106,405.12 | \$ 144,472,769.20 |
| Federal Agency/GSE | \$ 92,041,311.84 | \$ 92,406,496.96 |
| Municipal Debt | \$ 13,662,759.95 | \$ 13,736,223.50 |
| Bankers Acceptances | \$ - | \$ - |
| Commercial Paper | \$ - | \$ - |
| Negotiable Certificates of Deposit | \$ 21,800,000.00 | \$ 22,236,153.25 |
| Repurchase Agreements | \$ - | \$ - |
| Medium Term Maturity Notes | \$ 64,079,032.80 | \$ 65,494,005.45 |
| Money Market/Mutual Funds | \$ 228,154.11 | \$ 228,154.11 |
| Mortg & Asset-Backed Securities | \$ 56,355,250.29 | \$ 57,340,232.04 |
| Supranationals | \$ 5,243,418.50 | \$ 5,268,273.50 |
| Joint Powers Authority Pools | \$ - | \$ - |
| Variable & Floating Rate Securities | \$ 10,964,023.57 | \$ 11,084,678.25 |
| | <u>\$ 405,480,356.18</u> | <u>\$ 412,266,986.26</u> |

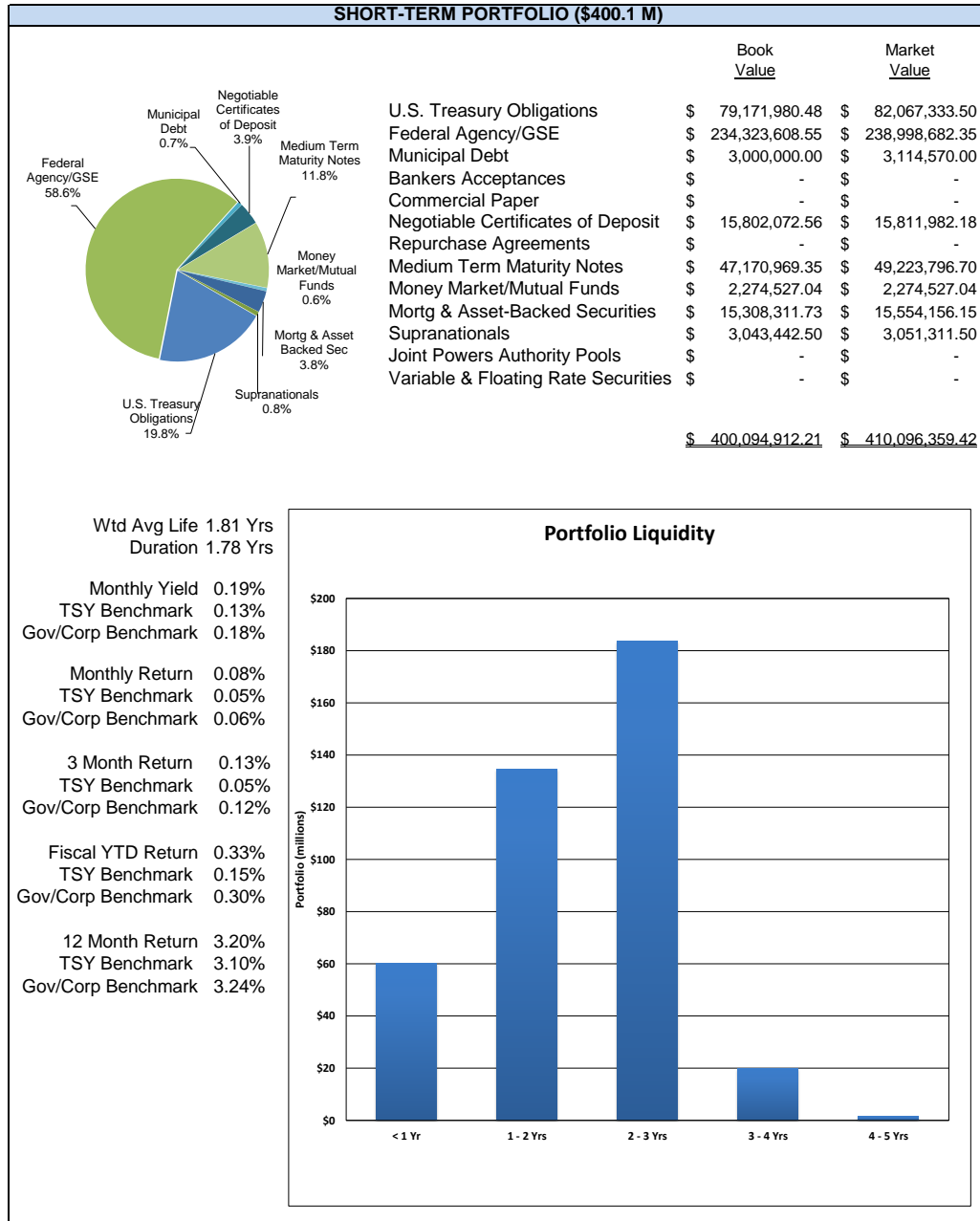
| | |
|--------------------|----------|
| Wtd Avg Life | 1.84 Yrs |
| Duration | 1.83 Yrs |
| Monthly Yield | 0.23% |
| TSY Benchmark | 0.13% |
| Gov/Corp Benchmark | 0.18% |
| Monthly Return | 0.10% |
| TSY Benchmark | 0.05% |
| Gov/Corp Benchmark | 0.06% |
| 3 Month Return | 0.16% |
| TSY Benchmark | 0.05% |
| Gov/Corp Benchmark | 0.12% |
| Fiscal YTD Return | 0.40% |
| TSY Benchmark | 0.15% |
| Gov/Corp Benchmark | 0.30% |
| 12 Month Return | 3.35% |
| TSY Benchmark | 3.10% |
| Gov/Corp Benchmark | 3.24% |



Investment Manager Diversification and Maturity Schedules

Chandler Asset Management

12/31/2020

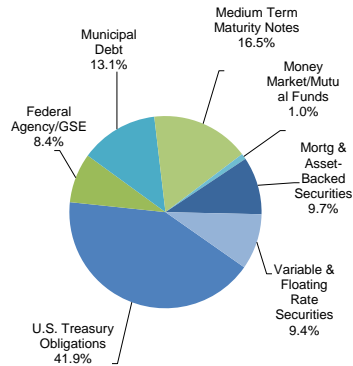


Investment Manager Diversification and Maturity Schedules

Payden & Rygel

12/31/2020

SHORT-TERM PORTFOLIO (\$410.3 M)



| | Book Value | Market Value |
|-------------------------------------|--------------------------|--------------------------|
| U.S. Treasury Obligations | \$ 172,061,234.42 | \$ 172,144,184.75 |
| Federal Agency/GSE | \$ 34,265,807.10 | \$ 34,464,685.80 |
| Municipal Debt | \$ 53,838,879.01 | \$ 53,976,090.54 |
| Bankers Acceptances | \$ - | \$ - |
| Commercial Paper | \$ - | \$ - |
| Negotiable Certificates of Deposit | \$ - | \$ - |
| Repurchase Agreements | \$ - | \$ - |
| Medium Term Maturity Notes | \$ 67,858,739.57 | \$ 69,373,438.84 |
| Money Market/Mutual Funds | \$ 3,959,441.77 | \$ 3,959,441.77 |
| Mortg & Asset-Backed Securities | \$ 39,783,571.37 | \$ 40,382,667.37 |
| Supranationals | \$ - | \$ - |
| Joint Powers Authority Pools | \$ - | \$ - |
| Variable & Floating Rate Securities | \$ 38,487,091.37 | \$ 38,805,036.16 |
| | <u>\$ 410,254,764.61</u> | <u>\$ 413,105,545.23</u> |

Wtd Avg Life 1.93 Yrs
Duration 1.92 Yrs

Monthly Yield 0.28%
TSY Benchmark 0.13%
Gov/Corp Benchmark 0.18%

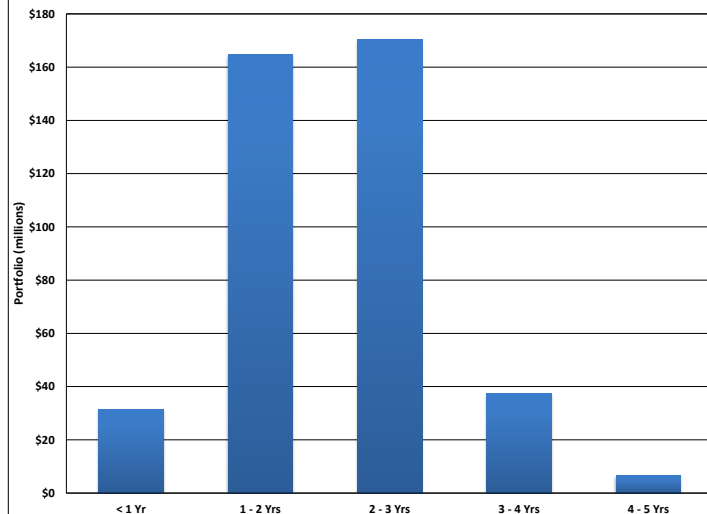
Monthly Return 0.10%
TSY Benchmark 0.05%
Gov/Corp Benchmark 0.06%

3 Month Return 0.21%
TSY Benchmark 0.05%
Gov/Corp Benchmark 0.12%

Fiscal YTD Return 0.51%
TSY Benchmark 0.15%
Gov/Corp Benchmark 0.30%

12 Month Return 3.48%
TSY Benchmark 3.10%
Gov/Corp Benchmark 3.24%

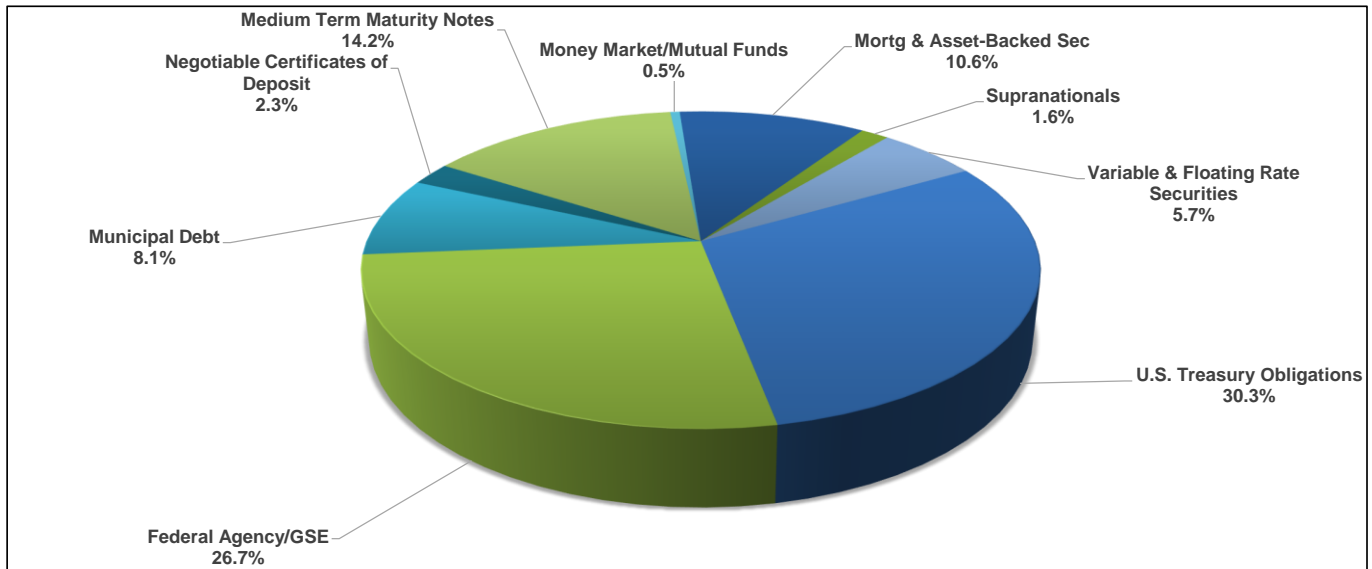
Portfolio Liquidity



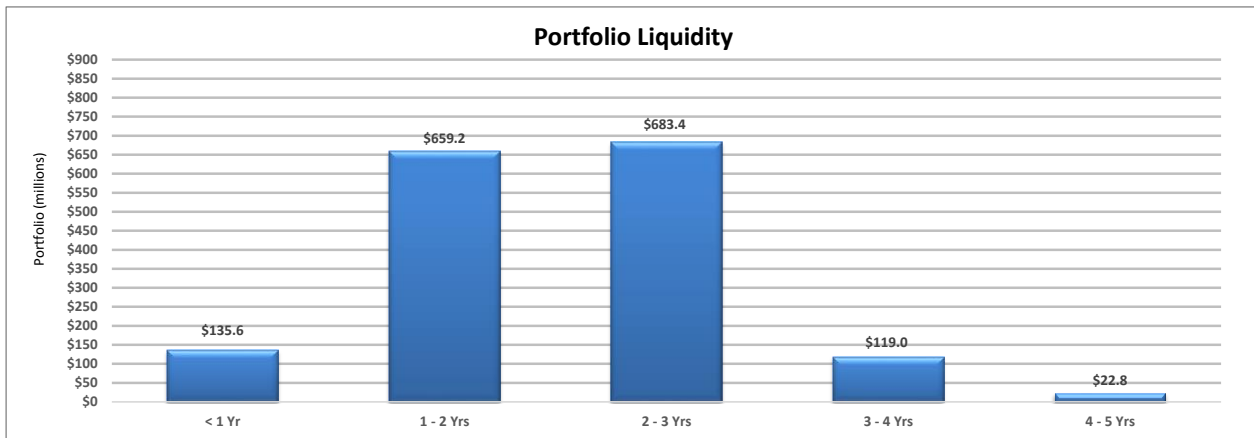
Short-Term Portfolio

12/31/2020

Portfolio Composition



Portfolio Liquidity



Rating Downgrades & Negative Credit Watch

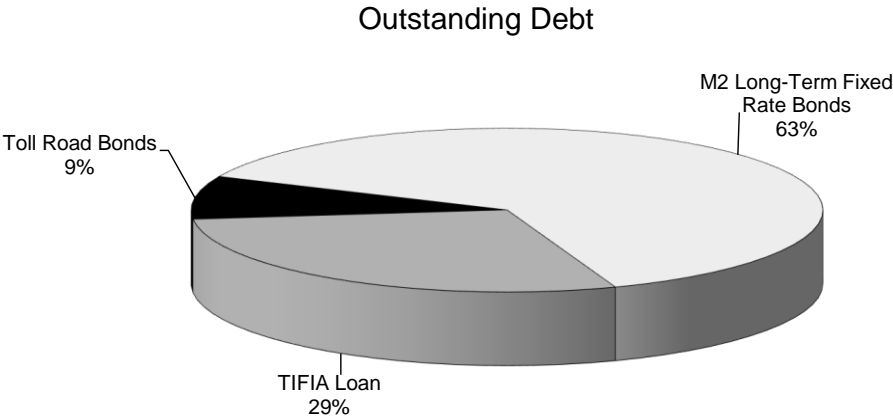
12/31/2020

| <u>Investment Manager / Security</u> | <u>Par Amount</u> | <u>Maturity</u> | <u>S&P</u> | <u>Moody's</u> | <u>Fitch Ratings</u> |
|--|-------------------|-----------------|----------------|----------------|----------------------|
| Rating Downgrades: | | | | | |
| N/A | | | | | |
| Negative Credit Watch: | | | | | |
| PFM | | | | | |
| Merck & Co. <i>On February 5, 2020, S&P placed the long-term ratings of Merck & Co. under review for possible downgrade. The credit watch placement is due to Merck's announcement that it will be spinning off a large portion of their brand. The security complies with the requirements of the Investment Policy, and the investment manager is comfortable holding the security due to the industry strength of Merck, and their vast pharmaceutical diversification.</i> | \$ 1,250,000 | 2/10/2022 | AA- | A1 | A+ |
| Port Authority of New York & New Jersey <i>On June 26, 2020, Fitch placed the long-term ratings of the Port Authority under review for possible downgrade. The credit watch placement reflects elevated stresses to both the agency's operating activities and revenue generation as a result of COVID-19. The security complies with the requirements of the Investment Policy, and the investment manager is comfortable holding the security due to expectations of long-term revenue recoveries.</i> | \$ 2,220,000 | 7/1/2023 | A+ | Aa3 | AA- |
| Payden & Rygel | | | | | |
| Southern CA Public Power Authority <i>On September 11, 2020, S&P placed the long-term ratings of the Southern CA Public Power Authority (SCAPPA) under review for possible downgrade. The credit watch placement is due to the weakening of one of the project participants, the City of Anaheim, this weakening comes as a result of implications from COVID-19, and its impacts on the tourism and hospitality industries. The security remains in compliance with the requirements of the Investment Policy. Based on the fundamental value of the utility itself as well as the inherent value of the bond, the investment manager is comfortable holding the security.</i> | \$ 2,735,000 | 7/1/2023 | AA- | N/A | AA- |

DEBT PROGRAM

(M2 Sales Tax Revenue Bonds, 91 Toll Revenue Bonds, 2017 TIFIA Loan (I-405))

Total Outstanding Debt*
As of 12/31/20



TOTAL OUTSTANDING DEBT: \$998,955,000

*Comprised of OCTA's debt obligations (M2 Sales Tax Revenue Bonds, 91 Toll Revenue Bonds, and 2017 TIFIA Loan (I-405)) currently outstanding and irrespective of OCTA's investment program.

Outstanding Debt*

As of 12/31/20

Orange County Local Transportation Authority (OCLTA-M2)

2010 Series A Taxable Build America Bonds - Sales Tax Revenue Bonds

| | |
|--------------------------------|-----------------------|
| Issued: | \$ 293,540,000 |
| Outstanding: | 250,000,000 |
| Debt Service FY 2021: | 17,270,000 |
| Pledged Revenue Source: | M2 Sales Tax Revenues |
| Ratings (Fitch/ Moody's/ S&P): | AA+/Aa2/AA+ |
| Final Maturity: | 2041 |

2019 M2 Sales Tax Bond

| | |
|-------------------------|-----------------------|
| Issued: | \$ 376,690,000 |
| Outstanding: | 376,690,000 |
| Debt Service FY 2021: | 26,569,650 |
| Pledged Revenue Source: | M2 Sales Tax Revenues |
| Ratings (Fitch/ S&P): | AA+/AA+ |
| Final Maturity: | 2041 |

91 Express Lanes

2013 OCTA 91 Express Lanes Refunding Bonds

| | |
|--------------------------------|-----------------------|
| Issued: | \$ 124,415,000 |
| Outstanding: | 85,265,000 |
| Debt Service FY 2021: | 10,795,075 |
| Pledged Revenue Source: | 91 Toll Road Revenues |
| Ratings (Fitch/ Moody's/ S&P): | A+/A1/AA- |
| Final Maturity: | 2030 |

405 Express Lanes

2017 TIFIA Loan

| | |
|-------------------------|------------------------|
| Outstanding: | \$ 287,000,000 |
| Accrued Interest: | 20,269,545 |
| Pledged Revenue Source: | 405 Toll Road Revenues |
| Ratings (Moody's): | Baa2 |
| Final Maturity: | 2057 |

*Comprised of OCTA's debt obligations (M2 Sales Tax Revenue Bonds, 91 Toll Revenue Bonds, and 2017 TIFIA Loan (I-405)) currently outstanding and irrespective of OCTA's investment program.

Orange County Transportation Authority
Portfolio Listing
As of December 31, 2020

| LIQUID PORTFOLIO | | | | | |
|--------------------------------------|---------------|-------------------|-------------------|-------|--|
| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD | |
| CASH EQUIVALENTS | | | | | |
| BANK DEPOSITS | 12/31/2020 | 268,060.00 | 268,060.00 | | |
| REPURCHASE AGREEMENT | 12/31/2020 | 39,322,515.00 | 39,322,515.00 | | |
| MONEY MARKET DEMAND ACCOUNT | N/A | 75,020,772.43 | 75,020,772.43 | 0.20% | |
| FIDELITY TREASURY OBLIGATIONS FUND | N/A | 40,450,051.13 | 40,450,051.13 | 0.01% | |
| FEDERATED TREASURY OBLIGATIONS FUND | N/A | 25,184,893.61 | 25,184,893.61 | 0.01% | |
| SUB-TOTAL | | 180,246,292.17 | 180,246,292.17 | | |
| LOCAL AGENCY INVESTMENT FUND (LAIF) | | | | | |
| | N/A | 10,922,718.11 | 10,922,718.11 | 0.54% | |
| ORANGE COUNTY INVESTMENT POOL (OCIP) | | | | | |
| | N/A | 402,273.49 | 402,273.49 | 0.90% | |
| LIQUID PORTFOLIO - TOTAL | | \$ 191,571,283.77 | \$ 191,571,283.77 | | |

| SHORT-TERM PORTFOLIO | | | | | |
|---|---------------|---------------|---------------|--------|--|
| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD | |
| Money Market Funds | | | | | |
| FIRST AMER:GVT OBLG Z | 12/31/2020 | 228,154.11 | 228,154.11 | 0.03% | |
| FIRST AMER:GVT OBLG Z | 12/31/2020 | 2,274,527.04 | 2,274,527.04 | 0.03% | |
| FIRST AMER:GVT OBLG Z | 12/31/2020 | 2,242,557.48 | 2,242,557.48 | 0.03% | |
| FIRST AMER:GVT OBLG Z | 12/31/2020 | 3,959,441.77 | 3,959,441.77 | 0.03% | |
| SUB-TOTAL | | 8,704,680.40 | 8,704,680.40 | | |
| NEGOTIABLE CERTIFICATES OF DEPOSIT | | | | | |
| Credit Suisse AG, New York Branch | 2/1/2022 | 3,100,000.00 | 3,102,666.00 | 0.44% | |
| DNB Bank ASA, New York Branch | 12/2/2022 | 3,875,000.00 | 3,999,891.25 | 0.37% | |
| Nordea Bank Abp, New York Branch | 8/26/2022 | 3,875,000.00 | 3,988,188.75 | 0.10% | |
| Skandinaviska Enskilda Banken AB (publ.) | 8/26/2022 | 3,875,000.00 | 3,989,080.00 | 0.10% | |
| Societe Generale, New York Branch | 2/14/2022 | 4,000,000.00 | 4,078,160.00 | 0.05% | |
| Sumitomo Mitsui Banking Corporation, New York Bra | 7/8/2022 | 3,075,000.00 | 3,078,167.25 | 0.63% | |
| MUFG Bank Ltd. (New York Branch) | 1/26/2021 | 7,802,072.56 | 7,802,702.18 | 0.10% | |
| Royal Bank of Canada New York Branch | 2/19/2021 | 8,000,000.00 | 8,009,280.00 | 0.16% | |
| SUB-TOTAL | | 37,602,072.56 | 38,048,135.43 | | |
| U.S. TREASURY OBLIGATIONS | | | | | |
| UNITED STATES TREASURY | 7/31/2022 | 4,097,668.75 | 4,202,965.80 | 0.13% | |
| UNITED STATES TREASURY | 7/31/2022 | 7,004,300.00 | 7,316,654.40 | 0.13% | |
| UNITED STATES TREASURY | 7/31/2022 | 6,005,625.00 | 6,165,720.00 | 0.13% | |
| UNITED STATES TREASURY | 7/31/2022 | 5,216,656.25 | 5,343,624.00 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 7,534,603.16 | 7,789,446.00 | 0.14% | |
| UNITED STATES TREASURY | 10/31/2022 | 5,360,733.97 | 5,574,230.20 | 0.13% | |
| UNITED STATES TREASURY | 2/28/2023 | 5,538,052.36 | 5,837,110.20 | 0.14% | |
| UNITED STATES TREASURY | 2/15/2022 | 9,389,351.56 | 9,650,040.00 | 0.13% | |
| UNITED STATES TREASURY | 4/15/2022 | 6,003,750.00 | 6,163,620.00 | 0.13% | |
| UNITED STATES TREASURY | 12/31/2022 | 4,326,890.63 | 4,523,173.50 | 0.13% | |
| UNITED STATES TREASURY | 12/31/2022 | 6,439,408.22 | 6,852,347.90 | 0.13% | |
| UNITED STATES TREASURY | 1/31/2023 | 1,253,320.31 | 1,292,087.50 | 0.13% | |
| UNITED STATES TREASURY | 1/31/2023 | 2,911,894.53 | 2,997,643.00 | 0.13% | |
| UNITED STATES TREASURY | 3/31/2023 | 15,308,789.06 | 15,457,050.00 | 0.14% | |
| UNITED STATES TREASURY | 6/30/2023 | 4,097,187.50 | 4,122,520.00 | 0.15% | |
| UNITED STATES TREASURY | 11/15/2022 | 3,995,937.50 | 4,111,400.00 | 0.14% | |
| UNITED STATES TREASURY | 1/31/2022 | 255,307.81 | 264,916.60 | 0.13% | |
| UNITED STATES TREASURY | 2/28/2022 | 1,006,718.75 | 1,020,310.00 | 0.13% | |
| UNITED STATES TREASURY | 4/30/2022 | 633,273.05 | 644,666.40 | 0.12% | |
| UNITED STATES TREASURY | 4/30/2022 | 1,974,765.63 | 2,046,560.00 | 0.12% | |
| UNITED STATES TREASURY | 5/31/2022 | 9,031,289.06 | 9,207,090.00 | 0.12% | |
| UNITED STATES TREASURY | 6/30/2022 | 2,010,156.25 | 2,048,680.00 | 0.13% | |
| UNITED STATES TREASURY | 10/15/2022 | 745,312.50 | 766,702.50 | 0.13% | |
| UNITED STATES TREASURY | 1/15/2023 | 2,713,289.06 | 2,775,303.00 | 0.13% | |
| UNITED STATES TREASURY | 1/15/2023 | 4,101,875.00 | 4,111,560.00 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2023 | 2,192,093.75 | 2,199,406.00 | 0.14% | |
| UNITED STATES TREASURY | 6/15/2023 | 4,003,281.25 | 4,010,320.00 | 0.14% | |
| UNITED STATES TREASURY | 6/15/2023 | 1,051,927.73 | 1,052,709.00 | 0.14% | |
| UNITED STATES TREASURY | 10/15/2023 | 9,980,859.38 | 9,993,000.00 | 0.15% | |
| UNITED STATES TREASURY | 11/15/2023 | 4,123,057.81 | 4,131,577.20 | 0.15% | |
| UNITED STATES TREASURY | 11/30/2022 | 874,179.69 | 875,105.00 | 0.12% | |
| UNITED STATES TREASURY | 12/31/2022 | 1,924,849.61 | 1,925,231.00 | 0.12% | |
| UNITED STATES TREASURY | 7/31/2022 | 6,061,226.56 | 6,371,244.00 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2021 | 7,598,515.63 | 7,632,984.00 | 0.25% | |
| UNITED STATES TREASURY | 8/31/2022 | 4,470,357.42 | 4,784,757.00 | 0.13% | |
| UNITED STATES TREASURY | 8/31/2022 | 2,874,960.94 | 3,086,940.00 | 0.13% | |
| UNITED STATES TREASURY | 11/30/2022 | 7,718,648.44 | 8,079,396.00 | 0.13% | |
| UNITED STATES TREASURY | 4/30/2023 | 5,234,208.98 | 5,431,072.50 | 0.14% | |
| UNITED STATES TREASURY | 5/31/2023 | 7,787,187.50 | 8,285,280.00 | 0.15% | |
| UNITED STATES TREASURY | 10/31/2023 | 8,007,187.50 | 8,334,080.00 | 0.15% | |
| UNITED STATES TREASURY | 6/30/2022 | 4,329,843.75 | 4,609,530.00 | 0.13% | |
| UNITED STATES TREASURY | 8/15/2022 | 6,983,046.88 | 7,155,890.00 | 0.13% | |
| UNITED STATES TREASURY | 10/15/2022 | 7,957,187.50 | 8,178,160.00 | 0.13% | |
| UNITED STATES TREASURY | 2/28/2022 | 10,149,609.38 | 10,118,000.00 | 0.11% | |
| UNITED STATES TREASURY | 4/15/2024 | 2,025,619.57 | 2,077,145.17 | -1.62% | |
| UNITED STATES TREASURY | 4/15/2024 | 1,941,630.70 | 2,041,733.00 | -1.62% | |
| UNITED STATES TREASURY | 5/15/2022 | 156,683.20 | 159,237.70 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2022 | 2,026,093.75 | 2,054,680.00 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2022 | 5,901,964.06 | 5,989,392.20 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2022 | 8,869,816.41 | 8,968,678.20 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2022 | 1,979,554.69 | 2,003,313.00 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 3,799,773.44 | 3,881,606.00 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 9,392,172.66 | 9,603,761.60 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 7,699,007.81 | 7,866,036.00 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 10,407,680.66 | 10,616,578.00 | 0.13% | |
| UNITED STATES TREASURY | 9/30/2022 | 4,212,140.63 | 4,318,608.00 | 0.13% | |
| UNITED STATES TREASURY | 10/15/2022 | 6,859,031.25 | 7,053,663.00 | 0.13% | |
| UNITED STATES TREASURY | 10/15/2022 | 3,944,908.20 | 4,037,966.50 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 4,087,313.28 | 4,087,967.15 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 5,110,995.70 | 5,111,219.10 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 3,678,658.20 | 3,679,674.50 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 4,132,031.25 | 4,133,333.00 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 2,821,000.00 | 2,822,764.00 | 0.13% | |
| UNITED STATES TREASURY | 3/15/2023 | 614,622.66 | 614,959.30 | 0.13% | |
| UNITED STATES TREASURY | 5/15/2023 | 4,098,078.13 | 4,098,893.00 | 0.14% | |
| UNITED STATES TREASURY | 10/15/2023 | 4,989,843.75 | 4,996,500.00 | 0.15% | |
| UNITED STATES TREASURY | 9/30/2022 | 1,754,588.67 | 1,755,070.20 | 0.12% | |
| UNITED STATES TREASURY | 9/30/2022 | 6,826,264.84 | 6,830,273.20 | 0.12% | |

Orange County Transportation Authority
Portfolio Listing
As of December 31, 2020

| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD |
|--|---------------|-----------------------|-----------------------|-------|
| UNITED STATES TREASURY | 9/30/2022 | 4,217,197.66 | 4,220,168.80 | 0.12 |
| UNITED STATES TREASURY | 11/30/2022 | 2,008,272.66 | 2,010,241.20 | 0.12 |
| UNITED STATES TREASURY | 11/30/2022 | 20,714,044.92 | 20,712,485.20 | 0.12 |
| UNITED STATES TREASURY | 11/30/2022 | 47,149,424.68 | 47,149,557.27 | 0.12 |
| UNITED STATES TREASURY | 11/30/2022 | 23,298,830.01 | 23,298,895.53 | 0.12 |
| UNITED STATES TREASURY | 12/15/2023 | 9,347,572.50 | 9,360,035.93 | 0.16 |
| UNITED STATES TREASURY | 12/15/2023 | 11,692,440.86 | 11,696,299.30 | 0.16 |
| UNITED STATES TREASURY | 12/15/2023 | 43,809,202.50 | 43,867,614.77 | 0.16 |
| UNITED STATES TREASURY | 12/15/2023 | 1,243,395.12 | 1,243,543.35 | 0.16 |
| SUB-TOTAL | | 491,088,240.02 | 498,901,995.86 | |
| FEDERAL AGENCY/GSE | | | | |
| FEDERAL HOME LOAN MORTGAGE CORP | 6/8/2022 | 6,996,640.00 | 7,020,510.00 | 0.05 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 5/22/2023 | 8,160,363.15 | 8,204,316.60 | 0.15 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 7/10/2023 | 7,758,283.75 | 7,793,582.25 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 4/20/2023 | 7,526,137.50 | 7,583,177.70 | 0.15 |
| FEDERAL HOME LOAN MORTGAGE CORP | 5/5/2023 | 7,146,997.00 | 7,186,679.50 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 6/26/2023 | 7,383,377.40 | 7,421,068.85 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 7/25/2022 | 4,963,756.50 | 4,976,343.25 | 0.11 |
| FEDERAL HOME LOAN MORTGAGE CORP | 8/24/2023 | 9,190,616.00 | 9,218,124.00 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/8/2023 | 5,275,963.27 | 5,285,233.50 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/8/2023 | 6,997,690.00 | 7,013,580.00 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/16/2023 | 3,088,437.00 | 3,097,892.00 | 0.15 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/16/2023 | 1,991,720.00 | 1,998,640.00 | 0.15 |
| FEDERAL HOME LOAN MORTGAGE CORP | 11/6/2023 | 8,192,620.00 | 8,206,970.00 | 0.22 |
| FEDERAL HOME LOAN MORTGAGE CORP | 12/4/2023 | 6,918,144.25 | 6,932,409.75 | 0.21 |
| FHMS K-727 A1 | 10/25/2023 | 450,566.02 | 467,969.56 | 0.55 |
| FEDERAL HOME LOAN BANKS | 9/8/2023 | 4,135,800.00 | 4,233,800.00 | 0.19 |
| FEDERAL HOME LOAN BANKS | 9/8/2023 | 4,104,600.00 | 4,233,800.00 | 0.19 |
| FEDERAL HOME LOAN BANKS | 3/8/2024 | 5,201,750.00 | 5,260,950.00 | 0.23 |
| FEDERAL HOME LOAN BANKS | 3/10/2023 | 5,053,550.00 | 5,284,750.00 | 0.15 |
| FEDERAL HOME LOAN BANKS | 6/10/2022 | 4,988,900.00 | 5,189,100.00 | 0.12 |
| FEDERAL HOME LOAN BANKS | 12/9/2022 | 7,058,660.00 | 7,391,720.00 | 0.11 |
| FEDERAL HOME LOAN BANKS | 3/11/2022 | 3,046,221.55 | 3,163,112.20 | 0.13 |
| FEDERAL HOME LOAN BANKS | 3/11/2022 | 1,160,218.50 | 1,204,751.00 | 0.13 |
| FEDERAL HOME LOAN BANKS | 6/9/2023 | 3,977,720.00 | 4,189,280.00 | 0.18 |
| FEDERAL HOME LOAN BANKS | 6/9/2023 | 4,029,880.00 | 4,189,280.00 | 0.18 |
| FEDERAL HOME LOAN BANKS | 9/9/2022 | 6,828,560.00 | 7,142,040.00 | 0.14 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 12/17/2021 | 6,022,920.00 | 6,153,900.00 | 0.13 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 3/1/2021 | 6,965,140.00 | 7,027,860.00 | 0.11 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 11/15/2021 | 7,034,930.00 | 7,178,990.00 | 0.12 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 7/17/2023 | 5,060,200.00 | 5,335,900.00 | 0.23 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 6/26/2023 | 6,967,450.00 | 7,269,290.00 | 0.22 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 2/1/2023 | 4,996,450.00 | 5,173,650.00 | 0.18 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 8/14/2023 | 4,993,550.00 | 5,178,700.00 | 0.23 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 8/14/2023 | 7,983,280.00 | 7,994,240.00 | 0.23 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 2/21/2023 | 5,000,600.00 | 5,135,400.00 | 0.18 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 4/8/2022 | 7,204,321.80 | 7,238,665.20 | 0.12 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 5/6/2022 | 8,124,668.55 | 8,150,456.50 | 0.11 |
| FEDERAL FARM CREDIT BANKS FUNDING CORP | 10/2/2023 | 4,994,600.00 | 4,995,150.00 | 0.24 |
| FEDERAL HOME LOAN MORTGAGE CORP | 6/8/2022 | 7,995,360.00 | 8,023,440.00 | 0.05 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 5/22/2023 | 6,111,548.70 | 6,144,466.80 | 0.15 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 7/10/2023 | 3,203,098.50 | 3,217,671.90 | 0.16 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 7/10/2023 | 5,000,300.00 | 5,011,950.00 | 0.16 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 11/27/2023 | 1,797,948.00 | 1,801,620.00 | 0.22 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/5/2022 | 6,815,760.00 | 7,133,210.00 | 0.12 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/19/2023 | 4,411,710.00 | 4,706,100.00 | 0.14 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/19/2023 | 2,233,875.00 | 2,405,340.00 | 0.14 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 4/12/2022 | 6,370,496.00 | 6,578,752.00 | 0.07 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 9/6/2022 | 3,986,080.00 | 4,085,120.00 | 0.11 |
| FEDERAL HOME LOAN MORTGAGE CORP | 1/13/2022 | 8,248,720.00 | 8,184,960.00 | 0.14 |
| FEDERAL HOME LOAN MORTGAGE CORP | 2/16/2021 | 4,986,800.00 | 5,013,400.00 | 0.23 |
| FEDERAL HOME LOAN MORTGAGE CORP | 5/5/2023 | 7,621,797.50 | 7,664,116.25 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 6/26/2023 | 7,463,143.80 | 7,501,242.45 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 8/24/2023 | 8,001,840.00 | 8,015,760.00 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/8/2023 | 5,098,317.00 | 5,109,894.00 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/8/2023 | 3,001,860.00 | 3,005,820.00 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/16/2023 | 6,376,128.00 | 6,395,648.00 | 0.15 |
| FEDERAL HOME LOAN MORTGAGE CORP | 11/6/2023 | 4,705,761.00 | 4,714,003.50 | 0.22 |
| FEDERAL HOME LOAN MORTGAGE CORP | 12/4/2023 | 5,959,094.65 | 5,971,382.55 | 0.21 |
| FEDERAL HOME LOAN BANKS | 8/15/2024 | 1,087,438.50 | 1,141,829.50 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 7/21/2025 | 3,680,000.00 | 3,681,104.00 | 0.21 |
| FEDERAL HOME LOAN MORTGAGE CORP | 11/25/2024 | 2,250,000.00 | 2,250,562.50 | 0.44 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 5/22/2023 | 4,336,906.50 | 4,360,266.00 | 0.15 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 7/10/2023 | 3,741,937.50 | 3,758,962.50 | 0.16 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 9/6/2022 | 548,086.00 | 561,704.00 | 0.11 |
| FEDERAL HOME LOAN MORTGAGE CORP | 4/20/2023 | 4,179,525.00 | 4,211,201.40 | 0.15 |
| FEDERAL HOME LOAN MORTGAGE CORP | 6/26/2023 | 3,968,378.40 | 3,988,636.60 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 8/24/2023 | 3,856,062.80 | 3,867,604.20 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/8/2023 | 2,809,072.70 | 2,815,451.40 | 0.18 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/16/2023 | 3,098,399.70 | 3,107,885.20 | 0.15 |
| U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT | 8/1/2021 | 710,000.00 | 719,478.50 | 0.28 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/20/2022 | 5,098,470.00 | 5,104,335.00 | 0.17 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/20/2022 | 5,839,084.50 | 5,839,959.75 | 0.17 |
| FEDERAL HOME LOAN MORTGAGE CORP | 7/28/2023 | 3,100,000.00 | 3,100,682.00 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 7/28/2023 | 2,050,000.00 | 2,050,451.00 | 0.16 |
| FEDERAL HOME LOAN MORTGAGE CORP | 8/12/2025 | 4,095,490.00 | 4,080,976.00 | 0.70 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/28/2023 | 4,084,387.25 | 4,085,694.45 | 0.28 |
| FEDERAL HOME LOAN MORTGAGE CORP | 9/28/2023 | 3,999,600.00 | 4,000,680.00 | 0.28 |
| FEDERAL HOME LOAN MORTGAGE CORP | 10/13/2023 | 4,097,950.00 | 4,099,877.00 | 0.30 |
| FEDERAL HOME LOAN MORTGAGE CORP | 11/24/2023 | 2,035,000.00 | 2,035,875.05 | 0.24 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/5/2022 | 251,800.00 | 254,757.50 | 0.12 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/5/2022 | 5,610,864.00 | 5,706,568.00 | 0.12 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 1/5/2022 | 5,677,685.00 | 5,757,519.50 | 0.12 |
| FEDERAL NATIONAL MORTGAGE ASSOCIATION | 10/27/2023 | 6,098,475.00 | 6,100,183.00 | 0.30 |
| FEDERAL HOME LOAN MORTGAGE CORP | 1/13/2022 | 5,652,771.25 | 5,703,894.00 | 0.14 |
| FEDERAL HOME LOAN MORTGAGE CORP | 1/13/2022 | 5,663,313.58 | 5,703,894.00 | 0.14 |
| FEDERAL HOME LOAN MORTGAGE CORP | 8/24/2023 | 4,745,155.00 | 4,759,357.50 | 0.18 |
| FN 467260 | 3/1/2021 | 2,465,498.81 | 2,414,379.47 | 3.30 |
| FN 468431 | 7/1/2021 | 267,970.26 | 264,673.93 | 3.02 |
| FN 468861 | 8/1/2021 | 600,658.50 | 594,696.11 | 2.47 |
| SUB-TOTAL | | 432,064,900.64 | 437,528,318.38 | |
| MEDIUM TERM NOTES | | | | |
| ADOBE INC | 2/1/2023 | 449,383.50 | 463,162.50 | 0.29 |
| AMAZON.COM INC | 6/3/2023 | 2,022,165.00 | 2,036,380.50 | 0.17 |
| AMERICAN EXPRESS CREDIT CORP | 5/5/2021 | 1,998,780.00 | 2,010,200.00 | 0.27 |
| AMERICAN HONDA FINANCE CORP | 6/27/2022 | 3,796,504.00 | 3,904,994.00 | 0.34 |
| APPLE INC | 8/4/2021 | 1,514,951.40 | 1,591,281.20 | 0.14 |

Orange County Transportation Authority
Portfolio Listing
As of December 31, 2020

| <u>DESCRIPTION</u> | <u>MATURITY DATE</u> | <u>BOOK VALUE</u> | <u>MARKET VALUE</u> | <u>YIELD</u> |
|---|----------------------|-------------------|---------------------|--------------|
| APPLE INC | 9/11/2022 | 589,899.70 | 604,909.30 | 0.21 |
| APPLE INC | 5/11/2023 | 1,475,974.40 | 1,497,656.40 | 0.24 |
| TRUIST FINANCIAL CORP | 9/3/2021 | 1,198,572.00 | 1,220,856.00 | 0.24 |
| BANK OF NEW YORK MELLON CORP | 8/23/2022 | 1,724,448.00 | 1,774,317.75 | 0.21 |
| BANK OF NEW YORK MELLON CORP | 1/27/2023 | 1,099,230.00 | 1,134,375.00 | 0.27 |
| BRISTOL-MYERS SQUIBB CO | 11/13/2023 | 1,900,000.00 | 1,903,439.00 | 0.33 |
| BURLINGTON NORTHERN SANTA FE LLC | 9/15/2021 | 1,024,930.00 | 1,014,000.00 | 0.37 |
| CATERPILLAR FINANCIAL SERVICES CORP | 9/7/2021 | 374,711.25 | 382,248.75 | 0.32 |
| CATERPILLAR FINANCIAL SERVICES CORP | 9/6/2022 | 1,048,540.50 | 1,079,274.00 | 0.24 |
| CATERPILLAR FINANCIAL SERVICES CORP | 11/18/2022 | 499,770.00 | 515,870.00 | 0.26 |
| CATERPILLAR FINANCIAL SERVICES CORP | 7/7/2023 | 1,124,370.00 | 1,134,427.50 | 0.32 |
| CHEVRON USA INC | 8/11/2023 | 450,000.00 | 452,272.50 | 0.23 |
| CHEVRON CORP | 5/16/2021 | 49,945.50 | 50,272.50 | 0.23 |
| CHEVRON CORP | 5/11/2023 | 875,000.00 | 893,427.50 | 0.25 |
| CITIGROUP INC | 8/2/2021 | 1,723,295.00 | 1,770,387.50 | 0.36 |
| JOHN DEERE CAPITAL CORP | 1/10/2022 | 769,260.80 | 793,069.20 | 0.27 |
| JOHN DEERE CAPITAL CORP | 6/7/2021 | 499,660.00 | 504,480.00 | 0.23 |
| JOHN DEERE CAPITAL CORP | 7/5/2023 | 399,672.00 | 404,236.00 | 0.28 |
| JOHN DEERE CAPITAL CORP | 10/10/2023 | 499,420.00 | 502,500.00 | 0.22 |
| EXXON MOBIL CORP | 3/6/2022 | 339,237.50 | 357,840.00 | 0.18 |
| EXXON MOBIL CORP | 3/6/2022 | 1,212,050.00 | 1,278,000.00 | 0.18 |
| HOME DEPOT INC | 3/1/2022 | 498,630.00 | 517,140.00 | 0.30 |
| HONEYWELL INTERNATIONAL INC | 8/8/2022 | 779,212.20 | 800,709.00 | 0.40 |
| HONEYWELL INTERNATIONAL INC | 8/19/2022 | 1,875,000.00 | 1,878,000.00 | 0.23 |
| IBM CREDIT LLC | 2/6/2023 | 1,057,720.00 | 1,059,020.00 | 0.18 |
| INTERNATIONAL BUSINESS MACHINES CORP | 2/12/2024 | 1,027,845.50 | 1,026,826.35 | 0.45 |
| JPMORGAN CHASE & CO | 4/1/2023 | 2,000,000.00 | 2,072,620.00 | 0.29 |
| MERCK & CO INC | 2/10/2022 | 1,226,775.00 | 1,278,637.50 | 0.28 |
| MICROSOFT CORP | 8/8/2021 | 1,057,023.00 | 1,107,568.00 | 0.22 |
| MICROSOFT CORP | 2/6/2022 | 2,049,725.70 | 2,132,615.10 | 0.38 |
| MORGAN STANLEY | 5/19/2022 | 993,370.00 | 1,032,720.00 | 0.38 |
| MORGAN STANLEY | 2/25/2023 | 1,063,280.00 | 1,072,170.00 | 0.38 |
| MORGAN STANLEY | 4/21/2021 | 1,957,500.00 | 2,012,400.00 | 0.47 |
| NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP | 1/21/2022 | 1,598,592.00 | 1,626,080.00 | 0.20 |
| NORTHERN TRUST CORP | 8/2/2022 | 1,012,140.00 | 1,033,350.00 | 0.27 |
| ORACLE CORP | 9/15/2021 | 1,187,662.00 | 1,237,335.75 | 0.28 |
| PNC BANK NA | 2/24/2023 | 800,000.00 | 812,360.00 | 0.39 |
| PACCAR FINANCIAL CORP | 5/10/2021 | 579,849.20 | 585,713.00 | 0.35 |
| PACCAR FINANCIAL CORP | 3/1/2022 | 499,560.00 | 514,350.00 | 0.38 |
| PACCAR FINANCIAL CORP | 5/10/2022 | 999,460.00 | 1,032,210.00 | 0.27 |
| PACCAR FINANCIAL CORP | 8/11/2023 | 449,410.50 | 449,712.00 | 0.37 |
| PEPSICO INC | 5/1/2023 | 923,168.50 | 938,190.50 | 0.14 |
| PEPSICO INC | 10/7/2023 | 524,700.75 | 527,892.75 | 0.20 |
| PFIZER INC | 9/15/2021 | 1,872,468.75 | 1,912,143.75 | 0.19 |
| PFIZER INC | 3/11/2022 | 424,974.50 | 437,762.75 | 0.28 |
| 3M CO | 3/1/2022 | 1,154,457.15 | 1,189,049.40 | 0.03 |
| TOYOTA MOTOR CREDIT CORP | 1/11/2022 | 3,686,662.50 | 3,838,462.50 | 0.30 |
| UNILEVER CAPITAL CORP | 3/7/2022 | 1,990,320.00 | 2,063,940.00 | 0.29 |
| U.S. BANCORP | 3/15/2022 | 509,935.00 | 515,310.00 | 0.27 |
| WELLS FARGO & CO | 4/1/2021 | 1,619,820.00 | 1,515,840.00 | 0.37 |
| AMERICAN HONDA FINANCE CORP | 11/16/2022 | 2,021,300.00 | 2,084,560.00 | 0.34 |
| AMERICAN HONDA FINANCE CORP | 1/12/2024 | 1,585,215.00 | 1,633,815.00 | 0.58 |
| APPLE INC | 5/3/2023 | 1,977,040.00 | 2,097,920.00 | 0.30 |
| APPLE INC | 2/23/2023 | 2,949,060.00 | 3,150,390.00 | 0.31 |
| BANK OF AMERICA CORP | 1/11/2023 | 3,034,740.00 | 3,180,630.00 | 0.32 |
| BANK OF NEW YORK MELLON CORP | 1/29/2023 | 2,944,320.00 | 3,155,610.00 | 0.34 |
| BERKSHIRE HATHAWAY INC | 3/15/2023 | 2,924,460.00 | 3,150,480.00 | 0.28 |
| BERKSHIRE HATHAWAY INC | 3/15/2023 | 2,014,300.00 | 2,100,320.00 | 0.28 |
| DEERE & CO | 6/8/2022 | 1,466,700.00 | 1,543,020.00 | 0.18 |
| JOHN DEERE CAPITAL CORP | 3/4/2021 | 1,344,769.75 | 1,360,609.70 | 0.43 |
| GENERAL DYNAMICS CORP | 5/11/2021 | 3,985,000.00 | 4,038,520.00 | 0.33 |
| ORACLE CORP | 5/15/2022 | 3,897,640.00 | 4,106,960.00 | 0.28 |
| PACCAR FINANCIAL CORP | 9/26/2022 | 1,498,170.00 | 1,544,400.00 | 0.29 |
| PACCAR FINANCIAL CORP | 2/7/2023 | 2,274,886.25 | 2,349,369.75 | 0.34 |
| CHARLES SCHWAB CORP | 5/21/2021 | 1,554,953.35 | 1,568,917.25 | 0.32 |
| TOYOTA MOTOR CREDIT CORP | 4/13/2021 | 2,488,525.00 | 2,518,475.00 | 0.34 |
| U.S. BANCORP | 2/5/2024 | 2,107,940.00 | 2,177,260.00 | 0.41 |
| VISA INC | 12/14/2022 | 1,962,480.00 | 2,092,840.00 | 0.20 |
| WALMART INC | 6/26/2023 | 3,083,010.00 | 3,221,820.00 | 0.31 |
| WALMART INC | 6/26/2023 | 2,056,460.00 | 2,147,880.00 | 0.31 |
| AMERICAN EXPRESS CO | 8/1/2022 | 3,103,260.00 | 3,095,310.00 | 0.37 |
| ASSOCIATION OF AMERICAN MEDICAL COLLEGES | 10/1/2022 | 2,990,000.00 | 3,027,943.10 | 1.19 |
| TRUIST FINANCIAL CORP | 6/20/2022 | 2,339,167.50 | 2,335,275.00 | 0.31 |
| TRUIST FINANCIAL CORP | 3/16/2023 | 2,947,817.00 | 3,062,277.00 | 0.39 |
| BAYCARE HEALTH SYSTEM INC | 11/15/2022 | 1,456,344.00 | 1,497,340.80 | 0.47 |
| CATERPILLAR FINANCIAL SERVICES CORP | 7/7/2023 | 3,053,289.20 | 3,080,600.90 | 0.32 |
| GEORGIA-PACIFIC LLC | 5/15/2024 | 3,064,049.85 | 3,075,053.20 | 0.53 |
| HONEYWELL INTERNATIONAL INC | 8/19/2022 | 4,015,000.00 | 4,021,424.00 | 0.23 |
| HUNTINGTON NATIONAL BANK | 8/7/2022 | 2,024,431.10 | 2,034,261.40 | 0.34 |
| KEYBANK NA | 11/22/2021 | 1,785,864.60 | 1,863,152.44 | 0.34 |
| KEYBANK NA | 11/22/2021 | 1,953,600.00 | 2,038,460.00 | 0.34 |
| MASSMUTUAL GLOBAL FUNDING II | 6/9/2023 | 3,982,648.85 | 4,033,696.70 | 0.35 |
| NATIONAL SECURITIES CLEARING CORP | 4/23/2023 | 3,162,024.90 | 3,228,173.40 | 0.33 |
| NEW YORK LIFE GLOBAL FUNDING | 5/5/2023 | 2,084,562.15 | 2,121,362.40 | 0.35 |
| PACIFIC LIFE GLOBAL FUNDING II | 9/23/2023 | 2,022,468.75 | 2,030,386.50 | 0.40 |
| PROTECTIVE LIFE GLOBAL FUNDING | 6/9/2023 | 3,500,000.00 | 3,560,585.00 | 0.37 |
| VIRGINIA ELECTRIC AND POWER CO | 3/15/2023 | 2,087,580.00 | 2,093,940.00 | 0.34 |
| WELLS FARGO & CO | 7/22/2022 | 1,551,524.80 | 1,573,382.40 | 0.36 |
| WELLS FARGO & CO | 7/22/2022 | 3,959,048.10 | 4,021,441.20 | 0.36 |
| ADOBE INC | 2/1/2023 | 1,103,486.15 | 1,137,321.25 | 0.29 |
| AMERICAN EXPRESS CO | 5/20/2022 | 1,558,128.00 | 1,609,374.00 | 0.31 |
| AMERIPRISE FINANCIAL INC | 3/22/2022 | 1,535,888.20 | 1,590,311.80 | 0.33 |
| AMERIPRISE FINANCIAL INC | 3/22/2022 | 119,877.60 | 123,920.40 | 0.33 |
| APPLE INC | 1/13/2023 | 647,825.00 | 651,606.25 | 0.21 |
| APPLE INC | 9/11/2022 | 1,874,681.25 | 1,922,381.25 | 0.21 |
| APPLE INC | 5/11/2023 | 1,441,069.60 | 1,462,238.85 | 0.24 |
| TRUIST FINANCIAL CORP | 6/20/2022 | 2,048,120.00 | 2,075,800.00 | 0.31 |
| TRUIST FINANCIAL CORP | 3/16/2023 | 1,943,560.70 | 2,019,026.70 | 0.39 |
| BANK OF AMERICA CORP | 1/23/2022 | 1,415,000.00 | 1,416,712.15 | 0.63 |
| BANK OF AMERICA CORP | 5/17/2022 | 1,075,000.00 | 1,087,738.75 | 0.36 |
| BANK OF NEW YORK MELLON CORP | 4/28/2023 | 1,352,323.95 | 1,393,060.59 | 0.37 |
| BANK OF NEW YORK MELLON CORP | 1/27/2023 | 2,228,439.00 | 2,299,687.50 | 0.27 |
| BRISTOL-MYERS SQUIBB CO | 11/13/2023 | 880,000.00 | 881,592.80 | 0.33 |
| CATERPILLAR FINANCIAL SERVICES CORP | 11/29/2022 | 859,078.00 | 885,598.00 | 0.35 |
| CATERPILLAR FINANCIAL SERVICES CORP | 9/7/2021 | 1,713,679.45 | 1,748,150.95 | 0.32 |
| CATERPILLAR FINANCIAL SERVICES CORP | 9/6/2022 | 1,353,116.55 | 1,392,777.40 | 0.24 |
| CATERPILLAR FINANCIAL SERVICES CORP | 11/18/2022 | 1,469,323.80 | 1,516,657.80 | 0.26 |
| CHEVRON CORP | 5/11/2023 | 455,000.00 | 464,582.30 | 0.25 |
| CISCO SYSTEMS INC | 9/20/2021 | 1,894,243.00 | 1,919,152.00 | 0.26 |

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| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD |
|---|---------------|-----------------------|-----------------------|-------|
| CITIGROUP INC | 12/8/2021 | 1,012,830.00 | 1,021,610.00 | 0.36 |
| CITIZENS BANK NA | 5/13/2021 | 1,493,725.00 | 1,499,208.20 | 0.37 |
| COMERICA INC | 7/31/2023 | 2,120,020.00 | 2,157,700.00 | 0.52 |
| CONSUMERS ENERGY CO | 6/1/2023 | 579,802.80 | 580,777.20 | 0.29 |
| JOHN DEERE CAPITAL CORP | 9/10/2021 | 1,154,641.95 | 1,178,354.10 | 0.20 |
| JOHN DEERE CAPITAL CORP | 6/13/2022 | 1,438,142.40 | 1,474,891.20 | 0.27 |
| JOHN DEERE CAPITAL CORP | 4/6/2023 | 519,875.20 | 530,384.40 | 0.31 |
| DUKE ENERGY CAROLINAS LLC | 3/15/2023 | 2,502,051.75 | 2,583,033.75 | 0.35 |
| ERP OPERATING LP | 4/15/2023 | 1,933,786.40 | 1,938,573.00 | 0.39 |
| ENTERGY LOUISIANA LLC | 11/17/2023 | 759,863.20 | 762,523.20 | 0.24 |
| ENTERGY LOUISIANA LLC | 11/17/2023 | 740,355.20 | 742,456.80 | 0.24 |
| EXXON MOBIL CORP | 4/15/2023 | 2,065,000.00 | 2,123,646.00 | 0.32 |
| FIFTH THIRD BANK NA (OHIO) | 1/30/2023 | 1,473,761.00 | 1,516,934.25 | 0.37 |
| HONEYWELL INTERNATIONAL INC | 8/8/2022 | 1,018,969.80 | 1,047,081.00 | 0.40 |
| HUNTINGTON NATIONAL BANK | 2/3/2023 | 1,568,681.20 | 1,613,112.20 | 0.42 |
| KEYBANK NA | 3/7/2023 | 694,840.24 | 711,313.12 | 0.39 |
| KEYBANK NA | 3/7/2023 | 311,595.00 | 319,452.00 | 0.39 |
| KEYBANK NA | 3/7/2023 | 150,524.50 | 154,401.80 | 0.39 |
| KEYBANK NA | 3/7/2023 | 821,620.13 | 838,029.08 | 0.39 |
| MORGAN STANLEY | 5/19/2022 | 1,912,255.00 | 1,962,168.00 | 0.38 |
| MORGAN STANLEY | 11/17/2021 | 2,009,680.00 | 2,039,480.00 | 0.37 |
| NATIONAL RURAL UTILITIES COOPERATIVE FINANCE CORP | 4/25/2022 | 1,208,052.00 | 1,230,972.00 | 0.30 |
| NIKE INC | 3/27/2025 | 134,816.40 | 145,488.15 | 0.51 |
| ORACLE CORP | 4/1/2025 | 449,833.50 | 483,642.00 | 0.68 |
| PNC BANK NA | 7/22/2022 | 1,925,000.00 | 1,945,539.75 | 0.32 |
| PNC BANK NA | 2/24/2023 | 315,000.00 | 319,866.75 | 0.39 |
| PACCAR FINANCIAL CORP | 9/26/2022 | 714,127.70 | 736,164.00 | 0.29 |
| PACCAR FINANCIAL CORP | 2/7/2023 | 1,999,900.00 | 2,065,380.00 | 0.34 |
| PRECISION CASTPARTS CORP | 1/15/2023 | 1,965,015.00 | 2,025,835.50 | 0.32 |
| TRUIST BANK | 5/17/2022 | 1,978,990.20 | 2,045,082.60 | 0.25 |
| US BANK NA | 1/21/2022 | 804,718.25 | 817,340.65 | 0.22 |
| WALMART INC | 12/15/2022 | 1,323,622.40 | 1,332,812.80 | 0.14 |
| WELLS FARGO BANK NA | 10/22/2021 | 1,789,803.10 | 1,832,494.60 | 0.33 |
| SUB-TOTAL | | 230,191,422.52 | 235,885,306.43 | |
| <u>MORTGAGE AND ASSET-BACK SECURITIES</u> | | | | |
| ALLYA 2019-1 A3 | 9/15/2023 | 1,172,101.16 | 1,191,549.60 | 0.76 |
| BMWLT 2018-1 A3 | 7/20/2021 | 86,753.52 | 86,900.94 | 0.29 |
| COMET 2019-2 A | 9/15/2022 | 2,749,307.55 | 2,816,742.50 | 0.29 |
| COPAR 2019-1 A3 | 11/15/2023 | 899,817.66 | 915,417.00 | 0.65 |
| CARMX 2020-4 A3 | 8/15/2025 | 474,895.45 | 476,719.50 | 0.36 |
| DCENT 2019-3 A | 10/15/2024 | 999,785.20 | 1,029,250.00 | 0.26 |
| FNA 2012-M5 A2 | 2/25/2022 | 797,470.95 | 813,275.45 | 0.78 |
| FNA 2013-M1 A2 | 8/25/2022 | 866,186.07 | 878,456.19 | 0.29 |
| FNA 2013-M7 A2 | 12/25/2022 | 722,590.86 | 734,565.56 | 0.09 |
| FHMS K-018 A2 | 1/25/2022 | 3,391,215.17 | 3,475,702.44 | 0.31 |
| FHMS K-019 A2 | 3/25/2022 | 2,356,037.37 | 2,434,691.07 | 0.30 |
| FHMS K-020 A1 | 1/25/2022 | 134,912.01 | 138,494.27 | 0.42 |
| FHMS K-022 A2 | 7/25/2022 | 1,204,406.25 | 1,232,760.00 | 0.38 |
| FHMS K-023 A1 | 4/25/2022 | 400,345.87 | 413,116.43 | 0.39 |
| FHMS K-023 A2 | 8/25/2022 | 1,775,839.84 | 1,799,262.50 | 0.41 |
| FHMS K-026 A2 | 11/25/2022 | 3,462,687.50 | 3,510,942.00 | 0.58 |
| FHMS K-026 A2 | 11/25/2022 | 510,800.78 | 516,315.00 | 0.58 |
| FHMS K-029 A1 | 10/25/2022 | 275,651.61 | 280,322.17 | 0.21 |
| FHMS K-029 A1 | 10/25/2022 | 503,588.14 | 512,763.23 | 0.21 |
| FHMS K-034 A1 | 2/25/2023 | 837,710.24 | 861,814.87 | 0.29 |
| FHMS K-035 A1 | 3/25/2023 | 732,228.55 | 751,728.17 | 0.41 |
| FHMS K-715 A2 | 1/25/2021 | 248,661.56 | 236,114.67 | 0.45 |
| FHMS K-717 A2 | 9/25/2021 | 785,411.92 | 794,828.52 | 0.40 |
| FHMS K-720 A2 | 6/25/2022 | 2,196,304.69 | 2,253,328.00 | 0.63 |
| FHMS K-720 A2 | 6/25/2022 | 1,005,312.50 | 1,024,240.00 | 0.63 |
| FHMS K-P05 A | 7/25/2023 | 229,460.64 | 235,773.81 | 1.21 |
| FHMS K-J27 A1 | 7/25/2024 | 999,430.43 | 1,033,725.71 | 0.48 |
| FITAT 2019-1 A3 | 12/15/2023 | 599,868.12 | 610,416.00 | 0.59 |
| FORDL 2019-A A3 | 5/15/2022 | 511,913.79 | 514,999.95 | -0.21 |
| GMCAR 2019-1 A3 | 11/16/2023 | 1,681,459.38 | 1,710,536.21 | 0.05 |
| GMCAR 2020-3 A3 | 4/16/2025 | 899,794.08 | 903,618.00 | 0.28 |
| GMCAR 2020-4 A3 | 8/18/2025 | 424,909.18 | 425,726.75 | 0.31 |
| GMALT 2019-3 A3 | 6/20/2022 | 699,922.79 | 705,250.00 | 0.42 |
| HDMOT 2020-A A3 | 10/15/2024 | 874,809.16 | 888,816.25 | 0.74 |
| HAROT 2018-4 A3 | 1/15/2023 | 764,109.59 | 776,176.30 | 0.54 |
| HAROT 2018-3 A3 | 8/22/2022 | 733,257.96 | 742,048.87 | 0.21 |
| HART 2019-A A3 | 6/15/2023 | 431,962.55 | 438,512.65 | 0.58 |
| MBALT 2020-B A3 | 11/15/2023 | 259,986.82 | 260,548.60 | 0.26 |
| MBALT 2018-B A3 | 9/15/2021 | 481,286.95 | 482,192.94 | -0.02 |
| MBART 2020-1 A3 | 2/18/2025 | 624,951.19 | 628,231.25 | 0.29 |
| MBART 2018-1 A3 | 1/15/2023 | 770,940.80 | 779,628.40 | 0.34 |
| MBALT 2019-A A3 | 11/15/2021 | 536,813.55 | 539,041.01 | -0.07 |
| NALT 2018-A A3 | 9/15/2021 | 60,167.91 | 60,240.57 | 0.34 |
| NALT 2019-B A3 | 7/15/2022 | 554,968.48 | 559,628.70 | 0.18 |
| NAROT 2018-C A3 | 6/15/2023 | 737,602.09 | 751,930.25 | 0.59 |
| NAROT 2020-B A3 | 7/15/2024 | 1,149,968.49 | 1,154,761.00 | 0.31 |
| NAROT 2018-B A3 | 3/15/2023 | 970,872.54 | 984,234.51 | 0.80 |
| NAROT 2019-C A3 | 7/15/2024 | 899,952.48 | 918,360.00 | 0.59 |
| NAROT 2019-A A3 | 10/16/2023 | 2,270,623.96 | 2,313,616.79 | 0.64 |
| NALT 2019-A A3 | 3/15/2022 | 205,227.17 | 206,428.36 | 0.36 |
| TAOT 2018-D A3 | 3/15/2023 | 804,878.69 | 818,175.18 | 0.41 |
| TAOT 2018-B A3 | 9/15/2022 | 687,728.23 | 695,062.89 | 0.37 |
| TAOT 2019-C A3 | 9/15/2023 | 1,099,990.98 | 1,117,303.00 | 0.42 |
| VZOT 2020-B A | 2/20/2025 | 799,832.00 | 802,832.00 | 0.29 |
| VZOT 2019-C A1A | 4/22/2024 | 1,424,890.13 | 1,455,566.25 | 0.25 |
| VZOT 2020-A A1A | 7/22/2024 | 999,882.90 | 1,024,010.00 | 0.04 |
| VWALT 2019-A A3 | 11/21/2022 | 899,985.78 | 913,383.00 | 0.04 |
| VALET 2018-2 A3 | 4/20/2023 | 1,673,857.47 | 1,703,656.73 | -0.07 |
| WOART 2020-B A3 | 5/15/2025 | 999,921.60 | 1,006,500.00 | 0.33 |
| HAROT 2020-1 A3 | 4/22/2024 | 2,939,423.76 | 3,001,534.20 | 0.39 |
| HAROT 2019-3 A3 | 8/15/2023 | 2,764,977.05 | 2,810,124.80 | 0.37 |
| JDOT 2019-B A3 | 12/15/2023 | 1,424,697.47 | 1,452,502.50 | 0.31 |
| JDOT 2020 A3 | 8/15/2024 | 2,124,870.16 | 2,151,668.75 | 0.36 |
| MBALT 2020-A A3 | 12/15/2022 | 1,409,814.16 | 1,429,697.70 | 0.14 |
| NAROT 2019-C A3 | 7/15/2024 | 2,954,843.98 | 3,015,282.00 | 0.59 |
| TAOT 2020-D A3 | 1/15/2025 | 1,689,685.15 | 1,693,346.20 | 0.26 |
| BACCT 2018-2 A | 9/15/2023 | 3,056,678.52 | 3,033,658.60 | 0.28 |
| BACCT 2018-2 A | 9/15/2023 | 1,086,593.36 | 1,078,410.20 | 0.28 |
| BMWLT 2019-1 A4 | 8/22/2022 | 4,789,968.75 | 4,776,549.75 | 0.20 |
| CNH 2020-A A2 | 7/17/2023 | 1,122,795.86 | 1,126,685.77 | 0.40 |
| CARMX 2019-3 A2A | 12/15/2022 | 724,921.50 | 728,288.84 | 0.56 |
| CARMX 2020-1 A3 | 12/16/2024 | 1,024,798.90 | 1,051,506.50 | 0.57 |
| CCOIT 2014-A1 A1 | 1/23/2023 | 1,991,259.38 | 1,997,633.40 | 0.47 |

Orange County Transportation Authority
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| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD |
|---|---------------|----------------|----------------|-------|
| FH G12952 | 12/1/2022 | 127,547.30 | 126,926.25 | 0.69 |
| FH G18303 | 3/1/2024 | 354,864.19 | 361,017.09 | -0.42 |
| FNR 2012-50 VA | 7/25/2023 | 247,505.20 | 243,482.76 | 0.20 |
| FNA 2012-M9 A2 | 4/25/2022 | 355,814.56 | 359,833.28 | 0.40 |
| FNA 2012-M9 A2 | 4/25/2022 | 73,316.51 | 74,147.46 | 0.40 |
| FNA 2012-M17 A2 | 11/25/2022 | 390,543.82 | 415,303.59 | 0.28 |
| FNR 2013-136 CV | 6/25/2023 | 315,985.58 | 313,584.71 | 0.63 |
| FHMS K-015 A2 | 7/25/2021 | 522,940.92 | 527,630.14 | 0.47 |
| FHMS K-015 A2 | 7/25/2021 | 143,026.14 | 142,054.27 | 0.47 |
| FHMS 2011-K016 A2 | 10/25/2021 | 2,081,693.90 | 2,119,101.90 | 0.44 |
| FHMS 2011-K016 A2 | 10/25/2021 | 600,886.06 | 600,181.37 | 0.44 |
| FHMS K-020 A2 | 5/25/2022 | 487,851.56 | 511,460.00 | 0.40 |
| FHMS K-020 A2 | 5/25/2022 | 97,562.50 | 102,292.00 | 0.40 |
| FHMS K-020 A2 | 5/25/2022 | 194,437.50 | 204,584.00 | 0.40 |
| FHMS K-021 A2 | 6/25/2022 | 979,257.81 | 1,026,420.00 | 0.32 |
| FHMS K-023 A1 | 4/25/2022 | 39,866.36 | 41,311.64 | 0.39 |
| FHMS K-023 A1 | 4/25/2022 | 194,960.33 | 199,328.68 | 0.39 |
| FHMS K-025 A1 | 4/25/2022 | 144,646.13 | 146,798.29 | 0.56 |
| FHMS K-025 A2 | 10/25/2022 | 500,603.91 | 506,679.60 | 0.58 |
| FHMS K-025 A2 | 10/25/2022 | 3,611,499.61 | 3,655,331.40 | 0.58 |
| FHMS K-S01 A2 | 1/25/2023 | 221,268.21 | 233,389.63 | 0.42 |
| FHMS K-027 A1 | 9/25/2022 | 40,376.55 | 41,856.35 | 0.42 |
| FHMS K-027 A2 | 1/25/2023 | 2,101,558.59 | 2,178,330.00 | 0.59 |
| FHMS K-027 A2 | 1/25/2023 | 1,875,366.21 | 1,944,937.50 | 0.59 |
| FHR 4285 BA | 12/15/2023 | 603,253.71 | 602,103.95 | 0.88 |
| FHMS K-041 A1 | 8/25/2024 | 2,082,024.67 | 2,079,355.40 | 0.27 |
| FHMS K-046 A1 | 1/25/2025 | 696,557.14 | 694,676.41 | 0.51 |
| FHMS K-047 A1 | 12/25/2024 | 780,601.55 | 798,709.16 | 0.35 |
| FN AM0359 | 8/1/2022 | 2,676,103.11 | 2,704,757.08 | 1.09 |
| FN AM1568 | 12/1/2022 | 1,380,807.14 | 1,416,285.14 | 2.46 |
| FN AM1568 | 12/1/2022 | 1,408,932.65 | 1,416,285.14 | 2.46 |
| FN AM1999 | 7/1/2021 | 2,184,801.96 | 2,247,770.29 | 1.53 |
| FNR 0338C MP | 5/25/2023 | 220,815.24 | 221,090.23 | 0.98 |
| FNR 0338C MP | 5/25/2023 | 243,056.86 | 242,775.33 | 0.98 |
| FNR 0333J LB | 5/25/2023 | 137,957.67 | 137,946.85 | 1.41 |
| FNR 0364L HQ | 7/25/2023 | 145,874.65 | 146,605.51 | 1.03 |
| FHR 2666 OD | 8/15/2023 | 137,100.70 | 138,019.72 | 1.04 |
| FHR 2666 OD | 8/15/2023 | 142,643.82 | 143,362.42 | 1.04 |
| FHR 2756 KA | 2/15/2024 | 543,051.02 | 538,316.75 | 1.40 |
| FNR 2008-45 DB | 6/25/2023 | 253,915.94 | 254,257.87 | 0.96 |
| FN BM6007 | 5/1/2023 | 689,959.97 | 681,540.26 | 1.08 |
| GMALT 2020-2 B | 7/22/2024 | 4,078,992.65 | 4,155,235.20 | 0.58 |
| JDOT 2019-B A2 | 5/16/2022 | 380,984.94 | 381,759.79 | 0.44 |
| JDOT 2019-B A2 | 5/16/2022 | 69,400.13 | 69,410.87 | 0.44 |
| MMAF 20B A3 | 8/14/2025 | 3,469,950.38 | 3,473,712.90 | 0.44 |
| MMAF 20A A2 | 4/9/2024 | 1,669,844.69 | 1,675,594.50 | 0.36 |
| NAROT 2017-C A3 | 4/18/2022 | 17,822.79 | 17,871.79 | 0.45 |
| NAROT 2017-C A3 | 4/18/2022 | 11,166.89 | 11,372.96 | 0.45 |
| NALT 2019-B A2A | 10/15/2021 | 212,462.36 | 212,701.93 | 0.16 |
| PFSFC 2019-A A2 | 4/15/2024 | 517,893.52 | 517,260.05 | 0.65 |
| PFSFC 20B A | 6/17/2024 | 1,564,789.51 | 1,580,900.40 | 0.51 |
| PFSFC 20E A | 10/15/2025 | 302,156.25 | 302,151.00 | 0.74 |
| SCART 20A A | 10/15/2024 | 2,117,440.99 | 2,138,027.64 | 0.00 |
| TFET 191 A3 | 4/24/2023 | 1,974,661.88 | 2,002,788.25 | 0.55 |
| BMWLT 2018-1 A3 | 7/20/2021 | 69,853.49 | 69,972.18 | 0.29 |
| BMWLT 2018-1 A4 | 3/21/2022 | 629,994.39 | 632,482.20 | 0.23 |
| COPAR 2020-1 A3 | 11/15/2024 | 2,129,547.16 | 2,171,194.20 | 0.56 |
| DRIVE 2020-2 A3 | 5/15/2024 | 629,975.93 | 633,143.70 | 0.40 |
| FNA 2011-M5 A2 | 7/25/2021 | 224,291.54 | 220,701.53 | -0.22 |
| FHMS K-020 A2 | 5/25/2022 | 2,714,871.09 | 2,761,884.00 | 0.40 |
| FHMS K-SMC A2 | 1/25/2023 | 1,483,888.67 | 1,557,854.60 | 0.32 |
| FHMS K-SMC A2 | 1/25/2023 | 2,030,198.44 | 2,132,901.60 | 0.32 |
| FHMS K-SMC A2 | 1/25/2023 | 410,500.00 | 418,216.00 | 0.32 |
| FHMS K-717 A2 | 9/25/2021 | 1,635,592.73 | 1,639,333.82 | 0.40 |
| FHMS K-724 A1 | 3/25/2023 | 937,984.34 | 960,505.39 | 0.83 |
| FHMS K-J23 A2 | 12/25/2022 | 1,338,418.14 | 1,356,596.03 | 0.98 |
| FHMS K-J30 A1 | 1/25/2025 | 1,600,078.72 | 1,602,813.32 | 0.46 |
| HDMOT 2019-A A3 | 2/15/2024 | 4,299,667.18 | 4,356,373.00 | 0.69 |
| HAROT 2019-3 A3 | 8/15/2023 | 1,809,984.98 | 1,839,539.20 | 0.37 |
| JDOT 2019 A3 | 7/17/2023 | 1,687,329.77 | 1,719,836.63 | 0.50 |
| JDOT 2020 A3 | 8/15/2024 | 2,799,828.92 | 2,835,140.00 | 0.36 |
| MBALT 2020-A A3 | 12/15/2022 | 1,029,864.25 | 1,044,389.10 | 0.14 |
| NALT 2018-A A3 | 9/15/2021 | 82,692.31 | 82,792.16 | 0.34 |
| SDART 2020-2 A3 | 4/15/2024 | 859,901.01 | 862,820.80 | 0.35 |
| SDART 2020-3 | 7/15/2024 | 2,469,763.87 | 2,476,076.20 | 0.33 |
| SDART 2020-4 A3 | 7/15/2024 | 2,099,691.09 | 2,106,300.00 | 0.28 |
| TAOT 2020-C A3 | 10/15/2024 | 2,129,835.99 | 2,137,476.30 | 0.26 |
| TAOT 2018-A A3 | 5/16/2022 | 0.00 | 0.00 | 0.34 |
| TAOT 2019-C A3 | 9/15/2023 | 1,829,984.99 | 1,858,785.90 | 0.42 |
| VZOT 2019-C A1A | 4/22/2024 | 1,999,845.80 | 2,042,900.00 | 0.25 |
| VWALT 2019-A A3 | 11/21/2022 | 849,986.57 | 862,639.50 | 0.04 |
| SUB-TOTAL | | 171,662,553.92 | 174,148,415.32 | |
| <i>Municipal Debt</i> | | | | |
| CALIFORNIA EARTHQUAKE AUTH REV | 7/1/2022 | 815,000.00 | 817,461.30 | 1.12 |
| CALIFORNIA ST DEPT WTR RES CENT VY PROJ REV | 12/1/2022 | 625,000.00 | 626,687.50 | 0.21 |
| CALIFORNIA ST DEPT WTR RES CENT VY PROJ REV | 12/1/2023 | 230,000.00 | 230,871.70 | 0.28 |
| CALIFORNIA ST UNIV REV | 11/1/2023 | 1,000,000.00 | 1,001,870.00 | 0.41 |
| CONNECTICUT ST | 7/1/2023 | 226,343.25 | 233,718.75 | 0.44 |
| FLORIDA ST BRD ADMIN FIN CORP REV | 7/1/2025 | 1,025,000.00 | 1,048,482.75 | 0.74 |
| LOS ANGELES CALIF CMNTY COLLEGE DIST | 8/1/2023 | 760,000.00 | 762,287.60 | 0.33 |
| MARYLAND ST | 8/1/2023 | 2,125,000.00 | 2,134,456.25 | 0.24 |
| MISSISSIPPI ST | 11/1/2023 | 925,000.00 | 928,209.75 | 0.30 |
| NEW YORK ST URBAN DEV CORP REV | 3/15/2023 | 915,000.00 | 913,536.00 | 0.55 |
| NEW YORK ST URBAN DEV CORP REV | 3/15/2024 | 2,790,000.00 | 2,785,563.90 | 0.67 |
| PORT AUTH N Y & N J | 7/1/2023 | 1,125,000.00 | 1,141,762.50 | 0.49 |
| PORT AUTH N Y & N J | 7/1/2023 | 1,101,416.70 | 1,111,315.50 | 0.49 |
| NEW YORK ST | 2/15/2024 | 3,000,000.00 | 3,114,570.00 | 0.77 |
| BAY AREA TOLL AUTH CALIF TOLL BRDG REV | 4/1/2022 | 2,865,000.00 | 2,925,451.50 | 0.43 |
| BAY AREA TOLL AUTH CALIF TOLL BRDG REV | 4/1/2022 | 1,105,500.00 | 1,123,210.00 | 0.43 |
| CALIFORNIA HEALTH FACs FING AUTH REV | 6/1/2021 | 2,140,000.00 | 2,153,439.20 | 0.39 |
| CALIFORNIA ST | 4/1/2024 | 3,239,373.40 | 3,335,224.35 | 0.48 |
| CALIFORNIA ST DEPT WTR RES CENT VY PROJ REV | 12/1/2024 | 2,120,000.00 | 2,130,854.40 | 0.43 |
| CHAFFEY CMNTY COLLEGE DIST CALIF | 6/1/2022 | 715,000.00 | 726,454.30 | 0.47 |
| CONTRA COSTA CALIF CMNTY COLLEGE DIST | 8/1/2022 | 1,000,000.00 | 1,020,350.00 | 0.36 |
| EL DORADO CALIF IRR DIST REV | 3/1/2023 | 720,000.00 | 726,458.40 | 0.45 |
| EL DORADO CALIF IRR DIST REV | 3/1/2024 | 720,000.00 | 731,520.00 | 0.57 |
| HAWAII ST ARPTS SYS CUSTOMER FAC CHARGE REV | 7/1/2022 | 715,000.00 | 723,079.50 | 1.06 |
| HAWAII ST ARPTS SYS CUSTOMER FAC CHARGE REV | 7/1/2024 | 715,000.00 | 734,397.95 | 1.21 |
| LOS ANGELES CALIF DEPT ARPTS ARPT REV | 5/15/2021 | 1,006,380.00 | 1,006,730.00 | 0.48 |

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| DESCRIPTION | MATURITY DATE | BOOK VALUE | MARKET VALUE | YIELD |
|--|---------------|----------------|----------------|-------|
| LOS ANGELES CALIF MUN IMPT CORP LEASE REV | 11/1/2022 | 900,000.00 | 901,125.00 | 0.45 |
| LOS ANGELES CALIF MUN IMPT CORP LEASE REV | 11/1/2023 | 720,000.00 | 718,423.20 | 0.73 |
| LOS ANGELES CNTY CALIF PUB WKS FING AUTH LEASE REV | 12/1/2021 | 1,537,050.00 | 1,538,220.00 | 0.39 |
| MASSACHUSETTS ST SCH BLDG AUTH DEDICATED SALES TAX | 10/15/2022 | 1,800,000.00 | 1,843,794.00 | 0.59 |
| MASSACHUSETTS ST WTR RES AUTH IAM COML PAPER NTS 3 | 8/1/2023 | 2,365,000.00 | 2,454,349.70 | 0.30 |
| MISSISSIPPI ST | 11/1/2023 | 4,540,000.00 | 4,555,753.80 | 0.30 |
| OHIO ST SPL OBLIG | 10/1/2023 | 1,180,000.00 | 1,187,386.80 | 0.34 |
| OHLONE CALIF CMNTY COLLEGE DIST | 8/1/2022 | 800,000.00 | 817,576.00 | 0.30 |
| PASADENA CALIF PUB FING AUTH LEASE REV | 12/1/2021 | 400,000.00 | 410,060.00 | 0.48 |
| PENNSYLVANIA ST TPK COMMN TPK REV | 12/1/2021 | 876,767.50 | 883,522.50 | 1.20 |
| RANCHO SANTIAGO CALIF CMNTY COLLEGE DIST | 9/1/2023 | 865,000.00 | 868,312.95 | 0.27 |
| RHODE IS ST TPK & BRDG AUTH TOLL REV | 12/1/2021 | 480,000.00 | 483,508.80 | 1.32 |
| RHODE IS ST TPK & BRDG AUTH TOLL REV | 12/1/2022 | 400,000.00 | 407,688.00 | 1.14 |
| RIVERSIDE CNTY CALIF PENSION OBLIG | 2/15/2022 | 2,420,000.00 | 2,465,471.80 | 0.58 |
| SAN DIEGO CALIF CMNTY COLLEGE DIST | 8/1/2022 | 1,500,000.00 | 1,539,585.00 | 0.27 |
| SAN DIEGO CNTY CALIF WTR AUTH WTR REV | 5/1/2024 | 1,440,000.00 | 1,448,726.40 | 0.41 |
| SAN FRANCISCO CALIF BAY AREA RAPID TRAN DIST SALES | 7/1/2022 | 1,484,761.60 | 1,508,880.80 | 0.30 |
| SAN FRANCISCO CALIF CITY & CNTY ARPTS COMMN INTL A | 5/1/2022 | 2,138,837.50 | 2,190,492.85 | 0.54 |
| SAN FRANCISCO CALIF CITY & CNTY ARPTS COMMN INTL A | 5/1/2023 | 1,635,140.00 | 1,699,122.30 | 0.71 |
| SAN FRANCISCO CALIF CITY & CNTY REDEV FING AUTH TA | 2/1/2021 | 1,910,798.40 | 1,690,080.00 | 1.37 |
| SAN JOSE EVERGREEN CALIF CMNTY COLLEGE DIST | 9/1/2021 | 290,000.00 | 290,629.30 | 0.27 |
| SAN JOSE EVERGREEN CALIF CMNTY COLLEGE DIST | 9/1/2022 | 430,000.00 | 433,151.90 | 0.26 |
| SAN JOSE EVERGREEN CALIF CMNTY COLLEGE DIST | 9/1/2023 | 430,000.00 | 431,483.50 | 0.37 |
| TEXAS ST | 10/1/2022 | 2,335,000.00 | 2,392,908.00 | 0.19 |
| UNIV CALIF REGTS MED CTR POOLED REV | 5/15/2021 | 1,201,003.20 | 1,220,188.05 | 0.47 |
| UPPER SANTA CLARA VY JT PWRS AUTH CALIF REV | 8/1/2023 | 2,590,000.00 | 2,598,806.00 | 0.55 |
| UPPER SANTA CLARA VY JT PWRS AUTH CALIF REV | 8/1/2024 | 2,625,000.00 | 2,637,810.00 | 0.69 |
| UTAH HSG CORP SINGLE FAMILY MTG REV | 1/1/2022 | 1,535,000.00 | 1,547,448.85 | 1.28 |
| UTAH HSG CORP SINGLE FAMILY MTG REV | 7/1/2022 | 640,000.00 | 648,640.00 | 1.24 |
| VENTURA CNTY CALIF PUB FING AUTH LEASE REV | 11/1/2022 | 560,000.00 | 564,082.40 | 0.45 |
| VENTURA CNTY CALIF PUB FING AUTH LEASE REV | 11/1/2023 | 720,000.00 | 730,670.40 | 0.52 |
| VENTURA CNTY CALIF PUB FING AUTH LEASE REV | 11/1/2023 | 722,793.60 | 730,670.40 | 0.52 |
| ALAMEDA CNTY CALIF JT PWRS AUTH LEASE REV | 6/1/2022 | 1,275,187.50 | 1,294,500.00 | 0.47 |
| BAY AREA TOLL AUTH CALIF TOLL BRDG REV | 4/1/2023 | 3,700,000.00 | 3,845,743.00 | 0.42 |
| BAY AREA TOLL AUTH CALIF TOLL BRDG REV | 4/1/2022 | 1,534,485.00 | 1,531,650.00 | 0.43 |
| BAY AREA TOLL AUTH CALIF TOLL BRDG REV | 4/1/2023 | 790,000.00 | 820,193.80 | 0.52 |
| CALIFORNIA EARTHQUAKE AUTH REV | 7/1/2023 | 365,000.00 | 367,533.10 | 1.19 |
| CALIFORNIA ST | 3/1/2022 | 1,802,064.00 | 1,718,029.50 | 0.44 |
| CALIFORNIA ST | 4/1/2021 | 3,000,120.00 | 3,018,630.00 | 0.31 |
| CALIFORNIA ST PUB WKS BRD LEASE REV | 12/1/2021 | 597,068.69 | 136,383.74 | 0.55 |
| CALIFORNIA ST PUB WKS BRD LEASE REV | 12/1/2021 | 333,842.71 | 339,909.04 | 0.55 |
| CALIFORNIA ST UNIV REV | 11/1/2023 | 1,090,000.00 | 1,092,038.30 | 0.41 |
| CONNECTICUT ST | 7/1/2023 | 875,193.90 | 903,712.50 | 0.44 |
| CONTRA COSTA CALIF CMNTY COLLEGE DIST | 8/1/2021 | 1,000,000.00 | 1,008,350.00 | 0.27 |
| LOS ALTOS CALIF SCH DIST | 8/1/2023 | 2,790,000.00 | 2,791,004.40 | 1.66 |
| LOS ANGELES CALIF MUN IMPT CORP LEASE REV | 11/1/2022 | 1,019,560.00 | 1,046,060.00 | 0.46 |
| LOS ANGELES CALI | 8/1/2024 | 1,290,000.00 | 1,301,171.40 | 0.01 |
| MASSACHUSETTS (COMMONWEALTH OF) | 5/1/2022 | 1,186,968.00 | 1,176,411.60 | 0.23 |
| OAKLAND-ALAMEDA CNTY CALIF COLISEUM AUTH LEASE REV | 2/1/2023 | 1,058,440.00 | 1,054,690.00 | 0.69 |
| PALM DESERT CALIF REDEV AGY SUCCESSOR AGY TAX ALLO | 10/1/2022 | 1,114,074.90 | 1,128,813.60 | 0.97 |
| RANCHO SANTIAGO CALIF CMNTY COLLEGE DIST | 9/1/2024 | 1,410,000.00 | 1,417,078.20 | 0.50 |
| RIVERSIDE CALIF UNI SCH DIST | 2/1/2022 | 750,000.00 | 760,485.00 | 0.51 |
| RIVERSIDE CNTY CALIF PENSION OBLIG | 2/15/2023 | 1,375,000.00 | 1,426,026.25 | 0.60 |
| SACRAMENTO CNTY CALIF SANTN DIST FING AUTH REV | 12/1/2023 | 1,500,000.00 | 1,511,070.00 | 0.50 |
| SAN BERNARDINO CALIF CMNTY COLLEGE DIST | 8/1/2024 | 890,000.00 | 905,868.70 | 0.44 |
| SAN DIEGO CALIF CMNTY COLLEGE DIST | 8/1/2021 | 1,285,000.00 | 1,297,348.85 | 0.29 |
| SAN DIEGO CALIF PUB FACS FING AUTH LEASE REV | 10/15/2021 | 1,325,000.00 | 1,351,314.50 | 0.47 |
| SAN DIEGO CALIF PUB FACS FING AUTH WTR REV | 8/1/2023 | 620,000.00 | 633,627.60 | 0.47 |
| SAN FRANCISCO CALIF CITY & CNTY PUB UTILS COMMN WT | 11/1/2022 | 630,000.00 | 648,912.60 | 0.31 |
| SAN FRANCISCO CALIF CITY & CNTY ARPTS COMMN INTL A | 5/1/2021 | 2,800,000.00 | 2,823,016.00 | 0.46 |
| SAN FRANCISCO CALIF CITY & CNTY ARPTS COMMN INTL A | 5/1/2022 | 2,350,000.00 | 2,427,785.00 | 0.55 |
| SANTA BARBARA CNTY CALIF SOLID WASTE SYS REV CTFS | 12/1/2021 | 375,000.00 | 384,513.75 | 0.52 |
| SEMITROPIC IMPT DIST SEMITROPIC WTR STORAGE DIST C | 12/1/2022 | 1,637,622.60 | 1,631,713.40 | 0.45 |
| SOUTHERN CALIF PUB PWR AUTH PWR PROJ REV | 7/1/2023 | 2,735,000.00 | 2,741,345.20 | 0.43 |
| UNIV CALIF REGTS MED CTR POOLED REV | 5/15/2022 | 1,577,512.50 | 1,579,326.00 | 0.50 |
| UNIVERSITY CALIF REVS | 5/15/2021 | 860,000.00 | 865,547.00 | 0.38 |
| UNIVERSITY CALIF REVS | 5/15/2022 | 1,926,739.20 | 1,996,108.80 | 0.38 |
| UNIVERSITY CALIF REVS | 5/15/2023 | 1,670,000.00 | 1,680,571.10 | 0.36 |
| UPPER SANTA CLARA VY JT PWRS AUTH CALIF REV | 8/1/2022 | 2,460,000.00 | 2,464,698.60 | 0.40 |
| VALLEJO CALIF WTR REV | 5/1/2023 | 840,000.00 | 854,910.00 | 0.70 |
| SUB-TOTAL | | 131,035,044.16 | 132,002,622.34 | |
| <i>Variable & Floating Rate</i> | | | | |
| BANK OF AMERICA CORP | 3/5/2024 | 1,064,260.00 | 1,068,290.00 | 0.40 |
| BANK OF AMERICA CORP | 5/19/2024 | 1,425,000.00 | 1,458,330.75 | 0.82 |
| CARMX 2020-3 A3 | 3/17/2025 | 774,867.17 | 779,650.00 | 0.34 |
| CITIGROUP INC | 10/30/2024 | 2,500,000.00 | 2,516,225.00 | 0.67 |
| CITIGROUP INC | 11/4/2022 | 600,000.00 | 609,588.00 | 0.41 |
| GMALT 2020-3 A3 | 8/21/2023 | 624,940.13 | 626,556.25 | 0.26 |
| GOLDMAN SACHS GROUP INC | 11/17/2023 | 1,675,000.00 | 1,681,783.75 | 0.51 |
| JPMORGAN CHASE & CO | 6/1/2024 | 1,575,000.00 | 1,617,052.50 | 0.79 |
| JPMORGAN CHASE & CO | 9/16/2024 | 300,000.00 | 301,590.00 | 0.61 |
| NALT 2020-B A3 | 10/16/2023 | 424,956.27 | 425,612.00 | 0.33 |
| BANK OF AMERICA CORP | 12/20/2023 | 2,879,411.20 | 2,883,877.40 | 0.33 |
| BANK OF AMERICA CORP | 10/24/2024 | 2,256,637.50 | 2,271,015.00 | 0.59 |
| BANK OF AMERICA CORP | 10/24/2024 | 802,424.00 | 807,472.00 | 0.59 |
| CITIGROUP INC | 11/4/2022 | 3,140,000.00 | 3,190,177.20 | 0.41 |
| FNA 2014-M6 A2 | 5/25/2021 | 84,654.60 | 86,137.18 | 0.83 |
| FN AL3382 | 3/1/2023 | 734,283.77 | 744,151.68 | 1.04 |
| GOLDMAN SACHS GROUP INC | 11/17/2023 | 3,560,000.00 | 3,574,418.00 | 0.51 |
| GOLDMAN SACHS GROUP INC | 11/17/2023 | 3,604,680.00 | 3,614,580.00 | 0.51 |
| JPMORGAN CHASE & CO | 12/5/2024 | 964,932.50 | 963,926.25 | 0.52 |
| JPMORGAN CHASE & CO | 12/5/2024 | 3,132,832.40 | 3,128,629.20 | 0.52 |
| JPMORGAN CHASE & CO | 12/5/2024 | 3,961,872.00 | 3,965,868.00 | 0.52 |
| KEYBANK NA | 2/1/2022 | 4,180,000.00 | 4,204,327.60 | 0.39 |
| MORGAN STANLEY | 11/10/2023 | 5,725,000.00 | 5,738,282.00 | 0.51 |
| MORGAN STANLEY | 11/10/2023 | 1,801,008.00 | 1,804,176.00 | 0.51 |
| PNC BANK NA | 2/24/2023 | 4,045,000.00 | 4,052,321.45 | 0.43 |
| STATE STREET CORP | 3/30/2023 | 1,750,000.00 | 1,806,122.50 | 0.39 |
| BANK OF AMERICA CORP | 10/24/2024 | 2,155,000.00 | 2,175,127.70 | 0.59 |
| CITIGROUP INC | 10/30/2024 | 2,065,000.00 | 2,078,401.85 | 0.67 |
| CITIBANK NA | 5/20/2022 | 298,510.50 | 297,802.50 | 0.38 |
| CITIBANK NA | 5/20/2022 | 1,319,576.85 | 1,317,397.50 | 0.38 |
| FNA 2014-M8 A2 | 6/25/2024 | 2,067,954.84 | 2,056,726.97 | 0.29 |
| FNA 2018-M5 A2 | 9/25/2021 | 527,510.73 | 489,763.44 | 0.74 |
| FHMS K-029 A2 | 2/25/2023 | 1,078,080.08 | 1,089,235.30 | 0.39 |
| FHMS K-029 A2 | 2/25/2023 | 1,716,426.56 | 1,734,316.40 | 0.39 |
| FHMS K-029 A2 | 2/25/2023 | 820,581.64 | 835,432.90 | 0.39 |
| FHMS K-029 A2 | 2/25/2023 | 1,797,539.45 | 1,787,191.90 | 0.39 |
| FHMS K-031 A2 | 4/25/2023 | 3,771,482.81 | 3,762,630.60 | 0.41 |
| FHMS K-032 A2 | 5/25/2023 | 3,805,596.09 | 3,993,160.60 | 0.33 |

**Orange County Transportation Authority
Portfolio Listing
As of December 31, 2020**

| <u>DESCRIPTION</u> | <u>MATURITY DATE</u> | <u>BOOK VALUE</u> | <u>MARKET VALUE</u> | <u>YIELD</u> |
|---|----------------------|----------------------------|----------------------------|--------------|
| FHMS K-033 A2 | 7/25/2023 | 3,809,798.44 | 3,855,423.00 | 0.42 |
| FHMS K-105 A | 7/25/2024 | 1,594,930.88 | 1,597,833.65 | 0.33 |
| FIRST REPUBLIC BANK | 2/12/2024 | 500,000.00 | 514,515.00 | 0.57 |
| GOLDMAN SACHS GROUP INC | 10/31/2022 | 1,573,456.50 | 1,581,410.25 | 0.56 |
| JPMORGAN CHASE & CO | 9/16/2024 | 1,160,000.00 | 1,166,148.00 | 0.61 |
| KEYBANK NA | 11/22/2021 | 1,570,646.00 | 1,560,400.50 | 0.33 |
| KEYBANK NA | 1/3/2024 | 1,450,000.00 | 1,451,435.50 | 0.43 |
| MORGAN STANLEY | 10/21/2025 | 615,000.00 | 620,055.30 | 0.68 |
| MORGAN STANLEY | 11/10/2023 | 1,160,000.00 | 1,162,691.20 | 0.51 |
| PNC BANK NA | 12/9/2022 | 1,640,000.00 | 1,665,190.40 | 0.39 |
| WELLS FARGO BANK NA | 9/9/2022 | 1,990,000.00 | 2,012,745.70 | 0.42 |
| SUB-TOTAL | | 92,073,850.91 | 92,725,195.87 | |
| <i>Supranationals</i> | | | | |
| INTER-AMERICAN DEVELOPMENT BANK | 5/24/2023 | 2,599,116.00 | 2,617,134.00 | 0.22 |
| INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT | 11/24/2023 | 2,644,302.50 | 2,651,139.50 | 0.24 |
| INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT | 11/24/2023 | 3,043,442.50 | 3,051,311.50 | 0.24 |
| INTER-AMERICAN DEVELOPMENT BANK | 4/14/2022 | 1,934,593.40 | 1,968,889.50 | 0.18 |
| INTER-AMERICAN DEVELOPMENT BANK | 4/14/2022 | 1,177,726.00 | 1,198,676.25 | 0.18 |
| INTER-AMERICAN DEVELOPMENT BANK | 4/14/2022 | 811,863.00 | 826,321.50 | 0.18 |
| INTER-AMERICAN DEVELOPMENT BANK | 9/14/2022 | 10,484,250.00 | 10,780,875.00 | 0.18 |
| INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT | 6/19/2023 | 2,889,102.00 | 2,965,938.00 | 0.22 |
| SUB-TOTAL | | 25,584,395.40 | 26,060,285.25 | |
| SHORT-TERM PORTFOLIO - TOTAL | | 1,620,007,160.53 | 1,639,259,716.65 | |
| BOND PROCEEDS PORTFOLIO | | | | |
| <i>GUARANTEED INVESTMENT CONTRACT (GIC)</i> | | | | |
| <i>THE BANK OF NOVA SCOTIA</i> | 4/1/2021 | 67,000,000.00 | 67,000,000.00 | 3.01% |
| <i>BNY MELLON-MONEY MARKET FUND</i> | N/A | 103,702,919.84 | 103,702,919.84 | 0.07% |
| BOND PROCEEDS PORTFOLIO-TOTAL | | \$ 170,702,919.84 | \$ 170,702,919.84 | |
| DEBT SERVICE RESERVE FUNDS | | | | |
| <u>DESCRIPTION</u> | <u>MATURITY DATE</u> | <u>BOOK VALUE</u> | <u>REQUIRED AMOUNT</u> | <u>YIELD</u> |
| <i>91 EXPRESS LANES 2013 BONDS</i> | 2030 | | 10,799,437.46 | |
| US BANK COMMERCIAL PAPER | 12/9/2020 | 11,485,442.30 | | 0.12% |
| FIRST AMERICAN TREAS OBLIGATIONS | N/A | 514.81 | | 0.01% |
| <i>91 EXPRESS LANES 2013 BONDS - OPERATING & MAINTENANCE RESERVES</i> | | | 13,000,000.00 | |
| BANK DEPOSITS | N/A | 213,076.50 | | |
| OPERATING RESERVE | 3/15/2021 | 3,098,023.75 | | 0.15% |
| MAINTENANCE RESERVE | 3/15/2021 | 10,493,306.25 | | 0.15% |
| DEBT SERVICE RESERVE FUNDS - TOTAL | | \$ 25,290,363.61 | | |
| TOTAL PORTFOLIO | | | | |
| | | Book Value | Market Value | |
| | | \$ 2,007,571,727.75 | \$ 2,026,824,283.87 | |



COMMITTEE TRANSMITTAL

February 8, 2020

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Capital Programs Division – Second Quarter Fiscal Year 2020-21
Capital Action Plan Performance Metrics

Executive Committee Meeting of February 1, 2021

Present: Chairman Do, Vice Chairman Murphy, and Directors Bartlett, Hennessey, Jones, and Shaw

Absent: None

Committee Vote

Following the discussion, no action was taken on this receive and file item.


Staff Recommendation

Receive and file as an information item.



February 1, 2021

To: Executive Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Capital Programs Division - Second Quarter Fiscal Year 2020-21
Capital Action Plan Performance Metrics

Overview

Staff has prepared a quarterly progress report on capital project delivery for the period of October 2020 through December 2020 for review by the Orange County Transportation Authority Board of Directors. This report highlights the Capital Action Plan for project delivery, which is used as a performance metric to assess delivery progress on highway, transit, and rail projects.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA) delivers highway, transit, rail, and facility projects from the beginning of the environmental approval phase through construction completion. Project delivery milestones are planned carefully with consideration of project scope, costs, schedule, and assessment of risks. The milestones reflected in the Capital Action Plan (CAP) are OCTA's planned and budgeted major project delivery commitments.

This report is a quarterly progress report on the CAP performance metrics, which are a snapshot of the planned CAP project delivery milestones in the budgeted fiscal year (FY).

Discussion

OCTA's objective is to deliver projects on schedule and within the approved project budget. Key project cost and schedule commitments are captured in the CAP, which is regularly updated with project status and any new projects (Attachment A). The CAP is categorized into four key project groupings

of freeway, railroad grade separation, and rail and station projects. Schedule milestones are used as performance indicators of progress in project delivery. The CAP performance metrics report provides a FY snapshot of the milestones targeted for delivery in the FY and provide transparency and performance measurement of capital project delivery.

The CAP project costs represent the total cost across all phases of project delivery, including support costs, right-of-way (ROW), and construction capital costs. Baseline costs, if established, are shown in comparison to either the actual or forecast cost. Baseline costs may be shown as to-be-determined (TBD) if project scoping studies and estimates have not been developed or approved and may be updated as delivery progresses, and milestones are achieved. Projects identified in the Orange County local transportation sales tax Measure M2 (M2) are identified with the corresponding M2 project logo. The CAP status update is also included in the M2 Quarterly Progress Report.

The CAP summarizes the very complex capital project critical path delivery schedules into eight key milestones.

| | |
|----------------------------|---|
| Begin Environmental | The date work on the environmental clearance, project report, or preliminary engineering phase begins. |
| Complete Environmental | The date environmental clearance and project approval is achieved. |
| Begin Design | The date final design work begins, or the date when a design-build contract begins. |
| Complete Design | The date final design work is 100 percent complete and approved. |
| Construction Ready | The date contract bid documents are ready for advertisement, including certification of ROW, all agreements executed, and contract constraints cleared. |
| Advertise for Construction | The date a construction contract is advertised for bids. |
| Award Contract | The date the construction contract is awarded. |
| Construction Complete | The date all construction work is completed, and the project is open to public use. |

These delivery milestones reflect progression across the project delivery phases shown below.



Project schedules reflect the planned baseline milestone dates in comparison to the forecast or actual milestone dates. Milestone dates may be shown as TBD if project scoping or approval documents have not been finalized and approved, or if the delivery schedule has not been negotiated with a partnering agency or consultant implementing the specific phase of a project. Planned milestone dates can be revised to reflect new dates from approved baseline schedule changes. Project schedules are reviewed monthly and milestone achievements and updated forecast dates are included to reflect project delivery status.

CAP milestones achieved in the second quarter of FY 2020-21 include:

Freeway Projects

- The begin design milestone was achieved for the State Route 91 widening segment between Acacia Street and La Palma Avenue. The contract for production of the plans, specifications, and estimate (PS&E) was executed with T.Y. Lin International on November 30, 2020.
- The begin design milestone was achieved for the Interstate 605 (I-605) Katella Avenue interchange improvements. The contract for production of the PS&E was executed with Michael Baker International on December 28, 2020.

Rail and Station Projects

- The complete design, construction ready, and advertise construction milestones for the Anaheim Canyon Metrolink Station expansion were achieved. The project was advertised for construction bids on October 27, 2020, and bids were opened on January 21, 2021.
- The complete construction milestone for the Laguna Niguel to San Juan Capistrano passing siding was achieved on November 17, 2020, one quarter earlier than planned. Final contract closeout activities are underway.

The following CAP milestones missed the planned delivery through the second quarter of FY 2020-21:

- The award contract milestone for construction of the Anaheim Canyon Metrolink Station expansion was missed. Construction bids will be opened on January 21, 2021, and the target contract award is on March 22, 2021.

Recap of FY 2020-21 Performance Metrics and CAP Updates

The performance metrics snapshot provided at the beginning of FY 2020-21 reflected 15 planned major project delivery milestones to be accomplished, seven of which were planned through the second quarter. The CAP and performance metrics have been updated to reflect milestones achieved and missed through the second quarter of FY 2020-21 (Attachment B). Seven milestones were achieved through the second quarter, including one milestone achieved early and one milestone missed.

CAP updates and FY 2020-21 Risks

Discussions continue with the cities of Laguna Hills, Laguna Woods, and Mission Viejo to refine and gain concurrence on acceptable build alternatives for the Interstate 5 (I-5) El Toro interchange improvement project. The project cost and schedule will not be determined until there is local concurrence on the alternatives and environmental clearance is achieved.

There are schedule and cost risks on the State Route 55 (SR-55) widening project, which proposes widening from Interstate 405 (I-405) to I-5. The construction ready milestone is planned for September 2021 pending successful completion of extremely complex ROW appraisals and negotiations on property required for construction. The working schedule considers potential eminent domain actions through the court to gain early possession of required ROW. Courts may be backlogged due to the coronavirus (COVID-19) pandemic, which may impact the schedule for early possession of ROW.

The forecast cost on the I-405 improvement from SR-55 to I-605 has been updated to reflect recent Board of Directors (Board)-approved change orders and budget adjustments.

There are schedule and cost risks on the OC Streetcar project. The construction completion target has been revised to October 2022 through construction contract change orders, and overall project contingency funding is being drawn down quicker than anticipated due to required changes. Staff is working closely

with the Federal Transit Administration (FTA) while FTA performs an overall project risk, cost, and schedule assessment to determine updates required to the cost and schedule commitments contained in the Full Funding Grant Agreement (FFGA) between OCTA and FTA. While awaiting finalization of the FTA assessment, staff will be seeking Board approval for supplemental contingency funding to address funding needs for changes anticipated over the next few months.

The Placentia Metrolink Station construction ready, advertise construction, and award contract milestones will not be met this FY. Approvals needed to construct the project remain dependent on finalization of the Metrolink/Burlington Northern Santa Fe Railway (BNSF) shared-use agreement, which allows for Metrolink operations on the BNSF rail corridor. Revised target milestones have not been forecast due to the pending Metrolink/BNSF negotiations. However, OCTA staff is working with the City of Placentia to facilitate coordination of the station scope and schedule with an adjacent development construction scope and schedule.

Recent highway project construction bids continue to indicate a favorable market with a higher number of bidders and competitive bids priced below the engineer's estimated cost of bid items.

Summary

Capital project delivery continues to progress and is reflected in the CAP. The planned FY 2020-21 performance metrics created from forecast project schedules are used as a general project delivery performance indicator throughout the FY. Staff will continue to manage project costs and schedules across all project phases to meet project delivery commitments and report quarterly.

Attachments

- A. Capital Action Plan, Status Through December 2020
- B. Capital Programs Division, Fiscal Year 2020-21 Performance Metrics Through December 2020

Prepared by:















A handwritten signature in blue ink, appearing to read "James G. Beil".

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

Capital Action Plan

Status Through December 2020
















Updated: January 18, 2021

| Capital Projects | Cost | Schedule | | | | | | | |
|---|-------------------|---------------------|------------------------|---------------|-----------------|--------------------|------------------------|----------------|-----------------------|
| | Baseline/Forecast | Plan/Forecast | | | | | | | |
| | (millions) | Begin Environmental | Complete Environmental | Begin Design | Complete Design | Construction Ready | Advertise Construction | Award Contract | Complete Construction |
| Freeway Projects: | | | | | | | | | |
| I-5, Pico to San Diego County | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD | TBD |
| | TBD | Apr-21 | Dec-23 | TBD | TBD | TBD | TBD | TBD | TBD |
|  I-5, Pico to Vista Hermosa | \$113.0 | Jun-09 | Dec-11 | Jun-11 | Oct-13 | Feb-14 | Oct-14 | Dec-14 | Aug-18 |
| Project C | \$83.6 | Jun-09 | Oct-11 | Jun-11 | Oct-13 | May-14 | Sep-14 | Dec-14 | Aug-18 |
|  I-5, Vista Hermosa to Pacific Coast Highway | \$75.6 | Jun-09 | Dec-11 | Jun-11 | Feb-13 | Jun-13 | Oct-13 | Dec-13 | Mar-17 |
| Project C | \$75.2 | Jun-09 | Oct-11 | Jun-11 | May-13 | Aug-13 | Feb-14 | Jun-14 | Jul-17 |
|  I-5, Pacific Coast Highway to San Juan Creek Road | \$70.7 | Jun-09 | Dec-11 | Jun-11 | Jan-13 | May-13 | Aug-13 | Oct-13 | Sep-16 |
| Project C | \$74.3 | Jun-09 | Oct-11 | Jun-11 | Jan-13 | Apr-13 | Aug-13 | Dec-13 | Jul-18 |
|  I-5, I-5/Ortega Interchange | \$90.9 | Sep-05 | Jun-09 | Jan-09 | Nov-11 | Mar-12 | Jun-12 | Aug-12 | Sep-15 |
| Project D | \$79.8 | Sep-05 | Jun-09 | Jan-09 | Dec-11 | Apr-12 | Jun-12 | Aug-12 | Jan-16 |
|  I-5, I-5/Ortega Interchange (Landscape) | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Project D | N/A | N/A | N/A | Jan-14 | Oct-14 | Feb-15 | Aug-15 | Sep-15 | Sep-16 |
|  I-5, SR-73 to Oso Parkway | \$151.9 | Sep-11 | Jun-14 | Mar-15 | Jan-18 | May-18 | Aug-18 | Dec-18 | Apr-25 |
| Project C & D | \$195.8 | Oct-11 | May-14 | Mar-15 | Aug-18 | May-19 | Aug-19 | Dec-19 | Apr-25 |
|  I-5, Oso Parkway to Alicia Parkway | \$196.2 | Sep-11 | Jun-14 | Nov-14 | Jun-17 | Dec-17 | Feb-18 | Jun-18 | Nov-23 |
| Project C & D | \$203.1 | Oct-11 | May-14 | Nov-14 | Dec-17 | Jun-18 | Nov-18 | Mar-19 | Nov-23 |
|  I-5, Alicia Parkway to El Toro Road | \$133.6 | Sep-11 | Jun-14 | Mar-15 | Jun-18 | Dec-18 | Jan-19 | May-19 | Oct-24 |
| Project C | \$165.9 | Oct-11 | May-14 | Mar-15 | May-19 | Apr-20 | May-20 | Sep-20 | Oct-24 |
|  I-5, SR-73 to El Toro Road (Landscape) | TBD | N/A | N/A | TBD | TBD | TBD | TBD | TBD | TBD |
| Project C | \$12.4 | N/A | N/A | Jul-22 | Mar-24 | Jul-24 | Sep-24 | Nov-24 | Jun-26 |
|  I-5, I-5/El Toro Road Interchange | TBD | Apr-17 | Nov-19 | TBD | TBD | TBD | TBD | TBD | TBD |
| Project D Cost/Schedule Risk | TBD | Apr-17 | Oct-21 | TBD | TBD | TBD | TBD | TBD | TBD |
|  I-5, I-405 to Yale Avenue | \$230.5 | May-14 | Aug-18 | TBD | TBD | TBD | TBD | TBD | TBD |
| Project B | \$230.5 | May-14 | Jan-20 | Sep-21 | Jun-24 | Dec-24 | Apr-25 | Jul-25 | Jan-29 |
|  I-5, Yale Avenue to SR-55 | \$200.4 | May-14 | Aug-18 | TBD | TBD | TBD | TBD | TBD | TBD |
| Project B | \$200.4 | May-14 | Jan-20 | Apr-21 | Dec-23 | Jun-24 | Oct-24 | Feb-25 | Aug-28 |
|  I-5, SR-55 to SR-57 | \$38.1 | Jul-11 | Jun-13 | Jun-15 | Mar-17 | Jul-17 | Sep-17 | Dec-17 | Apr-21 |
| Project A | \$39.7 | Jun-11 | Apr-15 | Jun-15 | Jun-17 | Dec-17 | Mar-18 | Nov-18 | Jan-21 |
|  SR-55, I-405 to I-5 | \$410.9 | Feb-11 | Nov-13 | Sep-17 | Apr-20 | Dec-20 | Apr-21 | Jul-21 | Aug-25 |
| Project F Cost/Schedule Risk | \$503.2 | May-11 | Aug-17 | Sep-17 | Apr-20 | Sep-21 | Dec-21 | Apr-22 | Apr-26 |

Capital Action Plan

Status Through December 2020











Updated: January 18, 2021

| Capital Projects | Cost | Schedule | | | | | | | |
|--|--------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | Baseline/Forecast | Plan/Forecast | | | | | | | |
| | (millions) | Begin Environmental | Complete Environmental | Begin Design | Complete Design | Construction Ready | Advertise Construction | Award Contract | Complete Construction |
|  SR-55, I-5 to SR-91 Project F | TBD TBD | Dec-16 Dec-16 | Jan-20 Mar-20 | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD |
|  SR-57 Northbound (NB), Orangewood Avenue to Katella Avenue Project G | TBD TBD | Apr-16 Apr-16 | Dec-18 Mar-19 | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD |
|  SR-57 (NB), Katella Avenue to Lincoln Avenue Project G | \$78.7 \$38.0 | Apr-08 Apr-08 | Jul-09 Nov-09 | Jul-08 Aug-08 | Nov-10 Dec-10 | Mar-11 Apr-11 | May-11 Jul-11 | Aug-11 Oct-11 | Sep-14 Apr-15 |
|  SR-57 (NB), Katella Avenue to Lincoln Avenue (Landscape) Project G | N/A N/A | N/A N/A | N/A N/A | N/A May-09 | N/A Jul-10 | N/A Jun-17 | N/A Jul-17 | N/A Sep-17 | N/A Jun-18 |
|  SR-57 (NB), Orangethorpe Avenue to Yorba Linda Boulevard Project G | \$80.2 \$52.3 | Aug-05 Aug-05 | Dec-07 Dec-07 | Feb-08 Feb-08 | Dec-09 Jul-09 | Apr-10 Dec-09 | Jun-10 May-10 | Oct-10 Oct-10 | May-14 Nov-14 |
|  SR-57 (NB), Yorba Linda Boulevard to Lambert Road Project G | \$79.3 \$54.1 | Aug-05 Aug-05 | Dec-07 Dec-07 | Feb-08 Feb-08 | Dec-09 Jul-09 | Apr-10 Mar-10 | Jun-10 May-10 | Oct-10 Oct-10 | Sep-14 May-14 |
|  SR-57 (NB), Orangethorpe Avenue to Lambert Road (Landscape) Project G | N/A N/A | N/A N/A | N/A N/A | N/A Oct-14 | N/A Aug-17 | N/A Dec-17 | N/A Jan-18 | N/A Feb-18 | N/A Apr-19 |
|  SR-57 (NB), Lambert Road to Tonner Canyon Project G | TBD TBD | TBD Jul-23 | TBD Mar-26 | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD |
|  SR-91 Westbound (WB), I-5 to SR-57 Project H | \$78.1 \$59.2 | Jul-07 Jul-07 | Apr-10 Jun-10 | Oct-09 Mar-10 | Feb-12 Apr-12 | Jul-12 Aug-12 | Aug-12 Oct-12 | Nov-12 Jan-13 | Apr-16 Jun-16 |
|  SR-91 Westbound (WB), I-5 to SR-57 (Landscape) Project H | N/A N/A | N/A N/A | N/A N/A | N/A Nov-14 | N/A Aug-16 | N/A Dec-16 | N/A Feb-17 | N/A Mar-17 | N/A Nov-17 |
|  SR-91, SR-55 to Lakeview Avenue (Segment 1) Project I | \$100.9 \$100.9 | Jan-15 Jan-15 | Oct-18 Jun-20 | Mar-20 Mar-20 | Jan-23 Jan-23 | Aug-23 Aug-23 | Oct-23 Oct-23 | Feb-24 Feb-24 | Sep-27 Sep-27 |
|  SR-91, La Palma Avenue to SR-55 (Segment 2) Project I | \$208.4 \$208.4 | Jan-15 Jan-15 | Oct-18 Jun-20 | Jun-20 Jun-20 | Jul-23 Jul-23 | Feb-24 Feb-24 | Mar-24 Mar-24 | Jul-24 Jul-24 | Mar-28 Mar-28 |
|  SR-91, Acacia Street to La Palma Ave (Segment 3) Project I | \$116.2 \$116.2 | Jan-15 Jan-15 | Oct-18 Jun-20 | TBD Nov-20 | TBD Sep-23 | TBD Apr-24 | TBD Jun-24 | TBD Sep-24 | TBD May-28 |
|  SR-91 (WB), Tustin Interchange to SR-55 Project I | \$49.9 \$42.5 | Jul-08 Jul-08 | Jul-11 May-11 | Jul-11 Jun-11 | Mar-13 Feb-13 | Jul-13 Apr-13 | Aug-13 Jun-13 | Oct-13 Oct-13 | Jul-16 Jul-16 |
|  SR-91, SR-55 to SR-241 Project J | \$128.4 \$79.7 | Jul-07 Jul-07 | Jul-09 Apr-09 | Jun-09 Apr-09 | Jan-11 Aug-10 | Apr-11 Dec-10 | Jun-11 Feb-11 | Sep-11 May-11 | Dec-12 Mar-13 |

Capital Action Plan

Status Through December 2020










Updated: January 18, 2021

| Capital Projects | Cost | Schedule | | | | | | | |
|---|-------------------|---------------------|------------------------|--------------|-----------------|--------------------|------------------------|----------------|-----------------------|
| | Baseline/Forecast | Plan/Forecast | | | | | | | |
| | (millions) | Begin Environmental | Complete Environmental | Begin Design | Complete Design | Construction Ready | Advertise Construction | Award Contract | Complete Construction |
|  SR-91, SR-55 to SR-241 (Landscape) | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Project J | N/A | N/A | N/A | May-12 | Feb-13 | Apr-13 | Jul-13 | Oct-13 | Feb-15 |
|  SR-91 Eastbound, SR-241 to SR-71 | \$104.5 | Mar-05 | Dec-07 | Jul-07 | Dec-08 | Mar-09 | May-09 | Jul-09 | Nov-10 |
| Project J | \$57.8 | Mar-05 | Dec-07 | Jul-07 | Dec-08 | May-09 | Jun-09 | Aug-09 | Jan-11 |
| 91 Express Lanes to SR-241 Toll Connector | TBD | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | TBD | Nov-13 | Jan-20 | Jun-16 | Dec-21 | Jun-22 | Jul-22 | Nov-22 | Jun-25 |
|  I-405, I-5 to SR-55 | TBD | Dec-14 | Jul-18 | TBD | TBD | TBD | TBD | TBD | TBD |
| Project L | TBD | Dec-14 | Aug-18 | TBD | TBD | TBD | TBD | TBD | TBD |
|  I-405, SR-55 to I-605 (Design-Build) | \$2,080.2 | Mar-09 | Mar-13 | Mar-14 | Nov-15 | Feb-16 | Mar-16 | Nov-16 | Feb-24 |
| Project K | \$2,080.2 | Mar-09 | May-15 | Mar-14 | Nov-15 | Feb-16 | Mar-16 | Nov-16 | Feb-24 |
| I-405/SR-22 HOV Connector | \$195.9 | N/A | N/A | Sep-07 | Sep-09 | Mar-10 | May-10 | Aug-10 | Aug-14 |
| | \$120.8 | N/A | N/A | Sep-07 | Jun-09 | Sep-09 | Feb-10 | Jun-10 | Mar-15 |
| I-405/I-605 HOV Connector | \$260.4 | N/A | N/A | Sep-07 | Sep-09 | Mar-10 | May-10 | Oct-10 | Jan-15 |
| | \$172.6 | N/A | N/A | Sep-07 | Sep-09 | Feb-10 | May-10 | Oct-10 | Mar-15 |
| I-405/SR-22/I-605 HOV Connector (Landscape) | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | N/A | N/A | N/A | Jun-08 | May-09 | Feb-16 | May-16 | Jul-16 | Feb-18 |
|  I-605, I-605/Katella Interchange | \$29.0 | Aug-16 | Nov-18 | TBD | TBD | TBD | TBD | TBD | TBD |
| Project M | \$29.0 | Aug-16 | Oct-18 | Dec-20 | Mar-23 | Jul-23 | Sep-23 | Dec-23 | Aug-25 |
| Grade Separation Projects: | | | | | | | | | |
|  Sand Canyon Avenue Railroad Grade Separation | \$55.6 | N/A | Sep-03 | Jan-04 | Jul-10 | Jul-10 | Oct-10 | Feb-11 | May-14 |
| Project R | \$61.9 | N/A | Sep-03 | Jan-04 | Jul-10 | Jul-10 | Oct-10 | Feb-11 | Jan-16 |
|  Raymond Avenue Railroad Grade Separation | \$77.2 | Feb-09 | Nov-09 | Mar-10 | Aug-12 | Nov-12 | Feb-13 | May-13 | Aug-18 |
| Project O | \$126.2 | Feb-09 | Nov-09 | Mar-10 | Dec-12 | Jul-13 | Oct-13 | Feb-14 | May-18 |
|  State College Boulevard Railroad Grade Separation (Fullerton) | \$73.6 | Dec-08 | Jan-11 | Jul-06 | Aug-12 | Nov-12 | Feb-13 | May-13 | May-18 |
| Project O | \$99.6 | Dec-08 | Apr-11 | Jul-06 | Feb-13 | May-13 | Sep-13 | Feb-14 | Mar-18 |
|  Placentia Avenue Railroad Grade Separation | \$78.2 | Jan-01 | May-01 | Jan-09 | Mar-10 | May-10 | Mar-11 | Jun-11 | Nov-14 |
| Project O | \$64.5 | Jan-01 | May-01 | Jan-09 | Jun-10 | Jan-11 | Mar-11 | Jul-11 | Dec-14 |
|  Kraemer Boulevard Railroad Grade Separation | \$70.4 | Jan-01 | Sep-09 | Jan-09 | Jul-10 | Jul-10 | Apr-11 | Aug-11 | Oct-14 |
| Project O | \$63.8 | Jan-01 | Sep-09 | Feb-09 | Jul-10 | Jan-11 | Jun-11 | Sep-11 | Dec-14 |

Capital Action Plan

Status Through December 2020

Updated: January 18, 2021

| Capital Projects | Cost | Schedule | | | | | | | |
|--|--------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | Baseline/Forecast | Plan/Forecast | | | | | | | |
| | (millions) | Begin Environmental | Complete Environmental | Begin Design | Complete Design | Construction Ready | Advertise Construction | Award Contract | Complete Construction |
|  Orangethorpe Avenue Railroad Grade Separation Project O | \$117.4 \$105.9 | Jan-01 Jan-01 | Sep-09 Sep-09 | Feb-09 Feb-09 | Dec-11 Oct-11 | Dec-11 Apr-12 | Feb-12 Sep-12 | May-12 Jan-13 | Sep-16 Oct-16 |
|  Tustin Avenue/Rose Drive Railroad Grade Separation Project O | \$103.0 \$96.6 | Jan-01 Jan-01 | Sep-09 Sep-09 | Feb-09 Feb-09 | Dec-11 Jul-11 | Mar-12 Jun-12 | May-12 Oct-12 | Aug-12 Feb-13 | May-16 Oct-16 |
|  Lakeview Avenue Railroad Grade Separation Project O | \$70.2 \$110.7 | Jan-01 Jan-01 | Sep-09 Sep-09 | Feb-09 Feb-09 | Oct-11 Jan-13 | Oct-12 Apr-13 | Feb-13 Sep-13 | May-13 Nov-13 | Mar-17 Jun-17 |
|  17th Street Railroad Grade Separation Project R | TBD TBD | Oct-14 Oct-14 | Jun-16 Nov-17 | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD |
| Rail and Station Projects: | | | | | | | | | |
|  Rail-Highway Grade Crossing Safety Enhancement Project R | \$94.4 \$90.4 | Jan-08 Jan-08 | Oct-08 Oct-08 | Jan-08 Jan-08 | Sep-08 Sep-08 | Sep-08 Sep-08 | Sep-08 Sep-08 | Aug-09 Aug-09 | Dec-11 Dec-11 |
|  San Clemente Beach Trail Safety Enhancements Project R | \$6.0 \$5.0 | Sep-10 Sep-10 | Jul-11 Jul-11 | Feb-12 Feb-12 | Apr-12 Jun-12 | Apr-12 Jun-12 | Jul-12 Oct-12 | Oct-12 May-13 | Jan-14 Mar-14 |
| San Juan Capistrano Passing Siding | \$25.3 \$36.4 | Aug-11 Aug-11 | Jan-13 Mar-14 | Mar-15 Mar-15 | May-16 Aug-18 | May-16 Aug-18 | Aug-16 Aug-18 | Dec-16 Mar-19 | Feb-21 Nov-20 |
|  OC Streetcar Project S Cost/Schedule Risk | \$424.4 \$424.4 | Aug-09 Aug-09 | Mar-12 Mar-15 | Feb-16 Feb-16 | Sep-17 Nov-17 | Oct-17 Dec-17 | Dec-17 Dec-17 | Aug-18 Sep-18 | Dec-21 Oct-22 |
|  Placentia Metrolink Station and Parking Structure Project R Cost/Schedule Risk | \$34.8 \$40.1 | Jan-03 Jan-03 | May-07 May-07 | Oct-08 Oct-08 | Jan-11 Feb-11 | TBD Apr-21 | TBD Apr-21 | TBD Aug-21 | TBD Mar-23 |
|  Orange County Maintenance Facility Project R | TBD TBD | Apr-20 Apr-20 | Apr-22 May-22 | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD | TBD TBD |
| Anaheim Canyon Station | \$27.9 \$29.9 | Jan-16 Jan-16 | Dec-16 Jun-17 | Mar-19 Mar-18 | May-19 Oct-20 | May-19 Oct-20 | Jul-19 Oct-20 | Nov-19 Mar-21 | Mar-21 Oct-22 |

Capital Action Plan

Status Through December 2020

Updated: January 18, 2021

| Capital Projects | Cost | Schedule | | | | | | | |
|--|-------------------|---------------------|------------------------|---------------|-----------------|--------------------|------------------------|----------------|-----------------------|
| | Baseline/Forecast | Plan/Forecast | | | | | | | |
| | (millions) | Begin Environmental | Complete Environmental | Begin Design | Complete Design | Construction Ready | Advertise Construction | Award Contract | Complete Construction |
| Orange Station Parking Expansion | \$33.2 | Dec-09 | Dec-12 | Nov-10 | Apr-13 | Jul-16 | Jul-16 | Nov-16 | Feb-19 |
| | \$30.9 | Dec-09 | May-16 | Nov-10 | Apr-16 | Jul-16 | Jul-16 | Jun-17 | Feb-19 |
| Fullerton Transportation Center - Elevator Upgrades | \$3.5 | N/A | N/A | Jan-12 | Dec-13 | Dec-13 | Jun-14 | Sep-14 | Mar-17 |
| | \$4.2 | N/A | N/A | Jan-12 | Dec-13 | Dec-13 | Aug-14 | Apr-15 | May-19 |
| Laguna Niguel/Mission Viejo Station ADA Ramps | \$3.5 | Jul-13 | Jan-14 | Jul-13 | Aug-14 | Aug-14 | Sep-14 | Jan-15 | Apr-17 |
| | \$5.0 | Jul-13 | Feb-14 | Jul-13 | Jul-15 | Jul-15 | Jul-15 | Oct-15 | Sep-17 |
| Anaheim Regional Transportation Intermodal Center Project R & T | \$227.4 | Apr-09 | Feb-11 | Jun-09 | Feb-12 | Feb-12 | May-12 | Jul-12 | Nov-14 |
| | \$232.2 | Apr-09 | Feb-12 | Jun-09 | May-12 | May-12 | May-12 | Sep-12 | Dec-14 |

Note: Costs associated with landscape projects are included in respective freeway projects.

Grey = Milestone achieved

Green = Forecast milestone meets or exceeds plan

Yellow = Forecast milestone is one to three months later than plan

Red = Forecast milestone is over three months later than plan

Begin Environmental: The date work on the environmental clearance, project report, or preliminary engineering phase begins.

Complete Environmental: The date environmental clearance and project approval is achieved.

Begin Design: The date final design work begins, or the date when a design-build contract begins.

Complete Design: The date final design work is 100 percent complete and approved.

Construction Ready: The date contract bid documents are ready for advertisement, including certification of right-of-way, all agreements executed, contract constraints are cleared.

Advertise for Construction: The date a construction contract is both funded and advertised for bids.

Award Contract: The date the construction contract is awarded.

Construction Complete: The date all construction work is completed and the project is open to public use.

Acronyms

I-5 - Santa Ana Freeway (Interstate 5)

SR-73 - San Joaquin Freeway (State Route 73)

SR-55 - Costa Mesa Freeway (State Route 55)

SR-57 - Orange Freeway (State Route 57)

SR-91 - Riverside Freeway (State Route 91)

SR-22 - Garden Grove Freeway (State Route 22)

I-405 - San Diego Freeway (Interstate 405)

SR-71 - Corona Expressway (State Route 71)

SR-241 - Foothill/Eastern Transportation Corridor (State Route 241)

I-605 - San Gabriel River Freeway (Interstate 605)

ADA - Americans with Disabilities Act

Capital Programs Division

Fiscal Year 2020-21 Performance Metrics Through December 2020

Begin Environmental

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|--|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| I-5, Avenida Pico to San Diego County Line | | | | | | | X | | |
| Total Forecast/Actual | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 1 |

Complete Environmental

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|---|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| No "Complete Environmental" milestones scheduled for FY 2020-21 | | | | | | | | | |
| Total Forecast/Actual | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Begin Design

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|---|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| SR-91, Acacia Street to La Palma Avenue | | | X | ✓ | | | | | |
| I-605/Katella Avenue Interchange | | | X | ✓ | | | | | |
| I-5, Yale Avenue to SR-55 | | | | | | | X | | |
| Total Forecast/Actual | 0 | 0 | 2 | 2 | 0 | 0 | 1 | 0 | 3 |

Complete Design

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|----------------------------------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| Anaheim Canyon Metrolink Station | X | | | ✓ | | | | | |
| Total Forecast/Actual | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |

Construction Ready

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|---|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| Anaheim Canyon Metrolink Station | X | | | ✓ | | | | | |
| Placentia Metrolink Station and Parking Structure | | | | | X | | | | |
| SR-55, I-405 to I-5 | | | | | | | X | | |
| Total Forecast/Actual | 1 | 0 | 0 | 1 | 1 | 0 | 1 | 0 | 3 |

Advertise Construction

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|---|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| Anaheim Canyon Metrolink Station | X | | | ✓ | | | | | |
| Placentia Metrolink Station and Parking Structure | | | | | X | | | | |
| Total Forecast/Actual | 1 | 0 | 0 | 1 | 1 | 0 | 0 | 0 | 2 |

Award Contract

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|---|-------------|--------|-------------|--------|-------------|--------|-------------|--------|------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| I-5, Alicia Parkway to El Toro Road | X | ✓ | | | | | | | |
| Anaheim Canyon Metrolink Station | | | X | | | | | | |
| Placentia Metrolink Station and Parking Structure | | | | | | | X | | |
| Total Forecast/Actual | 1 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 3 |

Capital Programs Division

Fiscal Year 2020-21 Performance Metrics Through December 2020

Complete Construction

| Project Description | FY 21 Qtr 1 | | FY 21 Qtr 2 | | FY 21 Qtr 3 | | FY 21 Qtr 4 | | FY 21 Fcst |
|------------------------------------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|---------------|
| | Fcst | Actual | Fcst | Actual | Fcst | Actual | Fcst | Actual | |
| San Juan Capistrano Passing Siding | | | | ✓ | X | | | | |
| I-5, SR-55 to SR-57 | | | | | | | X | | |
| Total Forecast/Actual | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 0 | 2 |

| | | | | | | | | | |
|--------|---|---|---|---|---|---|---|---|----|
| Totals | 4 | 1 | 3 | 6 | 3 | 0 | 5 | 0 | 15 |
|--------|---|---|---|---|---|---|---|---|----|

Begin Environmental: The date work on the environmental clearance, project report, or preliminary engineering phase begins.

Complete Environmental: The date environmental clearance and project approval is achieved.

Begin Design: The date final design work begins or the date when a design-build contract begins.

Complete Design: The date final design work is 100 percent complete and approved.

Construction Ready: The date contract bid documents are ready for advertisement, right-of-way certified, all agreements executed, and contract constraints are cleared.

Advertise for Construction: The date a construction contract is both funded and advertised for bids.

Award Contract: The date the construction contract is awarded.

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Acronyms

I-5 - Santa Ana Freeway (Interstate 5)

SR-55 - Costa Mesa Freeway (State Route 55)

SR-57 - Orange Freeway (State Route 57)

SR-91 - Riverside Freeway (State Route 91)

I-605 - San Gabriel River Freeway (Interstate 605)

I-405 - San Diego Freeway (Interstate 405)

FY - Fiscal Year

QTR - Quarter

FCST - Forecast

X = milestone forecast in quarter





COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Amendment to Agreement for Program Management Consultant Services for Highway Programs

Regional Planning and Highways Committee Meeting of February 1, 2021

Present: Directors Bartlett, Chaffee, Harper, Hernandez, Murphy, and Sarmiento

Absent: Director Delgleize

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 11 to Agreement No. C-5-3767 between the Orange County Transportation Authority and Mott MacDonald, LLC, to exercise the two-year option term for program management consultant services for the Highway Programs Department, in the amount of \$14,900,000, and extend the term of the agreement through August 23, 2023. This will increase the maximum obligation of the agreement to a total contract value of \$39,680,661.



February 1, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Program Management Consultant Services for Highway Programs

Overview

On April 11, 2016, the Orange County Transportation Authority Board of Directors approved an agreement with Mott MacDonald, LLC (formerly known as Hatch Mott MacDonald, LLC) to provide program management consultant services for the Highway Programs Department, for a term of five years, with one, two-year option term. An amendment to the existing agreement to exercise the two-year option term is requested for continued program management consultant services.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 11 to Agreement No. C-5-3767 between the Orange County Transportation Authority and Mott MacDonald, LLC, to exercise the two-year option term for program management consultant services for the Highway Programs Department, in the amount of \$14,900,000, and extend the term of the agreement through August 23, 2023. This will increase the maximum obligation of the agreement to a total contract value of \$39,680,661.

Discussion

The current program of highway projects is an aggressive endeavor to deliver more than \$5,000,000,000 of improvements included in the Measure M2 (M2) freeway program. The Next 10 Delivery Plan Update, adopted by the Orange County Transportation Authority (OCTA) Board of Directors (Board) in November 2019, advanced additional projects through construction, resulting in \$4,300,000,000 of freeway improvements that will be complete or nearing completion by 2026. To meet this commitment, OCTA's Highway Programs Department (HPD) continues implementation of numerous freeway projects in

the environmental, final design, right-of-way (ROW), utility relocation, and construction phases.

The HPD maintains a small core staff of program and project management professionals to oversee the highway program, which is supplemented by program management consultant (PMC) personnel to assist with providing the appropriate level of management oversight needed for the 30 projects included in the M2 freeway program. The PMC personnel assist and support the delivery of projects in the environmental, design, ROW acquisition, utility relocation, and construction phases to meet scope, cost, and schedule commitments by providing full-time staff, as well as part-time services and technical expertise, as needed for each project.

To ensure continued support by the PMC personnel to the HPD to meet delivery commitments, approval is requested for an amendment to exercise the option term to continue the PMC services. The proposed amendment will enable the PMC staff to continue providing project management, project controls, utilities, ROW management, scheduling, cost estimating, and claims support services for the design-build (DB) Interstate 405 (I-405) Improvement Project as identified in the table below.

The proposed amendment will also continue PMC services in the areas of project management and ROW services for the State Route 55 (SR-55) Improvement Project from I-405 to Interstate 5 (I-5), which was advanced to construction through Next 10 Delivery Plan updates and Board actions. OCTA is the lead agency for design, ROW acquisition, and utility relocations for this project. The November 2019 Board-approved update to the Next 10 Delivery Plan also resulted in advancing an additional eight projects through construction on State Route 91 (SR-91) from SR-55 to State Route 57 (SR-57), I-5 from I-405 to SR-55, SR-55 from I-5 to SR-91, SR-57 from Orangewood Avenue to Katella Avenue, and the Interstate 605/Katella Avenue interchange. The proposed amendment includes PMC support for the design and ROW phases of these projects. If any of these advanced projects are slowed down or deferred through a future update to the Next 10 Delivery Plan, the level of effort of this time and expense contract will be adjusted accordingly. The total amount of continued support services for the two-year option term is estimated at \$14,900,000, which correlates to an increase in the level of support that was not originally anticipated under this contract. The breakdown of the proposed amendment by project and by category of continued services through August 2023 is provided in the following table:

| | Scope | Description |
|----------------|--------------------|--|
| I-405 | Project Management | Extending the current project management support to near substantial completion |
| | ROW | Additional program management support to the Real Property Department to near substantial completion |
| | Project Controls | Extending the current project controls support to near substantial completion |
| SR-55 | Project Management | Additional project management support, including person most qualified (PMQ) and utilities support |
| | ROW | Additional ROW support to the Real Property Department |
| | Project Controls | Additional part-time project controls support |
| SR-91 | Project Management | Additional project management support, including PMQ, utilities, and support to the project manager |
| | ROW | Additional ROW project manager to support the Real Property Department |
| | Utilities | Additional utility support |
| | Project Controls | Additional project controls support |
| I-5 | Project Management | Additional project management support, including PMQ, utilities, and support to the project manager |
| | ROW | Additional ROW support to the Real Property Department |
| | Project Controls | Additional project controls support |
| Other Projects | Project Management | Additional project management support. Includes ROW support, utilities, and support to the project managers. |

Mott MacDonald, LLC, has been providing technical expertise and staff augmentation to assist in the delivery of highway and railroad grade separation projects for the highway program, under this contract since 2016, and under previous contracts as Hatch Mott MacDonald, LLC since 2008. This specialized support has included the development, procurement, and oversight of the I-405 DB contract. Services include project management and administration,

design services and preliminary project development, ROW support services, DB procurement, toll procurements and contracts, third-party agreements, funding, and oversight of DB construction. Continued support is needed from Mott MacDonald, LLC, to maintain successful delivery of the M2 freeway program during the two-year option term, as described above.

Procurement Approach

The procurement was handled in accordance with OCTA's Board-approved procedures for architectural and engineering services which conform to both state and federal laws. On April 11, 2016, the Board approved an agreement with Mott MacDonald, LLC, for a term of five years. The contract maximum obligation of the initial five-year term was issued in the amount of \$19,451,043. This agreement has been previously amended as shown in Attachment A.

Staff requested a cost proposal from Mott MacDonald, LLC for the level of effort required for continued program management support services. The cost proposal was reviewed by OCTA project staff and found to be fair and reasonable for the tasks to be performed.

Proposed Amendment No. 11 to Agreement No. C-5-3767, in the amount of \$14,900,000, is to provide additional funding and to exercise the two-year option term for the continued level of effort needed. Amendment No. 11 will bring the total contract value to \$39,680,661.

Fiscal Impact

Funding is included in OCTA's Fiscal Year 2020-21 Budget, Capital Programs Division, accounts 0017-7519-FK101-HGL, 0037-9017-A9510-HGL, and 0017-7519-FF101-HGL, and is funded with a combination of federal, state, and local funds.


Summary

Staff recommends Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Amendment No. 11 to Agreement No. C-5-3767, between the Orange County Transportation Authority and Mott MacDonald, LLC, to exercise the two-year option term for program management consultant services for the Highway Programs Department, in the amount of \$14,900,000, and extend the term of the agreement through August 23, 2023. This amendment will increase the maximum obligation of the agreement to a total contract value of \$39,680,661.

Attachment

A. Mott MacDonald, LLC, Agreement No. C-5-3767 Fact Sheet

Prepared by:



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Approved by:



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**Mott MacDonald, LLC
Agreement No. C-5-3767 Fact Sheet**

1. April 11, 2016, Agreement No. C-5-3767, \$19,451,043, approved by the Board of Directors (Board).
 - The agreement was executed on August 24, 2016, to provide program management consulting services for the Highway Programs Department (HPD) on an as-needed basis.
2. February 23, 2017, Amendment No. 1 to Agreement No. C-5-3767, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - Add new key personnel for prime consultant Mott MacDonald, LLC (Mott MacDonald).
 - Add option term language and modify allowable costs and payment language.
 - Modify "Other Direct Costs" schedule to update notes.
3. July 13, 2017, Amendment No. 2 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add new key personnel and other personnel for prime consultant Mott MacDonald and all subconsultants.
 - Add non-key personnel for subconsultant Lenax Construction Services, Inc.
4. October 16, 2017, Amendment No. 3 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add new key personnel for prime consultant Mott MacDonald.
5. February 1, 2018, Amendment No. 4 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add La Belle Marvin, Inc., as a new subconsultant to perform pavement testing, analysis, and engineering services.
6. April 25, 2019, Amendment No. 5 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add key and non-key personnel for prime consultant Mott MacDonald.
7. July 29, 2019, Amendment No. 6 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Modify the agreement's allowable costs and payment article in response to the Orange County Transportation Authority's internal audit recommendations.

8. August 19, 2019, Amendment No. 7 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Modify agreement to reflect Mott MacDonald's new address.
 - Add new key staff and remove staff no longer employed by Mott MacDonald.
 - Add non-key personnel for subconsultant VSCE, Inc.
 - Add KZAB Engineers, Inc., as a new subconsultant to perform project management and engineering support related to right-of-way (ROW) engineering.
9. October 7, 2019, Amendment No. 8 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add Monument ROW, Inc., as a new subconsultant to perform ROW coordination activities and provide project management support.
10. March 23, 2020, Amendment No. 9 to Agreement No. C-5-3767, \$0, approved by the CAMM Department.
 - Add non-key personnel for prime consultant Mott MacDonald and for subconsultants Monument ROW, Inc., La Belle Marvin, Inc., and VSCE, Inc.
11. June 8, 2020, Amendment No. 10 to Agreement No. C-5-3767, \$5,329,618, approved by the Board.
 - Amend the scope of work to provide additional program management consultant services for the HPD.
12. February 8, 2021, Amendment No. 11 to Agreement No. C-5-3767, \$14,900,000, pending Board approval.
 - Exercise the two-year option term for continued program management consultant services for the HPD and extend the term of the agreement to August 23, 2023.

Total committed to Mott MacDonald, LLC after approval of Amendment No. 11 to Agreement No. C-5-3767: \$39,680,661.



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board

Subject: Capital Programming Update

Regional Planning and Highways Committee Meeting of February 1, 2021

Present: Directors Bartlett, Chaffee, Harper, Hernandez, Murphy, and Sarmiento

Absent: Director Delgleize

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendations

- A. Authorize the use of \$10.579 million in Measure M2 funds for the Interstate 5 improvements from Interstate 405 to Yale Avenue (Segment 1).
- B. Authorize the use of \$3.240 million in Highway Infrastructure Program funds for the State Route 57 Improvement Project from Orangewood Avenue to Katella Avenue.
- C. Authorize the use of \$4.766 million in Federal Surface Transportation Block Grant or Congestion Mitigation and Air Quality Improvement funds for the following transit projects:
 - \$4.500 million in Congestion Mitigation and Air Quality Improvement funds for the rideshare and vanpool programs.
 - \$0.266 million in Surface Transportation Block Grant funds for the Orange County Mobility Hub Strategy.
- D. 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.



February 1, 2021

To: Regional Planning and Highways Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Capital Programming Update

Overview

The Orange County Transportation Authority uses various funding sources to implement planning efforts, capital projects, and transit operations. Project costs can vary from the programmed amount, which may require funding revisions and Board of Directors' approval to meet funding requirements. Board of Directors' authorization is required to provide funding for new and ongoing projects as further described herein.

Recommendations

- A. Authorize the use of \$10.579 million in Measure M2 funds for the Interstate 5 improvements from Interstate 405 to Yale Avenue (Segment 1).
- B. Authorize the use of \$3.240 million in Highway Infrastructure Program funds for the State Route 57 Improvement Project from Orangewood Avenue to Katella Avenue.
- C. Authorize the use of \$4.766 million in Federal Surface Transportation Block Grant or Congestion Mitigation and Air Quality Improvement funds for the following transit projects:
 - \$4.500 million in Congestion Mitigation and Air Quality Improvement funds for the rideshare and vanpool programs.
 - \$0.266 million in Surface Transportation Block Grant funds for the Orange County Mobility Hub Strategy.
- D. 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.

Background

The Orange County Transportation Authority (OCTA) directs the use of federal, state, and local funds based on the Board of Directors (Board)-approved Capital Programming Policies (CPP), Attachment A.

As projects progress through development, costs can change, funding agency requirements may limit the anticipated use of funds, opportunities to maximize external funding may arise, savings may be identified, or additional funding may be required. OCTA regularly reports on specific project costs through the quarterly Capital Action Plan (CAP), which highlights project costs, schedules, and status. Board action to update funding for projects is requested periodically to support costs consistent with the revised funding need for projects and are included in the Capital Funding Program (CFP), Attachment B.

Additionally, OCTA is responsible for programming Orange County's annual apportionment of federal Surface Transportation Block Grant (STBG) funding and Congestion Mitigation and Air Quality Improvement (CMAQ) Program funding. Annually, staff reviews which projects are required to receive federal authorization within each year in order to fully deliver projects and also meet the federal requirements to utilize apportionment and obligation authority each year.

Discussion

The CAP lists highway, grade separation, rail and transit projects, and includes the funding at completion estimate, as well as the schedule for key milestones for each project. In coordination with project managers, programming staff refers to the CAP from the Operations Division to recommend or make funding adjustments for new projects, ongoing projects, and projects that have met key milestones, such as the completion of final environmental approval, 65 percent design, 95 percent design, contract award, and close out. Recommendations may also be suggested to ensure the funds are being utilized efficiently for projects, and that OCTA is able to maximize the use of any funding programs, which may have limitations or deadlines that put the funds at risk.

Based on updates from the latest CAP and also the identified funding need for projects that are planned to be delivered using federal funds, staff is recommending the following funding changes.

Freeway Program

The environmental document for the Interstate 5 (I-5) improvements between Interstate 405 (I-405) and State Route 55 (SR-55) was completed in early 2020. Following the environmental phase, the project was segmented into the I-5 improvements between I-405 and Yale Avenue (Segment 1), and I-5 improvements between Yale Avenue and SR-55 (Segment 2). In July of 2020,

staff provided a report to the Board that the Segment 1 project estimate at completion in the March 2020 CAP differed from the funding documented by the CFP by \$10.597 million. These additional estimated costs were primarily attributed to OCTA internal project risk and legal fees, which are typically supported internally with Measure M2 (M2). However, programming recommendations were delayed pending the California Transportation Commission's decision on SB 1 (Chapter 5, Statutes of 2017) competitive applications as that decision impacted funding for the entire freeway program. On January 11, 2021, the Board approved the acceptance of \$140 million in SB 1 funds for the SR-55 Improvement Program from I-405 to I-5, thereby providing a significant infusion of external funds into the M2 Freeway Program and allowing for flexibility in how M2 and other external funds are programmed. Staff is now returning to the Board for approval to authorize the use of \$10.579 million in M2 funds for the I-5 improvements from I-405 to Yale Avenue (Segment 1), in order to align the programmed funding with the estimate at completion presented through the CAP. This is Project B in the Next 10 Delivery Plan (Next 10 Plan), and the use of M2 funds is consistent with the CPP.

The State Route 57 Improvement Project from Orangewood Avenue to Katella Avenue or Project G is identified in the Next 10 Plan to advance from the environmental phase to the construction phase. The environmental phase was completed in late 2019, and the design phase funding of \$4.777 million in M2 funds was approved by the OCTA Board in January 2020. Additional site exploration and design are required related to soil liquefaction and other seismic issues due to the proximity to the Santa Ana River. In addition, as part of the final environmental report, cost estimates were prepared in early 2019, but the design phase will now begin in late 2021, hence, escalation for design support must also be considered. The updated cost estimate now indicates a total need of \$6.827 million for the design phase. Staff is proposing to use \$3.240 million in available federal Highway Infrastructure Program (HIP) funds for the design cost changes. The HIP funding is intended for the restoration, repair, construction of federal aid eligible roads, bridges, and tunnels. The HIP funds will support the increase in design costs and will also replace the need for \$1.190 million in already programmed M2 funds within this phase, making those funds available for future phases or other freeway program projects. This use of HIP funds is consistent with the CPP to prioritize federal funds towards Next 10 Plan projects.

Annual Recommendations for Use of STBG and CMAQ

The OCTA Rideshare Program includes rideshare services, ride guide database, customer information, and marketing activities, all meant to encourage ridesharing. The Vanpool Program provides capital lease subsidies to vanpools to help offset the cost to the vanpool participants. Staff is recommending approval to program \$4.500 million in CMAQ funds for rideshare and vanpool services throughout Orange County. Although several of these services have been

suspended due to the coronavirus, this proposed funding is necessary to continue the rideshare and vanpool programs once these services can be reestablished and will fund the programs across multiple years. The use of CMAQ funding is consistent with the CPP for vanpool and rideshare services.

The Orange County Mobility Hub Strategy will provide an approach for locating and designing transit mobility hubs with an integrated suite of transportation services, supporting amenities, and technologies that increase multimodal mobility by improving access to transportation choices and regional activity centers. Staff is recommending \$0.266 million in STBG funds to complement the State Transportation Improvement Program planning, programming, and monitoring funds programmed to this study. These STBG funds, if approved, will be obligated this fiscal year, and will allow the study to move forward as planned. The use of STBG funds for countywide planning activities is consistent with the CPP, which notes that five percent of STBG funds may be used for planning purposes. This request is well within that limitation and the project was included in this year's budget.

The CFP includes a summary of how OCTA's capital projects are currently funded along with the proposed changes in this item. The project descriptions and additional information for each of the projects listed in the staff report are included in Attachment C. A list of Board actions, which directed capital funds towards OCTA capital projects over the last six months, is provided in Attachment D. Attachments C and D are provided so that today's actions can be considered in the context of how OCTA generally funds capital projects.

Summary

With the objective of ensuring that OCTA projects are fully funded, external funds are maximized, and funding levels are consistent with the estimate at completion listed in the quarterly CAP, OCTA is seeking Board approval to use and reprogram various funds.

Attachments

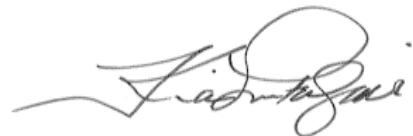
- A. Existing Capital Programming Policies by Fund Source, Approved February 2019
- B. Capital Funding Program Report
- C. Capital Programming Update Project Descriptions
- D. List of Board of Directors Reports with Programming Actions, July 2020 – December 2020

Prepared by:



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Approved by:



Kia Mortazavi
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Existing Capital Programming Policies by Fund Source
Approved February 2019

| Funding Source | Measure M2 (M2) Programming Policies |
|--|---|
| M2 Programs | |
| Projects A-M (Freeway projects on Interstate 5, State Route 22, State Route 55, State Route 57, State Route 91, Interstate 405, and Interstate 605) | Use projects A-M M2 funding consistent with the M2 Transportation Investment Plan, the M2020 Plan, and subsequent Board of Directors (Board)-approved plans and updates to the M2 Program. Program funds to projects through formal programming actions. |
| Freeway Environmental Mitigation Program (Tied to projects A-M) | Utilize five percent net revenues derived from M2 funding for projects A-M consistent with the M2 Transportation Investment Plan, the M2020 Plan, and subsequent Board-approved plans and updates to the M2 Program. Program funds to projects through Board approval actions for needed environmental mitigation projects. |
| Project N (Freeway Service Patrol) | Use Project N funds for the Freeway Service Patrol Program. Funds are programmed through the annual budget process. |
| Project O (Regional Capacity Program) and Project P (Regional Traffic Signal Synchronization Program) | Use Project O and Project P M2 funding consistent with the M2 Transportation Investment Plan, and consistent with the Comprehensive Transportation Funding Programs (CTFP) Guidelines. Program funds to projects through the cyclical CTFP call for projects (call) programming recommendations. |
| Project Q (Local Fair Share Program) | Use Project Q M2 funds consistent with the M2 Transportation Investment Plan. Funds are programmed through the annual budget, but actual disbursements may be adjusted based on the formula distribution of funds. |
| Project R (High-Frequency Metrolink Service) | Use Project R M2 funding consistent with the M2 Transportation Investment Plan, with the latest Next 10 Delivery Plan (Next 10 Plan), the Comprehensive Business Plan, and subsequent Board-approved plans and updates to the M2 Program. Program funds to projects through formal programming actions. |
| Project S (Transit Extensions to Metrolink) and Project T (Metrolink Gateways) | Use Project S and Project T M2 funding consistent with the M2 Transportation Investment Plan and consistent with CTFP Guidelines. Program funds to projects through a call. |
| Project U (Expand Mobility Choices for Seniors and Persons with Disabilities) | Use Project U M2 funds, consistent with the M2 Transportation Investment Plan, the Comprehensive Business Plan, and subsequent Board-approved plans and updates to the M2 Program. Funds are programmed through the annual budget process. |
| Project V (Community-Based Transit Circulators) and Project W (Safe Transit Stops) | Use Project V and Project W M2 funding consistent with the M2 Transportation Investment Plan, and consistent with CTFP Guidelines. Program funds to projects through a call. |

Existing Capital Programming Policies by Fund Source
Approved February 2019

| Funding Source | Measure M2 (M2) Programming Policies |
|--|---|
| Project X (Environmental Cleanup) | <p>Use Project X M2 funding consistent with the M2 Transportation Investment Plan and consistent with CTFP Guidelines. Program funds to projects through the CTFP call.</p> <p>The Environmental Cleanup Program consists of two programs. The Tier 1 Grant Program is designed to mitigate the more visible forms of pollution. Tier 1 consists of funding for equipment purchases and upgrades to existing catch basins and related devices such as screens, filters, and inserts. The Tier 2 Grant Program consists of funding regional, multi-jurisdictional, and capital-intensive projects, such as constructed wetlands, detention/infiltration basins, and bioswales.</p> |
| Funding Source/Agency | State and Federal Programming Policies |
| All State and Federal Fund Sources | <p>Priority of all funding sources is to fulfill commitments to the latest Next 10 Plan, specifically M2 projects and to maintain existing the Orange County Transportation Authority's (OCTA) assets in a state of good repair. Consideration will also be given to use state and federal funds for projects that are complementary to M2 projects and that share the program goals to reduce congestion, strengthen the economy, and improve the quality of life. All fund sources must be programmed through formal programming actions.</p> |
| State | |
| Active Transportation Program (ATP) – Southern California Association of Governments (SCAG) Regional Selection (Formula)/California Transportation Commission (CTC)/SCAG | <p>Bicycle and pedestrian projects up to a ten percent set-aside and contingent on ready-to-go projects as submitted through competitive calls.</p> |
| Cap-and-Trade (Competitive) – Affordable Housing and Sustainable Communities Program (AHSC)/Strategic Growth Council | <p>Use AHSC for fixed-guideway and transit corridor projects that serve disadvantaged communities and reduce greenhouse gas (GHG) emissions.</p> <p>*Note – In the guidelines, a transit project must be paired with an affordable housing project for Transit Oriented Development Program funds.</p> |
| Cap-and-Trade (Formula) – Low Carbon Transit Operations Program (LCTOP)/California Department of Transportation (Caltrans) | <p>Use LCTOP for transit operations or capital for expansion of bus transit service, fare reduction programs, and other bus and commuter rail transit efforts that increase ridership and reduce GHG emissions, where 50 percent of the funds provide benefit for passengers in disadvantaged communities. Funds generated from commuter rail service in Orange County may be used in Orange County for the expansion of commuter rail service, fare reduction programs for commuter rail, and other eligible commuter rail efforts that increase ridership and reduce GHG emissions.</p> |
| Cap-and-Trade (Competitive) – Transit and Intercity Rail Capital Program (TIRCP)/California State Transportation Agency | <p>Use TIRCP for capital projects that expand bus and rail service to increase ridership and for projects that improve the integration between bus and rail systems. Projects must also reduce GHG emissions.</p> |

Existing Capital Programming Policies by Fund Source
Approved February 2019

| Funding Source/Agency | State and Federal Programming Policies |
|---|---|
| Proposition 1A/CTC | All funds are programmed. |
| Proposition 1B – Competitive Programs Funding/CTC | Maximize the Orange County allocations consistent with each program and ensure the receipt of allocated funds. |
| Proposition 1B Public Transportation Modernization, Improvement, and Service Enhancement Account (PTMISEA)/Caltrans | Use PTMISEA funds for commuter rail improvements and to fund existing State Transportation Improvement Program (STIP) - Public Transit Administration projects (approximately \$60 million) currently programmed in the 2010 STIP and for eligible OC Bridges projects. |
| Proposition 1B – Transit System Safety, Security and Disaster Response Account (TSSSDRA)/California Governor's Office of Emergency Services | Use TSSSDRA to support capital projects that enhance the safety, security, and emergency response capabilities of transit. |
| Proposition 116 (CTC) | Use cost savings for commuter or intercity rail capital improvement projects along the Metrolink corridor (between the cities of Buena Park and San Clemente) that are funded with Measure M1 and M2 funds on a first-come, first-served basis. |
| SB 1 (Chapter 5, Statutes of 2017) Local Partnership Program (LPP) – Formula/CTC | Use LPP for ready-to-deliver M2 projects which are compatible with state goals and seek to balance funds between freeways, streets and roads, transit capital, and eligible environmental cleanup and based on the timing for the request for project nominations. |
| SB 1 - Caltrans (SGR)/Caltrans | Use funds for bus transit capital projects and for maintenance, rehabilitation, and replacement of existing OCTA transit assets. |
| SB 1 - Trade Corridors Enhancement Program (TCEP)/CTC | Use TCEP first for eligible M2 Program projects that meet the requirements and goals of the program, then fund other eligible Orange County projects. |
| STIP/CTC | Use of STIP funds for M2 freeway, commuter rail, fixed-guideway projects, planning/programming and complementary activities which seek an equitable balance between freeways and transit capital and are consistent with state goals. |

Existing Capital Programming Policies by Fund Source
Approved February 2019

| Funding Source/Agency | State and Federal Programming Policies |
|--|--|
| Federal | |
| Congestion Mitigation and Air Quality (CMAQ)/Caltrans for Federal Highways Administration (FHWA) | <p>Use CMAQ funding for:</p> <ul style="list-style-type: none"> • M2 fixed-guideway and/or M2 high-occupancy vehicle or high-occupancy toll operational improvements, • as match to leverage funding for OC Bridges grade separation projects, • vanpool program and rideshare services, • other rail and bus transit capital projects, • traffic light synchronization projects, and • new or expanded bus transit operations (three years of CMAQ funding may be used for the first five years). <p>Set-asides: Bicycle and pedestrian projects up to a ten percent set-aside and contingent on ready-to-go projects as submitted through competitive calls.</p> |
| Federal Transit Administration (FTA) Section 5307 Formula/FTA | <p>Use funds to support ongoing transit operations and SGR through (not in priority order):</p> <ul style="list-style-type: none"> • preventive maintenance, • capital cost of contracting, and • bus replacement. <p>Lower priority but eligible if funding available:</p> <ul style="list-style-type: none"> • other priority capital projects that are consistent with the Comprehensive Business Plan. <p>Set-Asides: Up to 20 percent for paratransit operating assistance, one percent for transit security (unless funded using local, state, or other federal funds), and percent of funds generated by rail operations to be used for rail operations and capital projects.</p> |
| FTA Section 5309 Fixed-Guideway Capital Investment Grants ("New Starts")/FTA | <p>Prioritize M2 fixed-guideway projects that are following project development requirements consistent with the "New Starts" and/or "Small Starts" process.</p> |
| FTA Section 5310 Formula Funds/FTA | <p>Use funds for eligible enhancements to paratransit capital and operations.</p> |
| FTA Section 5337 Formula Funds/FTA | <p>Use funds for commuter rail rehabilitation and/or renovation projects, for capital projects that maintain and/or replace equipment and facilities to keep the commuter rail system in a state of good repair and for preventive maintenance. Use funds generated by bus transit for bus transit capital maintenance.</p> |

Existing Capital Programming Policies by Fund Source
Approved February 2019

| Funding Source/Agency | State and Federal Programming Policies |
|---|--|
| FTA Section 5339 Formula Funds/FTA | <p>Use funds for:</p> <ul style="list-style-type: none"> • capital maintenance, • capital cost of contracting, • bus replacement, and • other bus capital projects as identified in the transit asset management plan. |
| Highway Infrastructure Program/Caltrans for Federal Highway Administration (FHWA) | Use funds for M2 Freeway Program (consistent with the latest Next 10 Plan). |
| National Highway Freight Program/CTC for FHWA | Currently these funds are administered by the state through the TCEP (see TCEP above). |
| Surface Transportation Block Grant Program - Formerly the Regional Surface Transportation Program/Caltrans for FHWA | Use funds for M2 Freeway Program (consistent with the latest Next 10 Plan) and local streets and roads. Funds may also be used for countywide planning activities up to five percent annually. |
| Transportation Alternatives Program (TAP) – CTC/SCAG through ATP | Use 100 percent of annual TAP apportionment for bicycle and pedestrian projects through a competitive call to local agencies. Currently these funds are administered by the state through the ATP. See ATP above. |



Capital Funding Program Report

Pending Board of Directors (Board) Approval - February 8, 2021

| State Highway 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 | |
| I-5 from SR-55 to SR-57, add one HOV lane each direction | A | \$41,500 | \$36,191 | | | | | | | | \$5,309 | |
| I-5 widening, I-405 to Yale Avenue (Segment 1) ¹ | B | \$230,482 | \$52,357 | | | \$95,338 | \$44,791 | | | | \$37,996 | |
| I-5 widening, Yale Avenue to SR-55 (Segment 2) | B | \$17,425 | \$15,027 | | | | | | | | \$2,398 | |
| I-5 HOV lane each direction s/o PCH to San Juan Creek Road | C | \$74,300 | \$11,326 | | | | | \$20,789 | | | \$42,185 | |
| I-5 HOV lanes from s/o Avenida Vista Hermosa to s/o PCH | C | \$75,300 | \$12,065 | | | \$46,779 | | | | | \$16,456 | |
| I-5 widening, Alicia Parkway to El Toro Road (Segment 3) | C | \$181,327 | \$49,897 | | \$4,728 | | \$9,388 | | | | \$117,314 | |
| I-5 widening, Oso Parkway to Alicia Parkway (Segment 2) | C | \$205,695 | \$47,676 | | \$7,921 | | | | | | \$150,098 | |
| I-5 widening, SR-73 to Oso Parkway (Segment 1) | C | \$213,267 | \$28,167 | | \$6,433 | \$91,977 | | \$29,832 | | | \$56,858 | |
| I-5, SR-73 to El Toro Road landscaping/replacement planting | C | \$12,365 | | | | \$6,000 | | | | | \$6,365 | |
| I-5/El Toro Interchange | D | \$4,400 | \$4,400 | | | | | | | | | |
| SR-55 (I-5 to SR-91) | F | \$13,921 | \$5,000 | | | | | | | | \$8,921 | |
| SR-55 widening between I-405 and I-5 | F | \$504,000 | \$160,500 | | \$41,900 | \$80,000 | \$140,000 | | | | \$81,600 | |
| SR-57 Orangewood Avenue to Katella Avenue ² | G | \$9,327 | \$2,500 | | \$3,240 | | | | | | \$3,587 | |
| SR-91, Acacia Avenue to La Palma Avenue (Segment 3) | I | \$16,201 | \$1,770 | | | | | | | | \$30 | \$14,401 |
| SR-91, La Palma Avenue to SR-55 (Segment 2) | I | \$46,314 | \$3,460 | | | | | | | | \$40 | \$42,814 |
| SR-91, SR-55 to Lakeview Avenue (Segment 1) | I | \$15,779 | \$1,770 | | | | | | | | \$30 | \$13,979 |
| SR-91, SR-241 to I-15 | J | \$41,800 | | | | | | | | | \$41,800 | |
| I-405 improvements, SR-73 to I-605 | K | \$2,080,234 | \$35,000 | | \$10,648 | | | \$89,771 | | | \$1,315,885 | \$628,930 |
| I-405 (I-5 to SR-55) | L | \$8,000 | \$8,000 | | | | | | | | | |
| I-405 s/b aux lane - University to Sand Canyon and Sand Canyon to SR-133 | L | \$2,328 | | | | \$2,328 | | | | | | |
| I-605/ Katella Avenue interchange | M | \$4,824 | | | | | | | | | \$4,824 | |
| 241/91 Express Lanes (HOT) Connector | | \$182,298 | \$50 | | | | | | | | \$182,248 | |
| I-5 HOV Lane Extension from Avenida Pico to San Diego County Line (PSR/PDS) | | \$6,071 | \$6,071 | | | | | | | | | |
| SR-74 widening, Calle Entradero-City/County line | | \$16,653 | | | | \$14,053 | | \$250 | | | \$1,950 | \$400 |
| SR-74 widening, City/County line to Antonio Parkway | | \$40,905 | \$5,285 | | | \$10,000 | | | | | \$25,620 | |
| State Highway Project Totals | | \$4,044,716 | \$486,512 | | \$74,870 | \$346,475 | \$194,179 | \$140,642 | | \$1,851,846 | \$950,192 | |
| Federal Funding Total | | \$561,382 | | | | | | | | | | |
| State Funding Total | | \$681,296 | | | | | | | | | | |
| Local Funding Total | | \$2,802,038 | | | | | | | | | | |
| Total Funding (000's) | | \$4,044,716 | | | | | | | | | | |

| State Highway 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 | |
| I-5 HOV lanes: s/o Avenida Pico to s/o Vista Hermosa | C | \$83,500 | \$26,867 | | \$1,600 | \$43,735 | | | | | \$11,298 | |
| I-5/SR-74 interchange improvements | D | \$80,300 | | | | \$48,683 | | \$24,109 | \$2,500 | | | \$5,008 |



Capital Funding Program Report

Pending Board of Directors (Board) Approval - February 8, 2021

| State Highway 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 |
| I-5/SR-74 interchange landscaping/replacement planting | D | \$1,440 | | | \$752 | \$688 | | | | | |
| SR- 57 n/b widening, Katella Avenue to Lincoln Avenue - landscaping | G | \$2,172 | | | | | | | | \$2,172 | |
| SR- 57 n/b widening, SR-91 to Yorba Linda Boulevard - landscaping | G | \$946 | | | | | | | | \$946 | |
| SR-57 n/b widening, Katella Avenue to Lincoln Avenue | G | \$35,827 | | | | | | \$24,127 | | \$11,700 | |
| SR-57 n/b widening, SR-91 to Yorba Linda Boulevard | G | \$51,354 | | | | | | \$39,475 | | \$11,879 | |
| SR-57 n/b widening, Yorba Linda to Lambert Road | G | \$52,871 | | | | | | \$41,250 | | \$11,621 | |
| SR-57 n/b widening, Yorba Linda to Lambert Road - landscaping | G | \$1,193 | | | | | | | | \$1,193 | |
| SR-91 w/b connect existing aux lanes, I-5 to SR-57 | H | \$62,977 | | | | | | \$27,227 | | \$35,750 | |
| SR-91 w/b connecting existing aux lanes, I-5 to SR-57 - landscaping | H | \$2,290 | | | | | | | | \$2,290 | |
| SR-91 w/b (SR-55 - Tustin interchange) improvements | I | \$43,753 | | | | \$15,753 | | \$14,000 | | \$14,000 | |
| SR-91 e/b widening, SR-241 to SR-71 | J | \$57,773 | | | \$45,911 | | | | | \$6,942 | \$4,920 |
| SR-91 w/b Routes 91/55 - e/o Weir replacement planting | J | \$2,898 | | | | \$2,898 | | | | | |
| SR-91 widening, SR-55 to Gypsum Canyon (Weir/SR-241) | J | \$76,993 | | | | \$22,250 | | \$54,045 | | \$698 | |
| I-405/SR-22/I-605 HOV connector - landscaping | | \$4,600 | \$4,600 | | | | | | | | |
| HOV connectors from I-405 and I-605 | M1 | \$173,091 | \$14,787 | | | | | \$135,430 | \$16,200 | | \$6,674 |
| HOV connectors from SR-22 to I-405 | M1 | \$115,878 | \$64,375 | | \$49,625 | | | | \$1,878 | | |
| State Highway Project Completed Totals | | \$849,856 | \$110,629 | | \$97,888 | \$134,007 | | \$359,663 | \$20,578 | \$110,489 | \$16,602 |

| | |
|------------------------------|------------------|
| Federal Funding Total | \$208,517 |
| State Funding Total | \$493,670 |
| Local Funding Total | \$147,669 |
| Total Funding (000's) | \$849,856 |

Board Actions:

1. Authorize the use of \$10.579 million in Measure M2 funds for the Interstate 5 Improvements from Interstate 405 to Yale Avenue (Segment 1).
2. Authorize the use of \$3.240 million in Highway Infrastructure Program funds for the State Route 57 Improvement project from Orangewood Avenue to Katella Avenue.

Acronyms:

Aux - Auxilliary

CMAQ - Congestion Mitigation Air Quality Improvement Program

FTA - Federal Transit Administration

FY - Fiscal Year

HOT - High-Occupancy Toll

HOV - High-Occupancy Vehicle

Hwy - Highway

I-405 - Interstate 405

I-5 - Interstate 5

I-605 - Interstate 605

LA - Los Angeles

M Code - Project Codes in Measure M1 and M2

M1 - Measure M1

M2 - Measure M2

N/B - Northbound

OC - Orange County

OCTA - Orange County Transportation Authority

PCH - Pacific Coast Highway

RSTP - Regional Surface Transportation Program

S/B - Southbound

S/O - South of

SR-133 - State Route 133

SR-241 - State Route 241

SR-55 - State Route 55

SR-57 - State Route 57

SR-71 - State Route 71

SR-73 - State Route 73

SR-90 - State Route 90

SR-91 - State Route 91

SS - Southside

STBG - Surface Transportation Block Grant

STIP - State Transportation Improvement Program

W/B - Westbound



Capital Funding Program Report

Pending Board of Directors (Board) Approval - February 8, 2021

| Bus Transit 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 |
| Go Local - Step 1 | S | \$5,730 | | | | | | | \$5,730 | | |
| Mobile ticketing equipment | S | \$4,036 | | | | | | \$4,036 | | | |
| M2 Project V Community Circulators | V | \$53,767 | | | | | | | | \$53,767 | |
| M2 Project W Safe Transit Stops (City) | W | \$1,708 | | | | | | | | \$1,708 | |
| M2 Project W Safe Transit Stops (OCTA) | W | \$370 | | | | | | | | \$370 | |
| ACCESS and fixed-route radio systems upgrade | | \$22,465 | | \$4,434 | \$341 | | | \$16,239 | | | \$1,451 |
| Associated Transportation Improvements | | \$556 | | \$556 | | | | | | | |
| Bravo! 529 buses (six) | | \$3,595 | \$549 | | | | | \$3,046 | | | |
| Bus replacement - articulated alternative fuel buses (60') | | \$31,105 | \$22,250 | \$8,855 | | | | | | | |
| Bus replacement (40' and ACCESS) | | \$149,009 | \$29,198 | \$68,139 | | | | | | | \$51,672 |
| Capital cost of contracting FY2016-17 to FY2023-24 (ACCESS and contracted fixed-route contracts) | | \$325,734 | | \$162,114 | | | | | | | \$163,620 |
| Engine rebuild | | \$16,294 | | \$14,824 | | | | \$1,470 | | | |
| Facility modifications, upgrades, and replacement projects | | \$5,347 | | | | | \$5,347 | | | | |
| FTA Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities | | \$3,657 | | \$3,657 | | | | | | | |
| FTA Section 5316 Jobs Access and Reverse Commute | | \$13,962 | | \$13,962 | | | | | | | |
| FTA Section 5317 New Freedom | | \$6,388 | | \$6,388 | | | | | | | |
| Goldenwest Transportation Center parking structure | | \$4,000 | \$3,400 | | | | | | | | \$600 |
| Goldenwest Transportation Center surface lot | | \$2,000 | | | | | | \$1,200 | | | \$800 |
| iShuttle replacement buses (12) | | \$6,803 | | | | | \$6,123 | | | | \$680 |
| iShuttle replacement buses (five) | | \$2,800 | | | | | \$2,520 | | | | \$280 |
| MSRC County Transportation Commission Partnership Program | | \$2,319 | | | | \$176 | | | | | \$2,143 |
| Non-fixed-route paratransit operations assistance - FY 2014-15 to FY 2023-24 | | \$294,861 | | \$102,395 | | | | | | | \$192,466 |
| OC Mobility Hubs Strategy ¹ | | \$300 | \$266 | | | \$34 | | | | | |
| OCTA Transit Security & Operations Center | | \$6,310 | \$50 | | | | | \$6,260 | | | |
| Preventive maintenance - including salaries and benefits (includes ATN & Laguna Beach) | | \$162,740 | | \$162,740 | | | | | | | |
| Purchase (165) 40-foot alternative fuel replacement buses (OCTA) | | \$229,384 | \$134,670 | \$47,696 | | | | | | | \$47,018 |
| Purchase replacement paratransit vans (through FY 2023-24) | | \$64,290 | | \$50,524 | | | | | | | \$13,766 |
| Rideshare/vanpool ¹ | | \$11,232 | \$11,232 | | | | | | | | |
| Standby backup generators at Anaheim and IRCC bases | | \$1,374 | | | | | \$1,374 | | | | |
| Transit Security Program | | \$3,167 | | | | | | \$3,167 | | | |
| Vanpool Program - capital lease | | \$12,838 | \$12,838 | | | | | | | | |
| VSS upgrades at OCTA facilities | | \$1,159 | | \$960 | | | | \$199 | | | |
| Zero-emission Bravo! buses (ten battery electric) and bus infrastructure | | \$13,938 | | | | | \$6,400 | \$7,538 | | | |
| Bus Transit Project Totals | | \$1,463,238 | \$214,453 | \$647,244 | \$341 | \$210 | \$21,764 | \$43,155 | \$5,730 | \$55,845 | \$474,496 |



Capital Funding Program Report

Pending Board of Directors (Board) Approval - February 8, 2021

| Bus Transit Project | | | | | | | | | | | | |
|------------------------------|--------|---------------|---------------|-----|------------|-------------|-----|-------------|-------------|----|-------------|--|
| | | | 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 | | \$862,038 | | | | | | | | | | |
| State Funding Total | | \$65,129 | | | | | | | | | | |
| Local Funding Total | | \$536,071 | | | | | | | | | | |
| Total Funding (000's) | | \$1,463,238 | | | | | | | | | | |

| Bus Transit 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 | |
| Heating ventilation unit replacements ² | | \$405 | | \$313 | | | \$92 | | | | | |
| Zero-emission hydrogen fuel cell buses (10) ² | | \$12,978 | | | | | \$5,640 | \$7,338 | | | | |
| Bus Transit Project Completed Totals | | \$13,383 | | \$313 | | | \$5,732 | \$7,338 | | | | |
| Federal Funding Total | | \$313 | | | | | | | | | | |
| State Funding Total | | \$13,070 | | | | | | | | | | |
| Local Funding Total | | \$0 | | | | | | | | | | |
| Total Funding (000's) | | \$13,383 | | | | | | | | | | |

Board Actions:

1. Authorize the use of \$4.766 million in Federal Surface Transportation Block Grant or Congestion Mitigation and Air Quality Improvement funds for the following transit projects:
 - \$0.266 million in Surface Transportation Block Grant funds for the Orange County Mobility Hub Strategy
 - \$4.500 million in Congestion Mitigation and Air Quality Improvement funds for the rideshare and vanpool programs.

Notes:

2. Project completed and funding updated to reflect actuals.

Acronyms:

ATN - Anaheim Transportation Network
 CMAQ - Congestion Mitigation Air Quality Improvement Program
 FTA - Federal Transit Administration
 FY - Fiscal Year
 IRCC - Irvine Construction Circle
 M Code - Project Codes in Measure M1 and M2
 M1 - Measure M1
 M2 - Measure M2
 MSRC - Mobile Source Air Pollution Reduction Review Committee
 OCTA - Orange County Transportation Authority
 SB 1 - Chapter 5, Statutes of 2017
 STBG - Surface Transportation Block Grant
 STIP - State Transportation Improvement Program
 VSS - Video Surveillance System



Capital Funding Program Report

Board of Directors (Board) Approved - July 13, 2020

| Local Road 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 |
| State-Local Partnership Program (SLPP) formula grant call | M1/Q | \$54,445 | | | | | | \$24,945 | \$1,280 | \$27,249 | \$971 |
| M2 Project O Regional Capacity Program call ¹ | O | \$319,611 | | | | | | \$24,254 | | \$295,357 | |
| SR-57 truck climbing lane phase I - Lambert Road interchange improvement | O | \$121,500 | | | \$7,719 | \$74,705 | | | | \$19,254 | \$19,822 |
| M2 Project P Regional Signal Synchronization Program call ¹ | P | \$117,578 | \$1,774 | | | | | \$11,762 | \$4,546 | \$99,496 | |
| M2 Project Q Fair Share Program (FY 2016-17 through FY 2021-22) ¹ | Q | \$361,621 | | | | | | | | \$361,621 | |
| M2 Project X Environmental Clean Up ¹ | X | \$55,258 | | | | | | | | \$55,258 | |
| Active Transportation Program - regional call | | \$72,406 | \$311 | | \$66,421 | \$92 | | | | | \$5,582 |
| Active Transportation projects | | \$17,784 | | | | \$15,650 | | | | | \$2,134 |
| ARRA transportation enhancements | | \$6,833 | | | \$4,049 | | | | \$500 | | \$2,284 |
| Arterial Pavement Management Program | | \$50,888 | \$19,930 | | | | | | | | \$30,958 |
| Atlanta Avenue widening | | \$4,160 | \$2,278 | | | | | | | | \$1,882 |
| Bicycle Corridor Improvement Program (BCIP) | | \$72,144 | \$49,803 | | | | | | | | \$22,341 |
| Bristol Street widening | | \$44,750 | | | | | | | | | \$44,750 |
| Local Agency American Reinvestment and Recovery Act of 2009 rehabilitation projects | | \$32,369 | | | \$32,369 | | | | | | |
| M1 Combined Transportation Funding Program (CTFP) | | \$34,000 | | | | | | | \$34,000 | | |
| SCAG Sustainability Planning Grants | | \$720 | | | \$671 | | | | | | \$49 |
| Traffic Signal Improvements | | \$15,000 | | | | \$12,000 | | | | | \$3,000 |
| Transportation Enhancement Activities | | \$22,172 | | | \$15,628 | | | | | | \$6,544 |
| Del Obispo widening | M1 | \$6,419 | \$3,740 | | | | | | | | \$2,679 |
| Local Road Project Totals | | \$1,409,658 | \$77,836 | | \$126,857 | \$102,447 | | \$60,961 | \$40,326 | \$858,235 | \$142,996 |
| Federal Funding Total | | \$204,693 | | | | | | | | | |
| State Funding Total | | \$163,408 | | | | | | | | | |
| Local Funding Total | | \$1,041,557 | | | | | | | | | |
| Total Funding (000's) | | \$1,409,658 | | | | | | | | | |

| Local Road 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 |
| Grand Avenue widening, 1st Street to 4th Street | O | \$12,537 | \$6,708 | | | | | | | | \$5,829 |
| Kraemer Boulevard grade separation | O | \$63,830 | \$22,044 | | | | | \$16,973 | | \$22,981 | \$1,832 |
| Lakeview Avenue grade separation | O | \$110,702 | \$37,102 | | \$9,709 | | | \$27,520 | | \$21,616 | \$14,755 |
| Orangethorpe Avenue grade separation | O | \$106,043 | \$38,240 | | \$18,600 | | | \$30,324 | | \$16,182 | \$2,697 |
| Placentia Avenue grade separation | O | \$64,539 | | | | | | \$33,386 | | \$27,453 | \$3,700 |
| Raymond Avenue grade separation | O | \$126,317 | | | | | | \$95,351 | | \$23,402 | \$7,564 |
| State College Boulevard grade separation | O | \$99,631 | \$31,541 | | \$10,887 | | | \$34,785 | | \$11,400 | \$11,018 |
| Tustin Avenue/Rose Drive grade separation | O | \$96,638 | \$45,957 | | | | | \$22,534 | | \$26,384 | \$1,763 |



Capital Funding Program Report

Board of Directors (Board) Approved - July 13, 2020

| Local Road 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 |
| M2 Fair Share State - Local Partnership Grant Program | Q | \$7,032 | | | | | | \$3,516 | | \$3,516 | |
| Antonio Parkway widening | | \$32,553 | \$15,499 | | | | | | | | \$17,054 |
| Firestone Boulevard widening at Artesia Boulevard | | \$2,468 | \$2,059 | | | | | | | | \$409 |
| I-5 at La Paz interchange improvements | M1 | \$8,942 | \$2,800 | | | | | | \$1,792 | | \$4,350 |
| Imperial Highway Smart Streets | M1 | \$1,900 | | | | | | \$200 | \$200 | | \$1,500 |
| Traffic Light Synchronization Program (TLSP), county-wide - Proposition 1B | M1 | \$8,000 | | | | | | \$4,000 | \$4,000 | | |
| Local Road Project Completed Totals | | \$741,132 | \$201,950 | | \$39,196 | | | \$268,589 | \$5,992 | \$152,934 | \$72,471 |
| Federal Funding Total | | \$241,146 | | | | | | | | | |
| State Funding Total | | \$268,589 | | | | | | | | | |
| Local Funding Total | | \$231,397 | | | | | | | | | |
| Total Funding (000's) | | \$741,132 | | | | | | | | | |

Project Updates:

1. Funding levels updated based on prior Board actions.

Acronyms:

Aux - Auxilliary

CMAQ - Congestion Mitigation Air Quality Improvement Program

FTA - Federal Transit Administration

FY - Fiscal Year

HOT - High-Occupancy Toll

HOV - High-Occupancy Vehicle

Hwy - Highway

I-405 - Interstate 405

I-5 - Interstate 5

I-605 - Interstate 605

LA - Los Angeles

M Code - Project Codes in Measure M1 and M2

M1 - Measure M1

M2 - Measure M2

N/B - Northbound

OC - Orange County

OCTA - Orange County Transportation Authority

PCH - Pacific Coast Highway

RSTP - Regional Surface Transportation Program

S/B - Southbound

S/O - South of

SS - Southside

STBG - Surface Transportation Block Grant

STIP - State Transportation Improvement Program

W/B - Westbound



Capital Funding Program Report

Board of Directors (Board) Approved - July 13, 2020

| 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 |
| Fullerton Transportation Center parking expansion | M1/R | \$33,667 | | | | \$11,250 | | \$11,035 | \$9,718 | | \$1,664 |
| OC Streetcar (New Starts) | M1/S | \$408,228 | \$54,465 | \$162,213 | | | | \$25,586 | | \$165,964 | |
| OC Streetcar preliminary studies and environmental | M1/S | \$7,014 | | \$341 | | | | | \$4,977 | \$554 | \$1,142 |
| Anaheim Canyon Station | R | \$29,900 | \$26,132 | | | | | | | \$2,000 | \$1,768 |
| Fullerton Transportation Center Stair Rehabilitation | R | \$1,330 | | \$1,295 | | | | | | | \$35 |
| Future VSS | R | \$217 | | \$174 | | | | | | | \$43 |
| Laguna Niguel to San Juan Capistrano Passing Siding | R | \$36,360 | \$25,056 | \$1,015 | | \$3,000 | | \$6,734 | | | \$555 |
| Metrolink new capital | R | \$516 | | \$516 | | | | | | | |
| Metrolink rehabilitation/renovation - FY 2011-12 to FY 2023-24 | R | \$169,802 | | \$169,802 | | | | | | | |
| Metrolink station and track improvements, and rehabilitation | R | \$3,063 | | \$2,617 | | | | | | | \$446 |
| Orange Olive Wye Connection | R | \$16,000 | | | | \$16,000 | | | | | |
| Placentia Commuter Rail Station | R | \$34,825 | \$50 | | | \$2,500 | | \$400 | | \$8,000 | \$23,875 |
| Preventive Maintenance (SCRRRA - Metrolink) - FY 16-17 to FY 23-24 | R | \$65,374 | | \$65,374 | | | | | | | |
| San Juan Creek Bridge replacement | R | \$43,091 | \$908 | \$39,832 | \$913 | | | \$59 | | \$1,379 | |
| Slope stabilization Laguna Niguel-Lake Forest | R | \$5,168 | | \$4,834 | | | | | | \$334 | |
| State College grade separation (LOSSAN) | R | \$79,284 | | | | | | \$46,000 | | \$33,284 | |
| Ticket vending machines | R | \$6,857 | | | | | | | | | \$6,857 |
| VSS at Commuter Rail Stations | R | \$4,409 | | \$3,594 | | | | \$56 | | | \$759 |
| M2 Project S Transit extensions to Metrolink (Rubber Tire) | S | \$733 | | | | | | | | \$733 | |
| Rail Project Totals | | \$945,838 | \$106,611 | \$451,607 | \$913 | \$32,750 | | \$89,870 | \$14,695 | \$212,248 | \$37,144 |
| Federal Funding Total | | \$559,131 | | | | | | | | | |
| State Funding Total | | \$122,620 | | | | | | | | | |
| Local Funding Total | | \$264,087 | | | | | | | | | |
| Total Funding (000's) | | \$945,838 | | | | | | | | | |

| 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 |
| Laguna Niguel-Mission Viejo Station parking improvements and expansion (ADA ramps) | M1/R | \$5,177 | \$2,800 | \$732 | | | | | \$1,645 | | |
| Metrolink Grade Crossing Safety Improvements (OCX) | M1/R | \$80,618 | | | | | | \$18,250 | \$7,600 | \$30,710 | \$24,058 |
| 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 |



Capital Funding Program Report

Board of Directors (Board) Approved - July 13, 2020

| 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 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 | |
| Control Point at 4th Street | R | \$2,985 | | \$2,985 | | | | | | | |
| Control Point Stadium Crossover | R | \$6,490 | | \$3,245 | | | | \$3,245 | | | |
| 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 |
| Transit Rail Security (monitors, fencing, video surveillance) | R | \$163 | | | | | | \$163 | | | |
| Go Local | S | \$7,730 | | | | | | | \$7,730 | | |
| 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 | | \$809,073 | \$93,439 | \$99,160 | \$4,735 | \$44,081 | | \$193,357 | \$205,975 | \$83,692 | \$84,634 |
| Federal Funding Total | | \$197,334 | | | | | | | | | |
| State Funding Total | | \$237,438 | | | | | | | | | |
| Local Funding Total | | \$374,301 | | | | | | | | | |
| Total Funding (000's) | | \$809,073 | | | | | | | | | |

Acronyms:

ADA - Americans with Disabilities Act

CMAQ - Congestion Mitigation Air Quality Improvement Program

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

OC - Orange County

OCTA - Orange County Transportation Authority

OCX - Rail-Highway Grade Crossing/Safety Enhancement Project

PSR - Project Study Report

ROW - Right-of-Way

STBG - Surface Transportation Block Grant

STIP - State Transportation Improvement Program

VSS - Video Surveillance System

Capital Programming Update Project Descriptions**Interstate 5 (I-5) Improvements from Interstate 405 (I-405) to Yale Avenue (Segment 1 {Construction})**

This project will add one general purpose lane in both directions of the I-5 from the I-405 to State Route 55. Additional features of the project include improvements to various interchanges. Auxiliary lanes will be added in some segments and re-established in others within the project limits. The overall project length is approximately nine miles.

Currently, this segment of the I-5 corridor is experiencing congestion and long traffic delays due to demand exceeding capacity, primarily resulting from local, regional, and interregional traffic demand. In addition, forecasted local and regional traffic demand is expected to increase by over 10,000 vehicles per day by the year 2040. This is Project B in the Next 10 Delivery Plan.

The existing and proposed funding plans are provided below.

| Existing Funding (in 000s) | STBG | STIP | SB 1 LPP-F | M2 | Total |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|------------------|
| Environmental | 4,473 | | | | 4,473 |
| Design | | | 7,395 | 7,396 | 14,791 |
| Right-of-Way | 27,459 | | | 6,729 | 34,188 |
| Construction | 20,425 | 95,338 | 37,396 | 13,292 | 166,451 |
| TOTAL | \$52,357 | \$95,338 | \$44,791 | \$27,417 | \$219,903 |

STBG - Surface Transportation Block Grant

STIP - State Transportation Improvement Program

SB 1 (Chapter 5, Statutes of 2017) LPP-F - Local Partnership Program – Formula

M2 – Measure M2

| Proposed Funding (in 000s) | STBG | STIP | SB 1 LPP-F | M2 | Total |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|------------------|
| Environmental | 4,473 | | | | 4,473 |
| Design | | | 7,395 | 7,396 | 14,791 |
| Right-of-Way | 10,595 | | 16,864 | 6,729 | 34,188 |
| Construction | 37,289 | 95,338 | 20,532 | 23,871 | 177,030 |
| TOTAL | \$52,357 | \$95,338 | \$44,791 | \$37,996 | \$230,482 |
| Increase/(Decrease) | - | - | - | \$10,579 | \$10,579 |

State Route 57 (SR-57) Improvement Project from Orangewood Avenue to Katella Avenue

This is Project G in the M2 Ordinance, which will widen the SR-57 freeway between Orangewood Avenue and Katella Avenue. The purpose of the project is to improve mainline mobility and throughput, improve lane continuity, and facilitate regional circulation and flow of goods and services by increasing freeway speeds and improving

Capital Programming Update Project Descriptions

merge/diverge operations. The project area currently experiences congestion and operational deficiencies due to increased traffic volumes and limited capacity.

Existing and proposed funding summaries are depicted below.

| Existing Funding (in 000s) | STBG | M2 | HIP | Total |
|-------------------------------|---------|---------|-----|---------|
| Environmental | 2,500 | | | 2,500 |
| Design | | 4,777 | | 4,777 |
| TOTAL | \$2,500 | \$4,777 | - | \$7,277 |

| Proposed Funding (in 000s) | STBG | M2 | HIP | Total |
|-------------------------------|---------|-----------|---------|---------|
| Environmental | 2,500 | | | 2,500 |
| Design | | 3,587 | 3,240 | 6,827 |
| TOTAL | \$2,500 | \$3,587 | \$3,240 | \$9,327 |
| Increase/(Decrease) | - | (\$1,190) | \$3,240 | \$2,050 |

HIP - Highway Infrastructure Program

Rideshare/Vanpool Program

The Rideshare/Vanpool Program includes regional rideshare services in Orange County, including ride guide database, customer information, and marketing activities. The Orange County Vanpool Program is a super carpool that saves riders money, time and stress for riders who have similar work destinations and schedules. The funding requesting Board of Directors' approval for vanpool program will provides capital lease subsidies to vanpools in the amount of \$400 to \$500 per month. The proposed Congestion Mitigation and Air Quality funding of \$4.5 million will support the program across multiple years.

Orange County Mobility Hub Strategy

This project will provide an approach for locating and designing mobility hubs with an integrated suite of transportation services, supporting amenities, and technologies that increase multimodal mobility by improving access to transportation choices and regional activity centers. Mobility hubs are situated at activity centers with concentrations of employment, housing, shopping and/or recreation. By providing alternatives to single occupancy vehicle trips within regional activity centers, mobility hubs can reduce vehicle dependency and promote use of transit, active transportation, and ridesharing. This study will identify best practices, establish criteria for siting and designing mobility hubs, and develop conceptual mobility hub designs at priority locations that are recommended for further study and potential implementation.

Capital Programming Update Project Descriptions

The proposed funding plan is provided below.

| Proposed Funding (in 000s) | STBG | STIP PPM | Total |
|-------------------------------|-------|----------|-------|
| Planning | 266 | 34 | 300 |
| TOTAL | \$266 | \$34 | \$300 |

STIP PPM - State Transportation Improvement Program Planning, Programming, and Monitoring

ATTACHMENT D

List of Board of Directors Reports with Programming Actions
July 2020 – December 2020

| Date | Report Title | Fund Source(s) Affected |
|-------------|---|--|
| 7/13/20 | Capital Programming Update | CARES Act, CMAQ, FTA 5337, LCTOP, M2 |
| 7/13/20 | OC Bridges Railroad Grade Separation Program Funding Update and Closeout | Demo Earmark, M2 Project O, Prop 1B TCIF, STBG |
| 8/10/20 | Grant Acceptance for the Orange County Bike Connectors Gap Closure Feasibility Study | Sustainable Transportation Planning Grant |
| 8/10/20 | Comprehensive Transportation Funding Programs Semi-Annual Review – March 2020 | M2 Projects P and X |
| 8/24/20 | SB 1 (Chapter 5, Statutes of 2017) SGR Recommendations for Fiscal Year 2020-21 Funds | SB 1 SGR |
| 9/14/20 | M2 Project W Safe Transit Stops – 2020 Programming Recommendations | M2 Project W |
| 10/12/20 | 2020 Project X – Environmental Cleanup Program Tier 1 Call for Projects – Programming Recommendations | M2 Project X |
| 10/12/20 | Cooperative Agreement with the California Department of Transportation for the SR-91 Improvement Project Between State Route 57 and State Route 55 and Authority to Acquire Right-of-Way | SR-91 Express Lanes Revenue |
| 12/14/20 | Comprehensive Transportation Funding Programs Semi-Annual Review – September 2020 | M2 Projects P, O, V, and W |
| 12/14/20 | Interstate 405 Improvement Project Funding Update | M2 |

Acronyms:

CARES Act – Coronavirus Aid, Relief, and Economic Security Act
CMAQ – Congestion Mitigation and Air Quality Improvement Program
Demo Earmark – Federal Demonstration Earmark
FTA 5337 – Federal Transit Administration Section 5337
LCTOP – Low Carbon Transit Operations Program
M2 – Measure M2
Prop 1B TCIF – Proposition 1B Trade Corridors Improvement Fund
SGR – State of Good Repair
SR-91 – State Route 91
STBG – Surface Transportation Block Grant



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Award of Agreement for Regional Modeling Traffic Operations
On-Call Support Staffing

Regional Planning and Highways Committee Meeting of February 1, 2021

Present: Directors Bartlett, Chaffee, Harper, Hernandez, Murphy, and Sarmiento

Absent: Director Delgleize

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendations

- A. Approve the selection of W.G. Zimmerman Engineering, Inc., as the firm to provide on-call support staffing services for the Regional Modeling Traffic Operations section.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2608 between the Orange County Transportation Authority and W.G. Zimmerman Engineering, Inc., in the amount of \$400,000, for a two-year initial term with two, two-year option terms.



February 1, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Award of Agreement for Regional Modeling Traffic Operations
On-Call Support Staffing

Overview

On October 6, 2020, the Orange County Transportation Authority released a request for proposals for on-call support staffing services for the Regional Modeling Traffic Operations section. One proposal was received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.

Recommendations

- A. Approve the selection of W.G. Zimmerman Engineering, Inc., as the firm to provide on-call support staffing services for the Regional Modeling Traffic Operations section.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2608 between the Orange County Transportation Authority and W.G. Zimmerman Engineering, Inc., in the amount of \$400,000, for a two-year initial term with two, two-year option terms.

Discussion

The Orange County Transportation Authority (OCTA) has been designated by the local agencies to administer and lead over 15 regionally significant traffic signal synchronization projects. These projects are currently underway or in early development.

When OCTA internal resources are unavailable or unable to perform certain specialized or unique tasks required for projects, OCTA utilizes external, qualified consultant services for that function. Project management assistance is required by OCTA to support traffic engineering needs for the Regional Traffic

Signal Synchronization Program (RTSSP) and other transportation engineering and planning projects on an as-needed basis. The contract awarded under this procurement will provide OCTA with the flexibility of engaging and delivering simultaneous traffic signal synchronization projects to meet delivery schedules and to assist staff in day-to-day tasks required as part of signal synchronization projects.

Regional modeling-traffic operations staff has limited resources to provide this service to local agencies in support of the RTSSP and requires assistance from an on-call consultant. The contracted support staff, which includes one on-site engineer, as well as off-site support staff, will provide OCTA resources to advance and deliver simultaneous traffic signal synchronization projects.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. Various factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as qualifications, prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On October 6, 2020, Request for Proposals (RFP) 0-2608 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on October 6 and 13, 2020. A pre-proposal conference was held virtually on October 13, 2020, with six attendees representing four firms. Three addenda were issued to make available the pre-proposal conference registration sheets and presentation, as well as to handle administrative issues related to the RFP.

On October 28, 2020, one proposal was received from W.G. Zimmerman Engineering, Inc. (WGZE). In accordance with OCTA's procurement policies and procedures, a single proposal received for a procurement over \$50,000 requires OCTA's Internal Audit Department to conduct an agreed-upon procedures review to determine whether the Contracts Administration and Materials Management Department (CAMM) complied with procedures to ensure adequate outreach to stimulate competition. The review found CAMM complied with these procedures. In addition, CAMM contacted the firms that attended the pre-proposal conference along with all the firms on the planholder's list indicating interest in submitting a proposal to inquire why they did not submit proposals

The responses from the firms varied, such as a potential conflict of interest with current or upcoming projects, uncertainty as to why a proposal was not prepared, lack of resources and inability to pursue the opportunity at this time, and not within scope of services.

An evaluation committee comprised of OCTA staff from CAMM, Transportation Modeling, Programming, and Planning and Analysis departments, as well as external representatives from the cities of Anaheim and Irvine, met to review the proposal received from WGZE.

The proposal was evaluated based on the following evaluation criteria and weightings:

- | | | |
|---|-----------------------------------|------------|
| • | Qualifications of the Firm | 20 percent |
| • | Staffing and Project Organization | 30 percent |
| • | Work Plan | 30 percent |
| • | Cost and Price | 20 percent |

Several factors were considered in developing the criteria weightings. Qualifications of the firm was weighted at 20 percent as the firm had to demonstrate experience working on similar signal synchronization projects. Staffing and project organization was weighted at 30 percent as the proposed project team had to demonstrate previous experience in all areas specified in the scope of work, stability with the firm, and sufficient allocation of resources to perform the work. Work plan was also weighted at 30 percent as the firm had to demonstrate its understanding of the project requirements, outline its technical approach to managing the signal synchronization projects with adequate support, and completing traffic-related assignments. Cost and price was weighted at 20 percent to ensure OCTA receives value for the services provided.

The evaluation committee conducted an interview with WGZE. The interview consisted of a brief overview of the team's organization plan, as well as an opportunity to respond to the evaluation committee's questions.

The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

WGZE is the incumbent firm and has been providing support staffing to OCTA since 2012. The firm has been providing traffic, transportation engineering, and project management services since 1995. The firm is located in the City of Huntington Beach with eight employees. WGZE has extensive

experience in traffic project management and traffic signal synchronization services. The firm demonstrated relevant experience having worked with several Southern California agencies in addition to OCTA, such as the Los Angeles County Metropolitan Transportation Authority, and the cities of La Mirada, Seal Beach, and Signal Hill on similar efforts. WGZE demonstrated familiarity with OCTA's signal synchronization program and process including funding guidelines, Measure M2 (M2) application reviews, issuing cooperative agreements and contract task orders, as well as agency coordination. The firm proposed to utilize the same subcontractor, Land CM Corp., as its current contract to provide project management support.

Staffing and Project Organization

WGZE proposed the same project team as its current contract with OCTA to provide continued support staffing for this effort. The proposed project manager is the founder of WGZE and has 30 years of experience in project management, traffic signal design, and corridor traffic signal timing. The proposed on-site traffic engineer has five years of experience and has been providing the same support services to OCTA since 2016, which includes developing a document control system, assisting with interagency coordination, providing support in developing corridor projects funded through M2, assisting with the execution of cooperative agreements and contract task orders, and providing project management services. WGZE's proposed project team demonstrated experience and familiarity with traffic signal synchronization projects, as well as experience with multiple transportation software modeling programs. During the interview, the project team further demonstrated its knowledge and expertise.

Work Plan

WGZE addressed all elements of the scope of work in its work plan. The firm demonstrated an understanding of the project requirements and discussed its approach to meeting those objectives. The firm described its management approach, which includes holding monthly project meetings, maintaining a project schedule, monitoring the budget, and providing quality assurance. The proposed on-site traffic engineer will continue to provide the same support services, including assisting in the management and administration of project contracts, assisting local agency staff and/or consultants by answering project-related questions, tracking and documenting scope changes, and providing data for various reporting needs. WGZE also discussed the project team's responsibilities in providing traffic engineering services as needed, such as maintaining the regional network using the Synchro software, assisting

with signal synchronization field tasks, and maintaining the OCTA geographic information system geodatabase related to traffic operations.

Cost and Price

CAMM also conducted a price review. The hourly rates proposed by WGZE are deemed fair and reasonable as they are on average lower than the OCTA project manager's independent cost estimate and are on average less than what OCTA currently pays for these services.

Procurement Summary

Based on the evaluation of the written proposal, the firm's qualifications, and the information obtained from the interview, the evaluation committee recommends the selection of WGZE to provide on-call support staffing services for the regional modeling-traffic operations section. The WGZE team demonstrated relevant experience and submitted a comprehensive proposal that was responsive to the requirements of the RFP.

The agreement will be a time-and-expense agreement with a two-year initial term and two, two-year option terms. The amount of the initial term is \$400,000.

Fiscal Impact

This project was approved in OCTA's Fiscal Year 2020-21 Budget, Planning Division, Account No. 0017-7519-SP001-P2U, and is funded through the Orange County Local Transportation Authority.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement C-0-2608 with W. G. Zimmerman Engineering, Inc., in the amount of \$400,000, for a two-year initial term, effective through April 30, 2023, with two, two-year option terms, to provide on-call support staffing services for the regional modeling-traffic operations section.

Attachment

None.

Prepared by:



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Regional Modeling - Traffic Operations
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Approved by:



Kia Mortazavi
Executive Director, Planning
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Pia Veasapen
Director, Contracts Administration
and Materials Management
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COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors

From: Andrea West, Interim Clerk of the Board *Andrea West*

Subject: Measure M2 Environmental Cleanup Program – Project X Tier 1 Grant Program Call for Projects

Regional Planning and Highways Committee Meeting of February 1, 2021

Present: Directors Bartlett, Chaffee, Harper, Hernandez, Murphy, and Sarmiento

Absent: Director Delgleize

Committee Vote

Following the roll call vote, this item was declared passed 6-0 by the Members present.

Committee Recommendations

- A. Approve the proposed revisions to the Comprehensive Transportation Funding Programs Guidelines for the Environmental Cleanup Program Tier 1 Program.
- B. Authorize staff to issue the fiscal year 2021 Environmental Cleanup Program Tier 1 call for projects.



February 1, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Measure M2 Environmental Cleanup Program - Project X Tier 1 Grant Program Call for Projects

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is positioned to the right of the "From:" line.

Overview

The Measure M2 Environmental Cleanup Program provides grants for projects that protect Orange County waterways and beaches from roadway runoff. Staff has updated the program implementation guidelines and is seeking authorization to release the next Environmental Cleanup Program Tier 1 call for projects.

Recommendations

- A. Approve the proposed revisions to the Comprehensive Transportation Funding Programs Guidelines for the Environmental Cleanup Program Tier 1 Program.
- B. Authorize staff to issue the fiscal year 2021 Environmental Cleanup Program Tier 1 call for projects.

Background

The Environmental Cleanup Program (ECP), also referred to as Project X, provides for the allocation of two percent of annual gross Measure M2 (M2) revenues to improve overall water quality in Orange County. Funding is allocated on a countywide competitive basis to assist jurisdictions in controlling transportation-related pollution. These funds are intended to supplement, not supplant, existing transportation-related water quality programs. Funds are awarded to priority projects that improve water quality in streams, harbors, and other waterways that have a nexus to transportation-related pollution, consistent with the Orange County Transportation Authority's (OCTA) Ordinance No. 3. The ordinance requires the Environmental Cleanup Allocation Committee (ECAC) to advise the OCTA Board of Directors (Board) on priorities and processes for the use of ECP funds.

On May 24, 2010, the Board approved a two-tiered approach to fund the M2 ECP. The Tier 1 Grant Program consists of funding for equipment purchases and upgrades to existing storm drains and related best management practices. The Tier 2 Grant Program consists of funding for regional, potentially multi-jurisdictional, capital-intensive projects.

The previous Tier 1 call for projects (call) was finalized by the OCTA Board on October 12, 2020, with the approval of \$2,800,000 in ECP Tier 1 funds. The Board programmed funding to support 12 successful project applications (based on the scoring criteria). To date, the Board has approved funding for 189 Tier 1 projects, totaling approximately \$27 million, and it is estimated that nearly 33 million gallons of trash and debris have been captured since inception of the ECP in 2011.

Discussion

OCTA staff worked with local agencies and the ECAC to determine areas of the program guidelines that needed to be adjusted, as well as reviewed issues that emerged out of the previous calls. The proposed modifications to the program guidelines are included in attachments A and B.

The proposed changes were reviewed by the ECAC at the January 14, 2021 meeting. The ECAC voted unanimously to endorse the changes to the CTFP Guidelines and recommended Board approval to issue the fiscal year (FY) 2021 ECP Tier 1 call. A summary of proposed modifications is provided below.

2021 Call Updates

The revisions to the CTFP Guidelines include minor technical changes to the ECP call application schedule. The proposed funding target, subject to Board approval, for the call is \$2.8 million, which is consistent with prior years. While M2 revenues were impacted by the economic downturn emerging from the coronavirus pandemic, this program has been conservatively managed in terms of funding distributions to the Tier I and Tier II programs, and based upon the program's currently projected cash flow, the \$2.8 million call amount appears to be both reasonable and fiscally responsible.

Based on requests from local agencies, the CTFP Guidelines were also modified to clarify that for the Project X Tier I program only, local agencies may spend up to 15 percent of total construction costs to support construction management, project management, and final design combined.

Finally, the updated CTFP Guidelines clarify that only electronic applications will be accepted during this call cycle.

Next Steps

Following Board approval expected on February 8, 2020, staff will notify local agencies of the call. Once the call is issued, staff will offer one-on-one meetings to assist local agencies with the application process. Per the recommendation of the ECAC, in addition to one-on-one meetings, staff will offer a workshop for local agencies as an additional resource. The workshop is tentatively scheduled for February 25, 2021. Applications will be due to OCTA by May 6, 2021, and staff will return to the Board with programming recommendations by late summer 2021.

Awards would be effective with Board approval and become available starting in FY 2021-22.

Summary

OCTA staff is recommending revisions to the ECP Tier 1 CTFP Guidelines and requests authorization to issue a 2021 ECP Tier 1 call, in order to make available approximately \$2.8 million for important projects that will mitigate the impacts of street runoff and improve water quality for Orange County waterways.

Attachments

- A. List of Proposed Revisions to the 2021 CTFP Guidelines for Project X (Chapter 11)
- B. Comprehensive Transportation Funding Programs Guidelines Excerpt, Proposed Revisions

Prepared by:



Alfonso Hernandez
Transportation Funding Specialist, Senior
(714) 560-5363

Approved by:



Kia Mortazavi
Executive Director, Planning
(714) 560-5741

List of Proposed Revisions to the 2021 CTFP Guidelines for Project X (Chapter 11)

| No. | Chapter | Section | Page No. | Proposed Change |
|-----|-------------|--|--------------|---|
| 1 | V. Precepts | Precept Number 28 | xx | Added the following language: Note: For the Project X Tier 1 Program only, local agencies may also include final design. |
| 2 | Chapter 11 | Overview | 11-1 to 11-3 | Minor wording modifications. |
| 3 | Chapter 11 | Funding Estimates | 11-5 | Updated reference from 2020 to 2021 and other minor wording modifications. |
| 4 | Chapter 11 | 2021 Tier 1 Call for Projects | 11-6 | Updated 2020 references to 2021 and clarified that the deadline for the 2021 Tier 1 call for projects is Thursday, May 6, 2021 at 5:00 PM. |
| 5 | Chapter 11 | Exhibit 11-1 (Tier 1 Scoring Criteria) | 11-7 - 11-8 | Minor wording modification. Removed the note that “overmatch bonus points can only be granted to project with a cash match.” Statement is no longer necessary, as cash is the only form of match now accepted by the program. |
| 6 | Chapter 11 | Application Process | 11-11 | Revised language to specify that OCTA will only accept electronic application packages and clarified appropriate application submittal and document formatting requirements. Also, clarified that application revisions may be allowed, if they are made prior to the application deadline. |
| 7 | Chapter 11 | Eligible Expenditures | 11-12 | Clarified the eligible expenditures, specifically the following language for construction management costs: For construction management, project management and final design (for Project X Tier 1 projects only), combined costs cannot exceed 15 percent of total construction cost. |
| 8 | Chapter 11 | Ineligible Expenditures | 11-12 | Clarified that Environmental Cleanup Program Project X Tier 1 funds are not to be used for planning but can be used for final design, subject to the eligible expenditure requirements. |

Acronyms

CTFP – Comprehensive Transportation Funding Program
OCTA – Orange County Transportation Authority

Comprehensive Transportation Funding Programs Guidelines Excerpt

Proposed Revisions

Intersection Capacity Utilization (ICU) calculations shall use 1,700 vehicles per hour per lane with a .05 clearance interval.

25. OCTA shall consider matching fund credit(s) for an implementing agency's proposed projects current and applicable environmental clearance expenditures. OCTA will review and consider these expenditures on a case-by-case basis at the time of funding approval.
26. An approved CTFP project may be determined ineligible for funding at any time if it is found that M2 funding has replaced all or a portion of funds or commitments that were to be provided by other sources such as: development conditions of approval, development deposits, fee programs, redevelopment programs or other dedicated local funding sources (i.e., assessment districts, community facilities districts, bonds, certificates of participation, etc.). Appeals may be made in accordance with Precept 39.
27. OCTA may fund environmental mitigation, up to 25 percent (25%) of the total eligible project cost by phase, as required for the proposed project contained in the environmental document. Participating environmental mitigation expenditures are eligible for funding under certain programs, but not all.
28. Construction Engineering, Construction Management, Materials Testing, Engineering Support and/or Project Management shall not exceed 15 percent (15%) of the total eligible project cost based upon the engineers' estimate. The cap is applied to the sum of eligible expenses, contract change orders (within the scope of work), equipment and materials (e.g. eligible traffic signal equipment). [Note: For the Project X Tier I program only, local agencies may include final design.](#)
29. Contract change orders are only eligible for reimbursement of work due to unforeseen changed conditions within the original scope of work and not exceeding 10 percent (10%) contingency provided in the application cost estimate.
30. OCTA shall evaluate "whole" projects during the initial review process. Subsequent phase application reviews shall not include prior phases in the evaluation unless locally funded and pledged as a match and are subject to OCTA verification. The criteria for ranking project applications is included in these guidelines as part of each program component chapter.
31. Projects that receive competitive CTFP funds shall not use other M2 competitive funds as a local match source. Lead agencies may request project consolidation. The TAC and Board must approve consolidation requests. OCTA shall use the weighted average match rate of the consolidated project's individual segments.
32. OCTA shall conduct a SAR of all active CTFP projects. All agencies shall participate in these sessions through a process established by OCTA. Currently, OCTA administers the SAR through OCFundtracker. OCTA's intent is to: 1) verify project

Chapter 11 – Environmental Cleanup Program (Project X)

Overview

The ECP, herein referred to as Project X, provides ~~for~~ M2 revenues to improve overall water quality in Orange County from transportation-generated pollution. Specifically, ~~the~~ OCTA's Ordinance No. 3 (Ordinance), dated July 24, 2006, provides that 2 percent (2%) of gross M2 revenues be dedicated to protecting Orange County beaches and waterways from the conveyance of urban runoff associated with transportation-generated pollution. Project X ensures that funds will be used on a countywide competitive basis to meet federal Clean Water Act standards for controlling transportation-generated pollution by funding nationally recognized Best Management Practices (BMPs).

As required by the Ordinance, an Environmental Cleanup Allocation Committee (ECAC), representing a broad cross-section of the water quality community, was formed in October 2007 to provide guidance on program design and funding. The goal of Project X is to fund projects on a countywide, competitive basis. This will assist the County of Orange and Orange County cities in reducing transportation-related water quality pollution by meeting Clean Water Act standards for local waterways and beaches.

Proposed projects must demonstrate a direct nexus (connection) to a reduction of transportation-related pollution as developed and defined by the ECAC in conformity with the Ordinance. All proposing agencies must demonstrate an understanding of how their proposed projects meet the following transportation pollution nexus definition:

- Transportation-related activities can be a contributor of pollutants and/or impairments to receiving waters via aerial deposition, storm, and non-storm water discharges. Transportation-related activities are associated with the operation, construction, and maintenance of public roads, highways, and other ground transportation systems.
- The conveyance of transportation-related pollutants to surface and groundwater can occur from precipitation, runoff, and leachate entering or discharging from public roads, highways, and other ground transportation systems via drainage systems, such as catch basins, curbs, gutters, ditches, manmade channels, retention basins, or storm drains. The quality and quantity of these discharges vary considerably and are affected by hydrology, geology, land use, season, and sequence and discharge of hydrologic events.
- Pollutant sources can encompass right-of-way, properties, facilities, and activities related to motor vehicles, highway maintenance, construction site runoff, maintenance facility runoff, illegal dumping, spills, and landscaping care. Pollutant categories include but are not limited to metals (such as copper, lead, and zinc), organic chemicals and compounds (hydrocarbons), pesticides, sediment, nutrients (nitrogen and phosphorus), litter, oxygen demanding substances (decaying

vegetation, animal waste, and other organic matter), groundwater dewatering discharges, and pathogenic material.

Project X funds are designed to supplement, not supplant, existing water quality programs. Proposed projects must improve and not replace existing pollution reduction efforts by an eligible party. Funds will be awarded to the most competitive projects with the highest benefit to water quality.

The intent of the Project X is to provide funding for water quality projects that do not replace existing transportation water quality expenditures. In other words, if a project has components which would replace features already in place or which would fulfill project specific mitigation, those components would not be eligible for funding consideration. Some upgrades and expansions may be eligible with appropriate supporting justification.

Proposed projects, which support compliance with the 2015 adopted Trash Provisions, are eligible for Project X funding provided the funds ~~would~~do not replace established and programmed funds and the funds are not applied to any mandated project design features or required mitigation measures.

The eligibility of the project and its components will be determined during the evaluation process. Contact Alfonso Hernandez at (714) 560-5363, or AHernandez@octa.net with questions.

Tier 1 Grant Program

Overview

The Tier 1 Grant Program is designed to mitigate the more visible forms of pollutants, such as litter and debris, which collect on ~~the~~ roadways and in the catch basins (storm drains) prior to being deposited in waterways and the ocean. It consists of grant funding for Orange County local governments to purchase equipment and upgrades for existing catch basins and other related BMPs (i.e., “street-scale” low flow diversion projects). Examples include screens, filters, and inserts for catch basins, as well as other devices designed to remove the above-mentioned pollutants. To date, [ten](#) Tier 1 calls for projects have been held. Through this process, many of the opportunities for street-scale BMPs have been fulfilled. Water quality projects, regardless of technology, are eligible for Tier 1 funding provided they have a verifiable benefit to water quality and fall within the maximum per project programming cap. The intent of this funding program is for project applicants to complete the work generally within one year from the letter agreement execution [date](#).

Tier 1 Project Types

Tier 1 projects funded in the past include the following types. A description of each project type is provided below:

- 1) Automatic Retractable Screen and other debris screens or inserts: screen or insert units prevent debris from entering the storm drain system.
- 2) Irrigation system retrofits to reduce runoff: these projects decrease runoff from highway medians by using more efficient irrigation systems and/or replacing existing landscape to reduce the amount of water used in irrigation.
- 3) Continuous Deflection Separator (CDS): CDS units screen, separate, and trap debris, sediment, oil, and grease from storm water runoff.
- 4) Linear Radial Gross Solid Removal Device (GSRD): GSRDs are certified full capture systems which efficiently remove large solids from runoff water flows.
- 5) Marina Trash Skimmer: these devices draw in floating debris, such as plastics, bottles, paper, oil sheen, and driftwood. The installation of marina trash skimmers will reduce the amount of trash and debris reaching the open ocean.
- 6) Bioswales and Bioretention systems: pollutants and sediments are captured and subsequently removed from stormwater runoff.
- 7) Trash Boom: a floating boom placed across a channel captures trash and debris that have reached flood channels from being further conveyed to downstream receiving waters.

Pre-Application Process

In order to ensure the best use of M2 funds and assist eligible jurisdictions with the Tier 1 Grant Program, applicants may engage in a pre-application process with OCTA staff in project planning, cost estimate development, and determination of likely projected competitiveness. Specific meeting times will be established once the call is initiated. After the call for projects deadline and submittal of the grant application, applicants will not be able to change the content of the application or scope of the project.

Eligible Applicants

Project X funds can be used to implement street and highway-related water quality improvement projects to assist Orange County cities and the County of Orange to meet federal Clean Water Act standards for urban runoff and State Water Resources Control Board requirements for trash capture. Applicants eligible for Project X funds include the 34 Orange County cities plus the County of Orange. Eligible applicants must meet the transportation requirements discussed in the M2 Ordinance.

Third parties, such as water and wastewater public entities, environmental resource organizations, nonprofit 501(c) environmental institutions, and homeowners' associations cannot act as the lead agency for a proposed project, however; these agencies can jointly apply with an Orange County city and/or the County of Orange.

Two or more agencies may participate in a project. If a joint application among agencies and/or third-party entities is submitted, a preliminary agreement with joint or third-party entities must be provided as part of the application. In order to meet Ordinance requirements, an eligible applicant must be the lead agency for the funding application. If a project includes more than one jurisdiction and is being submitted as a joint application, one agency shall act as lead agency and must provide a resolution of support from all joint applicants.

Each eligible jurisdiction must meet the eligibility criteria as set forth in Chapter 1 of these guidelines.

Project Programming

The Tier 1 Grant Program approach is designed to be consistent with Chapter 2 of these CTFP Guidelines regarding the provisions below:

- Program Consolidation
- Funding Projections
- Programming Adjustments
- Project Cost Escalation
- Programming Policies

- Schedule Change Requests
- Project Advancements
- Semi-Annual Review

Refer to Chapter 2 for explanations of the above provisions.

Funding Estimates

Approximately \$2.8 million is available for the 2021⁰ Tier 1 call for projects.

The maximum amount for the Tier 1 Grant Program is \$500,000 per project. The maximum amount that an eligible local agency can receive in this funding period is \$500,000.

Matching Funds

For the Tier 1 Grant Program, a minimum local match of 20 percent (20%) of the eligible project cost is required. The matching funds shall be provided as a cash contribution.

Retroactive expenditures cannot be credited towards the matching fund threshold [or project expenditures](#).

Overmatch

For the Tier 1 Grant Program, administering agencies may “overmatch” Project X projects; that is, additional cash match may be provided for the project. Applicants will receive additional points in the evaluation process for matching with cash above the minimum requirement. Proposals that exceed the 20 percent (20%) minimum funding match will be given an additional one-half point for every five percent (5%) over the minimum cash match (up to five bonus points).

Additionally, administering agencies must commit to cover any future cost overruns if the project is underfunded. Any work not eligible for Project X reimbursement must be funded by other means by the project applicant and cannot count as match. These non-eligible items should not be included in the cost estimate breakdown in the application.

Reimbursements

For the Tier 1 Grant Program, OCTA will release funds through two payments. The initial payment will constitute 75 percent (75%) of the contract award or programmed amount at contract award. OCTA will disburse the final payment, approximately 25 percent (25%) of eligible funds, after approval of the final report. Further information on reimbursements can be located within Chapter 9 of these Guidelines.

Scope Reductions/Modifications and Cost Savings

Any proposed scope modifications, such as a change in BMP device quantities and/or the adjustment of device locations of an approved project must be submitted to OCTA for review and approval in advance of the change to ensure consistency with Tier 1 Grant Program

requirements. The proposed modifications must mitigate the same pollutants, affect the same waterways, and meet all other provisions as stipulated in these guidelines.

If the proposed scope modification is approved by OCTA, any cost savings will be proportionally shared between OCTA and the grantee; for example, a reduction in Project X funds must be applied proportionally to maintain the approved local match percentage. All cost savings will be returned to the Tier 1 Grant Program for reallocation for subsequent calls for projects.

2021 Tier 1 Call for Projects

2021 Tier 1 Call for Projects applications must be received by OCTA **no later than 5:00 p.m. on Thursday, May 6, 2021**. Projects that do not award construction contracts by June 30, 2022 will not be considered. OCTA allocates funds on July 1 of each year. **Tier 1 projects are not eligible for delay requests**; please refer to Precept 17 for additional information. Funds will become available upon execution of a letter agreement.

After Tier 1 applications are reviewed by OCTA, an advisory panel will review and rank projects. Following a review by the ECAC, a recommended priority list of projects will be forwarded to the OCTA Board for approval in summer 2021. Funds allocated for projects are final once approved by the OCTA Board. No additional funds will be allocated to the project. Grantees are responsible for any costs exceeding the allocated amount.

Tier 1 Selection Criteria

OCTA will evaluate all proposals that meet the mandatory prerequisites based on competitive selection criteria (Exhibit 11-1) with the following categories:

- Project Need, Transportation Nexus, and Water Quality Benefits (15 points)
- Cost/Benefit (16 points)
- Pollutant Reduction Benefits (12 points)
- Effectiveness Against More Visible Forms of Pollutants (10 points)
- Justification for Project Devices Considered and Proposed (5 points)
- Proposed Device Performance Efficiency and/or Effectiveness (6 points)
- Project Readiness (6 points)
- Secondary attributes* (5 points)
- Methodology for Measuring Pollutant Reduction Before and After Implementation (10 points)
- Operations and Maintenance Plan (15 points)

**Note: Project elements which may qualify for points under the "secondary attributes" category do not need to be eligible expenditures. See Eligible Expenditures and Ineligible Expenditures sections for further information.*

Each proposal can receive a maximum of 100 points, exclusive of five bonus points for cash overmatch. See Exhibit 11-1 for scoring categories and point distribution.

Exhibit 11-1 (Tier 1 Scoring Criteria)

| Scoring Criteria | | Points Possible | | | | | | | | | | | | |
|--|--|---------------------|------------|--------|------------------|---|---|--------|---|---|----------|---|--|--------|
| 1. Describe the need for the selected BMP(s), including nexus to transportation pollutants, and detail the benefits to water quality the BMP(s) will achieve. (up to 15 Points) | | 15 | | | | | | | | | | | | |
| 2. Cost/Benefit (Up to 16 points): Based on information provided by the applicant, a cost/benefit calculation will be conducted to compare the total project cost to the area of priority land uses treated by the proposed BMP(s). Applicant is required to provide ¹ : <ul style="list-style-type: none">Types(s) of BMP(s) proposedNumber of each BMP typeTotal drainage area(s) contributing to each BMP typePercent of drainage area(s) that is/are considered priority land uses (i.e., high density residential, industrial, commercial, mixed urban, public transportation stations) The applicant must also provide geospatial information (through ArcGIS and/or Google Earth) that identifies the drainage area(s) and BMP location(s) for the project. | | 16 | | | | | | | | | | | | |
| 3. Pollutant Reduction Benefits: Based on treatment capacity and BMP type, project benefit will be calculated using the scoring equation: (A x 3) + (B x 3) + (C x 6) = (up to 12 points) ¹ | | 12 | | | | | | | | | | | | |
| <table><tr><th>Line</th><th>Factor</th><th>Points Available</th></tr><tr><td>A</td><td>Fractional percent of 1 year, 1-hour event flowrate discharging from priority land uses to the BMP(s)</td><td>0 to 1</td></tr><tr><td>B</td><td>Fractional percent of 85th percentile, 24-hr design event that is treated by a low-impact development (LID) or treatment control BMP²</td><td>0 to 1.5</td></tr><tr><td>C</td><td>BMP Multiplier:<ul style="list-style-type: none">1/3 point for high capacity systems2/3 point for filters/biofilters1 point for zero-discharge BMPs</td><td>0 to 1</td></tr></table> | | | Line | Factor | Points Available | A | Fractional percent of 1 year, 1-hour event flowrate discharging from priority land uses to the BMP(s) | 0 to 1 | B | Fractional percent of 85th percentile, 24-hr design event that is treated by a low-impact development (LID) or treatment control BMP ² | 0 to 1.5 | C | BMP Multiplier: <ul style="list-style-type: none">1/3 point for high capacity systems2/3 point for filters/biofilters1 point for zero-discharge BMPs | 0 to 1 |
| Line | Factor | Points Available | | | | | | | | | | | | |
| A | Fractional percent of 1 year, 1-hour event flowrate discharging from priority land uses to the BMP(s) | 0 to 1 | | | | | | | | | | | | |
| B | Fractional percent of 85th percentile, 24-hr design event that is treated by a low-impact development (LID) or treatment control BMP ² | 0 to 1.5 | | | | | | | | | | | | |
| C | BMP Multiplier: <ul style="list-style-type: none">1/3 point for high capacity systems2/3 point for filters/biofilters1 point for zero-discharge BMPs | 0 to 1 | | | | | | | | | | | | |
| ¹ Applicants are not expected to calculate the score for question 2 and question 3. OCTA's technical consultant will provide the analysis for these questions based on the application materials provided by the applicant. | | | | | | | | | | | | | | |
| ² Examples include high-capacity systems (i.e. hydrodynamic separators), filters/biofilters, or zero-discharge BMPs (i.e., retention/infiltration). | | | | | | | | | | | | | | |
| 4. How effective will the proposed project be in dealing with the more visible forms of pollutants, such as a litter and debris? (up to 10 points) | | 10 | | | | | | | | | | | | |
| 5. What other BMP types were considered for this project? Why was the proposed BMP chosen? (5 points) | | 5 | | | | | | | | | | | | |
| 6. Provide information on proposed BMP performance efficiency and/or effectiveness, including pollutant capture, storage capacity, flow capacity, etc. (up to 6 points) | | 6 | | | | | | | | | | | | |
| 7. Project Readiness: The project schedule will be reviewed by the evaluation committee to determine when the proposed BMP will be operational following the OCTA Board of Directors approval. (up to 6 points): | | 6 | | | | | | | | | | | | |
| Less than 4 Months | (6 points) | 8 - 12 months | (2 points) | | | | | | | | | | | |
| 4 - 8 months | (4 points) | More than 12 months | (1 point) | | | | | | | | | | | |

Comprehensive Transportation Funding Programs



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|--|-----------|
| 8. Secondary Attributes: Will the proposed project provide any benefits beyond water quality improvement (i.e., water use efficiency, public awareness, flooding control, recreation, habitat, sustainability)? (up to 5 points) | 5 |
| 9. What is the methodology for measuring pollutant reduction before and after the BMP is implemented? How frequently will monitoring and performance assessment occur? (up to 10 points) | 10 |
| 10. Provide an O&M plan for the lifespan of the proposed project. Include schedule of inspections, cleaning, removal and disposal of pollutants, repairs, etc. (up to 15 points) | 15 |

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- | | |
|--|----------|
| 11. BONUS: Are local matching funds in excess of the 20% minimum cash being proposed? If yes, at what percentage? (.5 point for each 5% cash overmatch, up to 5 points) | 5 |
|--|----------|

~~Note: overmatch bonus points can only be granted to projects with a cash match.~~

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Application Process

The following information, which is to be completed within the Tier 1 Grant Application Form, available electronically from OCTA, is required to evaluate and select projects. A checklist is included in the Tier 1 Grant Application Form to assist eligible agencies in assembling project proposals. The following project information will be necessary as part of the application process:

- Project Title
- Lead Agency Information
- Proposed Schedule
- Project Management
- Description and Scope of Proposed Project
- Integrated Regional Water Management Plan (IRWMP) identification (if applicable)
- Project Readiness
- Performance Metrics
- Detailed Project Estimate
- Minimum 20% Local Match (cash match only)
- Joint-Application (if applicable)

In addition to the completed Tier 1 Grant Application, the following documentation is required as part of the application process:

- Project design or concept drawings, including preliminary design calculations, of proposed BMPs.
- Precise maps to show tributary drainage area and proposed location(s) for BMP installation including geospatial information (through ArcGIS and/or Google Earth)
- Digital project site photos
- Preliminary agreements with joint and/or third-party entities if part of the funding application (if applicable)
- A city council resolution specific to each proposed project and funding commitment must be approved by the local jurisdiction's governing body prior to the Board approval of grant funds. A sample resolution is included as Exhibit 11-2. **Local agencies, at a minimum, must include items a-l.** The mechanism selected shall serve as a formal request for CTFP funds and states that matching funds will be provided by the agency. A final resolution authorizing [a](#) request for funding consideration with a commitment of local match funding must be provided with the project application. **If a draft copy of the resolution is provided, the local agency must also provide the date the resolution will be finalized by the local agency's governing body.** A final copy of the City Council approved resolution must be provided at least four (4) weeks **PRIOR** to the consideration of programming recommendations by OCTA's Board.

OCTA will only be accepting electronic copies of completed application forms and supporting documentation. All application materials are to be submitted by the call for projects deadline to the following OCTA staff email:

Alfonso Hernandez

Orange County Transportation Authority

AHernandez@octa.net

There is no maximum length for proposals. All pages must be numbered, organized, and use the standard ~~and printed on~~ 8 1/2 x 11 format size for the application form pages in PDF format. Supporting documentation, such as ~~maps~~ and drawings can be included in the ~~on~~ 11 x 17 format size. ~~The original proposal should be left unbound for reproduction purposes. An unbound original and two copies (total of three) of the completed application form and supporting documentation are to be submitted, plus an electronic copy of the complete application materials.~~ Electronic application materials can be submitted via email as an attachment, via a link to an online storage device site, such as DropBox and/or OneDrive, or USB drive. CD/DVD files will not be accepted.

Note:

Applications are considered final once the electronic application has been submitted. OCTA will document the submittal date and time and download the files for storage and application review. Any applications that do not contain all required information and documentation will be disqualified. Revisions may be allowed if changes are made prior to the application deadline.

Exhibit 11-2 (Tier 1 Sample Resolution)

RESOLUTION NO. _____

A RESOLUTION OF THE CITY COUNCIL/BOARD OF THE CITY/COUNTY OF _____

AUTHORIZING AN APPLICATION FOR FUNDS FOR THE ENVIRONMENTAL CLEANUP, TIER 1 GRANT PROGRAM UNDER ORANGE COUNTY LOCAL TRANSPORTATION ORDINANCE NO. 3 FOR (PROJECT NAME).

- (a) WHEREAS, Orange County Local Transportation Ordinance No.3, dated July 24, 2006, and is known and cited as the Renewed Measure M Transportation Ordinance and Investment Plan makes funds available through the Environmental Cleanup Program to help protect Orange County beaches and waterways from transportation-generated pollution (urban runoff) and improve overall water quality.
- (b) WHEREAS, the Environmental Cleanup, Tier 1 Grant Program consists of funding purchases and installation to catch basins with Best Management Practices, such as screens, filters, inserts, and other "street-scale" low flow diversion projects.
- (c) WHEREAS, OCTA has established the procedures and criteria for reviewing proposals; and
- (d) WHEREAS, (ADMINISTERING AGENCY) possesses authority to nominate water quality improvement projects that have a transportation pollution nexus to finance and construct the proposed project; and
- (e) WHEREAS, by formal action the (GOVERNING BODY) authorizes the nomination of (PROJECT NAME), including all understanding and assurances contained therein, and authorizes the person identified as the official representative of the (ADMINISTERING AGENCY) to act in connection with the nomination and to provide such additional information as may be required; and
- (f) WHEREAS, the (ADMINISTERING AGENCY) will maintain and operate the equipment acquired and installed; and
- (g) WHEREAS, the (ADMINISTERING AGENCY) will give OCTA's representatives access to and the right to examine all records, books, papers or documents related to the funded Tier 1 Grant Project; and
- (h) WHEREAS, the (ADMINISTERING AGENCY) will cause work on the project to be commenced within a reasonable time after receipt of notification from OCTA and that the project will be carried to completion with reasonable diligence; and
- (i) WHEREAS, the (ADMINISTERING AGENCY) will comply where applicable with provisions of the California Environmental Quality Act, the National Environmental Policy Act, the American with Disabilities Act, and any other federal, state, and/or local laws, rules and/or regulations;
- (j) WHEREAS, the (ADMINISTERING AGENCY) must include all projects funded by Net Revenues in the seven-year Capital Improvement Program as part of the Renewed Measure M Ordinance eligibility requirement.
- (k) WHEREAS, the (ADMINISTERING AGENCY) authorizes a formal amendment to the seven-year Capital Improvement Program to add projects approved for funding upon approval from the Orange County Transportation Authority Board of Directors.
- (l) WHEREAS, the City/County of _____ will provide a minimum of 20% in matching funds for the (PROJECT NAME) as required by the Orange County Comprehensive Transportation Funding Programs Guidelines.
- NOW, THEREFORE, BE IT RESOLVED that the City/County of _____ hereby authorizes (NAME OF AGENCY REPRESENTATIVE) as the official representative of the (ADMINISTERING AGENCY) to accept funds for the Environmental Cleanup, Tier 1 Grant Program for (PROJECT NAME).
- BE IT FURTHER RESOLVED that the City/County of _____ agrees to fund its share of the project costs and any additional costs over the identified programmed amount.

Eligible Expenditures

- Project X funds must be for capital improvements.
- ~~Construction management and project management cannot exceed 15 percent (15%) of total construction costs.~~ For construction management, project management and final design (for Project X Tier 1 projects only), combined costs cannot exceed 15 percent (15%) of total construction cost.
- Project X funds can only be used for facilities that are in public ownership for public use; however, water quality improvements on private property, which are connected to municipal separate storm sewer systems, are eligible. (For example, a homeowner association can apply for funding through an eligible agency if the proposed project is connected to a public facility.)
- Reducing volume of surface flows is an integral factor of improving water quality, therefore, projects that have water-saving features (i.e., drip systems) are eligible for funding considerations.

Ineligible Expenditures

- O&M costs are not eligible expenditures. O&M costs cannot be utilized as a source of matching funds.
- Project X funds are not to be used for planning but can be used for final design, subject to the restrictions above.
- Expenditures prior to the grantee executed letter agreement date cannot be considered eligible for funding or match.
- Landscaping installation and replacement are not eligible for funding consideration.
- Replacement of equipment funded with Project X funds that is still within its anticipated useful life (based on manufacturer's specifications).
- Capital equipment purchases related to regular on-going street maintenance efforts, including, but not limited to: trash receptacles, vacuum trucks and/or equipment, street sweepers, signage, etc.

Reporting and Reimbursement

A final report must be filed within 180 days of the project being completed with information as shown in Form 10-16. See Chapter 9 for the process and requirements regarding reimbursements and reporting for the Tier 1 Grant Program.

Additionally, an exception to Precept #36: Agencies may appeal to the ECAC and the OCTA Board on any issues that the agency and OCTA cannot resolve, as such are the reviewing and approving bodies, respectively, for this program.

Technical and/or Field Review

Once an agency submits a final report for a project, OCTA shall review the report for compliance with the CTFP guidelines and may conduct a field review. OCTA will use the project cost estimate forms submitted with the application and revised where appropriate, project accounting records and the final report as the primary items to conduct the review. Agencies must maintain separate records for projects (i.e., expenditures, interest) to ensure compliance. Only CTFP eligible items listed on a project's cost estimate form will be reimbursed. See Chapter 10 for independent audit requirements beyond the technical and/or field review.

Additional Information

Questions regarding these procedures and criteria should be directed to:

By mail:

Alfonso Hernandez
Orange County Transportation Authority
P.O. Box 14184
Orange, CA 92863-1584
Tel: (714) 560-5363
Fax: (714) 560-5794

In person:

Orange County Transportation Authority
600 South Main Street
Orange, CA 92863-1584

Via email:

AHernandez@octa.net



COMMITTEE TRANSMITTAL

February 8, 2021

To: Members of the Board of Directors
From: Andrea West, Interim Clerk of the Board *Andrea West*
Subject: South Orange County Multimodal Transportation Study Update

Regional Planning and Highways Committee Meeting of February 1, 2021

Present: Directors Bartlett, Chaffee, Harper, Hernandez, Murphy, and Sarmiento
Absent: Director Delgleize

Committee Vote

Following the discussion, no action was taken on this item.

Staff Recommendation

Receive and file as an information item.



February 1, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: South Orange County Multimodal Transportation Study Update

Overview

The Orange County Transportation Authority is conducting a long-range multimodal transportation study for the south Orange County area. Objectives of the study are to document transportation issues and opportunities, engage with key stakeholders, partner agencies, and the public to identify potential long-term multimodal solutions. A status report on the study is provided for Board of Directors' consideration.

Recommendation

Receive and file as an information item.

Background

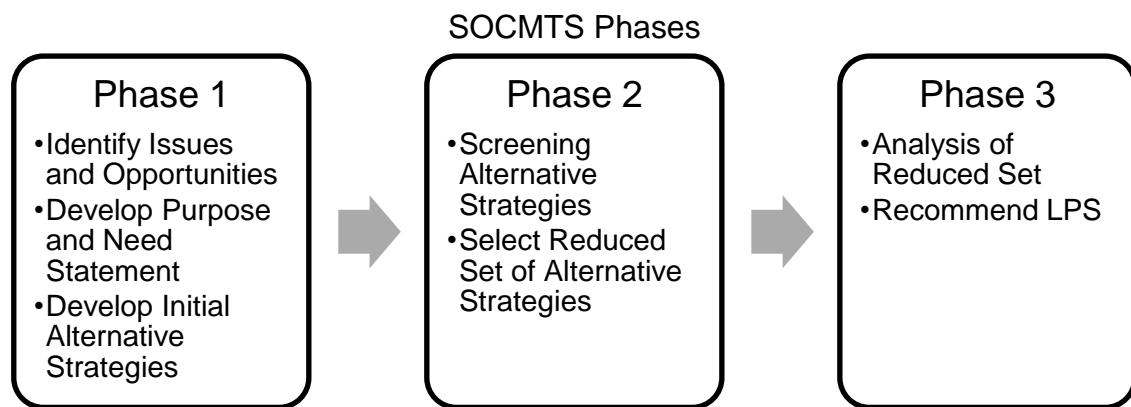
The Orange County Transportation Authority (OCTA) conducts planning studies to address the long-term transportation needs of Orange County. Multimodal transportation studies serve as the foundation of the long-range planning process by engaging stakeholders, providing focused analysis of corridor-specific transportation issues, and recommending a vision for the corridor or study area. This vision is often referred to as the locally preferred strategy (LPS).

Once an LPS is approved by the Board of Directors (Board), recommended improvements are considered for inclusion in the Long-Range Transportation Plan (LRTP) financially constrained project list. This project list is then submitted as input for the Regional Transportation Plan (RTP) developed by the Southern California Association of Governments (SCAG). Projects included in the RTP are then eligible to proceed through project-level development and can compete for state and federal funding.

Achieving consensus on a LPS involves local jurisdictions, transportation and environmental resource agencies, elected officials, residents, businesses, and other key community organizations in the study screening and decision-making processes. As such, these recommendations represent a locally supported vision for the study area's long-term transportation needs (Attachment A).

Discussion

In August 2020, an item was provided to the Board on the South Orange County Multimodal Transportation Study (SOCMTS). The August 2020 item reviewed the study background, phasing, stakeholder and partner agency engagement approach, and study area transportation issues and opportunities. The current update primarily focuses on the Purpose and Need Statement and the initial alternative strategies, which mark the completion of the first study phase.



The Purpose and Need Statement summarizes the existing and future transportation challenges in the study area and the desired outcomes of the study. Therefore, it provides the basis for defining alternatives for consideration, comparing alternative strategies, and ultimately for selecting an LPS for south Orange County. This also provides a starting point in forming the evaluation measures used to screen alternative strategies in favor of more competitive options during the study process.

The following Purpose and Need Statement was informed by the technical analysis of the transportation system in the study area, and refined through stakeholder, partner agency, and public input, including:

- Four meetings of the Technical Working Group comprised of technical planning and public works staff from cities within the study area.
- Four meetings of the Transportation Agency Working Group comprised of staff from the California Department of Transportation (Caltrans),

the Transportation Corridor Agencies (TCA), SCAG, the San Diego Association of Governments, the Southern California Regional Rail Authority (Metrolink), the North County Transit District, the Federal Transit Administration, and the Federal Highway Administration.

- Individual agency meetings offered by OCTA and, to date, requested by Caltrans, Metrolink, TCA, and the cities of Dana Point, Irvine, Laguna Beach, Laguna Hills, Laguna Niguel, Laguna Woods, and Newport Beach.
- One key stakeholder roundtable, one elected official roundtable, and one public webinar.
- An online survey that was available in English, Spanish, Mandarin, Korean, Vietnamese, and through a project information phone line, also available in multiple languages. A total of 360 surveys were collected and the results can be viewed in Attachment B.
- The online survey and public webinar were promoted through a social media campaign, e-blasts, communications toolkit sent to cities and stakeholders, news release, and to members of the Citizens Advisory Committee, Special Needs Advisory Committee, and Diverse Community Leaders group. Postcards printed in English and Spanish were mailed to low-income and disadvantaged communities with Mandarin, Korean, and Vietnamese interpretation offered.

Study Need

Long-term investments and strategies are needed to address the following transportation issues and opportunities in the study area:

- Historical land development patterns and transportation network that favor driving. The existing transportation network was largely developed to serve the auto-oriented access and circulation needs associated with the lower-density, single-family residential land-use patterns that comprise a substantial portion of south Orange County. As a result, travel by modes other than automobile is constrained. Traditional fixed-route transit is unable to provide convenient access to lower-density development areas. Despite a robust bikeway and sidewalk network, circulation by active transportation modes is challenging because of a circuitous road network and a land-use pattern that generally makes for lengthy distances between trip origins and destinations. Bicyclists and pedestrians also face potential safety concerns due to the lack of physical separation from motor vehicles often traveling at higher speeds and wide intersections with limited crossing times. In short, the auto-oriented land-use patterns and street network in south Orange County present challenges for providing efficient transit service, meeting the travel needs of non-auto owning people in the study area, and supporting safe travel conditions for all users.

- Growing travel demand on a constrained system. Many mainline segments of Interstate 5 and Interstate 405 through south Orange County consistently experience congestion on weekdays and weekends. This results in low travel-time reliability, with extra travel time needing to be budgeted to ensure on-time arrival during peak travel periods. The arterial street system depends heavily on east-west roads for both local circulation and freeway access. This results in reduced travel speeds and traffic congestion near freeway interchanges. Projected population and employment growth (with a nearly 20 percent increase by 2045) are expected to increase travel demand. If not effectively managed, this could worsen roadway congestion, increase travel times, and reduce travel speeds and reliability, particularly in areas where planned development is concentrated.
- Environmental and economic sustainability challenges. Vehicular emissions negatively affect air quality and contribute to climate change. These environmental impacts are anticipated to worsen as vehicle-miles traveled are projected to increase by 16 percent between 2016 and 2045, based on current trends. Risks like rising sea level and increased frequency and intensity of wildfires threaten the resiliency of the transportation network and its ability to serve the circulation needs of south Orange County in emergency situations. Traditional capacity expansion projects may impose unacceptable impacts on environmental resources like air and water quality, encroach upon biological or open space resources, or displace homes and businesses. Traditional capacity expansion projects can also be very expensive to build, operate, and maintain, which could result in impacts to the long-term financial viability of the system.
- Evolving travel behaviors in a rapidly changing world. There are significant uncertainties related to how emerging technology innovations and work conditions in a post-coronavirus (COVID-19) pandemic environment may affect transportation and mobility in south Orange County. Advancements in technologies, such as autonomous/connected-vehicle technology, high-speed electric vehicle charging, trip planning apps, and shared/micro-mobility could change travel behaviors and how traffic operates in south Orange County. Depending on the adoption rate, autonomous/connected vehicles could alter roadway capacities needed to sufficiently meet demand, as vehicles could travel safely at higher speeds with shorter following distances. Improvements in trip planning apps and shared/micro-mobility could enable south Orange County residents and visitors to make more informed choices about when, where, and how they travel. Increased levels of telework and telemedicine, and lingering COVID-19 threats could decrease travel overall, particularly via transit if people favor private vehicle options.

These types of uncertainties in emerging technologies and travel behavior will need to be recognized and accounted for in planning the future of south Orange County's transportation system.

Study Purpose

Each study need identified above has several purpose components identified to address the transportation issues and opportunities. The Purpose and Need Statement will be used to develop and evaluate strategies and alternatives for the study.

| Need | Purpose |
|---|--|
| Historical land development patterns and transportation network that favors driving | <ul style="list-style-type: none"> • Increase availability and convenience of using non-single occupant vehicle (SOV) modes • Provide convenient connections between different travel modes • Provide options that are competitive to driving • Support travel alternatives that reduce SOV trip-making and trip lengths in coordination with land-use changes |
| Growing travel demand on a constrained system | <ul style="list-style-type: none"> • Reduce overall travel demand • Enhance safety and efficiency of the existing transportation system • Employ cost-effective strategies to better utilize available highway, managed lane, and arterial capacity |
| Environmental and economic sustainability challenges | <ul style="list-style-type: none"> • Support increased adoption of zero-emission vehicles • Improve access to clean, affordable alternatives to private automobiles • Improve transportation resilience to destructive natural forces and events • Recommend improvements that minimize adverse environmental impacts and support economic development and community enhancement |
| Evolving travel behaviors in a rapidly changing world | <ul style="list-style-type: none"> • Adopt flexible recommendations to adapt to evolving circumstances and conditions • Pursue improvements utilizing proven technologies • Promote policies and improvements that support equity and innovation |

Initial Alternative Strategies

An initial set of alternative strategies will be evaluated as part of the SOCMTS. They are not intended to be cumulative and are not necessarily multimodal in nature at this point of the study. Reflecting the exploratory nature of these alternative strategies, they are labeled as scenarios. For the purposes of initial screening, the intent is to understand how the specific improvements and strategies identified within each scenario would affect travel in south Orange County and address the study's Purpose and Need Statement. The results of the initial screening will be used to create multimodal alternatives for more detailed evaluation in subsequent study tasks. The scenarios under evaluation include the following and are outlined in more detail in Attachment C.

- Maximize Rail and Transit
- Revise Roadway System Operations
- Eliminate Roadway Bottlenecks
- Repurpose Road Space - Enhance Transit/Active Transportation
- Demand Management - Support Tele-Everything
- Demand Management - Emphasize User Pricing and Managed Lanes
- Demand Management - Subsidize Mode Shift
- Maximize Emerging Technologies

During the next few months, OCTA will engage with the public, stakeholders, and partner agencies to review the performance of these alternative strategy scenarios. Based on the effectiveness in addressing the Purpose and Need Statement, the strategies will be combined into multimodal alternatives. Utilizing the Purpose and Need Statement, the recommended long-range alternative strategies will include improvements and policies that enhance travel choices, manage growing travel demand, address sustainability issues, and consider the implications of COVID-19 and possibilities of emerging technologies on mobility in the study area. The investments and policies will support convenient, competitive, and effective travel options beyond driving alone, will address the travel needs of disadvantaged communities and transit-dependent populations, and will be appropriate for implementation in south Orange County.

Summary

OCTA is developing strategies to improve travel in south Orange County. Study progress is presented for Board review. Technical analysis, in conjunction with input from stakeholder engagement efforts, will guide the development of the alternative strategies and be brought to the Board for consideration later this year.

Attachments

- A. South Orange County Multimodal Transportation Study Area
- B. South Orange County Multimodal Study, Public Involvement Program
Phase 1: Summary of Survey Results, January 2021
- C. South Orange County Multimodal Transportation Study Initial Alternative
Strategies

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South Orange County Multimodal Transportation Study Area





South Orange County Multimodal Transportation Study

Public Involvement Program Phase 1:

Summary of Survey Results

January 2021



Prepared by:



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Appendices

APPENDIX A Surveys

Appendix A.1 Online Survey (English; Spanish; Mandarin; Korean; Vietnamese)

Appendix A.2 Hard Copy Survey (English; Spanish; Mandarin; Korean; Vietnamese)

APPENDIX B Survey Results

Appendix B.1 Compiled Survey Results

Appendix B.2 English Survey Results

Appendix B.3 Spanish Survey Results

Appendix B.4 Mandarin Survey Results

APPENDIX C Notification Materials

Appendix C.1 Stakeholder Communications Toolkit

Appendix C.2 Study Website

Appendix C.3 News Release

Appendix C.4 Study Blog Article

Appendix C.5 On the Move Article

Appendix C.6 Eblast #1 — Community Meeting and Survey Invite

Appendix C.7 Eblast #2 — Survey Reminder

Appendix C.8 Community Meeting/ Survey Postcard (English; Spanish; Mandarin;
Korean; Vietnamese)

Appendix C.9 Facebook Posts

Appendix C.10 Twitter Posts

EXECUTIVE SUMMARY

The Orange County Transportation Authority (**OCTA**) is conducting the South Orange County Multimodal Transportation Study (**Study**) to examine a wide range of long-term transportation needs looking at the year 2045 and beyond, including improvements to streets, bus and other transit options, highways, and bikeways. As part of this Study, OCTA is implementing a comprehensive Public Involvement Program (**PIP**). Phase One of the PIP which took place in fall 2020, included an online public webinar, a key stakeholder virtual roundtable and a virtual meeting with south county elected officials. In addition, a survey was conducted which was designed to assess public perception of transportation challenges and improvement strategies in south Orange County. The survey was available September 25 to October 30, 2020 both online as well as through the project information phone line with a live person answering and conducting the survey. The engagement methods to distribute information about the survey included various channels such as emails, postcards mailed specifically to low-income and disadvantaged communities, a communications toolkit sent to cities and stakeholders, and the OCTA Facebook and Twitter accounts.

The survey research was qualitative, which means that results cannot be considered representative of the total population of interest. Informal research methods are useful to explore a group's opinions and views, allowing for the collection of verifiable data. This data can reveal information that may warrant further study and is often a cornerstone for generating new ideas. The survey accomplished the following objectives:

- Solicited public input to include in the study findings report which will include a general analysis of survey results and general comments provided
- Disseminated study information and the online survey to a vast target audience

A total of 360 surveys were collected (351 English, 8 Spanish, 1 Mandarin). The information phone line number was listed on all survey distribution materials; however, no responses were collected through the information phone line.

Key Findings

The survey respondents identified various opportunities to improve future transportation and mobility challenges within south Orange County. From the 350+ people surveyed – who reflect a wide range of demographics and preferences – a majority would like to see:

- Reduction in traffic congestion,
- Increased frequency and accessibility of multimodal transportation, and
- Increased safety and efficiency for all modes of travel.

The summary below displays the top-ranked results related to transportation preferences, perceived challenges, and opportunities for improvement. Respondents had the ability to select up to two or three responses depending on the question.

Table 1 Summary of Key Findings

| Survey Question | Top Ranked | Second Ranked | Third Ranked |
|--|-------------|---------------|-----------------|
| When you travel in and around Orange County, | Drive alone | Walk/jog/run | Carpool/vanpool |

| Survey Question | Top Ranked | Second Ranked | Third Ranked |
|--|---|--|--|
| how do you normally get from place to place? | 41% | 14% | 13% |
| What is the most important issue concerning transportation in south Orange County? (Pick 2) | Traffic congestion on freeways/highways 27% | Traffic congestion on local streets and roads 22% | Not enough transportation choices (bus, rail, or on-demand microtransit service) 19% |
| What is the primary challenge to bus and rail travel in south Orange County? (Pick 2) | Access to/from destinations 38% | Service frequency 30% | Travel time 19% |
| What is the primary challenge of using local streets in south Orange County? (Pick 2) | Traffic congestion 36% | Safety for all users (drivers, pedestrians, cyclists) 26% | Intersection delays 25% |
| What is the primary challenge to using freeways/highways in south Orange County? (Pick 2) | Traffic congestion 44% | Unpredictable commute time 25% | Back-up at freeway off ramps 16% |
| What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (Pick 2) | Safety concerns (lack of physical separation from cars, lack of pedestrian accommodations) 32% | Long distances between trip origins and destinations 26% | Gaps in the bikeway and sidewalk network 24% |
| Which set of transportation solutions is most important to you? (Pick 2) | Freeway maintenance, on and off ramp enhancements, and projects to improve overall traffic flow 26% | Pothole repairs, signal synchronization, and intersection improvements 21% | Bike lanes, bikeway networks, and pedestrian pathways 19% |
| Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits? | Land-use planning (coordinating new development with transportation) 39% | Bus, rail, and other transit services 22% | Technology to minimize traffic (signal synchronization, autonomous vehicles) |

| Survey Question | Top Ranked | Second Ranked | Third Ranked |
|--|--|---|--|
| | | | 21% |
| What do you think is the most useful strategy to reduce traffic congestion in south Orange County? (Pick 2) | Work from home programs 38% | Mobility hubs (shared activity centers for connecting bus/shuttle/rideshare/etc.) 27% | Pricing (tolled express lanes, charge for parking) 13% |
| Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most? (Pick 2) | Fix chokepoints (high congestion areas) 37% | Encourage carpools, vanpools, and ridesharing 20% | Other 13% |
| What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (Pick 2) | Concentrate business development around transit (bus/rail) centers 31% | Encourage walkability and complete streets (streets designed and operated safely for all users like drivers, cyclists, pedestrians) 28% | Concentrate new housing developments around transit (bus/rail) centers 23% |

*Percentages do not equal 100% because the answers were ranked.

Survey Overview

Survey Format

The survey was offered in English, Spanish, Mandarin, Korean, and Vietnamese to accommodate the south Orange County population demographics. An online survey was created using SurveyMonkey to provide a streamlined outlet to collect public input and feedback. The survey was also offered through the project information telephone line with a live operator to conduct the survey verbally, making the survey accessible to a wider range of people. The operator was available to provide the survey in English and Spanish, and for the Vietnamese, Korean and Mandarin surveys, the operator would return the stakeholder's call. The survey had a total of 17 questions that focused on the respondent's geographic location, mobility use, transportation and mobility concerns and challenges, and useful strategies to address these challenges. The survey provided respondents the ability to select up to two or three responses depending on the question. Several questions also gave respondents the option to choose "other" and individually submit an answer not already provided. The survey concluded with optional demographic questions related to age, ethnicity, and a sign-up to receive project updates.

Survey Outreach

To reach the south Orange County community at large, multiple outlets were utilized to disseminate the survey. The engagement methods included online tools, mailed postcards, communication toolkits distributed to cities and stakeholders within the project area and social media. Reference Appendix C for the outreach efforts. Through the various methods of outreach, the online survey was successfully distributed to a wide target audience which provided a good foundation for an analysis of the results. Reference Table 2 for a summary of the distribution channels.

Table 2 Summary of Survey Outreach

| #. | Notification Method | Audience | Notes |
|----|--|--|---|
| 1. | Community Meeting/Survey Postcard <ul style="list-style-type: none"> - Mailed postcards to over 13,000 stakeholders (English/ Spanish; interpretation was offered in Korean, Mandarin and Vietnamese) - Featured on project webpage | <ul style="list-style-type: none"> • Low income community • Disadvantaged community • Stakeholder database (including community organizations, city staff, major businesses, and facilities, etc.) | <ul style="list-style-type: none"> • The postcard promoted the Community Meeting as well as the online survey and project information phone line. |
| 2. | Facebook Ads | <ul style="list-style-type: none"> • South Orange County • Zip codes with a high Spanish Population • Zip codes with a high Korean Population • Zip codes with a high Vietnamese Population • Zip codes with a high Mandarin Population | <ul style="list-style-type: none"> • Facebook Ads were developed in four languages and targeted zip codes based on demographics and interests. • Ads were placed at the beginning and end of the survey period. |
| 3. | Twitter Posts | <ul style="list-style-type: none"> • OCTA Twitter Followers and General Public | <ul style="list-style-type: none"> • Twitter posts promoted the Community Meeting and the online survey. • Tweets were posted throughout the survey period. |
| 4. | Communications Toolkit | <ul style="list-style-type: none"> • South county cities and the County • OCTA's Citizen's Advisory Committee, Special Needs | <ul style="list-style-type: none"> • Provided instructions to distribute the survey via electronically to the |

| #. | Notification Method | Audience | Notes |
|----|--|--|---|
| | | Advisory Committee, and Diverse Leaders Committee <ul style="list-style-type: none"> • Transportation partners • Environmental Community • HOAs • Chambers | stakeholder's constituents. |
| 5. | Digital <ul style="list-style-type: none"> - Email Blasts - OCTA On the Move blog - Linking to project website and survey | <ul style="list-style-type: none"> • Stakeholder database (including HOAs, community organizations, city staff, major businesses, and facilities, etc.) | <ul style="list-style-type: none"> • Eblast distributed to stakeholder database (830) and OCTA customer database (36,540). • Blog article distributed to 12,700 readers |
| 6. | Announcement at meetings | <ul style="list-style-type: none"> • Stakeholder Roundtable • Technical Working Group meetings • Transportation Agency Working Group Meetings • Public Webinar • Elected Officials Roundtable | <ul style="list-style-type: none"> • Survey link was provided at each meeting |
| 7. | News Release | <ul style="list-style-type: none"> • Media outlets | <ul style="list-style-type: none"> • The release promoted the Community Meeting as well as the online survey and project information phone line. |

SURVEY RESULTS ANALYSIS

The survey results were analyzed based on the 360 responses collected from the 17-question survey.

Geographic Distribution

Multiple engagement methods were utilized to promote full participation within the project area. The majority of the survey respondents indicated they both lived and worked within south Orange County.

Home Zip Code

Out of the 360 surveys collected, 99% of the respondents shared their home zip code (357) and 81% of those respondents shared they live within the project area as shown in Figure 1. 13% of the respondents indicated their home zip code was outside of the project area but still within Orange County, the majority being east of the project area, with some respondents immediately adjacent to the project area. There was a higher concentration of survey participants in Newport Beach, Lake Forest, Mission Viejo, Laguna Niguel, Laguna Woods, and San Clemente. This can vary for numerous reasons such as more noticing reached these respondents through the city's distribution channels, the targeted Facebook ads, etc. Although the responses are concentrated more in some areas than others, the responses collected are spread throughout the entire project area.



Work Zip Code

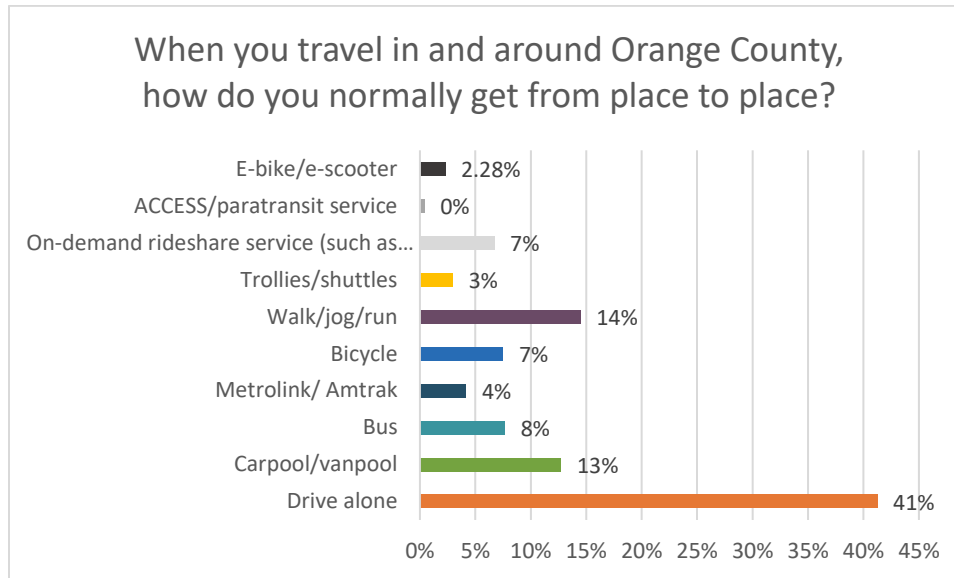
75% of the survey respondents (267) indicated their work zip code and from these respondents, 74% indicated their work zip code is within the project area. There was a higher concentration of survey participants in Lake Forest, Mission Viejo, and San Clemente. Although the responses are concentrated more in some areas than others, the responses collected are more evenly distributed throughout the entire project area slightly more than the home zip codes.



Figure 2: Survey Respondents - Work Zip Code

Transportation Preferences

One question was asked to analyze survey participants' current transportation preferences in Orange County.



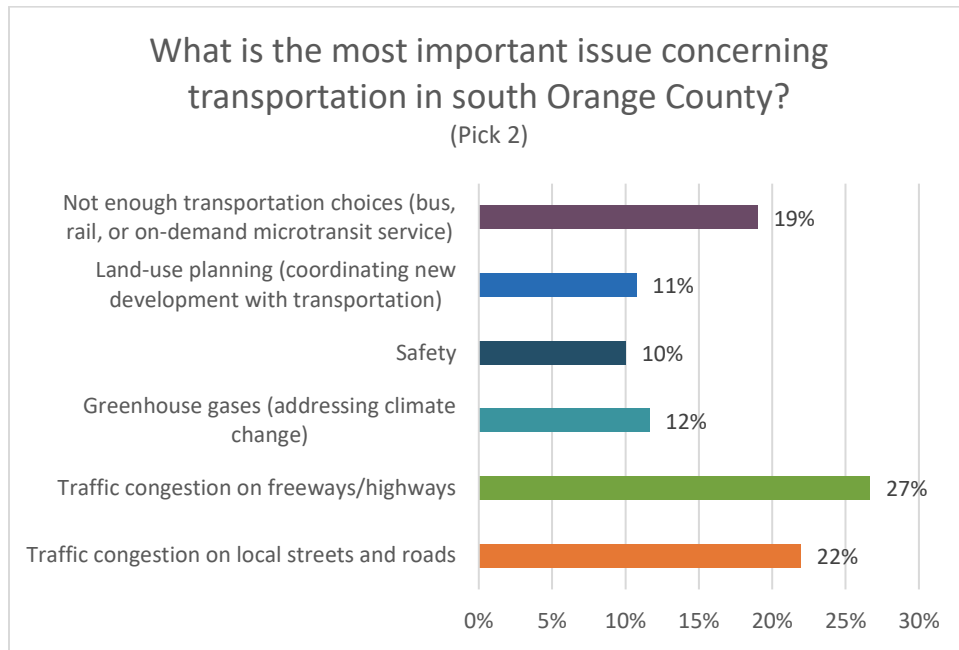
| Option | Total* |
|--|--------|
| Drive alone | 308 |
| Carpool/vanpool | 95 |
| Bus | 57 |
| Metrolink/ Amtrak | 31 |
| Bicycle | 56 |
| Walk/jog/run | 108 |
| Trolleys/shuttles | 22 |
| On-demand rideshare service (such as Uber or Lyft) | 50 |
| ACCESS/paratransit service | 3 |
| E-bike/e-scooter | 17 |

* Based upon 359 respondents

* Respondents allowed up to 3 choices

Perceived Challenges

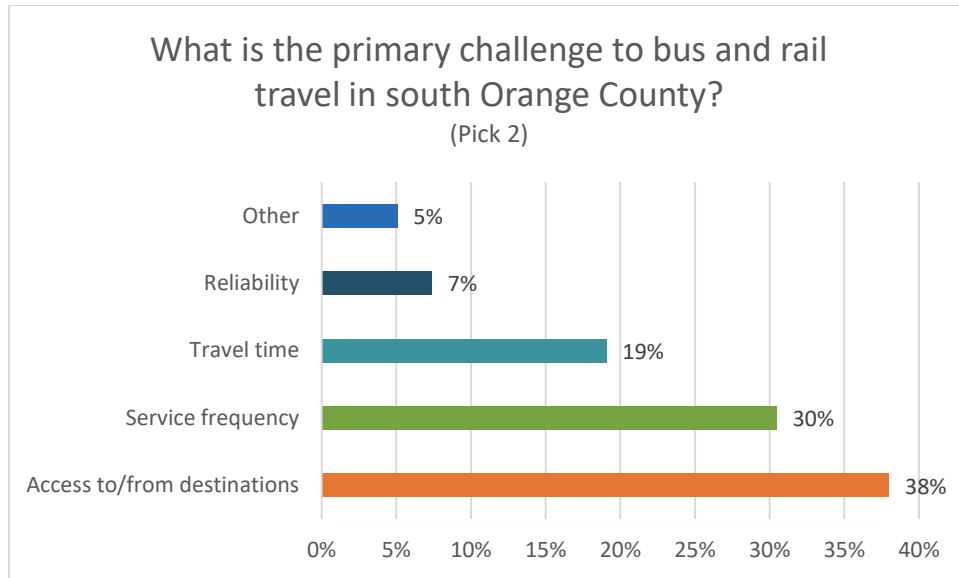
Five questions were asked to assess transportation challenges experienced when traveling in south Orange County to analyze what the community sees as a top concern.



| Option | Total* |
|--|--------|
| Traffic congestion on local streets and roads | 149 |
| Traffic congestion on freeways/highways | 181 |
| Greenhouse gases (addressing climate change) | 79 |
| Safety | 68 |
| Land-use planning (coordinating new development with transportation) | 73 |
| Not enough transportation choices (bus, rail, or on-demand microtransit service) | 129 |

* Based upon 358 respondents

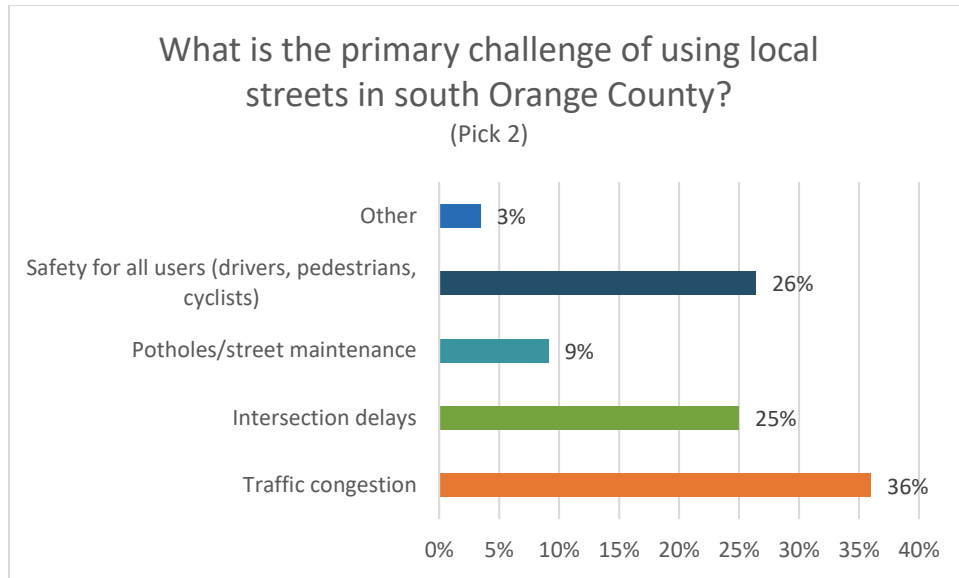
* Respondents allowed up to 2 choices



| Option | Total* |
|-----------------------------|--------|
| Access to/from destinations | 247 |
| Service frequency | 198 |
| Travel time | 124 |
| Reliability | 48 |
| Other | 33 |

* Based upon 354 respondents

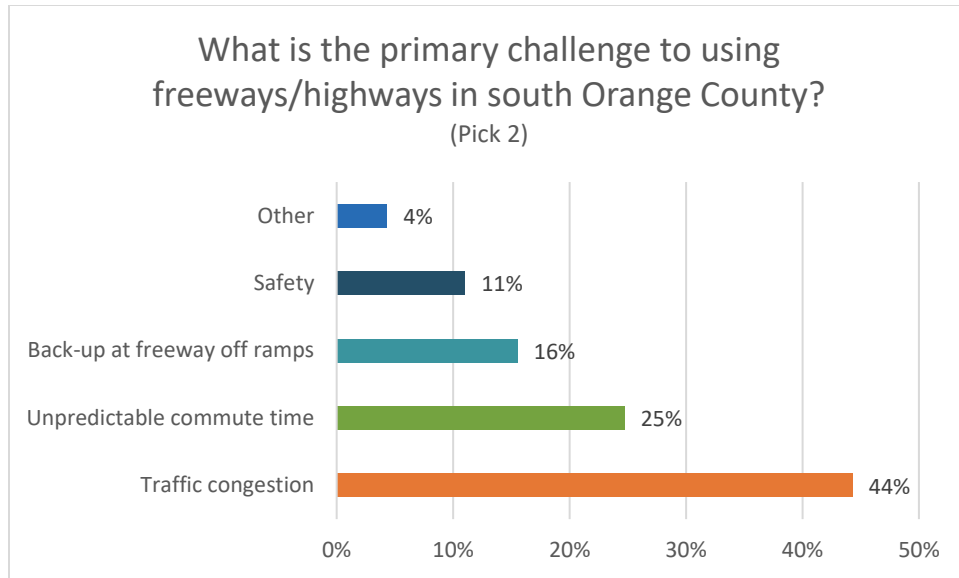
* Respondents allowed to 2 choices



| Option | Total* |
|---|--------|
| Traffic congestion | 229 |
| Intersection delays | 159 |
| Potholes/street maintenance | 58 |
| Safety for all users (drivers, pedestrians, cyclists) | 168 |
| Other | 22 |

* Based upon 358 respondents

* Respondents allowed up to 2 choices

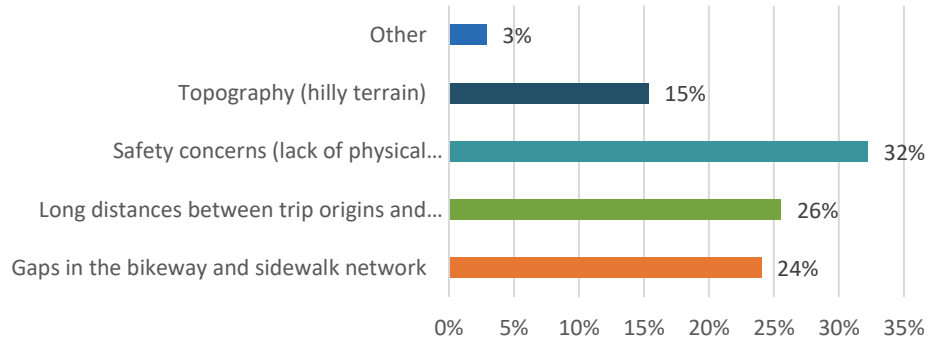


| Option | Total* |
|------------------------------|--------|
| Traffic congestion | 285 |
| Unpredictable commute time | 159 |
| Back-up at freeway off ramps | 100 |
| Safety | 71 |
| Other | 28 |

* Based upon 357 respondents

* Respondents allowed up to 2 choices

What is the most significant barrier to active transportation (walking, cycling) in south Orange County?
(Pick 2)



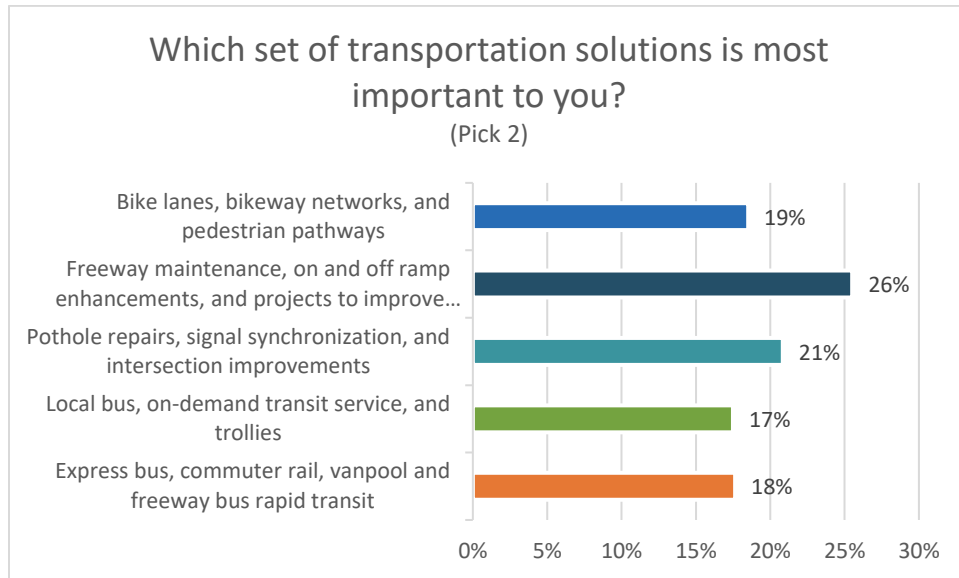
| Option | Total* |
|--|--------|
| Gaps in the bikeway and sidewalk network | 158 |
| Long distances between trip origins and destinations | 168 |
| Safety concerns (lack of physical separation from cars, lack of pedestrian accommodations) | 212 |
| Topography (hilly terrain) | 101 |
| Other | 19 |

* Based upon 356 respondents

* Respondents allowed up to 2 choices

General Transportation Solutions

Two questions were asked to prioritize the top opportunities to improve transportation in Orange County overall.

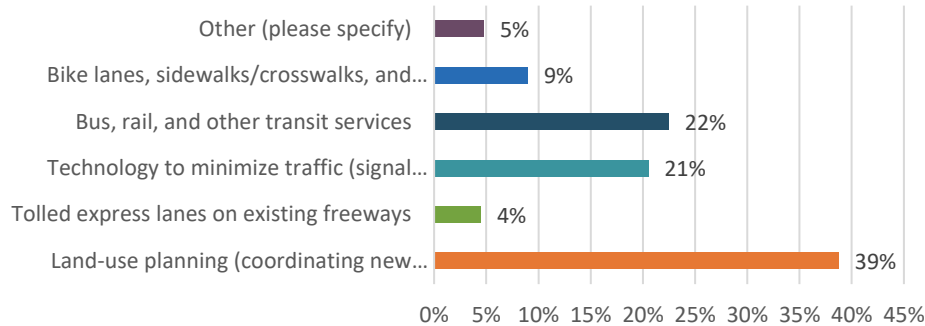


| Option | Total* |
|---|--------|
| Express bus, commuter rail, vanpool, and freeway bus rapid transit | 121 |
| Local bus, on-demand transit service, and trolleys | 120 |
| Pothole repairs, signal synchronization, and intersection improvements | 143 |
| Freeway maintenance, on and off ramp enhancements, and projects to improve overall traffic flow | 175 |
| Bike lanes, bikeway networks, and pedestrian pathways | 127 |

* Based upon 357 respondents

* Respondents allowed up to 2 choices

Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?



| Option | Total* |
|--|--------|
| Land-use planning (coordinating new development with transportation) | 138 |
| Tolled express lanes on existing freeways | 16 |
| Technology to minimize traffic (signal synchronization, autonomous vehicles) | 73 |
| Bus, rail, and other transit services | 80 |
| Bike lanes, sidewalks/crosswalks, and paved trails | 32 |
| Other (please specify) | 17 |

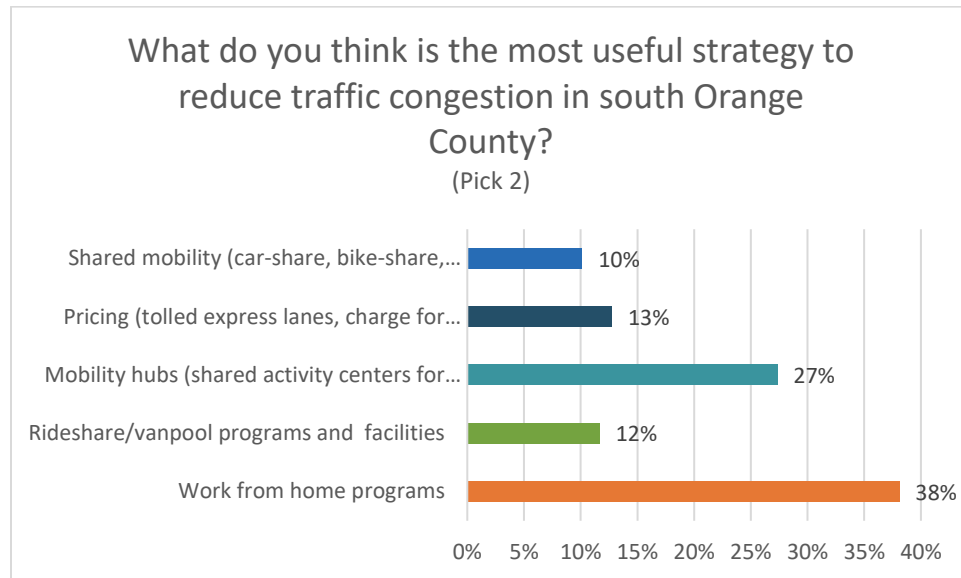
* Based upon 356 respondents

| Common Other Responses Received | # of Responses per Topic |
|---|--------------------------|
| Work from home initiatives | 2 |
| Autonomous vehicles | 2 |
| Limit/ remove toll road or toll road cost | 3 |
| Reduce new development | 2 |

* Based upon comments made two or more times by 17 respondents.

Traffic Congestion Solutions

Three questions were asked to determine the best strategies to improve traffic congestion in south Orange County. This offered insight on the respondents' top priorities and solutions.



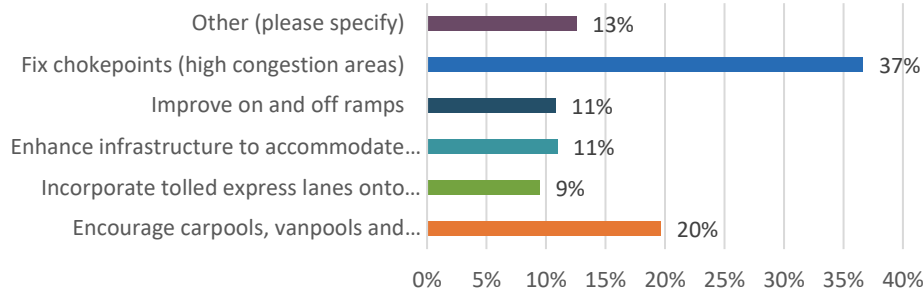
| Option | Total* |
|---|--------|
| Work from home programs | 248 |
| Rideshare/vanpool programs and facilities | 76 |
| Mobility hubs (shared activity centers for connecting bus/shuttle/rideshare/etc.) | 178 |
| Pricing (tolled express lanes, charge for parking) | 83 |
| Shared mobility (car-share, bike-share, scooter-share) | 66 |

* Based upon 351 respondents

* Respondents allowed up to 2 choices

Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most?

(Pick 2)



| Option | Total* |
|--|--------|
| Encourage carpools, vanpools, and ridesharing | 133 |
| Incorporate tolled express lanes onto existing freeways (91 Express Lanes) | 64 |
| Enhance infrastructure to accommodate autonomous (self-driving) vehicles | 74 |
| Improve on and off ramps | 73 |
| Fix chokepoints (high congestion areas) | 248 |
| Other (please specify) | 85 |

* Based upon 351 respondents

* Respondents allowed up to 2 choices

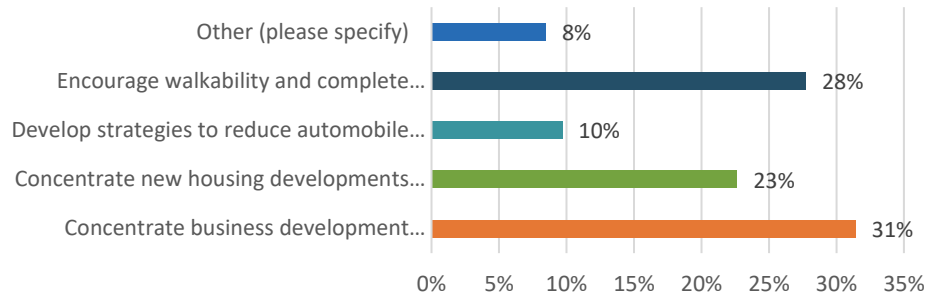
| Common Other Responses Received | # of Responses per Topic |
|---|--------------------------|
| Affordable public transit service | 6 |
| Increase/ improve overall trains/ bus service (especially light rail) | 36 |
| Expand bike parking | 2 |
| Double-stacked Freeways | 2 |
| Reduce construction | 3 |
| Decrease toll roads/ lanes | 3 |

| Common Other Responses Received | # of Responses per Topic |
|---|--------------------------|
| Increase multimodal options | 10 |
| Encourage toll road use/ reduce fees | 2 |
| Incentivize carpools, vanpools, or ridesharing | 3 |
| Existing roadway maintenance | 3 |
| Increase more accessibility/ public use of golf carts | 3 |
| Construct/ improve safety of cycling lanes | 6 |
| Complete roadway gaps | 4 |
| Encourage Work from Home Initiatives | 3 |

* Based upon comments made two or more times by 85 respondents.

What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County?

(Pick 2)



| Option | Total* |
|---|--------|
| Concentrate business development around transit (bus/rail) centers | 204 |
| Concentrate new housing developments around transit (bus/rail) centers | 147 |
| Develop strategies to reduce automobile dependency (i.e., charge for parking) | 63 |
| Encourage walkability and complete streets (streets designed and operated safely for all users like drivers, cyclists, pedestrians) | 180 |
| Other (please specify) | 55 |

* Based upon 356 respondents

* Respondents allowed up to 2 choices

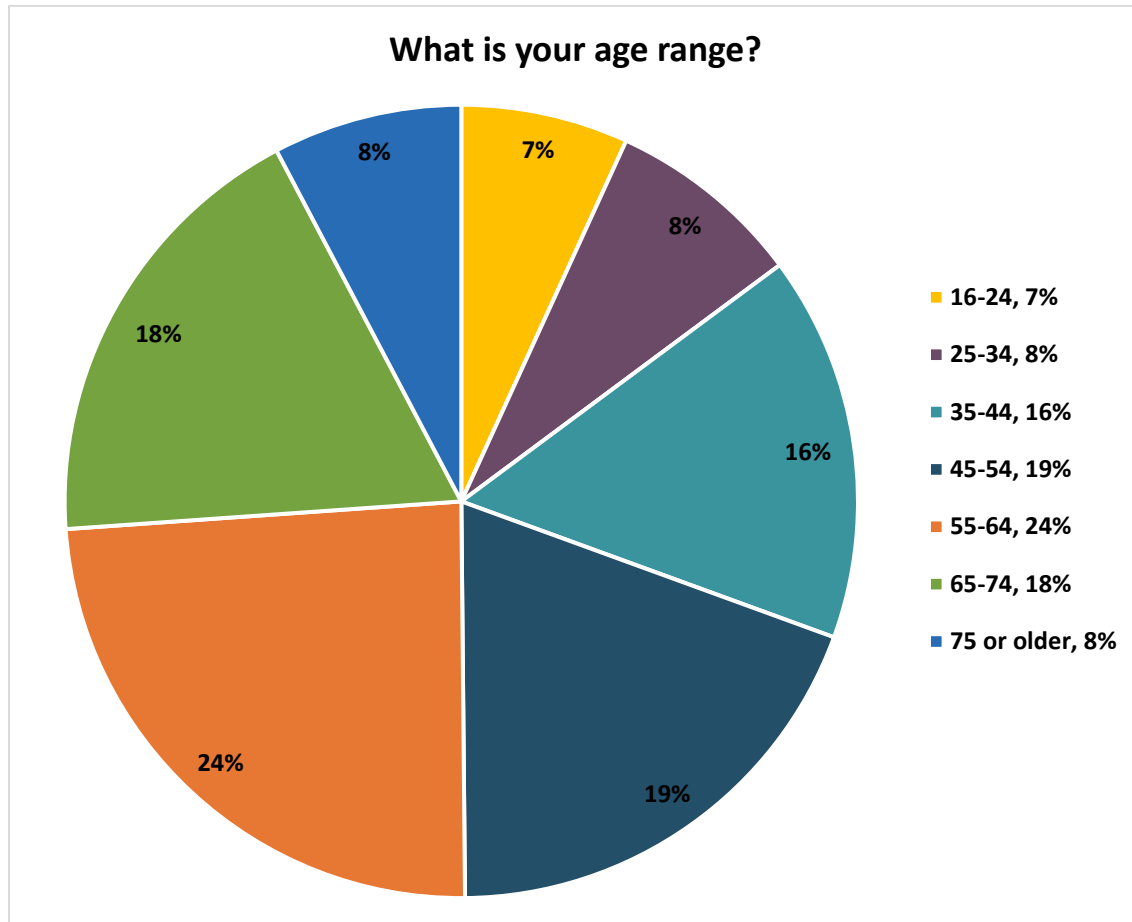
| Common Other Responses Received | # of Responses per Topic |
|---|--------------------------|
| Rail service supplemented by local driving services | 2 |
| Eliminate parking/toll road fees | 6 |

| Common Other Responses Received | # of Responses per Topic |
|---|--------------------------|
| Improve/ increase public transportation (bus, rail) | 9 |
| Incentivize carpools, vanpools, or ridesharing | 1 |
| Reduce residential/ commercial development | 7 |
| Create more multimodal roads (golf cart/ bike friendly) | 2 |
| Increase cost of new development | 3 |
| Encourage work from home environment | 2 |

* Based upon comments made two or more times by 55 respondents.

Demographics

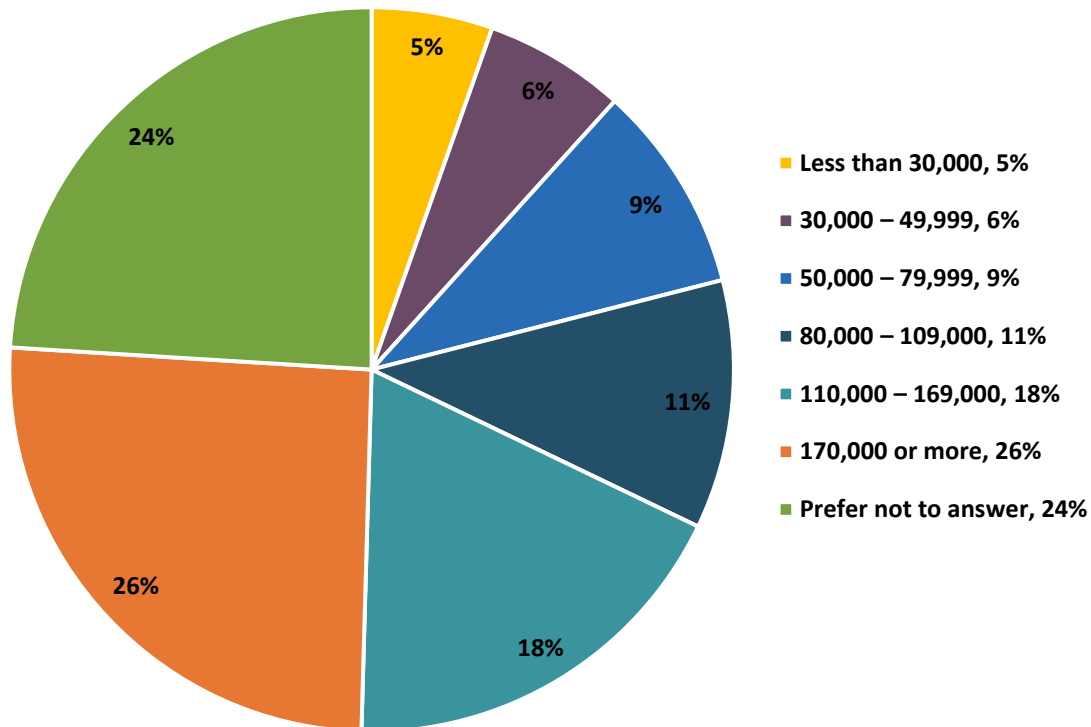
Three questions were asked to assess the demographics of the respondents.



| Option | Total* |
|-------------|--------|
| 16-24 | 23 |
| 25-34 | 27 |
| 35-44 | 53 |
| 45-54 | 65 |
| 55-64 | 81 |
| 65-74 | 62 |
| 75 or older | 26 |

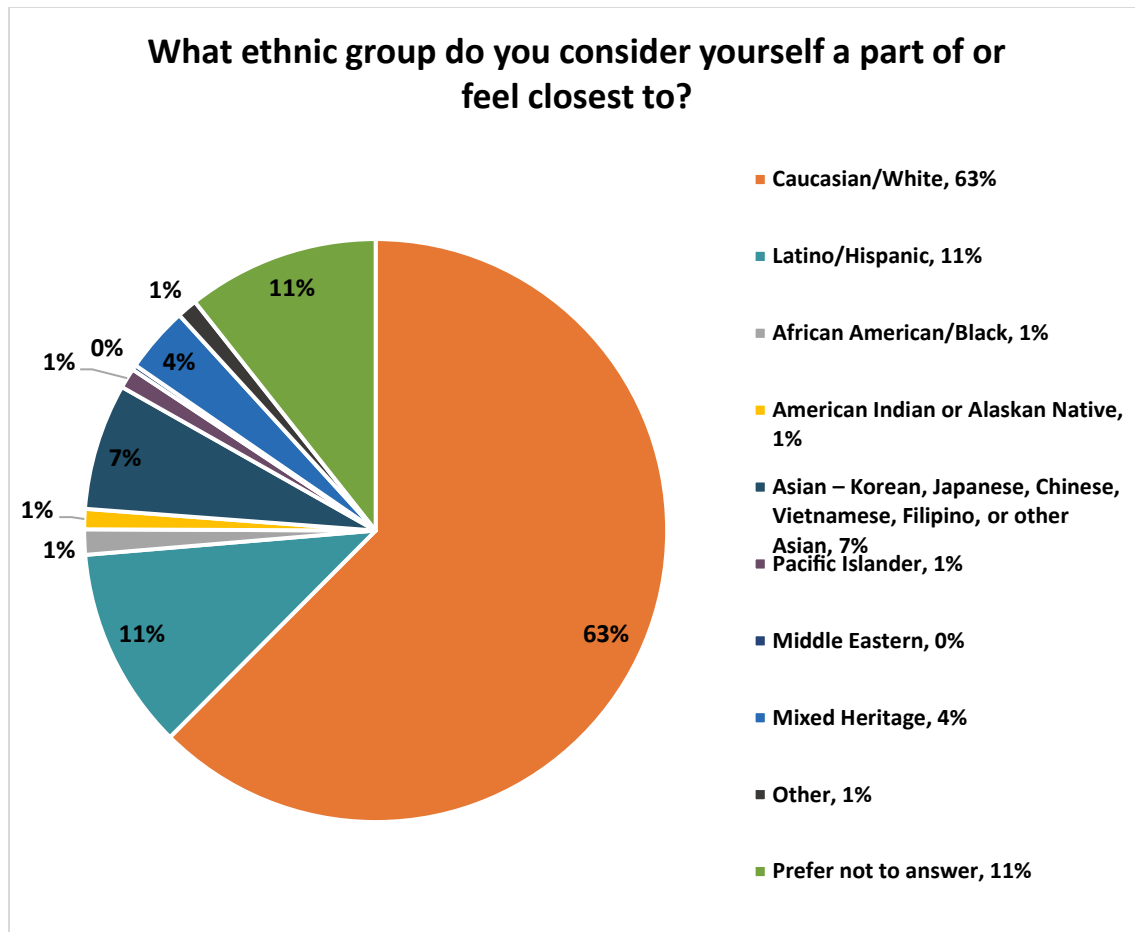
* Based upon 337 respondents

What is your combined annual household income?



| Option | Total* |
|----------------------|--------|
| Less than 30,000 | 18 |
| 30,000 – 49,999 | 21 |
| 50,000 – 79,999 | 31 |
| 80,000 – 109,000 | 37 |
| 110,000 – 169,000 | 61 |
| 170,000 or more | 85 |
| Prefer not to answer | 80 |

* Based upon 333 respondents



| Option | Total* |
|---|--------|
| Caucasian/White | 223 |
| Latino/Hispanic | 40 |
| African American/Black | 5 |
| American Indian or Alaskan Native | 4 |
| Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other Asian | 25 |
| Pacific Islander | 4 |
| Middle Eastern | 1 |
| Mixed Heritage | 13 |
| Other | 4 |
| Prefer not to answer | 38 |

* Based upon 357 respondents

Stay Involved

A total of 90 email contacts were received and were included in the Stakeholder Database to receive notifications, project updates, community meeting invites and to be included in outreach during Phase 2.

CONCLUSION

The collected survey results offered insight that showed respondents recognize the need to address transportation challenges and want to see an increase in alternative transportation frequency and accessibility, a reduction in traffic congestion, and overall safer conditions for all modes of travel. Analysis of the South Orange County Multimodal Transportation Study, along with strategic planning, will help address the various challenges of transportation accessibility while providing mobility opportunities to relieve transportation congestion and acclimating to the county's rising population. During Phase 2 of the PIP, OCTA will be presenting draft multimodal alternatives to the public for review and input. The feedback collected during Phase 2 combined with the public input collected during Phase 1 will provide OCTA a solid foundation to develop recommendations to address future south Orange County's mobility needs.

Appendices

Appendix A

Surveys

**Appendix A.1 Online Survey (English;
Spanish; Mandarin; Korean;
Vietnamese)**

**Appendix A.2 Hard Copy Survey (English;
Spanish; Mandarin; Korean;
Vietnamese)**

Appendix A

Appendix A.1 Online Survey (English; Spanish; Mandarin; Korean; Vietnamese)



OCTA SOCMTS PUBLIC INPUT SURVEY

The Orange County Transportation Authority (OCTA), is conducting a transportation study that will consider transportation needs of residents, commuter, and visitors in south Orange County. The South Orange County Multimodal Transportation Study (SOCMTS) will identify improvements for all modes of transportation, including streets, bus and rail transit, highways and bikeways through the year 2045.

Please take this short survey to provide your input and help OCTA improve transportation in south Orange County.

Take the survey in [Spanish](#), [Mandarin](#), [Korean](#) or [Vietnamese](#).

1. What is your home zip code?

2. When you travel in and around Orange County, how do you normally get from place to place?

You may select up to three choices.

- ☐ Drive alone
- ☐ Carpool/vanpool
- ☐ Bus
- ☐ Metrolink/ Amtrak
- ☐ Bicycle
- ☐ Walk/jog/run
- ☐ Trollies/shuttles
- ☐ On-demand rideshare service (such as Uber or Lyft)
- ☐ ACCESS/paratransit service
- ☐ E-bike/e-scooter

3. What is the most important issue concerning transportation in south Orange County? (pick two)

- ☐ Traffic congestion on local streets and roads
- ☐ Traffic congestion on freeways/highways
- ☐ Greenhouse gases (addressing climate change)
- ☐ Safety
- ☐ Land-use planning (coordinating new development with transportation)
- ☐ Not enough transportation choices (bus, rail, or on-demand microtransit service)

**4. What is the primary challenge to bus and rail travel in south Orange County?
(pick two)**

- ☐ Access to/from destinations
- ☐ Service frequency
- ☐ Travel time
- ☐ Reliability
- ☐ Other

**5. What is the primary challenge of using local streets in south Orange County?
(pick two)**

- ☐ Traffic congestion
- ☐ Intersection delays
- ☐ Potholes/street maintenance
- ☐ Safety for all users (drivers, pedestrians, cyclists)
- ☐ Other

6. What is the primary challenge to using freeways/highways in south Orange County? (pick two)

- ☐ Traffic congestion
- ☐ Unpredictable commute time
- ☐ Back-up at freeway off ramps
- ☐ Safety
- ☐ Other

7. What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (pick two)

- ☐ Gaps in the bikeway and sidewalk network
- ☐ Long distances between trip origins and destinations
- ☐ Safety concerns (lack of physical separation from cars, lack of pedestrian accommodations)
- ☐ Topography (hilly terrain)
- ☐ Other

8. What do you think is the most useful strategy to reduce traffic congestion in south Orange County? (pick two)

- ☐ Work from home programs
- ☐ Rideshare/vanpool programs and facilities
- ☐ Mobility hubs (shared activity centers for connecting bus/shuttle/rideshare/etc.)
- ☐ Pricing (tolled express lanes, charge for parking)
- ☐ Shared mobility (car-share, bike-share, scooter-share)

9. Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most? (pick two)

- ☐ Encourage carpools, vanpools and ridesharing
- ☐ Incorporate tolled express lanes onto existing freeways (91 Express Lanes)
- ☐ Enhance infrastructure to accommodate autonomous (self-driving) vehicles
- ☐ Improve on and off ramps
- ☐ Fix chokepoints (high congestion areas)
- ☐ Other (please specify)

10. Which set of transportation solutions is most important to you? (pick two)

- ☐ Express bus, commuter rail, vanpool and freeway bus rapid transit
- ☐ Local bus, on-demand transit service, and trolleys
- ☐ Pothole repairs, signal synchronization, and intersection improvements
- ☐ Freeway maintenance, on and off ramp enhancements, and projects to improve overall traffic flow
- ☐ Bike lanes, bikeway networks, and pedestrian pathways

11. What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (pick two)

- ☐ Concentrate business development around transit (bus/rail) centers
- ☐ Concentrate new housing developments around transit (bus/rail) centers
- ☐ Develop strategies to reduce automobile dependency (i.e., charge for parking)
- ☐ Encourage walkability and complete streets
(streets designed and operated safely for all users like drivers, cyclists, pedestrians)
- ☐ Other (please specify)

12. Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?

- ☐ Land-use planning (coordinating new development with transportation)
- ☐ Tolloed express lanes on existing freeways
- ☐ Technology to minimize traffic (signal synchronization, autonomous vehicles)
- ☐ Bus, rail, and other transit services
- ☐ Bike lanes, sidewalks/crosswalks, and paved trails
- ☐ Other (please specify)

THANKS FOR YOUR INPUT! NOW, PLEASE TELL US A LITTLE ABOUT YOURSELF. (Optional)

13. What is your worksite zip code if you have one?

14. What is your age range?

☐ 16-24

☐ 55-64

☐ 25-34

☐ 65-74

☐ 35-44

☐ 75 or older

☐ 45-54

15. What is your combined annual household income?

☐ Less than 30,000

☐ 110,000 – 169,000

☐ 30,000 – 49,999

☐ 170,000 or more

☐ 50,000 – 79,999

☐ Prefer not to answer

☐ 80,000 – 109,000

16. What ethnic group do you consider yourself a part of or feel closest to?

☐ Caucasian/White

☐ Pacific Islander

☐ Latino/Hispanic

☐ Middle Eastern

☐ African American/Black

☐ Mixed Heritage

☐ American Indian or Alaskan Native

☐ Other

☐ Asian – Korean, Japanese, Chinese,
Vietnamese, Filipino, or other Asian

☐ Prefer not to answer

17. Sign up to receive project updates and meeting invites

Stay in touch! Sign-up today at octa.net/SouthOCStudy to learn more about the study, upcoming meetings and to receive news updates.



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

La Autoridad de Transporte del Condado de Orange (OCTA) está realizando un estudio sobre transporte que considerará las necesidades de transporte de los residentes, viajeros y visitantes en el condado de Orange del sur. El Estudio sobre el Transporte Multimodal del Condado de Orange del Sur (SOCMTS) identificará mejoras para todas las modalidades de transporte, incluyendo calles, tránsito, autopistas y bicisendas hasta el año 2045.

Por favor realice esta breve encuesta para darnos su opinión y ayudar a la OCTA a mejorar el transporte en el condado de Orange del sur.

1. ¿Cuál es su código postal?

2. Cuando viaja por el condado de Orange, ¿cómo se desplaza habitualmente de un lugar a otro?

Puede seleccionar hasta tres opciones.

- ☐ Conduzco solo
- ☐ Viaje compartido en coche/van
- ☐ Autobús
- ☐ Metrolink/ Amtrak
- ☐ Bicicleta
- ☐ Caminar/trotar/correr
- ☐ Trolebuses/shuttles
- ☐ Servicio de viaje compartido a demanda (como Uber o Lyft)
- ☐ ACCESS/servicio de paratransito
- ☐ Bicicleta eléctrica/scooter eléctrico

3. ¿Cuál es el problema de transporte más importante en el condado de Orange del sur? (seleccione dos)

- ☐ Congestión del tráfico en las calles locales y carreteras
- ☐ Congestión del tráfico en las autopistas
- ☐ Gases de efecto invernadero (resolución del cambio climático)
- ☐ Seguridad
- ☐ Planificación del uso de la tierra (coordinación de los nuevos desarrollos con el transporte)
- ☐ Falta de opciones de transporte suficientes (autobús, tren, o servicio de microtránsito a demanda)

4. ¿Cuál es el principal desafío que plantea viajar en tren o en autobús en el condado de Orange del sur? (seleccione dos)

- ☐ Acceso a/desde los destinos
- ☐ Frecuencia de los servicios
- ☐ Tiempo de viaje
- ☐ Confiabilidad
- ☐ Otros

5. ¿Cuál es el principal desafío a la hora de utilizar las calles locales en el condado de Orange del sur? (seleccione dos)

- ☐ Congestión del tráfico
- ☐ Demoras en las intersecciones
- ☐ Baches/mantenimiento de las calles
- ☐ Seguridad para todos los usuarios (conductores, peatones, ciclistas)
- ☐ Otros
- ☐ Other (please specify)

6. ¿Cuál es el principal desafío a la hora de utilizar las autopistas en el condado de Orange del sur? (seleccione dos)

- ☐ Congestión del tráfico
- ☐ Tiempo de desplazamiento impredecible
- ☐ Asistencia en las salidas de las autopistas
- ☐ Seguridad
- ☐ Otros

7. ¿Cuál es la principal barrera al transporte activo (caminar, bicicleta) en el condado de Orange del sur? (seleccione dos)

- ☐ Deficiencias en la red de bicisendas y sendas peatonales
- ☐ Largas distancias entre el origen y destino de los viajes
- ☐ Problemas de seguridad (falta de separación física respecto de los vehículos, falta de adaptaciones para peatones)
- ☐ Topografía (terreno montañoso)
- ☐ Otros

8. ¿Cuál cree que es la estrategia más útil para reducir la congestión del tráfico en el condado de Orange del sur? (seleccione dos)

- ☐ Programas de trabajo en casa
- ☐ Programas de viaje compartido e instalaciones
- ☐ Centros de movilidad (centros de actividad compartida para conectar los servicios de autobuses/viaje compartido, etc.)
- ☐ Precios (carriles rápidos con peaje, estacionamiento de pago)
- ☐ Movilidad compartida (servicio compartido de vehículos, bicicletas y scooters)

9. Dado el espacio limitado para ampliar el ancho de las autopistas sin impactar en los comercios y residencias, ¿qué medida contribuiría más a gestionar la congestión de las autopistas en el condado de Orange del sur? (seleccione dos)

- ☐ Promover los viajes compartidos
- ☐ Incorporar carriles exprés con peaje a las autopistas existentes (91 carriles exprés)
- ☐ Optimizar la infraestructura para acomodar los vehículos autónomos
- ☐ Mejorar las vías de entrada y salida de las autopistas
- ☐ Solucionar los cuellos de botella (zonas de alta congestión)
- ☐ Otros (por favor, especificar)

10. ¿Qué conjunto de soluciones de transporte es más importante para usted? (seleccione dos)

- ☐ Autobús exprés, tren interurbano, viaje compartido en van y tránsito rápido de autobús por autopista
- ☐ Servicio de autobuses locales, tránsito a demanda y trolebuses
- ☐ Reparación de baches, sincronización de señales y mejoras en las intersecciones
- ☐ Mantenimiento de las autopistas, mejoras en las vías de entrada y salida y proyectos para optimizar el flujo del tráfico en general
- ☐ Carriles especiales para bicicletas, redes de bicisendas y sendas peatonales

11. ¿Cuál es la mejor forma de abordar la congestión del tráfico a través de la planificación del uso de la tierra (coordinación de nuevos desarrollos con el transporte) en el condado de Orange del sur? (seleccione dos)

- ☐ Concentrar el desarrollo de los negocios en torno a los centros de tránsito (autobús/tren)
- ☐ Concentrar los nuevos desarrollos de viviendas en torno a los centros de tránsito (autobuses/trenes)
- ☐ Desarrollar estrategias para reducir la dependencia al automóvil (es decir, estacionamiento de pago)
- ☐ Fomentar la infraestructura para caminar y finalizar las obras en las calles (calles diseñadas y operadas de manera segura para todos los usuarios, como conductores, ciclistas, peatones)
- ☐ Otros (por favor especificar)

12. Teniendo en cuenta que se prevé que la población del condado de Orange del sur continúe creciendo en un futuro cercano, ¿qué estrategia aportaría los mayores beneficios a largo plazo?

- ☐ Planificación del uso de la tierra (coordinación de los nuevos desarrollos con el sistema de transporte)
- ☐ Carriles expés con peaje en las autopistas existentes
- ☐ Tecnología para minimizar el tráfico (sincronización de señales, vehículos autónomos)
- ☐ Bicisendas, sendas peatonales y sendas pavimentadas
- ☐ Otros (por favor, especificar)

¡GRACIAS POR SUS COMENTARIOS! POR FAVOR CUÉNTENOS MÁS SOBRE USTED. (Opcional)

13. ¿Cuál es el código postal de su lugar de trabajo, si corresponde?

14. ¿Cuál es su rango de edad?

☐ 16-24

☐ 55-64

☐ 25-34

☐ 65-74

☐ 35-44

☐ 75 o más

☐ 45-54

15. ¿Cuál es el ingreso anual total de su hogar?

☐ Menos de 30,000

☐ 110,000 – 169,000

☐ 30,000 – 49,999

☐ 170,000 o más

☐ 50,000 – 79,999

☐ Prefiero no responder

☐ 80,000 – 109,000

16. ¿A qué grupo étnico cree que pertenece o con cuál se siente más identificado?

☐ Caucásico/Blanco

☐ Isleño del Pacífico

☐ Latino/Hispano

☐ Procedente de Medio Oriente

☐ Afroamericano/Negro

☐ Herencia mixta

☐ Indio americano o nativo de Alaska

☐ Otros

☐ Asiático – coreano, japonés, chino, vietnamita, filipino u otro

☐ Prefiero no responder

17. Suscríbase para recibir información actualizada sobre los proyectos e invitaciones a las reuniones

Manténgase en contacto. Suscríbase hoy en octa.net/SouthOCStudy para obtener más información sobre el estudio y las próximas reuniones, y para recibir noticias actualizadas.



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

橙县交通管理局（OCTA）正在进行交通研究。这项研究将考虑橙县南部的居民、社区和访客的交通需要。橙县南部多式交通研究（SOCMTS）将确定所有交通模式的改进方案，包括到 2045 年的街道、公共汽车和铁路公交、公路和自行车道。

请您完成这份简短的调查，提供您的意见，帮助 OCTA 改善橙县南部的交通。

1. 您的住家邮政编码是什么？

2. 您在橙县及其周围出行时，通常如何从一个地方到另一个地方？

您可以最多选择三项。

- ☐ 独自驾车
- ☐ 小车/面包车共乘
- ☐ 公共汽车
- ☐ Metrolink/ Amtrak
- ☐ 自行车
- ☐ 步行/慢跑/跑步
- ☐ 电车/班车
- ☐ 按需共乘服务（例如 Uber 或 Lyft）
- ☐ ACCESS/辅助运输服务
- ☐ 电动自行车/电动踏板车

3. 关于橙县南部的交通，最重要的问题是什么？（选择两个）

- ☐ 当地街道和道路上的交通拥堵
- ☐ 高速公路/公路上的交通拥堵
- ☐ 温室气体（应对气候变化）
- ☐ 土地利用规划（对新开发和交通进行协调）
- ☐ 交通运输选项不够（公共汽车，铁路或者按需的微型公交服务）

4. 在橙县南部，公共汽车和铁路面临的主要挑战是什么？（选择两个）

- ☐ 方便往返目的地
- ☐ 服务频率
- ☐ 旅行时间
- ☐ 可靠性
- ☐ 其他

5. 在橙县南部，使用当地街道的主要挑战是什么？（选择两个）

- ☐ 交通拥堵
- ☐ 交叉路口延误
- ☐ 坑洼/街道维修
- ☐ 所有使用者（驾驶人，行人，骑自行车的人）的安全
- ☐ 其他

6. 在橙县南部，使用高速公路/公路的主要挑战是什么？（选择两个）

- ☐ 交通拥堵
- ☐ 通勤时间不可预测
- ☐ 在高速公路出口匝道排队等候
- ☐ 安全
- ☐ 其他

7. 在橙县南部，积极交通（步行，骑自行车）的最大障碍是什么？（选择两个）

- ☐ 自行车道与人行道网络中的空隙
- ☐ 出发地与目的地自己的距离较远
- ☐ 安全问题（与汽车没有物理隔离，没有信任转让设施）
- ☐ 地形（丘陵地带）
- ☐ 其他

8. 您认为减少橙县南部交通拥堵的最有效策略是什么？（选择两个）

- ☐ 在家工作方案
- ☐ 共乘车/共乘方案和设施
- ☐ 移动中心（用于连接公共汽车/班车/共乘车的共享活动中心）
- ☐ 收费（收费高速公路，停车费）
- ☐ 共享出行（汽车共享，自行车共享，踏板车共享）

9. 在不影响企业和住宅的前提下利用有限的空间来拓宽高速公路，哪一项可以最大程度地管理橙县南部高速公路的拥堵？（选择两个）

- ☐ 鼓励小车共乘，面包车共乘和拼车
- ☐ 把收费车道纳入现有的高速公路（91号公路快速车道）
- ☐ 加强基础设施以适用自动（自动驾驶）车辆
- ☐ 改善高速公路出入口坡道
- ☐ 疏通阻塞点（高拥挤区域）
- ☐ 其他（请具体说明）

10. 您认为哪一组交通运输解决方案最重要？（选择两个）

- ☐ 快速公共汽车、通勤铁路、面包车共乘和高速公路公共汽车快速运输
- ☐ 当地公共汽车、按需公交服务和电车
- ☐ 坑洼修复、信号同步和交叉路口改善
- ☐ 高速公路维护、出入口坡道改善和改善整体交通流量的项目
- ☐ 自行车道、自行车道网络和人行道

11. 在橙县南部，通过土地利用规划（对新开发和交通进行协调）解决交通拥堵的最佳方法是什么？（选择两个）

- ☐ 集中公交（公共汽车/铁路）中心周围的业务发展
- ☐ 集中公交（公共汽车/铁路）中心周围的住房开发
- ☐ 制定减少依赖汽车的策略（即收停车费）
- ☐ 鼓励步行和整条街道（为驾驶人、骑自行车的人和行人等所有志愿者安全设计和运营的街道）
- ☐ 其他（请具体说明）

12. 考虑到橙县南部的人口预计在可以一建的将来会继续增长，哪种策略将提供最大的长期利益？

- ☐ 土地利益规划（对新开发和交通进行协调）
- ☐ 现有高速公路上的收费快车道
- ☐ 减少交通的技术（信号同步，自动驾驶车辆）
- ☐ 公共汽车、铁路和其他公交服务
- ☐ 自行车道、人行道/人行横道和铺面小径
- ☐ 其他（请具体说明）

谢谢您的意见！现在，请向我们稍微介绍一下您自己。（可选）

13. 如果有的话，您的工作地点的邮政编码是什么？

14. 您在哪个年龄段？

- | | |
|----------------------------------|----------------------------------|
| <input type="checkbox"/> 16-24 岁 | <input type="checkbox"/> 55-64 岁 |
| <input type="checkbox"/> 25-34 岁 | <input type="checkbox"/> 65-74 岁 |
| <input type="checkbox"/> 35-44 岁 | <input type="checkbox"/> 75 岁以上 |
| <input type="checkbox"/> 45-54 岁 | |

15. 您的家庭年总收入是多少？

- | | |
|---|--|
| <input type="checkbox"/> 低于30,000 | <input type="checkbox"/> 110,000 - 169,000 |
| <input type="checkbox"/> 30,000 - 49,999 | <input type="checkbox"/> 170,000 以上 |
| <input type="checkbox"/> 50,000 - 79,999 | <input type="checkbox"/> 不愿回答 |
| <input type="checkbox"/> 80,000 - 109,000 | |

16. 您认为自己属于或者最接近哪个种族？

- | | |
|---|--------------------------------|
| <input type="checkbox"/> 高加索人/白人 | <input type="checkbox"/> 太平洋岛民 |
| <input type="checkbox"/> 拉丁裔/西班牙裔 | <input type="checkbox"/> 中东人 |
| <input type="checkbox"/> 非洲裔美国人/黑人 | <input type="checkbox"/> 混合族裔 |
| <input type="checkbox"/> 美洲印第安人或阿拉斯加原住民 | <input type="checkbox"/> 其他 |
| <input type="checkbox"/> 亚裔 - 韩国人、日本人、中国人、越南人、菲律宾人或其他亚裔 | <input type="checkbox"/> 不愿回答 |

17. 注册接收项目更新资讯和会议邀请

保持联系。今天就在octa.net/SouthOCStudy上注册，以了解有关该研究的更多信息、即将举行的会议并接收新闻更新。



OCTA SOCMTS PUBLIC INPUT SURVEY – Korean

오렌지 카운티 교통국(OCTA)은 지역 주민들, 통근자들 및 남부 오렌지 카운티 방문객들의 교통 요구를 고려하여 교통 연구를 수행하고 있습니다. 남부 오렌지 카운티 복합 교통수단 연구(SOCMTS)는 2045년에 걸쳐 자동차 도로, 버스와 철도 대중 교통, 고속도로 및 자전거 도로를 포함한 모든 교통 수단에 대한 개선책들을 강구할 것입니다.

이 짧은 설문조사를 통해 의견을 주셔서 OCTA가 남부 오렌지 카운티의 교통을 개선하는데 도움을 주시기 바랍니다.

1. 집 우편번호는 어떻게 되나요?

2. 오렌지 카운티 안에서 또는 주위를 다닐 때 보통 한 곳에서 다른 곳으로 어떻게 이동 하나요?

응답을 세 개까지 선택할 수 있습니다.

- ☐ 혼자 운전
- ☐ 카풀/밴풀
- ☐ 버스
- ☐ 메트로링크/엠트랙
- ☐ 자전거
- ☐ 걷기/조깅/달리기
- ☐ 트롤리/셔틀
- ☐ 차량 공유 서비스(예: **Uber** 또는 **Lyft**)
- ☐ **ACCESS**/보조 대중교통
- ☐ 전기 자전거/전자 스쿠터

3. 남부 오렌지 카운티의 교통과 관련하여 가장 중요한 문제는 무엇입니까? (2 개만 선택)

- ☐ 거리와 도로의 교통 체증
- ☐ 프리웨이/고속도로의 교통 체증
- ☐ 온실 가스 (기후 변화 원인)
- ☐ 안전
- ☐ 토지 사용 계획 (교통 수단 변화와 함께)
- ☐ 교통 수단 선택이 많지 않음 (버스, 철도 또는 초소형 교통 수단)

4. 남부 오렌지 카운티에서 버스와 철도를 사용할 때 가장 큰 문제는 무엇입니까? (2 개만 선택)

- ☐ 목적지까지/로부터 접근
- ☐ 서비스 빈도
- ☐ 여행 시간
- ☐ 신뢰도
- ☐ 기타

5. 남부 오렌지 카운티에서 지역내 도로를 사용할 때 가장 큰 문제는 무엇입니까? (2 개만 선택)

- ☐ 교통 체증
- ☐ 교차로 지연
- ☐ 포트홀/도로 관리
- ☐ 모든 사용자(운전자, 보행자, 자전거)들을 위한 안전
- ☐ 기타

6. 남부 오렌지 카운티에서 프리웨이/고속도로를 사용할 때 가장 큰 문제는 무엇입니까? (2 개만 선택)

- ☐ 교통 체증
- ☐ 예측할 수 없는 통근 시간
- ☐ 프리웨이에서 램프 출구 교통 정체
- ☐ 안전
- ☐ 기타

7. 남부 오렌지 카운티에서 걸거나 자전거 탈 때 가장 큰 장벽은 무엇입니까? (2 개만 선택)

- ☐ 자전거 도로 또는 걷는 길이 끊어진다
- ☐ 출발지와 목적지 사이에 거리가 멀다
- ☐ 안전 문제 (자동차와의 물리적 분리 부족, 보행자 편의 시설 부족)
- ☐ 지형 (언덕이 많음)
- ☐ 기타

8. 남부 오렌지 카운티의 교통 혼잡을 줄이는데 가장 좋은 전략은 무엇이라고 생각하십니까? (2 개만 선택)

- ☐ 재택 근무
- ☐ 차량공유/밴풀 및 시설
- ☐ 이동수단 허브 (버스/셔틀/차량공유 등을 연결하는 활동 센터)
- ☐ 요금부과 (유료 익스프레스 레인, 유료 주차)
- ☐ 이동수단 공유 (자동차 공유, 자전거 공유, 스쿠터 공유)

9. 상점들과 주택에 영향을 주지 않고 프리웨이를 확장하는데 공간이 부족한 상황에서, 남부 오렌지 카운티 프리웨이 체증을 관리하는 데 가장 도움이 되는 것은? (2 개만 선택)

- ☐ 카풀, 밴풀 및 차량 공유를 장려한다
- ☐ 기존 프리웨이(91 익스프레스 레인)에 유료 익스프레스 레인을 통합한다
- ☐ 자율주행(셀프 드라이빙) 차량을 위해 인프라 강화한다
- ☐ 램프 진입 및 출구시 정체 개선
- ☐ 정체 구간 개선 (교통 체증 지역)
- ☐ 기타 (구체적으로 기재)

10. 귀하에게 가장 중요한 교통 수단은 무엇입니까? (2 개만 선택)

- ☐ 익스프레스 버스, 통근 전철, 밴풀, 프리웨이 급행 버스
- ☐ 지역 버스, 주문형 교통 서비스 및 트롤리
- ☐ 포트홀 수리, 신호 동기화 및 교차로 개선
- ☐ 프리웨이 유지 관리, 램프 진입 및 출구 개선, 전반적인 교통 흐름 개선 프로젝트
- ☐ 자전거 레인, 자전거 도로망, 보행자 길

11. 남부 오렌지 카운티의 토지 사용 계획(교통 수단 변화와 함께)을 통해 교통 체증을 해결하는 가장 좋은 방법은 무엇입니까? (2 개만 선택)

- ☐ 대중 교통(버스/철도) 센터 주변에 비즈니스 개발에 집중한다
- ☐ 대중 교통(버스/철도) 센터 주변에 새로운 주거지 개발에 집중한다
- ☐ 자동차 의존도를 줄이는 전략을 개발한다 (예: 유료 주차)
- ☐ 걷기 쉽고 운전자, 자전거, 보행자 모두에게 안전한 거리를 만든다
- ☐ 기타(구체적으로)

12. 남부 오렌지 카운티의 인구가 계속 증가할 것으로 예상되는 것을 고려할 때 장기적인 혜택을 위한 가장 좋은 전략은 무엇입니까?

- ☐ 토지 사용 계획 (교통 수단 변화와 함께)
- ☐ 기존 프리웨이에 유료 익스프레스 레인 설치
- ☐ 교통량을 최소화 하는 기술(신호 동기화, 자율 주행 차)
- ☐ 버스, 철도 및 기타 대중 교통 서비스
- ☐ 자전거 도로, 인도/횡단 보도 및 포장된 트레일
- ☐ 기타(구체적으로)

의견을 주셔서 감사합니다! 본인에 대하여 좀 말씀해 주시기 바랍니다. (선택)

13. 직장 우편번호는 어떻게 됩니까?

14. 연령대는 어떻게 되십니까?

☐ 16-24 세

☐ 55-64 세

☐ 25-34 세

☐ 65-74 세

☐ 35-44 세

☐ 75 세 이상

☐ 45-54 세

15. 가계 총 소득은 얼마입니까?

☐ 30,000불 미만

☐ 110,000 - 169,000 불

☐ 30,000 - 49,999 불

☐ 170,000 불 이상

☐ 50,000 - 79,999 불

☐ 답하고 싶지 않음

☐ 80,000 - 109,000 불

16. 어떤 인종 그룹에 속하신다고 생각하십니까?

☐ 백인

☐ 태평양 도서인

☐ 라틴계/히스패닉

☐ 중동인

☐ 흑인

☐ 혼혈인

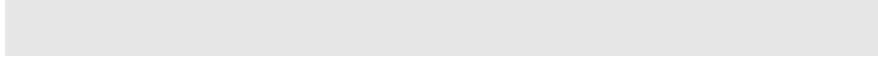
☐ 아메리칸 인디언 또는 알래스카 원주민

☐ 기타

☐ 아시아 - 한국, 일본, 중국, 베트남, 필리핀
또는 기타 아시아

☐ 답하고 싶지 않음

17. 프로젝트 업데이트 및 회의 초대를 받으려면 등록하십시오



참여 방법. 웹사이트 octa.net/SouthOCStudy에서 등록하신 다음 연구, 미팅들에 대해 자세히 알아보고 뉴스 업데이트도 받으십시오.



OCTA SOCMTS PUBLIC INPUT SURVEY – Vietnamese

Cơ quan Giao thông Vận chuyển Quận Orange (OCTA), đang tiến hành một cuộc nghiên cứu về giao thông vận chuyển sẽ xem xét nhu cầu vận chuyển của cư dân, người đi làm và du khách ở khu vực phía nam Quận Cam. Cuộc Nghiên cứu Giao thông Vận chuyển Đa phương thức của Khu vực phía Nam Quận Orange (SOCMTS) sẽ xác định các cải tiến cho tất cả các phương thức vận chuyển, bao gồm các đường phố, các phương tiện xe buýt và đường sắt, đường cao tốc và đường dành cho xe đạp cho đến cuối năm 2045.

Xin vui lòng thực hiện cuộc khảo sát ngắn này để cung cấp ý kiến đóng góp của quý vị và trợ giúp OCTA cải thiện phương tiện đi lại ở khu vực phía nam Quận Orange.

1. Mã zip nhà của quý vị là gì?

2. Khi quý vị đi lại trong và xung quanh Quận Cam, quý vị thường đi từ nơi này đến nơi khác bằng cách nào?

Quý vị có thể chọn tối đa ba lựa chọn.

- ☐ Lái xe một mình
- ☐ Đi chung xe / xe van
- ☐ Xe buýt
- ☐ Metrolink / Amtrak
- ☐ Xe đạp
- ☐ Đi bộ / chạy bộ / chạy
- ☐ Xe điện (Trolleys) / xe đưa đón
- ☐ Dịch vụ đi chung xe theo yêu cầu (chẳng hạn như Uber hoặc Lyft)
- ☐ TIẾP CẬN / dịch vụ vận chuyển phụ
- ☐ Xe đạp điện / xe tay ga điện

3. Vấn đề quan trọng nhất liên quan đến giao thông vận chuyển ở phía nam Quận Cam là gì? o (Chỉ chọn hai)

- ☐ Tắc nghẽn giao thông trên đường phố và đường địa phương
- ☐ Ùn tắc giao thông trên xa lộ / đường cao tốc
- ☐ Khí thải từ nhà kính (giải quyết biến đổi khí hậu)
- ☐ Sự an toàn
- ☐ Quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận chuyển)
- ☐ Không có đủ các lựa chọn phương tiện đi lại (xe buýt, đường sắt hoặc dịch vụ đi lại vi mô theo yêu cầu)

4. Khó khăn chính đối với việc đi lại bằng xe buýt và đường sắt ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Tiếp cận đến / đi từ các điểm đến
- ☐ Tần suất dịch vụ
- ☐ Thời gian du lịch
- ☐ Độ tin cậy
- ☐ Điều khác

5. Khó khăn chính của việc sử dụng các đường phố địa phương ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Ùn tắc giao thông
- ☐ Chậm trễ tại giao lộ
- ☐ Ổ gà / bảo trì đường phố
- ☐ An toàn cho tất cả các người sử dụng (người lái xe, người đi bộ, người đi xe đạp)
- ☐ Khác

6. Thách thức chính đối với việc sử dụng xa lộ / đường cao tốc ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Ùn tắc giao thông
- ☐ Thời gian đi làm không lường trước được
- ☐ Kẹt xe tại lối ra khỏi xa lộ
- ☐ Sự an toàn
- ☐ Khác

7. Rào cản quan trọng nhất đối với phương tiện giao thông tích cực (đi bộ, đi xe đạp) ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Khoảng trống trong mạng lưới đường dành cho xe đạp và vỉa hè
- ☐ Khoảng cách xa giữa điểm xuất phát và điểm đến của chuyến đi
- ☐ Mối quan tâm về an toàn (thiếu ngăn cách vật thể đối với ô tô, thiếu tiện nghi cho người đi bộ)
- ☐ Địa hình (địa hình đồi núi)
- ☐ Điều khác

8. Quý vị nghĩ chiến lược hữu ích nhất để giảm tắc nghẽn giao thông ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Các chương trình làm việc tại nhà
- ☐ Các chương trình và cơ sở đi chung xe / đi chung xe van
- ☐ Các trung tâm di động (các trung tâm hoạt động chung để kết nối xe buýt / xe đưa đón / đi chung xe / v.v.)
- ☐ Định giá (thu phí làn đường cao tốc, phí đậu xe)
- ☐ Di chuyển chung (chia sẻ ô tô, chia sẻ xe đạp, chia sẻ xe tay ga)

9. Với không gian hạn chế để mở rộng xa lộ mà không gây ảnh hưởng đến các doanh nghiệp và cư dân, điều nào có thể giúp quản lý vấn đề tắc nghẽn xa lộ ở phía nam Quận Cam nhiều nhất? (Chỉ chọn hai)

- ☐ Khuyến khích đi chung xe ô tô, xe van và đi chung xe kiểu tắc-xi
- ☐ Kết hợp các làn đường cao tốc có thu phí vào các đường cao tốc hiện có (Làn đường Tốc hành xa lộ 91)
- ☐ Tăng cường cơ sở hạ tầng để đáp ứng các phương tiện tự lái (tự lái)
- ☐ Cải thiện trên các lối vào và lối ra khỏi xa lộ
- ☐ Khắc phục các điểm tắc nghẽn (khu vực tắc nghẽn cao)
- ☐ Điều Khác (vui lòng nêu cụ thể)

10. Loạt giải pháp giao thông vận chuyển nào quan trọng nhất đối với quý vị? (Chỉ chọn hai)

- ☐ Xe buýt tốc hành, xe hỏa đưa đi làm, xe vanpool và xe buýt nhanh trên xa lộ
- ☐ Xe buýt địa phương, dịch vụ vận chuyển theo yêu cầu và xe điện
- ☐ Sửa chữa ổ gà, đồng bộ hóa đèn hiệu giao thông và cải tiến giao lộ
- ☐ Bảo trì đường cao tốc, cải tiến các lối ra vào xa lộ và các dự án cải thiện luồng giao thông tổng thể
- ☐ Làn đường dành cho xe đạp, mạng lưới đường dành cho xe đạp và đường dành cho người đi bộ

11. Cách tốt nhất để giải quyết tình trạng tắc nghẽn giao thông thông qua quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận tải) ở phía nam Quận Cam là gì? (Chỉ chọn hai)

- ☐ Tập trung phát triển kinh doanh xung quanh các trung tâm vận chuyển (xe buýt / đường sắt)
- ☐ Tập trung các dự án phát triển nhà ở mới xung quanh các trung tâm vận chuyển (xe buýt / đường sắt)
- ☐ Phát triển các chiến lược để giảm sự phụ thuộc vào ô tô (tức là phí đậu xe)
- ☐ Khuyến khích khả năng đi bộ và đường phố hoàn chỉnh (đường phố được thiết kế và vận hành an toàn cho tất cả người dùng như người lái xe, người đi xe đạp, người đi bộ)
- ☐ Điều khác (vui lòng ghi rõ)

12. Xem xét rằng dân số phía Nam Quận Cam dự kiến sẽ tiếp tục tăng trong tương lai gần, chiến lược nào sẽ mang lại lợi ích lâu dài nhất?

- ☐ Quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận tải)
- ☐ Dịch vụ xe buýt, đường sắt và các dịch vụ vận chuyển khác
- ☐ Làn đường cao tốc có thu phí trên các xa lộ hiện hữu
- ☐ Làn đường dành cho xe đạp, vỉa hè / lối đi bộ sang đường và lối mòn lát đá
- ☐ Công nghệ giảm thiểu giao thông (đồng bộ hóa tín hiệu, xe tự hành)
- ☐ Điều khác (vui lòng ghi rõ)

CẢM ƠN Ý KIẾN ĐÓNG GÓP CỦA QUÝ VỊ! NGAY BÂY GIỜ, HÃY NÓI CHO CHÚNG TÔI BIẾT ĐÔI CHÚT VỀ BẢN THÂN QUÝ VỊ. (Không bắt buộc)

13. Mã zip nơi làm việc của quý vị là gì nếu quý vị có?

14. Độ tuổi của quý vị là bao nhiêu?

☐ 16-24

☐ 55-64

☐ 25-34

☐ 65-74

☐ 35-44

☐ 75 tuổi trở lên

☐ 45-54

15. Tổng số thu nhập trong hộ gia đình hàng năm của quý vị là bao nhiêu?

☐ Dưới 30.000

☐ 110.000 - 169.000

☐ 30.000 - 49.999

☐ 170,000 trở lên

☐ 50.000 - 79.999

☐ Không thích trả lời

☐ 80.000 - 109.000

16. Quý vị coi mình là một phần của hoặc cảm thấy gần gũi nhất với nhóm dân tộc nào?

☐ Caucasian / Da trắng

☐ Người đảo Thái Bình Dương

☐ Người gốc La tinh / gốc Tây Ban Nha

☐ Người Trung Đông

☐ Người Mỹ gốc Phi châu / Da đen

☐ Người Hợp chủng

☐ Người Mỹ Da đỏ hoặc thổ dân Alaska

☐ Khác

☐ Người Á Châu - Hàn Quốc, Nhật Bản, Trung Quốc, Việt Nam, Philippines, hoặc người Châu Á khác

☐ Không thích trả lời

17. Đăng ký để nhận thông tin cập nhật về dự án và lời mời họp

GIỮ LIÊN LẠC. Đăng ký ngay hôm nay tại octa.net/SouthOCStudy để tìm hiểu thêm về cuộc nghiên cứu, các cuộc họp sắp tới và nhận các bản cập nhật tin tức.

Appendix A

Appendix A.2 Hard Copy Survey (English; Spanish; Mandarin; Korean; Vietnamese)

PUBLIC INPUT Survey



1 What is your home zip code?

2 When you travel in and around Orange County, how do you normally get from place to place?

You may select up to three choices.

- ☐ Drive alone
- ☐ Carpool/vanpool
- ☐ Bus
- ☐ Metrolink/ Amtrak
- ☐ Bicycle
- ☐ Walk/jog/run
- ☐ Trolleys/shuttles
- ☐ On-demand rideshare service (such as Uber or Lyft)
- ☐ ACCESS/paratransit service
- ☐ E-bike/e-scooter

3 What is the most important issue concerning transportation in south Orange County? (pick one)

- ☐ Traffic congestion on local streets and roads
- ☐ Traffic congestion on freeways/highways
- ☐ Greenhouse gases (addressing climate change)
- ☐ Safety
- ☐ Land-use planning (coordinating new development with transportation)
- ☐ Not enough transportation choices (bus, rail, or on-demand microtransit service)

4 What is the primary challenge to bus and rail travel in south Orange County? (pick one)

- ☐ Access to/from destinations
- ☐ Service frequency
- ☐ Travel time
- ☐ Reliability
- ☐ Other

5 What is the primary challenge of using local streets in south Orange County? (pick one)

- ☐ Traffic congestion
- ☐ Intersection delays
- ☐ Potholes/street maintenance
- ☐ Safety for all users (drivers, pedestrians, cyclists)
- ☐ Other

6 What is the primary challenge to using freeways/highways in south Orange County? (pick one)

- ☐ Traffic congestion
- ☐ Unpredictable commute time
- ☐ Back-up at freeway off ramps
- ☐ Safety
- ☐ Other

7 What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (pick one)

- ☐ Gaps in the bikeway and sidewalk network
- ☐ Long distances between trip origins and destinations
- ☐ Safety concerns (lack of physical separation from cars, lack of pedestrian accommodations)
- ☐ Topography (hilly terrain)
- ☐ Other

8 What do you think is the most useful strategy to reduce traffic congestion in south Orange County? (pick one)

- ☐ Work from home programs
- ☐ Rideshare/vanpool programs and facilities
- ☐ Mobility hubs (shared activity centers for connecting bus/shuttle/rideshare/etc.)
- ☐ Pricing (tolled express lanes, charge for parking)
- ☐ Shared mobility (car-share, bike-share, scooter-share)

Continued on other side →

9 Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most? (pick one)

- ☐ Encourage carpools, vanpools and ridesharing
- ☐ Incorporate tolled express lanes onto existing freeways (91 Express Lanes)
- ☐ Enhance infrastructure to accommodate autonomous (self-driving) vehicles
- ☐ Improve on and off ramps
- ☐ Fix chokepoints (high congestion areas)
- ☐ Other (please be specific)

10 Which set of transportation solutions is most important to you? (pick one)

- ☐ Express bus, commuter rail, vanpool and freeway bus rapid transit
- ☐ Local bus, on-demand transit service, and trollies
- ☐ Pothole repairs, signal synchronization, and intersection improvements
- ☐ Freeway maintenance, on and off ramp enhancements, and projects to improve overall traffic flow
- ☐ Bike lanes, bikeway networks, and pedestrian pathways

11 What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (pick one)

- ☐ Concentrate business development around transit (bus/rail) centers
- ☐ Concentrate new housing developments around transit (bus/rail) centers
- ☐ Develop strategies to reduce automobile dependency (i.e., charge for parking)
- ☐ Encourage walkability and complete streets (streets designed and operated safely for all users like drivers, cyclists, pedestrians)
- ☐ Other (please specify)

12 Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?

- ☐ Land-use planning (coordinating new development with transportation)
- ☐ Tolled express lanes on existing freeways
- ☐ Technology to minimize traffic (signal synchronization, autonomous vehicles)
- ☐ Bus, rail, and other transit services
- ☐ Bike lanes, sidewalks/crosswalks, and paved trails
- ☐ Other (please specify)

THANKS FOR YOUR INPUT! NOW, PLEASE TELL US A LITTLE ABOUT YOURSELF. (Optional)

13 What is your worksite zip code if you have one?

14 What is your age range?

- | | |
|--------------------------------|--------------------------------------|
| <input type="checkbox"/> 16-24 | <input type="checkbox"/> 55-64 |
| <input type="checkbox"/> 25-34 | <input type="checkbox"/> 65-74 |
| <input type="checkbox"/> 35-44 | <input type="checkbox"/> 75 or older |
| <input type="checkbox"/> 45-54 | |

15 What is your combined annual household income?

- | | |
|---|---|
| <input type="checkbox"/> Less than 30,000 | <input type="checkbox"/> 110,000 – 169,000 |
| <input type="checkbox"/> 30,000 – 49,999 | <input type="checkbox"/> 170,000 or more |
| <input type="checkbox"/> 50,000 – 79,999 | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> 80,000 – 109,000 | |

16 What ethnic group do you consider yourself a part of or feel closest to?

- | | |
|--|---|
| <input type="checkbox"/> Caucasian/White | <input type="checkbox"/> Pacific Islander |
| <input type="checkbox"/> Latino/Hispanic | <input type="checkbox"/> Middle Eastern |
| <input type="checkbox"/> African American/Black | <input type="checkbox"/> Mixed Heritage |
| <input type="checkbox"/> American Indian or Alaskan Native | <input type="checkbox"/> Other |
| <input type="checkbox"/> Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other Asian | <input type="checkbox"/> Prefer not to answer |

17 Sign up to receive project updates and meeting invites

☐ Email Address _____

CONTACT INFORMATION:

 Marissa Espino, Community Relations Officer

 mespino@octa.net

 833. 711. 8070

 octa.net/SouthOCStudy

Encuesta sobre **OPINIÓN PÚBLICA**



1 ¿Cuál es su código postal?

2 Cuando viaja por el condado de Orange, ¿cómo se desplaza habitualmente de un lugar a otro?

Puede seleccionar hasta tres opciones.

- ☐ Conduzco solo
- ☐ Viaje compartido en coche/van
- ☐ Autobús
- ☐ Metrolink/ Amtrak
- ☐ Bicicleta
- ☐ Caminar/trotar/correr
- ☐ Trolebuses/shuttles
- ☐ Servicio de viaje compartido a demanda (como Uber o Lyft)
- ☐ ACCESS/servicio de paratransito
- ☐ Bicicleta eléctrica/scooter eléctrico

3 ¿Cuál es el problema de transporte más importante en el condado de Orange del sur? (seleccione uno)

- ☐ Congestión del tráfico en las calles locales y carreteras
- ☐ Congestión del tráfico en las autopistas
- ☐ Gases de efecto invernadero (resolución del cambio climático)
- ☐ Seguridad
- ☐ Planificación del uso de la tierra (coordinación de los nuevos desarrollos con el transporte)
- ☐ Falta de opciones de transporte suficientes (autobús, tren, o servicio de microtránsito a demanda)

4 ¿Cuál es el principal desafío que plantea viajar en tren o en autobús en el condado de Orange del sur? (seleccione uno)

- ☐ Acceso a/desde los destinos
- ☐ Frecuencia de los servicios
- ☐ Tiempo de viaje
- ☐ Confiabilidad
- ☐ Otros

5 ¿Cuál es el principal desafío a la hora de utilizar las calles locales en el condado de Orange del sur? (seleccione uno)

- ☐ Congestión del tráfico
- ☐ Demoras en las intersecciones
- ☐ Baches/mantenimiento de las calles
- ☐ Seguridad para todos los usuarios (conductores, peatones, ciclistas)
- ☐ Otros

6 ¿Cuál es el principal desafío a la hora de utilizar las autopistas en el condado de Orange del sur? (seleccione uno)

- ☐ Congestión del tráfico
- ☐ Tiempo de desplazamiento impredecible
- ☐ Asistencia en las salidas de las autopistas
- ☐ Seguridad
- ☐ Otros

7 ¿Cuál es la principal barrera al transporte activo (caminar, bicicleta) en el condado de Orange del sur? (seleccione una)

- ☐ Deficiencias en la red de bisesendas y sendas peatonales
- ☐ Largas distancias entre el origen y destino de los viajes
- ☐ Problemas de seguridad (falta de separación física respecto de los vehículos, falta de adaptaciones para peatones)
- ☐ Topografía (terreno montañoso)
- ☐ Otros

8 ¿Cuál cree que es la estrategia más útil para reducir la congestión del tráfico en el condado de Orange del sur? (seleccione una)

- ☐ Programas de trabajo en casa
- ☐ Programas de viaje compartido e instalaciones
- ☐ Centros de movilidad (centros de actividad compartida para conectar los servicios de autobuses/viaje compartido, etc.)
- ☐ Precios (carriles rápidos con peaje, estacionamiento de pago)
- ☐ Movilidad compartida (servicio compartido de vehículos, bicicletas y scooters)

Continúa en el reverso →

- 9** Dado el espacio limitado para ampliar el ancho de las autopistas sin impactar en los comercios y residencias, ¿qué medida contribuiría más a gestionar la congestión de las autopistas en el condado de Orange del sur? (seleccione una)

- ☐ Promover los viajes compartidos
- ☐ Incorporar carriles exprés con peaje a las autopistas existentes (91 carriles exprés)
- ☐ Optimizar la infraestructura para acomodar los vehículos autónomos
- ☐ Mejorar las vías de entrada y salida de las autopistas
- ☐ Solucionar los cuellos de botella (zonas de alta congestión)
- ☐ Otros (por favor, especificar)

- 10** ¿Qué conjunto de soluciones de transporte es más importante para usted? (seleccione uno)

- ☐ Autobús exprés, tren interurbano, viaje compartido en van y tránsito rápido de autobús por autopista
- ☐ Servicio de autobuses locales, tránsito a demanda y trolebuses
- ☐ Reparación de baches, sincronización de señales y mejoras en las intersecciones
- ☐ Mantenimiento de las autopistas, mejoras en las vías de entrada y salida y proyectos para optimizar el flujo del tráfico en general
- ☐ Carriles especiales para bicicletas, redes de bicisendas y sendas peatonales

- 11** ¿Cuál es la mejor forma de abordar la congestión del tráfico a través de la planificación del uso de la tierra (coordinación de nuevos desarrollos con el transporte) en el condado de Orange del sur? (seleccione uno)

- ☐ Concentrar el desarrollo de los negocios en torno a los centros de tránsito (autobús/tren)
- ☐ Concentrar los nuevos desarrollos de viviendas en torno a los centros de tránsito (autobuses/trenes)
- ☐ Desarrollar estrategias para reducir la dependencia al automóvil (es decir, estacionamiento de pago)
- ☐ Fomentar la infraestructura para caminar y finalizar las obras en las calles (calles diseñadas y operadas de manera segura para todos los usuarios, como conductores, ciclistas, peatones)
- ☐ Otros (por favor especificar)

- 12** Teniendo en cuenta que se prevé que la población del condado de Orange del sur continúe creciendo en un futuro cercano, ¿qué estrategia aportaría los mayores beneficios a largo plazo?

- ☐ Planificación del uso de la tierra (coordinación de los nuevos desarrollos con el sistema de transporte)
- ☐ Carriles exprés con peaje en las autopistas existentes
- ☐ Tecnología para minimizar el tráfico (sincronización de señales, vehículos autónomos)
- ☐ Bicisendas, sendas peatonales y sendas pavimentadas
- ☐ Otros (por favor, especificar)

¡GRACIAS POR SUS COMENTARIOS! POR FAVOR CUÉNTENOS MÁS SOBRE USTED. (Opcional)

- 13** ¿Cuál es el código postal de su lugar de trabajo, si corresponde?

- 14** ¿Cuál es su rango de edad?

- | | |
|--------------------------------|-----------------------------------|
| <input type="checkbox"/> 16-24 | <input type="checkbox"/> 55-64 |
| <input type="checkbox"/> 25-34 | <input type="checkbox"/> 65-74 |
| <input type="checkbox"/> 35-44 | <input type="checkbox"/> 75 o más |
| <input type="checkbox"/> 45-54 | |

- 15** ¿Cuál es el ingreso anual total de su hogar?

- | | |
|---|--|
| <input type="checkbox"/> menos de 30,000 | <input type="checkbox"/> 110,000 – 169,000 |
| <input type="checkbox"/> 30,000 – 49,999 | <input type="checkbox"/> 170,000 o más |
| <input type="checkbox"/> 50,000 – 79,999 | <input type="checkbox"/> Prefiero no responder |
| <input type="checkbox"/> 80,000 – 109,000 | |

- 16** ¿A qué grupo étnico cree que pertenece o con cuál se siente más identificado?

- | | |
|--|--|
| <input type="checkbox"/> Caucásico/Blanco | <input type="checkbox"/> Isleño del Pacífico |
| <input type="checkbox"/> Latino/Hispano | <input type="checkbox"/> Procedente de Medio Oriente |
| <input type="checkbox"/> Afroamericano/Negro | <input type="checkbox"/> Herencia mixta |
| <input type="checkbox"/> Indio americano o nativo de Alaska | <input type="checkbox"/> Otros |
| <input type="checkbox"/> Asiático – coreano, japonés, chino, vietnamita, filipino u otro | <input type="checkbox"/> Prefiero no responder |

- 17** Suscríbase para recibir información actualizada sobre los proyectos e invitaciones a las reuniones

- ☐ Dirección de e-mail _____

INFORMACIÓN DE CONTACTO:



Marissa Espino, Community Relations Officer



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833.711.8070



octa.net/SouthOCStudy

民众意见调查



1 您的住家邮政编码是什么？

2 您在橙县及其周围出行时，通常如何从一个地方到另一个地方？您可以最多选择三项。

- ☐ 独自驾车
- ☐ 小车/面包车共乘
- ☐ 公共汽车
- ☐ Metrolink/ Amtrak
- ☐ 自行车
- ☐ 步行/慢跑/跑步
- ☐ 电车/班车
- ☐ 按需共乘服务(例如 Uber 或 Lyft)
- ☐ ACCESS/辅助运输服务
- ☐ 电动自行车/电动踏板车

3 关于橙县南部的交通，最重要的问题是什么？

- ☐ 当地街道和道路上的交通拥堵
- ☐ 高速公路/公路上的交通拥堵
- ☐ 温室气体(应对气候变化)
- ☐ 土地利用规划(对新开发和交通进行协调)
- ☐ 交通运输选项不够(公共汽车，铁路或者按需的微型公交服务)

4 在橙县南部，公共汽车和铁路面临的主要挑战是什么？

- ☐ 方便往返目的地
- ☐ 服务频率
- ☐ 旅行时间
- ☐ 可靠性
- ☐ 其他

5 在橙县南部，使用当地街道的主要挑战是什么？(选一项)

- ☐ 交通拥堵
- ☐ 交叉路口延误
- ☐ 坑洼/街道维修
- ☐ 所有使用者(驾驶人，行人，骑自行车的人)的安全
- ☐ 其他

6 在橙县南部，使用高速公路/公路的主要挑战是什么？

- ☐ 交通拥堵
- ☐ 通勤时间不可预测
- ☐ 在高速公路出口匝道排队等候
- ☐ 安全
- ☐ 其他

7 在橙县南部，积极交通(步行，骑自行车)的最大障碍是什么？(选一项)

- ☐ 自行车道与人行道网络中的空隙
- ☐ 出发地与目的地自己的距离较远
- ☐ 安全问题(与汽车没有物理隔离，没有信任转让设施)
- ☐ 地形(丘陵地带)
- ☐ 其他

8 您认为减少橙县南部交通拥堵的最有效策略是什么？(选一项)

- ☐ 在家工作方案
- ☐ 共乘车/共乘方案和设施
- ☐ 移动中心(用于连接公共汽车/班车/共乘车的共享活动中心)
- ☐ 收费(收费高速公路，停车费)
- ☐ 共享出行(汽车共享，自行车共享，踏板车共享)

另一面续 →

9 在不影响企业和住宅的前提下利用有限的空间来拓宽高速公路,哪一项可以最大程度地管理橙县南部高速公路的拥堵?(选一项)

- ☐ 鼓励小车共乘,面包车共乘和拼车
- ☐ 把收费车道纳入现有的高速公路(91号公路快速车道)
- ☐ 加强基础设施以适用自动(自动驾驶)车辆
- ☐ 改善高速公路出入口坡道
- ☐ 疏通阻塞点(高拥挤区域)
- ☐ 其他(请具体说明)

10 您认为哪一组交通运输解决方案最重要?(选一项)

- ☐ 快速公共汽车、通勤铁路、面包车共乘和高速公路公共汽车快速运输
- ☐ 当地公共汽车、按需公交服务和电车
- ☐ 坑洼修复、信号同步和交叉路口改善
- ☐ 高速公路维护、出入口坡道改善和改善整体交通流量的项目
- ☐ 自行车道、自行车道网络和人行道

11 在橙县南部,通过土地利用规划(对新开发和交通进行协调)解决交通拥堵的最佳方法是什么?(选一项)

- ☐ 集中公交(公共汽车/铁路)中心周围的业务发展
- ☐ 集中公交(公共汽车/铁路)中心周围的住房开发
- ☐ 制定减少依赖汽车的策略(即收停车费)
- ☐ 鼓励步行和整条街道(为驾驶人、骑自行车的人和行人等所有志愿者安全设计和运营的街道)
- ☐ 其他(请具体说明)

12 考虑到橙县南部的人口预计在可以一键的将来会继续增长,哪种策略将提供最大的长期利益?

- ☐ 土地利益规划(对新开发和交通进行协调)
- ☐ 现有高速公路上的收费快车道
- ☐ 减少交通的技术(信号同步,自动驾驶车辆)
- ☐ 公共汽车、铁路和其他公交服务
- ☐ 自行车道、人行道/人行横道和铺面小径
- ☐ 其他(请具体说明)

感谢您的意见! 现在,请向我们稍微介绍一下您自己。(可选)

13 如果有的话,您的工作地点的邮政编码是什么?

14 您在哪个年龄段?

- ☐ 16-24 岁
- ☐ 25-34 岁
- ☐ 35-44 岁
- ☐ 45-54 岁
- ☐ 55-64 岁
- ☐ 65-74 岁
- ☐ 75 岁以上

15 您的家庭年总收入是多少?

- ☐ 低于30,000
- ☐ 30,000 - 49,999
- ☐ 50,000 - 79,999
- ☐ 80,000 - 109,000
- ☐ 110,000 - 169,000
- ☐ 170,000 以上
- ☐ 不愿回答

16 您认为自己属于或者最接近哪个种族?

- ☐ 高加索人/白人
- ☐ 拉丁裔/西班牙裔
- ☐ 非洲裔美国人/黑人
- ☐ 美洲印第安人或阿拉斯加原住民
- ☐ 亚裔 - 韩国人、日本人、中国人、越南人、菲律宾人或
其他亚裔
- ☐ 太平洋岛民
- ☐ 中东人
- ☐ 混合族裔
- ☐ 其他
- ☐ 不愿回答

17 注册接收项目更新资讯和会议邀请

- ☐ 电子邮件地址 _____

联系信息:

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대중 의견 설문조사



1 집 우편번호는 어떻게 되나요?

2 오렌지 카운티 안에서 또는 주위를 다닐 때 보통 한 곳에서 다른 곳으로 어떻게 이동하나요?

응답을 세 개까지 선택할 수 있습니다.

- ☐ 혼자 운전
- ☐ 카풀/밴풀
- ☐ 버스
- ☐ 메트로링크/앰트랙
- ☐ 자전거
- ☐ 걷기/조깅/달리기
- ☐ 트롤리/셔틀
- ☐ 차량 공유 서비스(예: Uber 또는 Lyft)
- ☐ ACCESS/보조 대중교통
- ☐ 전기 자전거/전자 스쿠터

3 남부 오렌지 카운티의 교통과 관련하여 가장 중요한 문제는 무엇입니까? (하나만 선택)

- ☐ 거리와 도로의 교통 체증
- ☐ 프리웨이/고속도로의 교통 체증
- ☐ 온실 가스 (기후 변화 원인)
- ☐ 안전
- ☐ 토지 사용 계획 (교통 수단 변화와 함께)
- ☐ 교통 수단 선택이 많지 않음 (버스, 철도 또는 초소형 교통 수단)

4 남부 오렌지 카운티에서 버스와 철도를 사용할 때 가장 큰 문제는 무엇입니까? (하나만 선택)

- ☐ 목적지까지/로부터 접근
- ☐ 서비스 빈도
- ☐ 여행 시간
- ☐ 신뢰도
- ☐ 기타

5 남부 오렌지 카운티에서 지역내 도로를 사용할 때 가장 큰 문제는 무엇입니까? (하나만 선택)

- ☐ 교통 체증
- ☐ 교차로 지연
- ☐ 포트홀/도로 관리
- ☐ 모든 사용자(운전자, 보행자, 자전거)들을 위한 안전
- ☐ 기타

6 남부 오렌지 카운티에서 프리웨이/고속도로를 사용할 때 가장 큰 문제는 무엇입니까? (하나만 선택)

- ☐ 교통 체증
- ☐ 예측할 수 없는 통근 시간
- ☐ 프리웨이에서 램프 출구 교통 정체
- ☐ 안전
- ☐ 기타

7 남부 오렌지 카운티에서 걷거나 자전거 탈 때 가장 큰 장벽은 무엇입니까? (하나만 선택)

- ☐ 자전거 도로 또는 걷는 길이 끊어진다
- ☐ 출발지와 목적지 사이에 거리가 멀다
- ☐ 안전 문제 (자동차와의 물리적 분리 부족, 보행자 편의 시설 부족)
- ☐ 지형 (언덕이 많음)
- ☐ 기타

8 남부 오렌지 카운티의 교통 혼잡을 줄이는데 가장 좋은 전략은 무엇이라고 생각하십니까? (하나만 선택)

- ☐ 재택 근무
- ☐ 차량공유/밴풀 및 시설
- ☐ 이동수단 허브 (버스/셔틀/차량공유 등을 연결하는 활동 센터)
- ☐ 요금부과 (유료 익스프레스 레인, 유료 주차)
- ☐ 이동수단 공유 (자동차 공유, 자전거 공유, 스쿠터 공유)

반대 쪽에 계속 →

9 상점들과 주택에 영향을 주지 않고 프리웨이를 확장하는데 공간이 부족한 상황에서, 남부 오렌지 카운티 프리웨이 체증을 관리하는 데 가장 도움이 되는 것은? (하나만 선택)

- ☐ 카풀, 밴풀 및 차량 공유를 장려한다
- ☐ 기존 프리웨이(91 익스프레스 레인)에 유료 익스프레스 레인을 통합한다
- ☐ 자율주행(셀프 드라이빙) 차량을 위해 인프라 강화한다
- ☐ 램프 진입 및 출구시 정체 개선
- ☐ 정체 구간 개선 (교통 체증 지역)
- ☐ 기타 (구체적으로 기재)

11 남부 오렌지 카운티의 토지 사용 계획(교통 수단 변화와 함께)을 통해 교통 체증을 해결하는 가장 좋은 방법은 무엇입니까? (하나만 선택)

- ☐ 대중 교통(버스/철도) 센터 주변에 비즈니스 개발에 집중한다
- ☐ 대중 교통(버스/철도) 센터 주변에 새로운 주거지 개발에 집중한다
- ☐ 자동차 의존도를 줄이는 전략을 개발한다 (예: 유료 주차)
- ☐ 걷기 쉽고 운전자, 자전거, 보행자 모두에게 안전한 거리를 만든다
- ☐ 기타(구체적으로)

10 귀하에게 가장 중요한 교통 수단은 무엇입니까? (하나만 선택)

- ☐ 익스프레스 버스, 통근 전철, 밴풀, 프리웨이 급행 버스
- ☐ 지역 버스, 주문형 교통 서비스 및 트롤리
- ☐ 포트홀 수리, 신호 동기화 및 교차로 개선
- ☐ 프리웨이 유지 관리, 램프 진입 및 출구 개선, 전반적인 교통 흐름 개선 프로젝트
- ☐ 자전거 레인, 자전거 도로망, 보행자 길

12 남부 오렌지 카운티의 인구가 계속 증가할 것으로 예상되는 것을 고려할 때 장기적인 혜택을 위한 가장 좋은 전략은 무엇입니까?

- ☐ 토지 사용 계획 (교통 수단 변화와 함께)
- ☐ 기존 프리웨이에 유료 익스프레스 레인 설치
- ☐ 교통량을 최소화 하는 기술(신호 동기화, 자율 주행 차)
- ☐ 버스, 철도 및 기타 대중 교통 서비스
- ☐ 자전거 도로, 인도/횡단 보도 및 포장된 트레일
- ☐ 기타(구체적으로)

의견을 주셔서 감사합니다! 본인에 대하여 좀 말씀해 주시기 바랍니다. (선택)

13 직장 우편번호는 어떻게 됩니까?

14 연령대는 어떻게 되십니까?

- ☐ 16-24 세
- ☐ 25-34 세
- ☐ 35-44 세
- ☐ 45-54 세
- ☐ 55-64 세
- ☐ 65-74 세
- ☐ 75 세 이상

15 가계 총 소득은 얼마입니까?

- ☐ 30,000 불 미만
- ☐ 30,000 – 49,999 불
- ☐ 50,000 – 79,999 불
- ☐ 80,000 – 109,000 불
- ☐ 110,000 – 169,000 불
- ☐ 170,000 불 이상
- ☐ 답하고 싶지 않음

16 어떤 인종 그룹에 속하신다고 생각하십니까?

- ☐ 백인
- ☐ 라틴계/히스패닉
- ☐ 흑인
- ☐ 아메리칸 인디언 또는 알래스카 원주민
- ☐ 아시아인 - 한국, 일본, 중국, 베트남, 필리핀 또는 기타 아시아
- ☐ 태평양 도서인
- ☐ 중동인
- ☐ 혼혈인
- ☐ 기타
- ☐ 답하고 싶지 않음

17 프로젝트 업데이트 및 회의 초대장을 받으려면 등록하십시오

- ☐ 이메일 주소 _____

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KHẢO SÁT Ý KIẾN ĐÓNG GÓP CỦA CÔNG CHÚNG



1 Mã zip nhà của quý vị là gì?

2 Khi quý vị đi lại trong và xung quanh Quận Cam, quý vị thường đi từ nơi này đến nơi khác bằng cách nào? Quý vị có thể chọn tối đa ba lựa chọn.

- ☐ Lái xe một mình
- ☐ Đi chung xe / xe van
- ☐ Xe buýt
- ☐ Metrolink/ Amtrak
- ☐ Xe đạp
- ☐ Đi bộ / chạy bộ / chạy
- ☐ Xe điện (Trolleys) / xe đưa đón
- ☐ Dịch vụ đi chung xe theo yêu cầu (chẳng hạn như Uber hoặc Lyft)
- ☐ TIẾP CẬN / dịch vụ vận chuyển phụ
- ☐ Xe đạp điện / xe tay ga điện

3 Vấn đề quan trọng nhất liên quan đến giao thông vận chuyển ở phía nam Quận Cam là gì? (chọn một)

- ☐ Tắc nghẽn giao thông trên đường phố và đường địa phương
- ☐ Ùn tắc giao thông trên xa lộ / đường cao tốc
- ☐ Khí thải từ nhà kính (giải quyết biến đổi khí hậu)
- ☐ Sự an toàn
- ☐ Quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận chuyển)
- ☐ Không có đủ các lựa chọn phương tiện đi lại (xe buýt, đường sắt hoặc dịch vụ đi lại vi mô theo yêu cầu)

4 Khó khăn chính đối với việc đi lại bằng xe buýt và đường sắt ở phía nam Quận Cam là gì? (chọn một)

- ☐ Tiếp cận đến / đi từ các điểm đến
- ☐ Tần suất dịch vụ
- ☐ Thời gian du lịch
- ☐ Độ tin cậy
- ☐ Điều khác

5 Khó khăn chính của việc sử dụng các đường phố địa phương ở phía nam Quận Cam là gì? (chọn một)

- ☐ Ùn tắc giao thông
- ☐ Chậm trễ tại giao lộ
- ☐ Ổ gà / bảo trì đường phố
- ☐ An toàn cho tất cả các người sử dụng (người lái xe, người đi bộ, người đi xe đạp)
- ☐ Khác

6 Thách thức chính đối với việc sử dụng xa lộ / đường cao tốc ở phía nam Quận Cam là gì? (chọn một)

- ☐ Ùn tắc giao thông
- ☐ Thời gian đi làm không lường trước được
- ☐ Kẹt xe tại lối ra khỏi xa lộ
- ☐ Sự an toàn
- ☐ Khác

7 Rào cản quan trọng nhất đối với phương tiện giao thông tích cực (đi bộ, đi xe đạp) ở phía nam Quận Cam là gì? (chọn một)

- ☐ Khoảng trống trong mạng lưới đường dành cho xe đạp và vỉa hè
- ☐ Khoảng cách xa giữa điểm xuất phát và điểm đến của chuyến đi
- ☐ Mối quan tâm về an toàn (thiếu ngăn cách vật thể đối với ô tô, thiếu tiện nghi cho người đi bộ)
- ☐ Địa hình (địa hình đồi núi)
- ☐ Điều khác

8 Quý vị nghĩ chiến lược hữu ích nhất để giảm tắc nghẽn giao thông ở phía nam Quận Cam là gì? (chọn một)

- ☐ Các chương trình làm việc tại nhà
- ☐ Các chương trình và cơ sở đi chung xe / đi chung xe van
- ☐ Các trung tâm di động (các trung tâm hoạt động chung để kết nối xe buýt / xe đưa đón / đi chung xe / v.v.)
- ☐ Định giá (thu phí làn đường cao tốc, phí đậu xe)
- ☐ Di chuyển chung (chia sẻ ô tô, chia sẻ xe đạp, chia sẻ xe tay ga)

Tiếp tục ở phía bên kia →

9 Với không gian hạn chế để mở rộng xa lộ mà không gây ảnh hưởng đến các doanh nghiệp và cư dân, điều nào có thể giúp quản lý vấn đề tắc nghẽn xa lộ ở phía nam Quận Cam nhiều nhất? (chọn một)

- ☐ Khuyến khích đi chung xe ô tô, xe van và đi chung xe kiểu tắc-xi
- ☐ Kết hợp các làn đường cao tốc có thu phí vào các đường cao tốc hiện có (Làn đường Tốc hành xa lộ 91)
- ☐ Tăng cường cơ sở hạ tầng để đáp ứng các phương tiện tự lái (tự lái)
- ☐ Cải thiện trên các lối vào và lối ra khỏi xa lộ
- ☐ Khắc phục các điểm tắc nghẽn (khu vực tắc nghẽn cao)
- ☐ Điều Khác (vui lòng nêu cụ thể)

10 Loại giải pháp giao thông vận chuyển nào quan trọng nhất đối với quý vị? (chọn một)

- ☐ Xe buýt tốc hành, xe hỏa đưa đi làm, xe vanpool và xe buýt nhanh trên xa lộ
- ☐ Xe buýt địa phương, dịch vụ vận chuyển theo yêu cầu và xe điện
- ☐ Sửa chữa ổ gà, đồng bộ hóa đèn hiệu giao thông và cải tiến giao lộ
- ☐ Bảo trì đường cao tốc, cải tiến các lối ra vào xa lộ và các dự án cải thiện luồng giao thông tổng thể
- ☐ Làn đường dành cho xe đạp, mạng lưới đường dành cho xe đạp và đường dành cho người đi bộ

11 Cách tốt nhất để giải quyết tình trạng tắc nghẽn giao thông qua quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận tải) ở phía nam Quận Cam là gì? (chọn một)

- ☐ Tập trung phát triển kinh doanh xung quanh các trung tâm vận chuyển (xe buýt / đường sắt)
- ☐ Tập trung các dự án phát triển nhà ở mới xung quanh các trung tâm vận chuyển (xe buýt / đường sắt)
- ☐ Phát triển các chiến lược để giảm sự phụ thuộc vào ô tô (tức là phí đậu xe)
- ☐ Khuyến khích khả năng đi bộ và đường phố hoàn chỉnh (đường phố được thiết kế và vận hành an toàn cho tất cả người dùng như người lái xe, người đi xe đạp, người đi bộ)
- ☐ Điều khác (vui lòng ghi rõ)

12 Xem xét rằng dân số phía Nam Quận Cam dự kiến sẽ tiếp tục tăng trong tương lai gần, chiến lược nào sẽ mang lại lợi ích lâu dài nhất?

- ☐ Quy hoạch sử dụng đất (phối hợp phát triển mới với giao thông vận tải)
- ☐ Làn đường cao tốc có thu phí trên các xa lộ hiện hữu
- ☐ Công nghệ giảm thiểu giao thông (đồng bộ hóa tín hiệu, xe tự hành)
- ☐ Dịch vụ xe buýt, đường sắt và các dịch vụ vận chuyển khác
- ☐ Làn đường dành cho xe đạp, vỉa hè / lối đi bộ sang đường và lối mòn lát đá
- ☐ Điều khác (vui lòng ghi rõ)

CẢM ƠN Ý KIẾN ĐÓNG GÓP CỦA QUÝ VỊ! NGAY BÂY GIỜ, HÃY NÓI CHO CHÚNG TÔI BIẾT ĐÔI CHÚT VỀ BẢN THÂN QUÝ VỊ.

13 Mã zip nơi làm việc của quý vị là gì nếu quý vị có? (Không bắt buộc)

14 Độ tuổi của quý vị là bao nhiêu?

- | | |
|--------------------------------|--|
| <input type="checkbox"/> 16-24 | <input type="checkbox"/> 55-64 |
| <input type="checkbox"/> 25-34 | <input type="checkbox"/> 65-74 |
| <input type="checkbox"/> 35-44 | <input type="checkbox"/> 75 tuổi trở lên |
| <input type="checkbox"/> 45-54 | |

15 Tổng số thu nhập trong hộ gia đình hàng năm của quý vị là bao nhiêu?

- | | |
|---|--|
| <input type="checkbox"/> Dưới 30.000 | <input type="checkbox"/> 110.000 – 169.000 |
| <input type="checkbox"/> 30.000 – 49.999 | <input type="checkbox"/> 170.000 trở lên |
| <input type="checkbox"/> 50.000 – 79.999 | <input type="checkbox"/> Không thích trả lời |
| <input type="checkbox"/> 80.000 – 109.000 | |

16 Quý vị coi mình là một phần của hoặc cảm thấy gần gũi nhất với nhóm dân tộc nào?

- | | |
|---|---|
| <input type="checkbox"/> Caucasian / Da trắng | <input type="checkbox"/> Người đảo Thái Bình Dương |
| <input type="checkbox"/> Người gốc La tinh / gốc Tây Ban Nha | <input type="checkbox"/> Người Trung Đông |
| <input type="checkbox"/> Người Mỹ gốc Phi châu/Da đen | <input type="checkbox"/> Người Hợp chủng dân Alaska |
| <input type="checkbox"/> Người Mỹ Da đỏ hoặc thổ dân Alaska | <input type="checkbox"/> Khác |
| <input type="checkbox"/> Người Á Châu - Hàn Quốc, Nhật Bản, Trung Quốc, Việt Nam, Philippines, hoặc người Châu Á khác | <input type="checkbox"/> Không thích trả lời |

17 Đăng ký để nhận thông tin cập nhật về dự án và lời mời họp

☐ Địa chỉ email _____

THÔNG TIN LIÊN LẠC:

 Marissa Espino, Community Relations Officer

 mespino@octa.net

 833. 711. 8070

 octa.net/SouthOCStudy

Appendix B

Survey Results

Appendix B.1 Compiled Survey Results

Appendix B.2 English Survey Results

Appendix B.3 Spanish Survey Results

Appendix B.4 Mandarin Survey Results

Appendix B

Appendix B.1 Compiled Survey Results

OCTA SOCMTS PUBLIC INPUT SURVEY

What is your home zip code?

Responding Participants

| | English | Spanish | Mandarin |
|-----------------|------------|----------|----------|
| Answered | 349 | 8 | 1 |
| Skipped | 2 | 0 | 0 |

| English Respondent s | Response Date | Responses |
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| 4 | 02:05 PM | 92688 |
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| | Oct 29 2020 | |
| 11 | 08:56 AM | 92840 |

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| | Oct 23 2020 | |
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| | Oct 23 2020 | |
| 43 | 12:36 PM | 92677 |

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| | Oct 15 2020 | |
| 106 | 11:27 AM | 92660 |
| | Oct 15 2020 | |
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| | Oct 15 2020 | |
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| | Oct 15 2020 | |
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| | Oct 14 2020 | |
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| | Oct 14 2020 | |
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| | Oct 10 2020 | |
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| | Oct 10 2020 | |
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| 186 | 09:13 AM | 92651 |
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| | Sep 30 2020 | |
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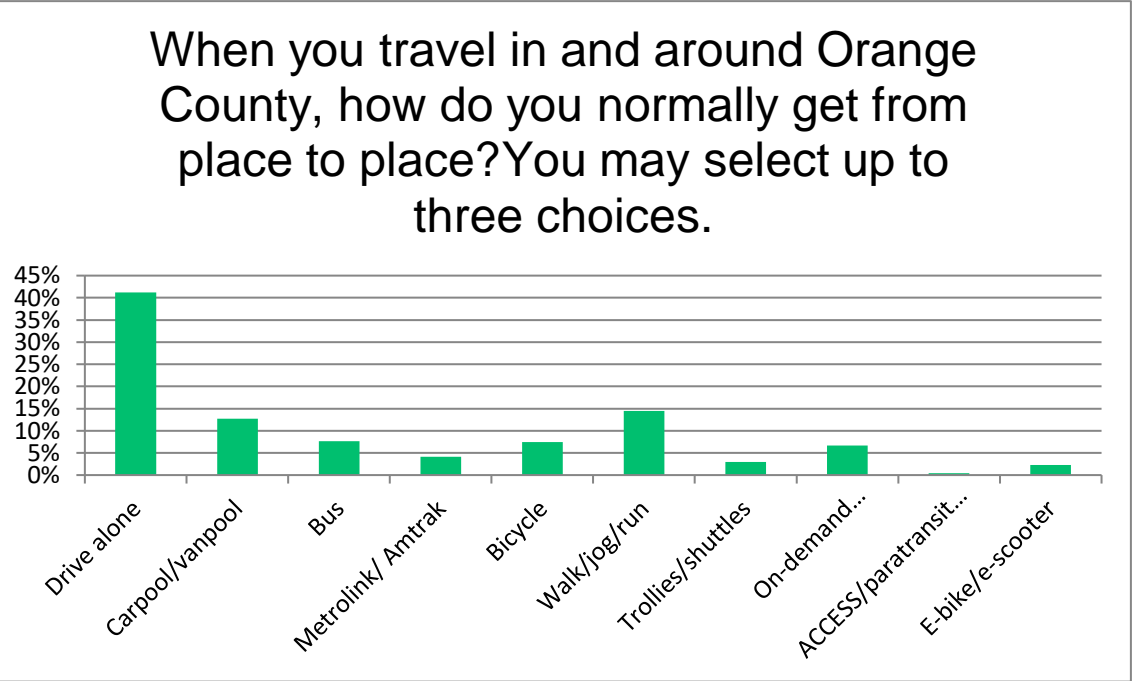
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| | Sep 30 2020 | |
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| | Sep 30 2020 | |
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| | Sep 30 2020 | |
| 320 | 12:57 PM | 90803 |
| | Sep 30 2020 | |
| 321 | 12:27 PM | 90680 |
| | Sep 30 2020 | |
| 322 | 11:35 AM | 92630 |
| | Sep 30 2020 | |
| 323 | 11:30 AM | 92628 |
| | Sep 30 2020 | |
| 324 | 11:22 AM | 92646 |
| | Sep 30 2020 | |
| 325 | 11:11 AM | 92612 |
| | Sep 30 2020 | |
| 326 | 11:09 AM | 92707 |
| | Sep 30 2020 | |
| 327 | 10:53 AM | 95448 |
| | Sep 30 2020 | |
| 328 | 10:22 AM | 92630 |
| | Sep 30 2020 | |
| 329 | 10:15 AM | 92679 |
| | Sep 30 2020 | |
| 330 | 10:15 AM | 92618 |
| | Sep 30 2020 | |
| 331 | 10:07 AM | 92630 |

| | | |
|-----|-------------|-------|
| | Sep 30 2020 | |
| 332 | 09:50 AM | 92692 |
| | Sep 30 2020 | |
| 333 | 09:49 AM | 92692 |
| | Sep 30 2020 | |
| 334 | 09:44 AM | 92054 |
| | Sep 30 2020 | |
| 335 | 09:23 AM | 92610 |
| | Sep 30 2020 | |
| 336 | 09:18 AM | 92630 |
| | Sep 30 2020 | |
| 337 | 07:15 AM | 92604 |
| | Sep 29 2020 | |
| 338 | 09:24 PM | 92707 |
| | Sep 29 2020 | |
| 339 | 02:07 PM | 92610 |
| | Sep 29 2020 | |
| 340 | 10:32 AM | 92691 |
| | Sep 28 2020 | |
| 341 | 08:11 AM | 92870 |
| | Sep 27 2020 | |
| 342 | 08:45 PM | 92806 |
| | Sep 26 2020 | |
| 343 | 05:54 PM | 92610 |
| | Sep 26 2020 | |
| 344 | 10:33 AM | 92675 |
| | Sep 26 2020 | |
| 345 | 07:14 AM | 92692 |
| | Sep 25 2020 | |
| 346 | 11:36 PM | 92646 |
| | Sep 25 2020 | |
| 347 | 12:35 PM | 92677 |

| | | | |
|----------------------------|-----|-------------------------|-----------|
| Spanish Respondent s | 348 | Sep 25 2020 10:38 AM | 92675 |
| | 349 | Sep 25 2020 10:34 AM | 92780 |
| | | Response Date | Responses |
| | 350 | Oct 30 2020 05:57 AM | 92866 |
| | 351 | Oct 29 2020 07:03 AM | 92675 |
| | 352 | Oct 27 2020 10:30 PM | 92701 |
| | 353 | Oct 19 2020 08:30 PM | 92703 |
| | 354 | Oct 18 2020 09:43 AM | 92801 |
| | 355 | Oct 17 2020 11:46 AM | 92704 |
| | 356 | Oct 16 2020 04:31 AM | 92688 |
| | 357 | Sep 27 2020 08:10 AM | 92801 |
| | | Response Date | Responses |
| | 358 | Oct 19 2020 12:51 PM | 92620 |
| | | | |

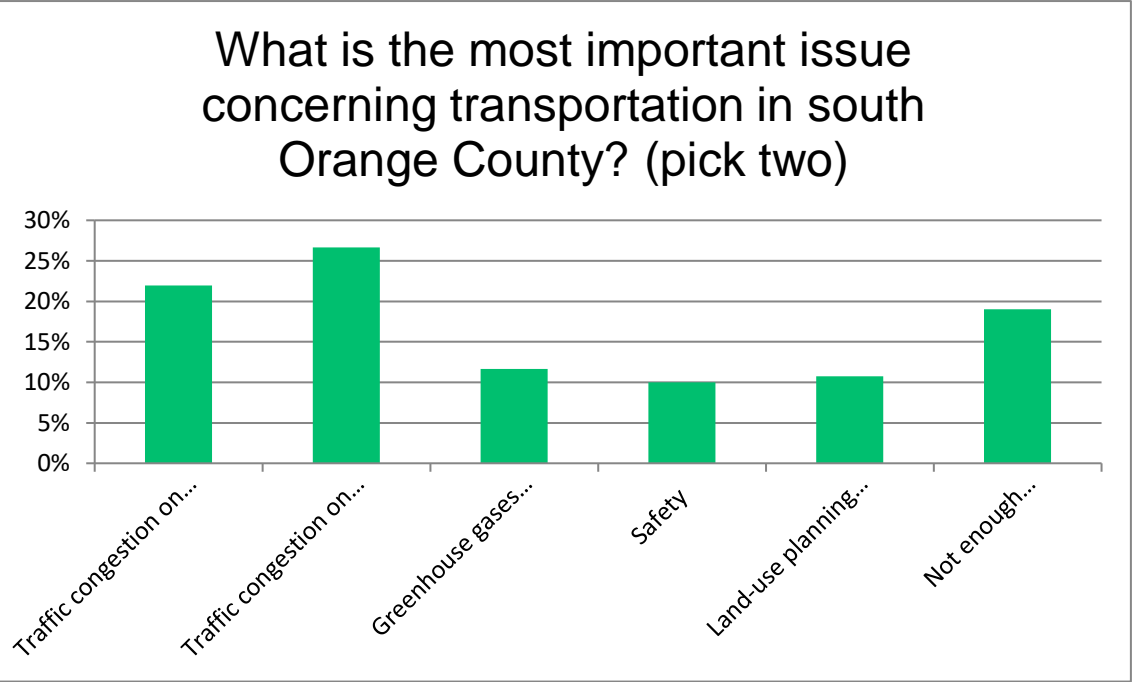
OCTA SOCMTS PUBLIC INPUT SURVEY
 When you travel in and around Orange County,
 how do you normally get from place to
 place?You may select up to three choices.

| Answer Choices | Responses | | | | | Total Answered | | |
|--|----------------|---------|---------|----------|------------|-------------------------|---------|----------|
| | % | English | Spanish | Mandarin | Total | English | Spanish | Mandarin |
| Drive alone | 41% | 306 | 1 | 1 | 308 | Responding Participants | | |
| Carpool/vanpool | 13% | 93 | 1 | 1 | 95 | | | |
| Bus | 8% | 50 | 7 | 0 | 57 | Answered: 350 | | |
| Metrolink/ Amtrak | 4% | 29 | 2 | 0 | 31 | | | |
| Bicycle | 7% | 55 | 1 | 0 | 56 | Answered: 8 | | |
| Walk/jog/run | 14% | 104 | 3 | 1 | 108 | | | |
| Trolleys/shuttles | 3% | 22 | 0 | 0 | 22 | Skipped: 1 | | |
| On-demand rideshare service (such as Uber or Lyft) | 7% | 49 | 1 | 0 | 50 | | | |
| ACCESS/paratransit service | 0% | 3 | 0 | 0 | 3 | Skipped: 0 | | |
| E-bike/e-scooter | 2.28% | 17 | 0 | 0 | 17 | | | |
| Total | 100.00% | | | | 747 | | | |



OCTA SOCMTS PUBLIC INPUT SURVEY
What is the most important issue concerning
transportation in south Orange County? (pick two)

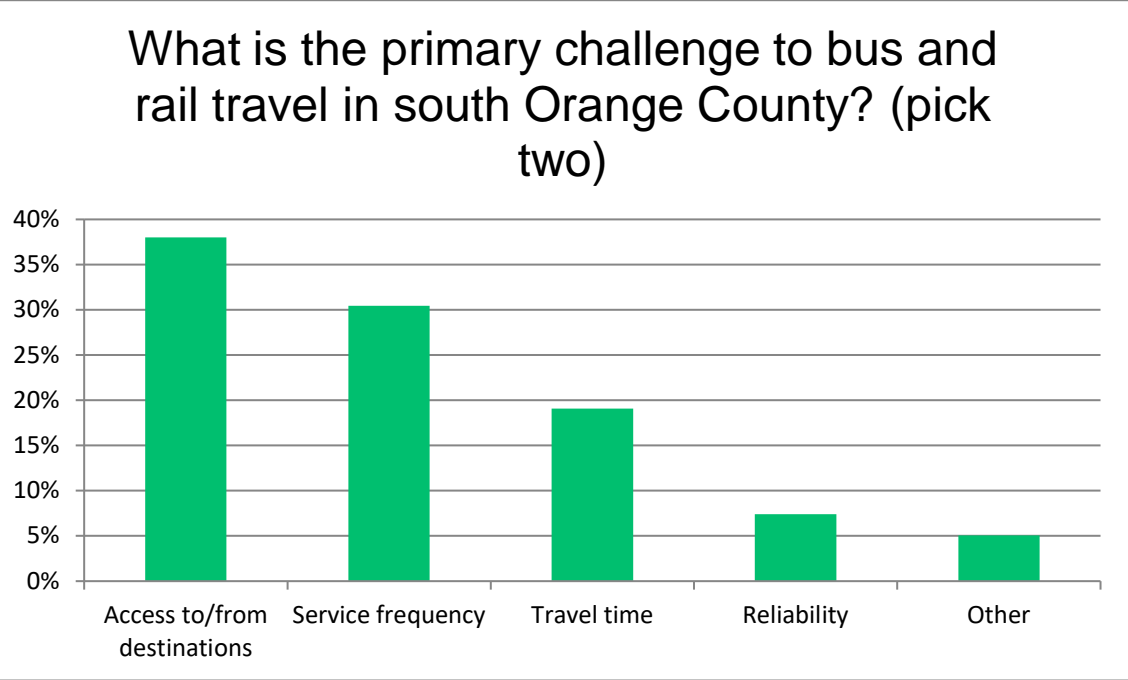
| Answer Choices | Responses | | | | | Total Answered | 679 |
|--|-----------|---------|---------|----------|-------|--|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Traffic congestion on local streets and roads | 22% | 145 | 3 | 1 | 149 | Responding Participants English Spanish Mandarin Answered: 349 Answered: 8 Answered: 1 Skipped: 2 Skipped: 0 Skipped: 0 | |
| Traffic congestion on freeways/highways | 27% | 177 | 3 | 1 | 181 | | |
| Greenhouse gases (addressing climate change) | 12% | 79 | 0 | 0 | 79 | | |
| Safety | 10% | 66 | 2 | 0 | 68 | | |
| Land-use planning (coordinating new development with transportation) | 11% | 72 | 1 | 0 | 73 | | |
| Not enough transportation choices (bus, rail, or on-demand microtransit) | 19% | 122 | 7 | 0 | 129 | | |
| Total | 100.00% | | | | 679 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY

What is the primary challenge to bus and rail travel in south Orange County? (pick two)

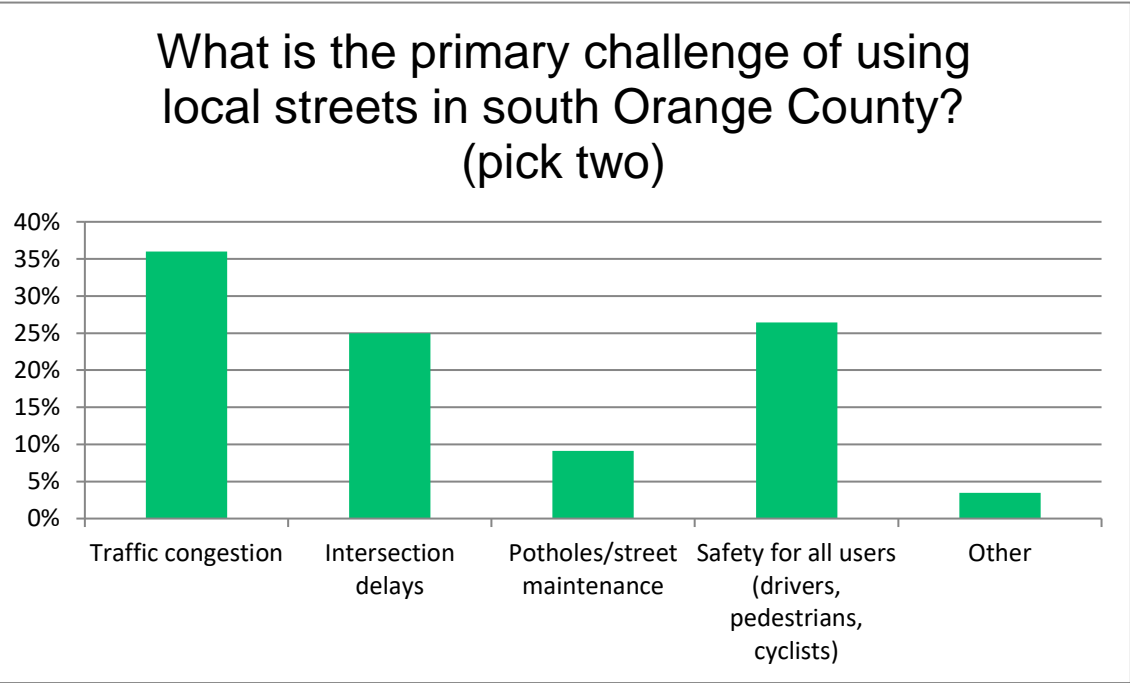
| Answer Choices | | Responses | | | | | | |
|-----------------------------|---------|-----------|---------|----------|-------|-----------------------------|---------------|-------------|
| | % | English | Spanish | Mandarin | Total | Total Answered | 650 | |
| Access to/from destinations | 38% | 241 | 5 | 1 | 247 | 198 Responding Participants | English | Spanish |
| Service frequency | 30% | 192 | 6 | 0 | 198 | | | |
| Travel time | 19% | 120 | 3 | 1 | 124 | | | |
| Reliability | 7% | 47 | 1 | 0 | 48 | | | |
| Other | 5% | 33 | 0 | 0 | 33 | | | |
| Total | 100.00% | | | | | 650 | Answered: 345 | |
| | | | | | | Skipped: 6 | Skipped: 0 | Answered: 1 |
| | | | | | | Skipped: 0 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY

What is the primary challenge of using local streets in south Orange County? (pick two)

| Answer Choices | Responses | | | | | Total Answered | 636 |
|---|-----------|---------|---------|----------|-------|--|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Traffic congestion | 36% | 227 | 2 | 0 | 229 | Responding Participants English Spanish Mandarin Answered: 349 Answered: 8 Answered: 1 Skipped: 2 Skipped: 0 Skipped: 0 | |
| Intersection delays | 25% | 153 | 6 | 0 | 159 | | |
| Potholes/street maintenance | 9% | 54 | 3 | 1 | 58 | | |
| Safety for all users (drivers, pedestrians, cyclists) | 26% | 165 | 2 | 1 | 168 | | |
| Other | 3% | 21 | 1 | 0 | 22 | | |
| Total | 100.00% | | | | 636 | | |



| | | | |
|-------------|---------------|------------------------|------|
| Respondents | Response Date | Other (please specify) | Tags |
|-------------|---------------|------------------------|------|

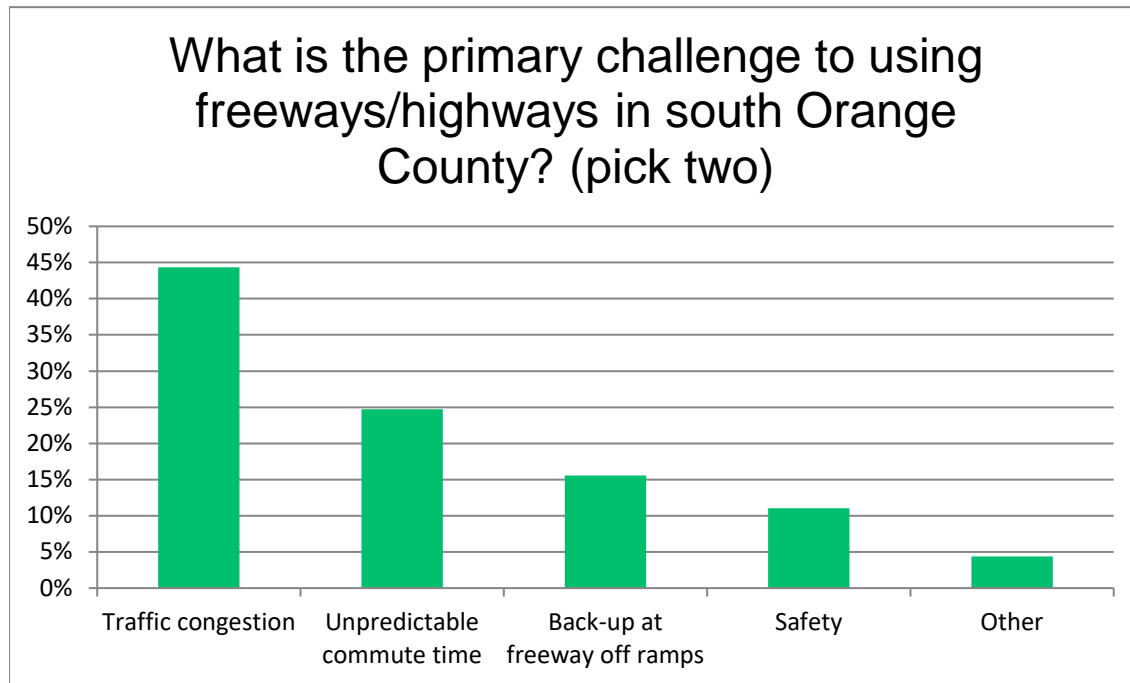
(Spanish) There are
homeless people who
on the bus smell a lot
of cigarettes or pee,
sometimes they occupy
several seats for their
things, once under one
of them and I sat on a
seat and got my clothes
wet because there was
liquid.

1 Oct 29 2020 07:03 AM

OCTA SOCMTS PUBLIC INPUT SURVEY

What is the primary challenge to using
freeways/highways in south Orange County?
(pick two)

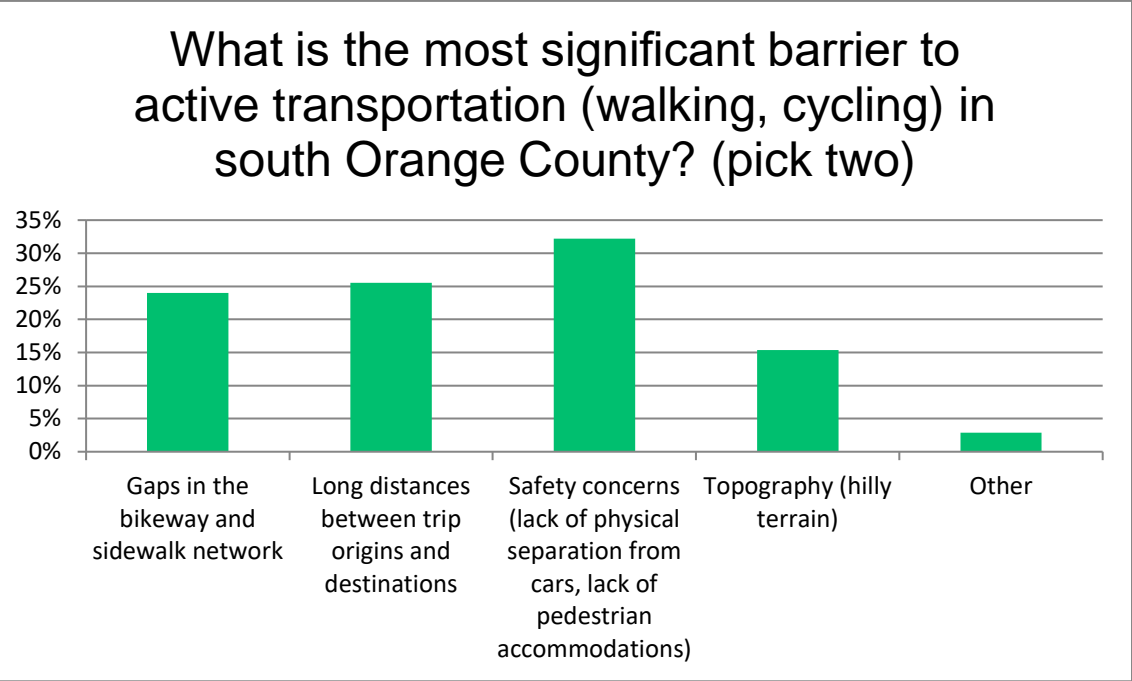
| Answer Choices | Responses | | | | | Total Answ | 643 |
|------------------------------|----------------|---------|---------|----------|------------|--|---------------------------------------|
| | % | English | Spanish | Mandarin | Total | | |
| Traffic congestion | 44% | 279 | 5 | 1 | 285 | Responding Participants English Spanish Answered: Answered: 8 Skipped: 3 Skipped: 0 | Mandarin Answered: 1 Skipped: 0 |
| Unpredictable commute time | 25% | 156 | 3 | 0 | 159 | | |
| Back-up at freeway off ramps | 16% | 98 | 2 | 0 | 100 | | |
| Safety | 11% | 68 | 2 | 1 | 71 | | |
| Other | 4% | 28 | 0 | 0 | 28 | | |
| Total | 100.00% | | | | 643 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY

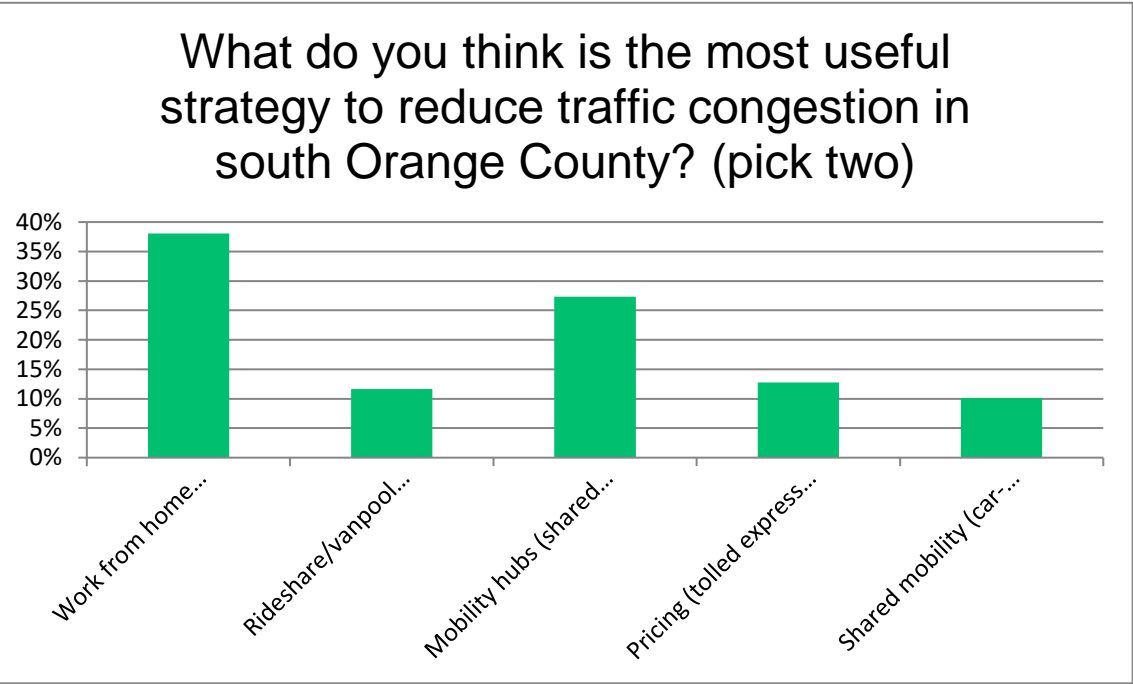
What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (pick two)

| Answer Choices | Responses | | | | | Total Answered | 658 |
|--|-----------|---------|---------|----------|-------|--|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Gaps in the bikeway and sidewalk network | 24% | 154 | 3 | 1 | 158 | Responding Participants English Spanish Mandarin Answered: 347 Answered: 8 Answered: 1 Skipped: 4 Skipped: 0 Skipped: 0 | |
| Long distances between trip origins and destinations | 26% | 163 | 5 | 0 | 168 | | |
| Safety concerns (lack of physical separation from cars, lack of pedestrian accommodations) | 32% | 207 | 4 | 1 | 212 | | |
| Topography (hilly terrain) | 15% | 101 | 0 | 0 | 101 | | |
| Other | 3% | 19 | 0 | 0 | 19 | | |
| Total | 100.00% | | | | 658 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY
What do you think is the most useful strategy
to reduce traffic congestion in south Orange
County? (pick two)

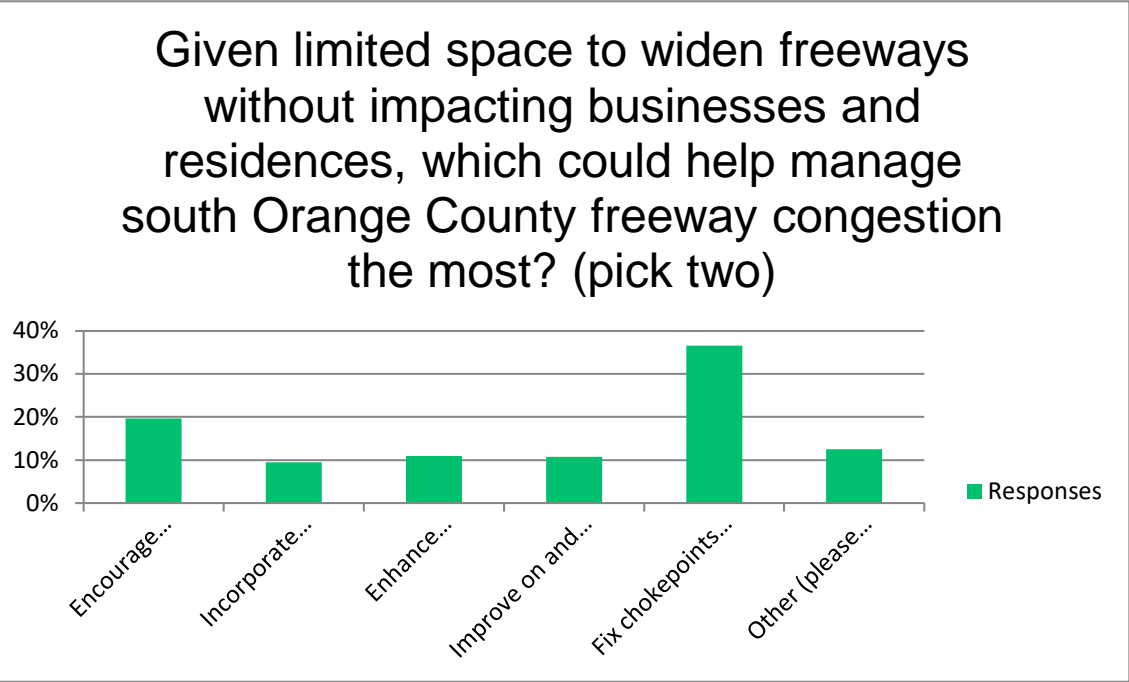
| Answer Choices | Responses | | | | | Total Answered | 651 |
|--|-----------|---------|---------|----------|-------|--|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Work from home programs | 38% | 245 | 2 | 1 | 248 | Responding Participants English Spanish Mandarin Answered: 342 Answered: 8 Answered: 1 Skipped: 9 Skipped: 0 Skipped: 0 | |
| Rideshare/vanpool programs and facilities | 12% | 73 | 2 | 1 | 76 | | |
| Mobility hubs (shared activity centers for connecting bus and transit) | 27% | 172 | 6 | 0 | 178 | | |
| Pricing (tolled express lanes, charge for parking) | 13% | 81 | 2 | 0 | 83 | | |
| Shared mobility (car-share, bike-share, scooter-share) | 10% | 63 | 3 | 0 | 66 | | |
| Total | 100.00% | | | | 651 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY

Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most? (pick two)

| Answer Choices | Responses | | | | | Total Answered | 677 |
|--|-----------|---------|---------|----------|-------|--|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Encourage carpools, vanpools and ridesharing | 20% | 129 | 4 | 0 | 133 | Responding Participants English: 342 Spanish: 8 Mandarin: 1 Skipped: 0 | |
| Incorporate tolled express lanes onto existing freeway | 9% | 61 | 2 | 1 | 64 | | |
| Enhance infrastructure to accommodate autonomous | 11% | 73 | 1 | 0 | 74 | | |
| Improve on and off ramps | 11% | 71 | 2 | 0 | 73 | | |
| Fix chokepoints (high congestion areas) | 37% | 243 | 4 | 1 | 248 | | |
| Other (please specify) | 13% | 85 | 0 | 0 | 85 | | |
| Total | 100.00% | | | | 677 | | |



| Respondents | Response Date | Other (please specify) | Tags |
|-------------|------------------------|--|------|
| | Oct 27 2020 1 06:59 PM | Express bus service on OC freeways linking OC and LA County. | |

| | | |
|----|----------------------|--|
| | | Work with business to gain extra dataset in terms of business hours # of employees ect |
| 2 | Oct 27 2020 04:18 PM | |
| | Oct 25 2020 | |
| 3 | 10:42 PM | mass transit |
| | Oct 25 2020 | More bus and train service |
| 4 | 02:31 PM | Restrict all commercial trucks to use between 8pm and 8am |
| | Oct 25 2020 | trains for long distances to hubs with buses & cabs for local |
| 5 | 02:14 PM | |
| | Oct 23 2020 | Implement first and last mile mobility devices. |
| 6 | 05:12 PM | |
| | Oct 23 2020 | |
| 7 | 02:42 PM | |
| | Oct 23 2020 | |
| 8 | 01:14 PM | Double Track Railroad |
| | | |
| | Oct 22 2020 | Properly maintain existing roadways anticipating autonomous increases |
| 9 | 12:21 PM | |
| | Oct 22 2020 | |
| 10 | 09:07 AM | Fix rail! more public transportation - train at better prices and more frequency during the whole day. Think like big city! |
| | Oct 22 2020 | |
| 11 | 09:05 AM | |
| | Oct 21 2020 | |
| 12 | 09:20 PM | More Metrolink! |
| | Oct 21 2020 | Close bicycle facility gaps. |
| 13 | 03:32 PM | Please. |

Encouraging higher capacity use of toll roads to take pressure off the 5; example: reduced cost use for 3+ vehicles or free use by an OCTA BRT route. Also, expand neighborhood "leisure" public transportation in more communities (e.g. trolleys in Laguna, Dana Point, San Clemente could be expanded to Laguna Niguel, Mission Viejo, Aliso Viejo, etc.). Land use planning that puts more jobs within walking distance of Metrolink stations.

Oct 21 2020
14 02:49 PM

Designate more lots where carpools could leave their cars. (eg. Walnut in Irvine near the 5 Fwy.)

Oct 21 2020
15 09:19 AM

more transit/rail infrastructure

Oct 21 2020
16 08:33 AM

Fix Metrolink and expand bike parking! A small residential area doesn't need bike share, but I would ride my bike to the trains station if I could keep it there safely for my commute!

Oct 21 2020
17 06:00 AM

eliminate toll fees so that all people including lower income utilize these underutilized lane resources

Oct 20 2020
18 07:45 PM

| | | | |
|--|----|-------------------------|---|
| | 19 | Oct 20 2020 12:23 PM | Better place bike parking (security of locked bikes) and ensure bike lanes on MSRs |
| | 20 | Oct 20 2020 11:59 AM | Construct the 241-South Toll Rd, using the former Green Alignment, which was killed only due to a major mis-information campaign by environmental activists. there is no other reasonable option to manage congestion, it is a shame folks from South County do not realize that. If there is an emergency, I-5 is the only lifeline, pretty shortsighted to not include Foothill south in every conceivable alternative if a real solution is desired. Carpools, vanpools and ridesharing have proven since the 1970s to not be a solution to manage congestion. Hanging your hat on autonomous vehicles would be very shortsighted, only a small proportion of vehicles by your horizon year would be autonomous. Fixing chokepoints and ramps is a bandaid that is not a true solution, sure those are helpful, but those do |
| | 21 | Oct 20 2020 11:00 AM | Increased frequencies of |
| | 22 | Oct 20 2020 08:19 AM | trains and buses. |

| | | |
|----|-------------|----------------------------|
| | Oct 19 2020 | Incorporating a much |
| 23 | 03:48 PM | better light-rail/subway |
| | | type travel network |
| | Oct 19 2020 | Make it easier for local |
| 24 | 09:39 AM | traffic to choose ebike or |
| | | golf cart |
| | Oct 18 2020 | |
| 25 | 10:47 AM | better public transit |
| | Oct 18 2020 | |
| 26 | 10:18 AM | eliminate car pool lanes |
| | Oct 18 2020 | |
| 27 | 09:20 AM | Work at home. |
| | | Connect Portola Parkway |
| | | to minimize traffic on |
| | Oct 16 2020 | Sand Canyon and |
| 28 | 08:01 PM | Bake/Alton |
| | | Use multi modal |
| | | sidewalks for golf carts. |
| | | No green house gas |
| | | emissions, easy for |
| | Oct 16 2020 | seniors, require small |
| 29 | 05:07 PM | parking footprint. |
| | Oct 16 2020 | Develop and encourage |
| 30 | 04:48 PM | public transit |
| | Oct 16 2020 | Add more free public |
| 31 | 04:39 PM | transportation options |
| | | using the bus. Schedules |
| | Oct 15 2020 | must match route time |
| 32 | 11:50 AM | more closely |
| | Oct 15 2020 | municipal transportation |
| 33 | 10:22 AM | lanes |
| | | DON'T continue building |
| | | unless you have the space |
| | | for roads to |
| | Oct 15 2020 | accommodate the new |
| 34 | 09:45 AM | people. SIMPLE! |
| | Oct 15 2020 | Shared cars at train |
| 35 | 09:31 AM | stations |
| | | Don't widen freeways |
| | Oct 14 2020 | ..constant construction |
| 36 | 04:01 PM | worse |

| | | |
|----|-------------------------|--|
| 37 | Oct 14 2020 03:17 PM | Improve other modes of travel to compete with freeway |
| 38 | Oct 14 2020 11:44 AM | encourage work from home |
| 39 | Oct 13 2020 02:21 PM | More Trolley's. More Train Sprinters. Incentivize carpools, vanpools, ridesharing |
| 40 | Oct 13 2020 11:38 AM | with vouchers or something similar |
| 41 | Oct 12 2020 11:39 AM | more frequent, free, fast buses |
| 42 | Oct 10 2020 03:29 PM | Limit population growth commensurate with infrastructure capacity & efficiency. don't do any of these -- you will only increase traffic. Consider congestion tolls |
| 43 | Oct 10 2020 05:44 AM | Improve public transportation as in europe |
| 44 | Oct 09 2020 10:45 PM | |
| 45 | Oct 08 2020 09:38 PM | Light rail or dedicated bus service in center medians add train / light rail along I-5 and I-405 fwy corridors w/ connections to bus |
| 46 | Oct 08 2020 06:05 PM | limit new track home building in areas, thus creating chokepoints... |
| 47 | Oct 08 2020 05:18 PM | |
| 48 | Oct 08 2020 08:58 AM | It's impossible to get to airports using public transportation. This needs to be fixed. And the drop off point should be at the airport not 20 minutes away from it leaving you still trying to get there. |

| | | |
|----|-------------------------|--|
| 49 | Oct 07 2020 10:16 PM | Better OCTA Service |
| 50 | Oct 07 2020 12:33 PM | Run public transportation along highway corridors get people to live near jobs; bring jobs to bedroom type communitites |
| 51 | Oct 06 2020 09:11 PM | Light rail |
| 52 | Oct 06 2020 07:43 PM | Get people out of cars onto bikes and buses. |
| 53 | Oct 06 2020 06:28 PM | Public transportation intercity shuttles that start and end at metro link |
| 54 | Oct 06 2020 11:20 AM | Truck Management: hours/lanes/\$\$ Create and improve safe cycling lanes and connecting bike paths |
| 55 | Oct 05 2020 09:16 PM | offer more public transit |
| 56 | Oct 05 2020 03:21 PM | Rail that is frequent Make it easier and safer to travel by bike away from cars |
| 57 | Oct 05 2020 11:12 AM | Resurface the freeways as was paid for but not done! |
| 58 | Oct 05 2020 11:00 AM | Construct additional rail/subway commuter system that is user- friendly |
| 59 | Oct 05 2020 10:52 AM | |
| 60 | Oct 04 2020 01:24 PM | |
| 61 | Oct 04 2020 12:12 PM | |
| 62 | Oct 04 2020 11:22 AM | |

| | | |
|----|----------------------|---|
| | | <p>Toll Lanes make traffic WORSE NOT BETTER! I used to live in Corona and saw the devastation they have caused on the 91. Why anyone is still pushing for them after the 91 debacle is beyond me.</p> |
| 63 | Oct 04 2020 10:56 AM | <p>self driving cars will mitigate most of the problems for a long time, but we have weird choke points where you lose 3 lanes suddenly. The toll roads are terrible because they generate massive jams where they terminate onto the</p> |
| 64 | Oct 04 2020 09:32 AM | <p>freeways. No more toll roads.</p> |
| 65 | Oct 02 2020 07:29 PM | <p>Complete roadway gaps. Connecting La Pata to Antonio Parkway is the best example. The Portola Parkway gap should be expedited as a roadway and protected bikeway.</p> |
| 66 | Oct 02 2020 06:56 PM | <p>Increase quality of public transport (bus and rail travel)</p> |

| | | |
|----|-------------------------|--|
| | | Double deck freeways, Purchase land (e.g. not allow a person or business to privately hold property within 200 yards of all freeways) along both sides of every freeway and rent back until enough land has been purchased to widen a freeway. |
| 67 | Oct 02 2020 04:59 PM | |
| 68 | Oct 02 2020 04:20 PM | improve bus transport options eliminate the tolls and carpool lanes. If the toll roads were free, then lower income people could use them, and traffic would be reduced on the "freeways", likewise a reduction in travel time average for all, if carpool lanes were available to all vehicles. |
| 69 | Oct 02 2020 09:43 AM | |
| 70 | Oct 02 2020 08:30 AM | stop widespread development Begin building and utilizing multi modal trails. We have over 1300 golf carts in our city. |
| 71 | Oct 01 2020 04:30 PM | Great for seniors, ghg not used |
| 72 | Oct 01 2020 12:35 PM | More options for public transit with more time slots |

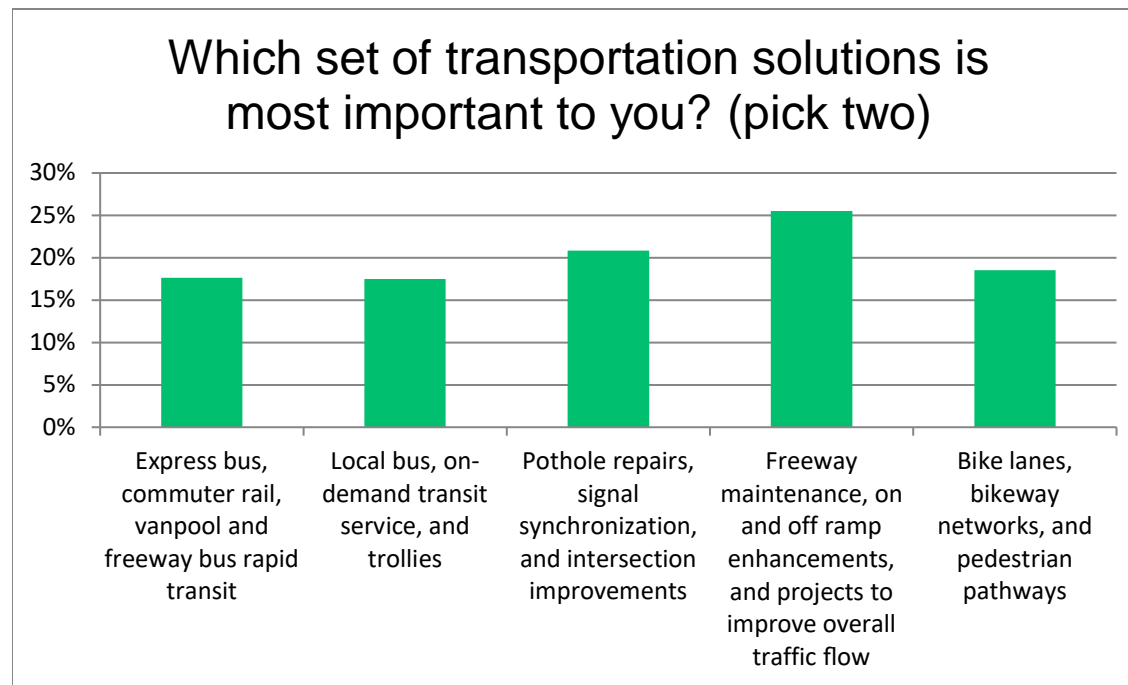
| | | |
|----|-------------------------|--|
| | | better driver training, non-personal vehicles should only be allowed in the two rightmost lanes and the CHP should fine them for using other lanes. I'm constantly seeing big rigs |
| 73 | Oct 01 2020 07:21 AM | SB 5 using the 3rd lane from the right. Train - more light rail. |
| 74 | Sep 30 2020 06:26 PM | Buses sit in the same traffic. |
| 75 | Sep 30 2020 04:27 PM | Encourage train and bicycle trips |
| 76 | Sep 30 2020 03:53 PM | Add carpool lanes on the 73 and 241 |
| 77 | Sep 30 2020 02:33 PM | More busses |
| 78 | Sep 30 2020 01:43 PM | Add protected bicycle lanes |
| 79 | Sep 30 2020 12:57 PM | multi modal options |
| 80 | Sep 30 2020 11:30 AM | change work schedule to an earlier or later start work time. |
| 81 | Sep 30 2020 10:53 AM | Be like the bay area build a freeway on top of the freeway, get more bravo bus routes with less stops to destinations that people actually wanna go. More Light Rail would be cool as well. |
| 82 | Sep 30 2020 09:18 AM | Encourage more higher wage industries (not retail) to have locations in So. OC so people won't have to commute on freeways. |

| | | |
|--|--|--|
| | Sep 29 2020 | |
| | 83 | 10:32 AM Finish the 241 |
| | Sep 28 2020 build public | |
| | 84 | 08:11 AM transportation, light rail |
| | Sep 26 2020 Better bus and commuter | |
| | 85 | 05:54 PM rail service |

OCTA SOCMTS PUBLIC INPUT SURVEY

Which set of transportation solutions is most important to you? (pick two)

| Answer Choices | Responses | | | | | | | |
|---|----------------|---------|---------|----------|------------|-------------------------|-------------|-------------|
| | % | English | Spanish | Mandarin | Total | Total Responses | | |
| Express bus, commuter rail, vanpool and freeway bus | 18% | 119 | 2 | 0 | 121 | | | |
| Local bus, on-demand transit service, and trolleys | 17% | 113 | 7 | 0 | 120 | Responding Participants | | |
| Pothole repairs, signal synchronization, and intersection | 21% | 140 | 2 | 1 | 143 | English | Spanish | Mandarin |
| Freeway maintenance, on and off ramp enhancements | 26% | 172 | 2 | 1 | 175 | Answered: 348 | Answered: 8 | Answered: 1 |
| Bike lanes, bikeway networks, and pedestrian pathway | 19% | 124 | 3 | 0 | 127 | Skipped: 3 | Skipped: 0 | Skipped: 0 |
| Total | 100.00% | | | | 686 | | | |

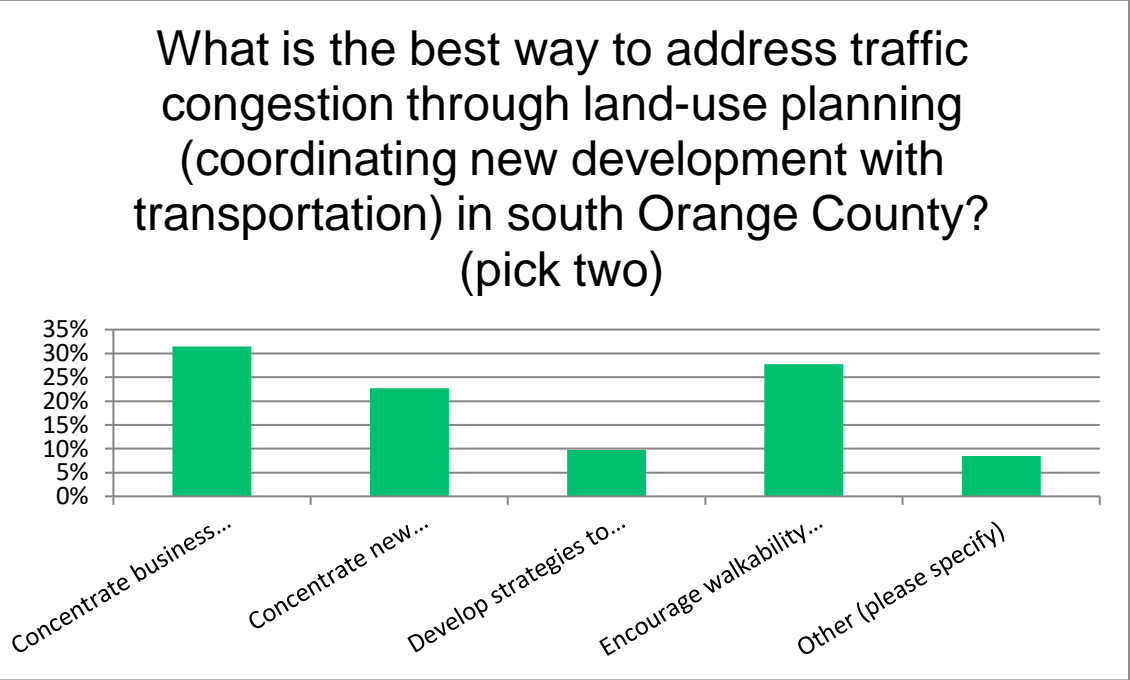


OCTA SOCMTS PUBLIC INPUT SURVEY

What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (pick two)

| Answer Choice | Responses | | | | |
|--------------------------|-----------|---------|---------|----------|-------|
| | % | English | Spanish | Mandarin | Total |
| Concentrate business... | 31% | 198 | 5 | 1 | 204 |
| Concentrate new... | 23% | 143 | 3 | 1 | 147 |
| Develop strategies to... | 10% | 63 | 0 | 0 | 63 |
| Encourage walkability... | 28% | 175 | 5 | 0 | 180 |
| Other (please specify) | 8% | 54 | 1 | 0 | 55 |
| Total | 100.00% | | | | 649 |

| | | |
|-------------------------|-------------|-------------|
| Total Answered | 649 | |
| Responding Participants | | |
| English | Spanish | Mandarin |
| Answered: 347 | Answered: 8 | Answered: 1 |
| Skipped: 4 | Skipped: 0 | Skipped: 0 |



| Respondents | Response | | Tags |
|-------------|------------------------|---|------|
| | Date | Other (please specify) | |
| | Oct 29 2020 1 09:12 AM | let private parties determine how development works in their particular community | |
| | Oct 28 2020 2 03:21 PM | You're too late. Too many communities have been developed that can ONLY utilize already established arterials meant for that community. | |
| | Oct 24 2020 3 02:44 AM | Encourage bicycling, walking, jogging, alternatives to cars | |

| | | |
|----|----------------------|--|
| | | Not charge for parking. |
| 4 | Oct 23 2020 05:12 PM | Trains supplemented by local cabs, etc |
| 5 | Oct 23 2020 01:14 PM | Improve rail by double tracking |
| 6 | Oct 22 2020 09:15 AM | Develop an Uber style service run by the OCTA MIXED USE near rail :) Like the "One Paseo" |
| 7 | Oct 22 2020 09:07 AM | development in North San Diego Offer parallel roads to high traffic roads (eg.Ortega hwy) to alleviate high traffic and bottle necking (eg El Toro Rd has Los Aliso as an alternative when El Toro has excess traffic) |
| 8 | Oct 21 2020 05:05 PM | |
| 9 | Oct 20 2020 07:45 PM | charging for parking favors affluent and harms lower income, eliminate the tolls from toll roads. toll free holidays and rush hours |
| 10 | Oct 20 2020 11:59 AM | Require developers to first construct an appropriately-sized road network that meets the projected vehicle capacity increase before a single building facility is approved for construction. No final project approval until the vehicle transportation network is in place. |

not a real option, sure
some people ride
metrolink but does
someone really think
transit in south county is
the solution to anything?
This is very shortsighted.
Based on the last 100
years, it should be clear
that land-use planning is
market based and to think
it will change is folly. This
county is auto dependent
and always will be, you
cannot change the
mindset of a vast majority
of the population so why
try? People that travel in
south county that are
impacted by congestion
do not care about
walkability or complete
streets, if you get on the
freeway, active modes are
not an option for your trip
to begin with, not hard to

- | | | |
|----|-------------|----------------------------|
| | Oct 20 2020 | figure out. Charge for |
| 11 | 11:00 AM | parking in south county? |
| | Oct 19 2020 | expanding rail travel |
| 12 | 03:48 PM | locations |
| | Oct 19 2020 | reduce number of houses |
| 13 | 02:10 PM | being built |
| | Oct 19 2020 | More bikeways and golf |
| 14 | 09:39 AM | cart friendly streets |
| | Oct 18 2020 | raise cost of new |
| 15 | 07:57 PM | development |
| | Oct 16 2020 | |
| 16 | 07:12 PM | Build more roads |
| | Oct 16 2020 | |
| 17 | 05:07 PM | Work from home option |
| | Oct 16 2020 | Add more public |
| 18 | 04:39 PM | transportation |
| | | Read question #9. You |
| | | need infrastructure before |
| | Oct 15 2020 | you bring more people |
| 19 | 09:45 AM | and cars! |

| | | |
|----|-------------------------|--|
| 20 | Oct 14 2020 02:20 PM | Make public transportation easy, safe and available |
| 21 | Oct 14 2020 11:44 AM | Not approving new development without water permits. |
| 22 | Oct 13 2020 11:38 AM | Construct transit centers around EXISTING housing development |
| 23 | Oct 10 2020 04:43 PM | Stop developing! Encourage businesses to allow work-from-home and 4-day workweeks |
| 24 | Oct 10 2020 02:00 PM | Develop mixed use areas (vs. separate business and resident) that connect to transit |
| 25 | Oct 08 2020 06:05 PM | |
| 26 | Oct 08 2020 05:18 PM | DON'T Charge for parking, then we can meet with others and carpool One parking charge is more than the gas to get there and back. |
| 27 | Oct 08 2020 02:12 PM | discontinue groups like you |
| 28 | Oct 07 2020 03:46 PM | Better bus routes, e.g. Aliso Creek (movie & shopping) |
| 29 | Oct 04 2020 05:41 PM | Get rid of toll lanes since the toll roads have been paid for than let people drive them without a toll |
| 30 | Oct 04 2020 03:07 PM | Always develop with wide lanes and room to grow/expand |
| 31 | Oct 04 2020 02:58 PM | Hyper-proximity cities (15- minute cities) |
| 32 | Oct 04 2020 01:09 PM | Restrict new development |
| 33 | Oct 04 2020 12:12 PM | End high density housing developments now!! |

| | | |
|----|----------------------|---|
| | | Have developer pay for arterial roads when developing an area and ONLY when studies show they are necessary (not BEFORE) |
| 34 | Oct 04 2020 10:56 AM | |
| 35 | Oct 04 2020 10:13 AM | new main roads to accommodate new large developments |
| | | stop trying to price people from activities, like parking pricing, toll roads and the rest, it is a regressive tax, we already pay for the highways, stop tolling them. Stop throwing a ton of houses into areas without having gotten the infrastructure resolved first. |
| 36 | Oct 04 2020 09:32 AM | |
| 37 | Oct 03 2020 03:37 PM | Limit new housing development! |
| 38 | Oct 03 2020 09:16 AM | Smart intersections, signal synchronization county-wide |
| 39 | Oct 02 2020 07:29 PM | Remove bikeways from streets by investing in pedestrian/bike bridges |
| 40 | Oct 02 2020 02:51 PM | limit growth. |
| | | Increasing density through unbridled development results in greater tripmaking and traffic. Control growth instead of merely attempting to accomodate growth. |
| 41 | Oct 02 2020 12:30 PM | |
| 42 | Oct 02 2020 11:35 AM | Not a fan of restricting development rights. |

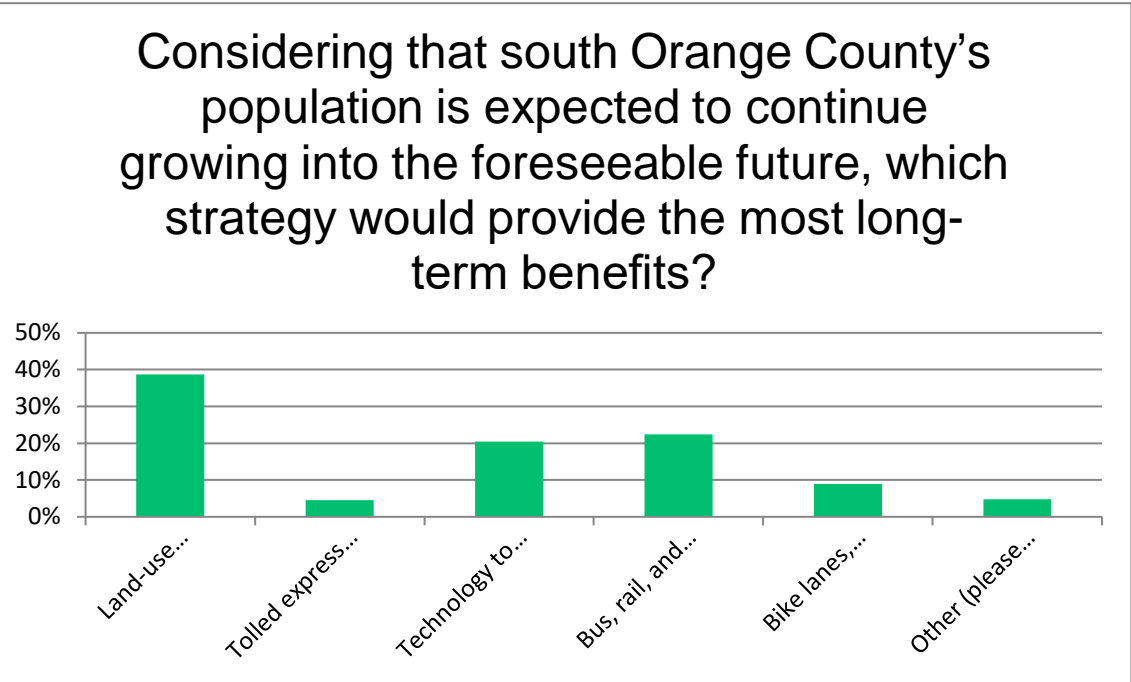
| | | |
|----|----------------------|--|
| | | enough with the charging to impact behavior. It adversely affects lower income people. Make parking free around train and bus terminals. |
| 43 | Oct 02 2020 09:43 AM | increase bus safety; |
| 44 | Oct 02 2020 08:30 AM | people are afraid to ride mass transit |
| 45 | Oct 01 2020 06:16 PM | Stop development |
| 46 | Oct 01 2020 04:30 PM | Multi modal trails and small electronic mobility devices for individual housing on one end of (bus/rail) and business on the other end |
| 47 | Oct 01 2020 02:10 PM | |
| 48 | Oct 01 2020 10:25 AM | Land use planning is not the issue. Most bus/rail centers are located in highly developed areas now. The key to reducing congestion is to move more cars through the freeway/toll roads more quickly. Congestion pricing will do more to reduce congestion than land use planning. |
| 49 | Oct 01 2020 07:21 AM | better synconized stop lights, similar stores on both sides of the street thus eliminating the need to turn left and interrupting the flow of traffic in opposite direction. |
| 50 | Sep 30 2020 02:32 PM | Provide adequate thoroughfares in and around residential development |
| 51 | Sep 30 2020 11:30 AM | well lit bus and light rail service pick up and drop off points |

| | | |
|----|-------------------------|--|
| | | how about making pch into a toll road or build a toll road somewhere else extend the 241 already. Its only taken what 5 years. I live in the bay area now and almost dont wanna come back to oc cause it sucks for busses and trains worse than la. |
| 52 | Sep 30 2020 10:53 AM | |
| | | Sep 26 2020 |
| 53 | 07:14 AM | City shuttle service |
| | | Sep 25 2020 |
| 54 | 12:35 PM | Affordable Senior transportation |
| | | Oct 27 2020 |
| 55 | 10:30 PM | (Spanish) More bus routes |

OCTA SOCMTS PUBLIC INPUT SURVEY

Considering that south Orange County’s population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?

| Answer Choices | Responses | | | | | Total Answered | 356 |
|--|----------------|---------|---------|----------|------------|---|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Land-use planning (coordinating new development with transportation planning) | 39% | 135 | 3 | 0 | 138 | <div> <div> <div>Responding Participants</div> <div>English</div> <div>Spanish</div> <div>Mandarin</div> </div> <div> <div>Answered: 347</div> <div>Answered: 8</div> <div>Skipped: 4</div> <div>Skipped: 0</div> </div> </div> | |
| Tolled express lanes on existing freeways | 4% | 15 | 1 | 0 | 16 | | |
| Technology to minimize traffic (signal synchronization, autonomous vehicle technology) | 21% | 72 | 1 | 0 | 73 | | |
| Bus, rail, and other transit services | 22% | 80 | 0 | 0 | 80 | | |
| Bike lanes, sidewalks/crosswalks, and paved trails | 9% | 28 | 3 | 1 | 32 | | |
| Other (please specify) | 5% | 17 | 0 | 0 | 17 | | |
| Total | 100.00% | | | | 356 | | |



| Respondents | Response | | Other (please specify) | Tags |
|-------------|-------------|------------|--|------|
| | Date | | | |
| | Oct 22 2020 | 1 09:15 AM | Develop an uber style service | |
| | Oct 20 2020 | 2 11:59 AM | See my response to the previous question. | |
| | Oct 18 2020 | 3 09:20 AM | Work at home | |
| | Oct 16 2020 | 4 07:12 PM | Build more roads, highway lanes and finish the 241 | |

| | | |
|----|-------------------------|---|
| 5 | Oct 15 2020 09:45 AM | I don't mind land use planning BUT you need to address capacity of the town or city. |
| 6 | Oct 14 2020 11:44 AM | Synchronization of lights, working at home benefits, & autonomous vehicles. |
| 7 | Oct 08 2020 06:05 PM | Encourage less dependence on vehicles, and more bike/walk to local destinations. Further destinations would use bus/rail. Freeways are so congested and don't trust Caltrans to manage budget, schedule or prioritize local community needs. Want to keep local funds to serve local needs. |
| 8 | Oct 08 2020 02:12 PM | Stop making the problem worst as you are doing. |
| 9 | Oct 07 2020 03:46 PM | Electric automobiles Reduce the toll road cost. |
| 10 | Oct 04 2020 05:41 PM | Lower the price dramatically Resurface freeways. End all toll roads to improve utilization! |
| 11 | Oct 04 2020 12:12 PM | Again, Tolloed express lanes are a horrible idea. Developers should build arterial roads when they build new communities WHERE THEY ARE NEEDED. NO MORE TOLL ROADS/NO MORE TOLL ROAD EXTENSIONS/NO MORE TOLL LANES! |
| 12 | Oct 04 2020 10:56 AM | |
| 13 | Oct 03 2020 03:37 PM | Limit new housing development! |

| | | |
|----|-------------------------|---|
| 14 | Oct 02 2020 12:30 PM | See response to previous question. |
| 15 | Oct 01 2020 07:21 AM | eliminate the toll on toll roads. I would use toll roads 261 and 241 instead of Jamboree if it was free. |
| 16 | Sep 30 2020 11:22 AM | Stop building on whatever is left of our open spaces. Educate people on rules of the road. Make bike lanes safer. We have a tandem that we would ride everywhere. We finally stopped riding due to people not paying attention while driving. |
| 17 | Sep 25 2020 12:35 PM | Affordable senior transportation |

OCTA SOCMTS PUBLIC INPUT SURVEY

What is your worksite zip code if you have one?

Responding Participants

| | Spanish | Mandarin |
|----------|---------|----------|
| Answered | 8 | 1 |
| Skipped | 0 | 0 |

| English Respondent s | Responses | Tags |
|----------------------------|-----------|------|
| 1 | 90740 | |
| 2 | 92672 | |
| 3 | 92653 | |
| 4 | 92688 | |
| 5 | 92673 | |
| 6 | 92866 | |
| 7 | 92805 | |
| 8 | 92692 | |
| 9 | 92677 | |
| 10 | 92688 | |
| 11 | 92653 | |
| 12 | 92805 | |
| 13 | 92863 | |
| 14 | 92688 | |
| 15 | 92704 | |
| 16 | 92704 | |
| 17 | 92672 | |
| 18 | 92627 | |
| 19 | 90245 | |
| 20 | 92653 | |
| 21 | 92804 | |

| | |
|----|---------|
| 22 | 92866 |
| 23 | 92672 |
| 24 | 92675 |
| 25 | 92704 |
| 26 | 92704 |
| 27 | Retired |
| 28 | 92626 |
| 29 | - |
| 30 | 92704 |
| 31 | 92704 |
| 32 | 92630 |
| 33 | 92673 |
| 34 | 92868 |
| 35 | 92626 |
| 36 | 92677 |
| 37 | 92677 |
| 38 | 92677 |
| 39 | 92618 |
| 40 | 92675 |
| 41 | 90804 |
| 42 | 92629 |
| 43 | 92673 |
| 44 | 92618 |
| 45 | 92701 |
| 46 | 92653 |
| 47 | 92618 |
| 48 | 92672 |
| 49 | 92675 |
| 50 | 92697 |
| 51 | 92612 |
| 52 | 92672 |
| 53 | N/A |

| | |
|----|-------|
| 54 | 92660 |
| 55 | 92410 |
| 56 | 92623 |
| 57 | 92614 |
| 58 | 92673 |
| 59 | 92673 |
| 60 | 92625 |
| 61 | 92868 |
| 62 | 92660 |
| 63 | 92626 |
| 64 | 92630 |
| 65 | 92672 |
| 66 | na |
| 67 | 92620 |
| 68 | 92614 |
| 69 | 92660 |
| 70 | 92660 |
| 71 | 92612 |
| 72 | 92618 |
| 73 | 92691 |
| 74 | 92692 |
| 75 | 92637 |
| 76 | 92630 |
| 77 | 92629 |
| 78 | 92657 |
| 79 | 92672 |
| 80 | 92677 |
| 81 | 92630 |
| 82 | 92612 |
| 83 | 92674 |
| 84 | 92672 |
| 85 | 92660 |

| | |
|-----|-------|
| 86 | 92673 |
| 87 | 92672 |
| 88 | na |
| 89 | 92672 |
| 90 | 92672 |
| 91 | 92673 |
| 92 | 92672 |
| 93 | 92705 |
| 94 | 92660 |
| 95 | 92868 |
| 96 | 92651 |
| 97 | 92660 |
| 98 | 92688 |
| 99 | 92672 |
| 100 | 92672 |
| 101 | 92780 |
| 102 | 92672 |
| 103 | 92672 |
| 104 | 92673 |
| 105 | None |
| 106 | N.A. |
| 107 | 90041 |
| 108 | 92806 |
| 109 | 92675 |
| 110 | 92618 |
| 111 | 92618 |
| 112 | 92691 |
| 113 | 92691 |
| 114 | 92691 |
| 115 | 92691 |
| 116 | 92691 |
| 117 | 92691 |

| | |
|-----|------------------------|
| 118 | 92691 |
| 119 | 92691 |
| 120 | 92691 |
| 121 | 92691 |
| 122 | 92612 |
| 123 | 92831 |
| 124 | 92612 / 92618 |
| 125 | *2630 |
| 126 | 92623 |
| 127 | 92868 |
| 128 | 92673 |
| 129 | 92673 |
| 130 | 92831 |
| 131 | 92651 |
| 132 | 92618 |
| 133 | 30144 |
| 134 | 92677 |
| 135 | 92843 |
| 136 | 90045 |
| 137 | 92660 |
| 138 | 92629 |
| 139 | 90014 |
| 140 | 92688 |
| 141 | 92701 |
| 142 | 92629 |
| 143 | Retired / home / 92651 |
| 144 | 92868 |
| 145 | 92660 |
| 146 | 92656 |
| 147 | 92677 |
| 148 | 92651 |
| 149 | 92656 |

| | |
|-----|-------|
| 150 | 92656 |
| 151 | N/a |
| 152 | 92691 |
| 153 | 92677 |
| 154 | 92692 |
| 155 | 92630 |
| 156 | 92629 |
| 157 | N/A |
| 158 | 92660 |
| 159 | 92688 |
| 160 | 92610 |
| 161 | 90240 |
| 162 | 92610 |
| 163 | 92630 |
| 164 | 92660 |
| 165 | 92630 |
| 166 | 92624 |
| 167 | 92626 |
| 168 | 92646 |
| 169 | 92656 |
| 170 | 92630 |
| 171 | 92782 |
| 172 | 92868 |
| 173 | 92606 |
| 174 | 92618 |
| 175 | 92624 |
| 176 | 92602 |
| 177 | 92673 |
| 178 | 90660 |
| 179 | na |
| 180 | 92672 |
| 181 | 92673 |

| | |
|-----|-------|
| 182 | 92647 |
| 183 | 92626 |
| 184 | 92624 |
| 185 | 90017 |
| 186 | 92672 |
| 187 | 92691 |
| 188 | 92653 |
| 189 | 92806 |
| 190 | 90601 |
| 191 | 92691 |
| 192 | 92675 |
| 193 | 92691 |
| 194 | 92677 |
| 195 | 92618 |
| 196 | 92677 |
| 197 | 92691 |
| 198 | 92660 |
| 199 | 91708 |
| 200 | 92630 |
| 201 | 90003 |
| 202 | 92637 |
| 203 | 90089 |
| 204 | 92692 |
| 205 | 92675 |
| 206 | 92675 |
| 207 | 92868 |
| 208 | 92630 |
| 209 | 92705 |
| 210 | 92780 |
| 211 | 92630 |
| 212 | 92637 |
| 213 | 92618 |

| | |
|-----|--------------------|
| 214 | 92863 |
| 215 | 92868 |
| 216 | 92704 |
| 217 | 92806 |
| 218 | 92691 |
| 219 | 92691 |
| 220 | 92691 |
| 221 | 92691 |
| 222 | 92691 |
| 223 | 92691 |
| 224 | 92691 |
| 225 | 92630 |
| 226 | 92618 |
| 227 | 91765 |
| 228 | 92704 |
| 229 | 90015 |
| 230 | 92707 |
| 231 | 92130 |
| 232 | 92614 |
| 233 | 92630 |
| 234 | 92623 |
| 235 | n/a |
| 236 | 92868 |
| 237 | 92626 |
| 238 | No comments at all |
| 239 | 92807 |
| 240 | 92630 |
| 241 | 92688 |
| 242 | 92691 |
| 243 | n/a |
| 244 | 92715 |
| 245 | 92630 |

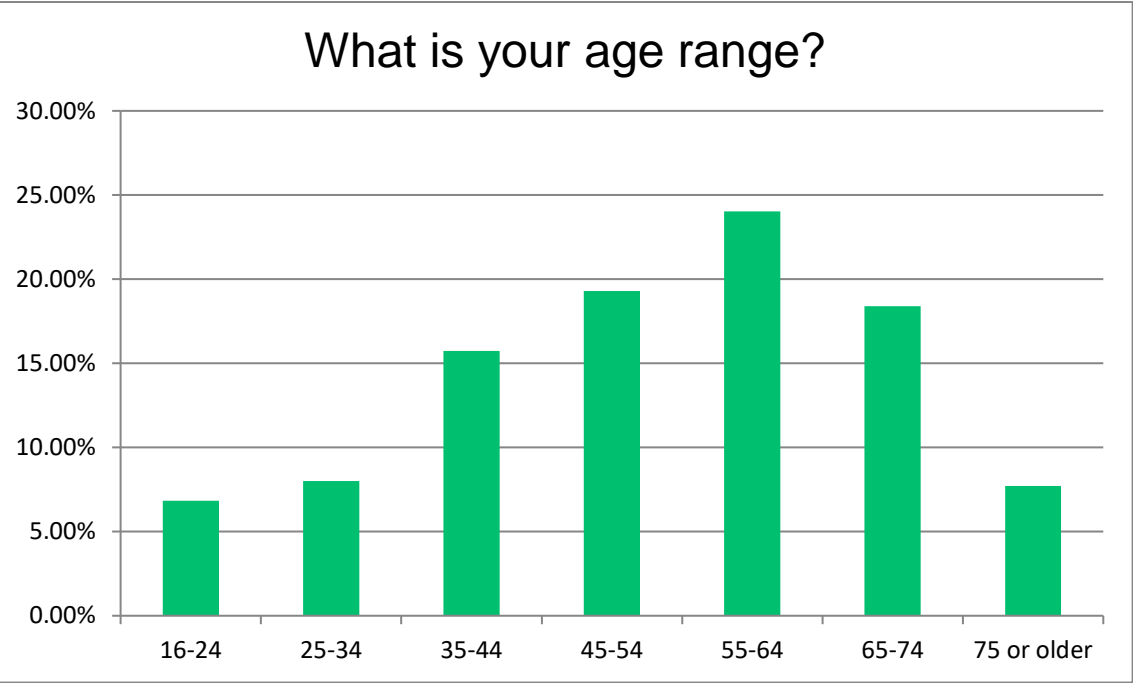
| 246 | 92705 | | |
|----------------------------|-----------|------|--|
| 247 | 92844 | | |
| 248 | 92630 | | |
| 249 | 92663 | | |
| 250 | 92618 | | |
| 251 | 92868 | | |
| 252 | 95448 | | |
| 253 | 92679 | | |
| 254 | 92604 | | |
| 255 | 92656 | | |
| 256 | 92630 | | |
| 257 | 92630 | | |
| 258 | 92630 | | |
| 259 | 92610 | | |
| 260 | 92630 | | |
| 261 | 92691 | | |
| 262 | 92614 | | |
| 263 | 92618 | | |
| 264 | 92614 | | |
| 265 | 92604 | | |
| 266 | 92610 | | |
| 267 | 92675 | | |
| 268 | 92692 | | |
| 269 | 92646 | | |
| 270 | N/A | | |
| 271 | 92693 | | |
| 272 | 92693 | | |
| Spanish Respondent s | Responses | Tags | |
| 273 | 92917 | | |
| 274 | 92637 | | |

| | | | |
|-----------------------------|-----|-----------|------|
| | 275 | 92701 | |
| | 276 | 92780 | |
| | 277 | 92703 | |
| | 278 | 92701 | |
| | 279 | 92694 | |
| | 280 | 92801 | |
| Mandarin Respondent s | | Responses | Tags |
| | 281 | 92602 | |

OCTA SOCMTS PUBLIC INPUT SURVEY

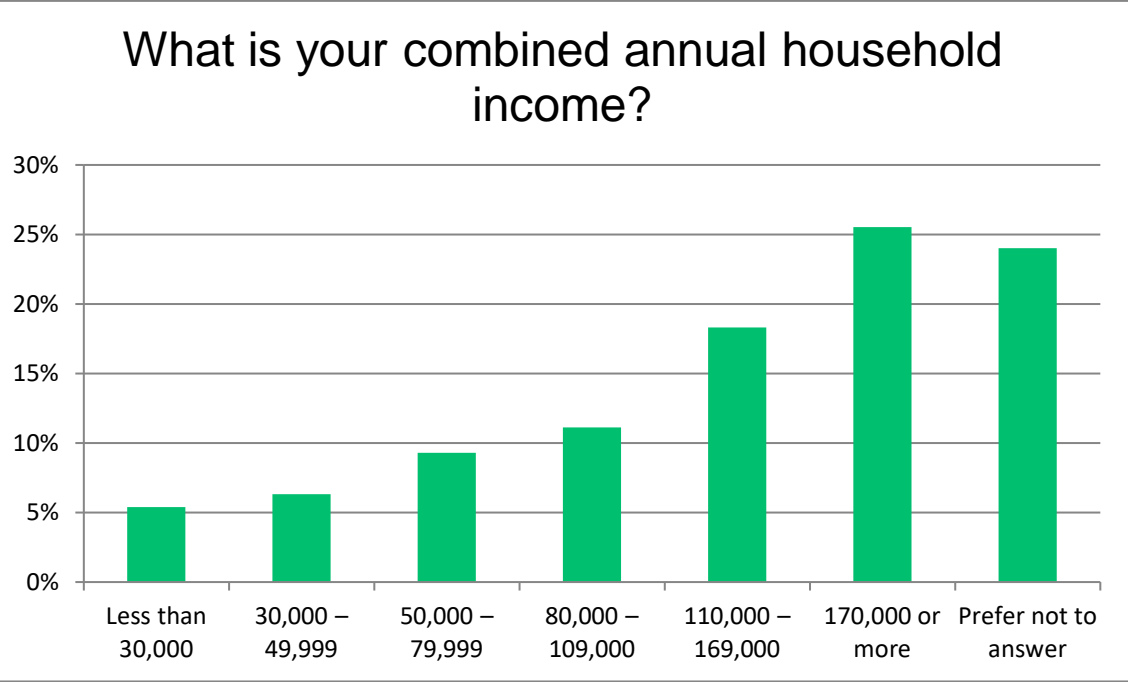
What is your age range?

| Answer Choices | | Responses | | | | Total Answered | | 337 |
|----------------|---------|-----------|---------|----------|-------|----------------------------|-------------|------------|
| | % | English | Spanish | Mandarin | Total | | | |
| 16-24 | 6.82% | 22 | 1 | 0 | 23 | 27 Responding Participants | | Mandarin |
| 25-34 | 8.01% | 26 | 1 | 0 | 27 | | | |
| 35-44 | 15.73% | 50 | 3 | 0 | 53 | English | Spanish | Mandarin |
| 45-54 | 19.29% | 61 | 3 | 1 | 65 | Answered: 328 | Answered: 8 | |
| 55-64 | 24.04% | 81 | 0 | 0 | 81 | Skipped: 23 | Skipped: 0 | Skipped: 0 |
| 65-74 | 18.40% | 62 | 0 | 0 | 62 | | | |
| 75 or older | 7.72% | 26 | 0 | 0 | 26 | | | |
| Total | 100.00% | | | | 337 | | | |



OCTA SOCMTS PUBLIC INPUT SURVEY
What is your combined annual household income?

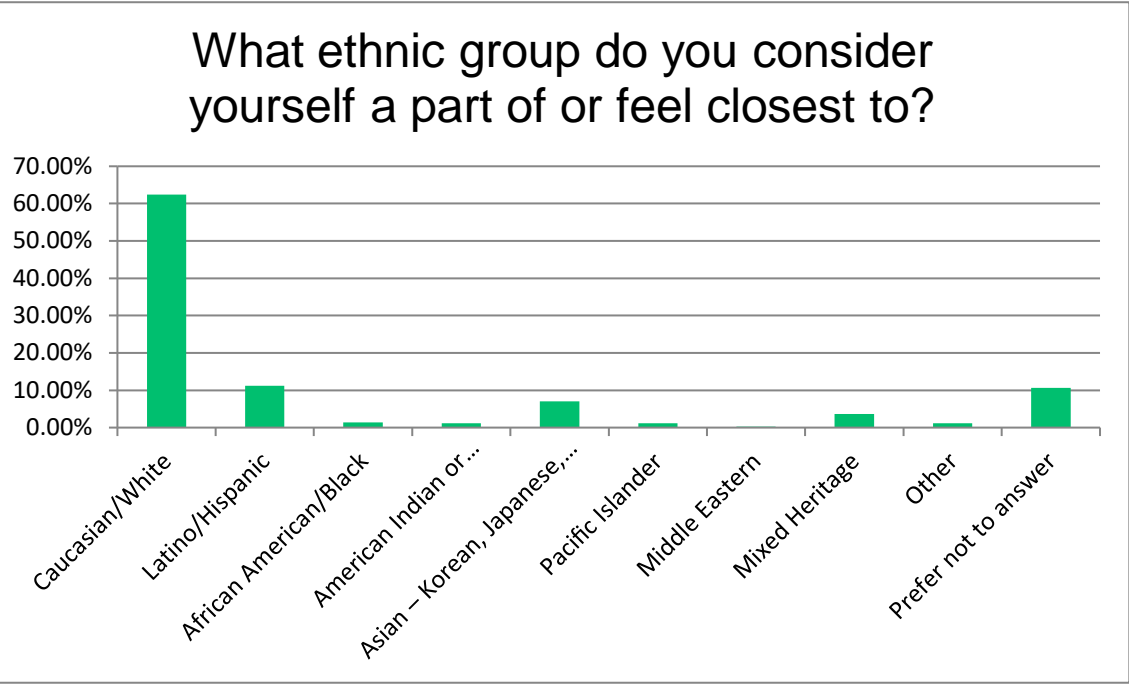
| Answer Choices | Responses | | | | | Total Answered | 333 |
|----------------------|-----------|---------|---------|----------|-------|---|-----|
| | % | English | Spanish | Mandarin | Total | | |
| Less than 30,000 | 5% | 14 | 3 | 1 | 18 | 21 Responding Participants English Spanish Mandarin Answered: 328 Answered: 8 Answered: 1 Answered: 324 Answered: 8 Answered: 1 Skipped: 27 Skipped: 0 Skipped: 0 | |
| 30,000 – 49,999 | 6% | 19 | 2 | 0 | 21 | | |
| 50,000 – 79,999 | 9% | 30 | 1 | 0 | 31 | | |
| 80,000 – 109,000 | 11% | 37 | 0 | 0 | 37 | | |
| 110,000 – 169,000 | 18% | 61 | 0 | 0 | 61 | | |
| 170,000 or more | 26% | 85 | 0 | 0 | 85 | | |
| Prefer not to answer | 24% | 78 | 2 | 0 | 80 | | |
| Total | 100.00% | | | | 333 | | |



OCTA SOCMTS PUBLIC INPUT SURVEY

What ethnic group do you consider yourself a part of or feel closest to?

| Answer Choices | Responses | | | | | | | |
|---|-------------------|---------|---------|----------|-------|----------------------------|-------------|-------------|
| | English % Only | English | Spanish | Mandarin | Total | Total Answered | | |
| Caucasian/White | 62.46% | 223 | 0 | 0 | 223 | 40 Responding Participants | 5 English | Spanish |
| Latino/Hispanic | 11.20% | 32 | 8 | 0 | 40 | | | |
| African American/Black | 1.40% | 5 | 0 | 0 | 5 | | | |
| American Indian or Alaskan Native | 1.12% | 4 | 0 | 0 | 4 | | | |
| Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other | 7.00% | 24 | 0 | 1 | 25 | 25 Skipped: 23 | Answered: 8 | Mandarin |
| Pacific Islander | 1.12% | 4 | 0 | 0 | 4 | Skipped: 0 | Skipped: 0 | Answered: 1 |
| Middle Eastern | 0.28% | 1 | 0 | 0 | 1 | | | Skipped: 0 |
| Mixed Heritage | 3.64% | 13 | 0 | 0 | 13 | | | |
| Other | 1.12% | 4 | 0 | 0 | 4 | | | |
| Prefer not to answer | 10.64% | 38 | 0 | 0 | 38 | | | |
| Total | 100.00% | | | | 357 | | | |



Appendix B

Appendix B.2 English Survey Results

OCTA SOCMTS PUBLIC INPUT SURVEY

What is your home zip code?

Answered 349

Skipped 2

| Response | | | |
|-------------|------|-----------|------|
| Respondents | Date | Responses | Tags |

| | | | |
|----|-------------|-------|--|
| | Oct 30 2020 | | |
| 1 | 01:01 PM | 90630 | |
| | Oct 29 2020 | | |
| 2 | 03:41 PM | 92630 | |
| | Oct 29 2020 | | |
| 3 | 02:06 PM | 92614 | |
| | Oct 29 2020 | | |
| 4 | 02:05 PM | 92688 | |
| | Oct 29 2020 | | |
| 5 | 12:39 PM | 92656 | |
| | Oct 29 2020 | | |
| 6 | 10:58 AM | 92688 | |
| | Oct 29 2020 | | |
| 7 | 09:52 AM | 92647 | |
| | Oct 29 2020 | | |
| 8 | 09:35 AM | 92692 | |
| | Oct 29 2020 | | |
| 9 | 09:12 AM | 92677 | |
| | Oct 29 2020 | | |
| 10 | 09:01 AM | 92679 | |
| | Oct 29 2020 | | |
| 11 | 08:56 AM | 92840 | |
| | Oct 29 2020 | | |
| 12 | 08:55 AM | 92805 | |

| | | |
|----|-------------|-------|
| | Oct 29 2020 | |
| 13 | 07:44 AM | 92627 |
| | Oct 28 2020 | |
| 14 | 03:38 PM | 92880 |
| | Oct 28 2020 | |
| 15 | 03:21 PM | 92688 |
| | Oct 28 2020 | |
| 16 | 08:15 AM | 91761 |
| | Oct 28 2020 | |
| 17 | 08:10 AM | 92703 |
| | Oct 28 2020 | |
| 18 | 06:13 AM | 91762 |
| | Oct 27 2020 | |
| 19 | 08:38 PM | 92673 |
| | Oct 27 2020 | |
| 20 | 07:25 PM | 92707 |
| | Oct 27 2020 | |
| 21 | 06:59 PM | 92648 |
| | Oct 27 2020 | |
| 22 | 04:18 PM | 92694 |
| | Oct 27 2020 | |
| 23 | 02:46 PM | 92683 |
| | Oct 27 2020 | |
| 24 | 08:04 AM | 92660 |
| | Oct 27 2020 | |
| 25 | 07:53 AM | 92672 |
| | Oct 26 2020 | |
| 26 | 08:54 PM | 92886 |
| | Oct 25 2020 | |
| 27 | 10:42 PM | 92886 |
| | Oct 25 2020 | |
| 28 | 02:31 PM | 92675 |

| | | |
|----|-------------|-------|
| | Oct 25 2020 | |
| 29 | 11:03 AM | 92637 |
| | Oct 24 2020 | |
| 30 | 08:40 AM | 92882 |
| | Oct 24 2020 | |
| 31 | 07:41 AM | 92673 |
| | Oct 24 2020 | |
| 32 | 03:56 AM | 91709 |
| | Oct 24 2020 | |
| 33 | 02:44 AM | 92637 |
| | Oct 23 2020 | |
| 34 | 08:54 PM | 92688 |
| | Oct 23 2020 | |
| 35 | 07:33 PM | 92637 |
| | Oct 23 2020 | |
| 36 | 05:12 PM | 92677 |
| | Oct 23 2020 | |
| 37 | 03:40 PM | 92805 |
| | Oct 23 2020 | |
| 38 | 02:42 PM | 92704 |
| | Oct 23 2020 | |
| 39 | 01:40 PM | 92840 |
| | Oct 23 2020 | |
| 40 | 01:39 PM | 92610 |
| | Oct 23 2020 | |
| 41 | 01:14 PM | 92673 |
| | Oct 23 2020 | |
| 42 | 12:58 PM | 92692 |
| | Oct 23 2020 | |
| 43 | 12:36 PM | 92677 |
| | Oct 23 2020 | |
| 44 | 11:21 AM | 92677 |

| | | |
|----|-------------|-------|
| | Oct 23 2020 | |
| 45 | 11:11 AM | 92677 |
| | Oct 23 2020 | |
| 46 | 10:54 AM | 92677 |
| | Oct 23 2020 | |
| 47 | 09:31 AM | 92677 |
| | Oct 22 2020 | |
| 48 | 12:21 PM | 92673 |
| | Oct 22 2020 | |
| 49 | 11:53 AM | 92675 |
| | Oct 22 2020 | |
| 50 | 09:15 AM | 92675 |
| | Oct 22 2020 | |
| 51 | 09:07 AM | 92675 |
| | Oct 22 2020 | |
| 52 | 09:05 AM | 92679 |
| | Oct 21 2020 | |
| 53 | 09:20 PM | 92705 |
| | Oct 21 2020 | |
| 54 | 05:05 PM | 92675 |
| | Oct 21 2020 | |
| 55 | 03:32 PM | 92656 |
| | Oct 21 2020 | |
| 56 | 03:31 PM | 92694 |
| | Oct 21 2020 | |
| 57 | 02:49 PM | 92677 |
| | Oct 21 2020 | |
| 58 | 09:19 AM | 92653 |
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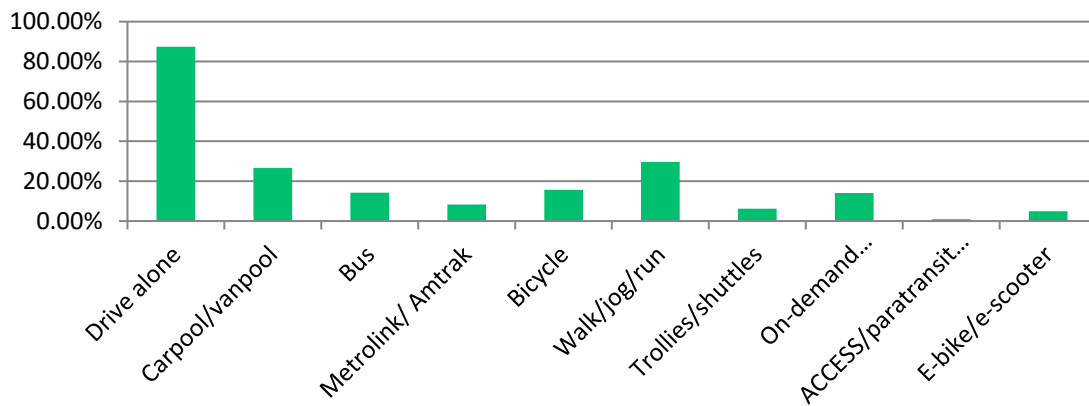
Sep 25 2020

349 10:34 AM 92780

OCTA SOCMTS PUBLIC INPUT SURVEY
When you travel in and around Orange County,
how do you normally get from place to
place?You may select up to three choices.

| Answer Choices | Responses | |
|--|-----------|------------|
| Drive alone | 87.43% | 306 |
| Carpool/vanpool | 26.57% | 93 |
| Bus | 14.29% | 50 |
| Metrolink/ Amtrak | 8.29% | 29 |
| Bicycle | 15.71% | 55 |
| Walk/jog/run | 29.71% | 104 |
| Trollies/shuttles | 6.29% | 22 |
| On-demand rideshare service (such as Uber or Lyft) | 14.00% | 49 |
| ACCESS/paratransit service | 0.86% | 3 |
| E-bike/e-scooter | 4.86% | 17 |
| Answered | | 350 |
| Skipped | | 1 |

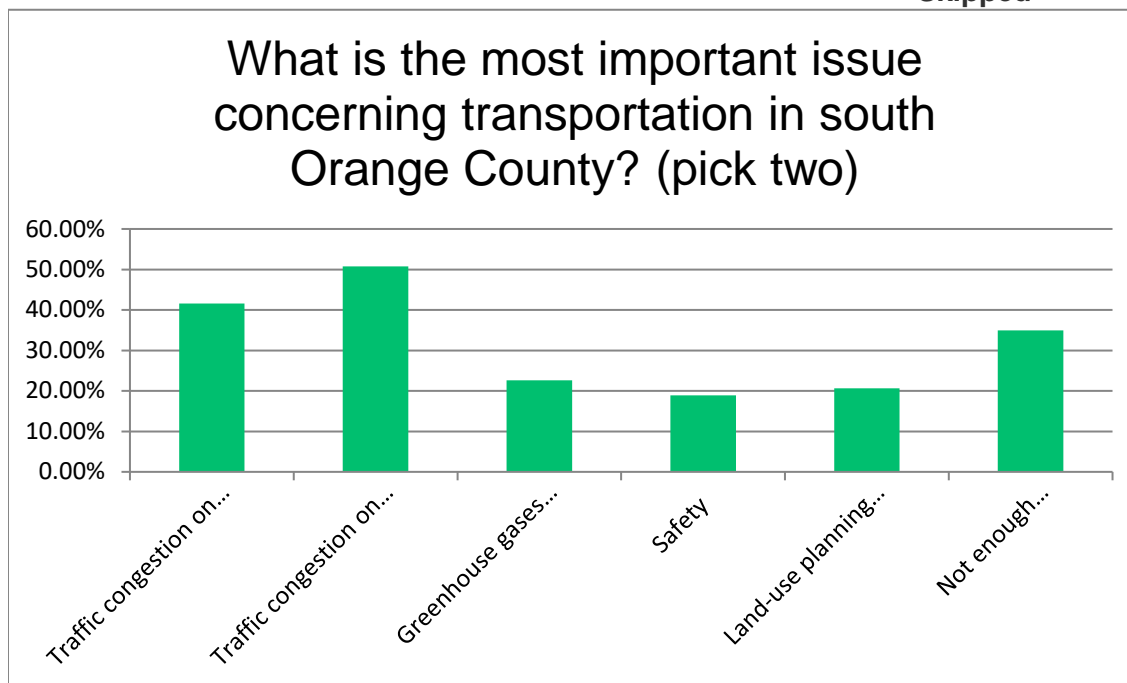
When you travel in and around Orange County, how do you normally get from place to place?You may select up to three choices.



OCTA SOCMTS PUBLIC INPUT SURVEY

What is the most important issue concerning transportation in south Orange County? (pick two)

| Answer Choices | Responses | |
|--|-----------------|------------|
| Traffic congestion on local streets and roads | 41.55% | 145 |
| Traffic congestion on freeways/highways | 50.72% | 177 |
| Greenhouse gases (addressing climate change) | 22.64% | 79 |
| Safety | 18.91% | 66 |
| Land-use planning (coordinating new development with transportation) | 20.63% | 72 |
| Not enough transportation choices (bus, rail, or on-demand microtransit) | 34.96% | 122 |
| | Answered | 349 |
| | Skipped | 2 |

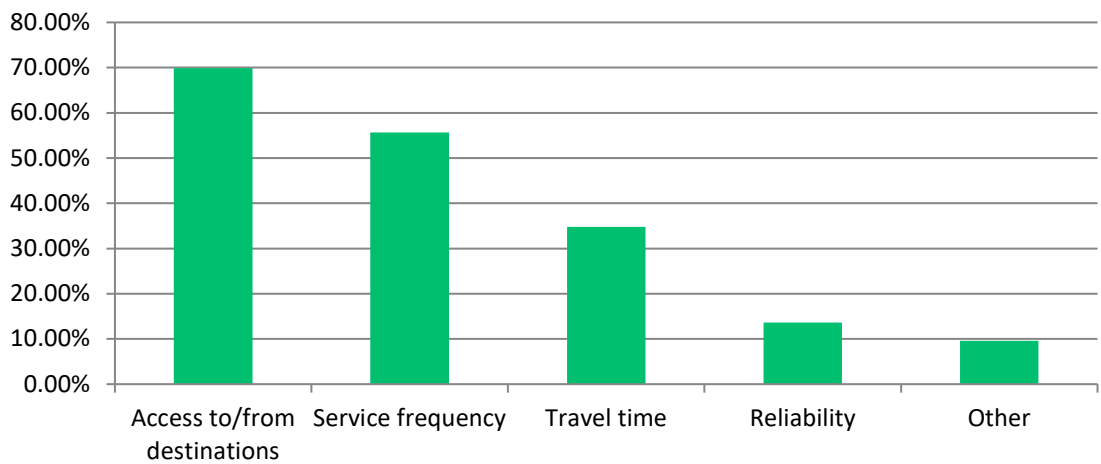


OCTA SOCMTS PUBLIC INPUT SURVEY

What is the primary challenge to bus and rail travel in south Orange County? (pick two)

| Answer Choices | Responses | |
|-----------------------------|-----------|------------|
| Access to/from destinations | 69.86% | 241 |
| Service frequency | 55.65% | 192 |
| Travel time | 34.78% | 120 |
| Reliability | 13.62% | 47 |
| Other | 9.57% | 33 |
| Answered | | 345 |
| Skipped | | 6 |

What is the primary challenge to bus and rail travel in south Orange County? (pick two)

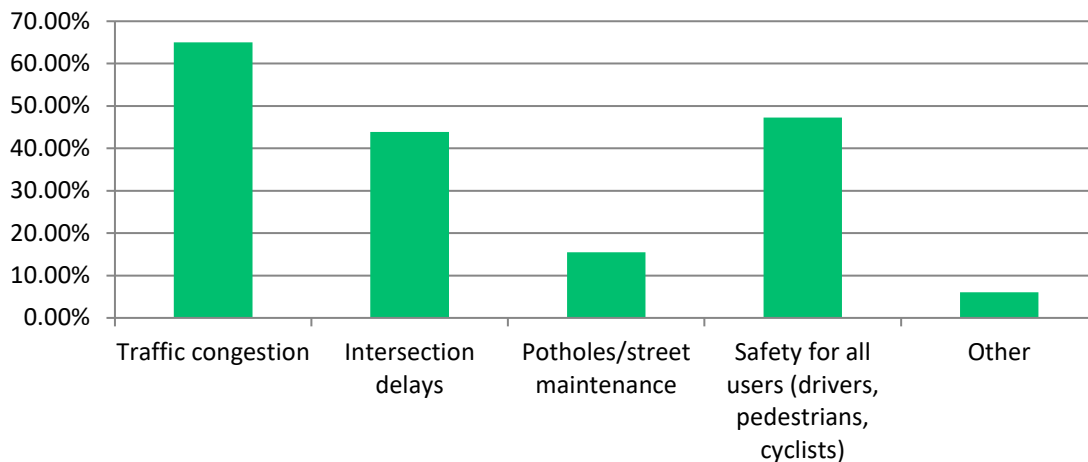


OCTA SOCMTS PUBLIC INPUT SURVEY

What is the primary challenge of using local streets in south Orange County? (pick two)

| Answer Choices | Responses | |
|---|-----------|------------|
| Traffic congestion | 65.04% | 227 |
| Intersection delays | 43.84% | 153 |
| Potholes/street maintenance | 15.47% | 54 |
| Safety for all users (drivers, pedestrians, cyclists) | 47.28% | 165 |
| Other | 6.02% | 21 |
| Answered | | 349 |
| Skipped | | 2 |

What is the primary challenge of using local streets in south Orange County? (pick two)

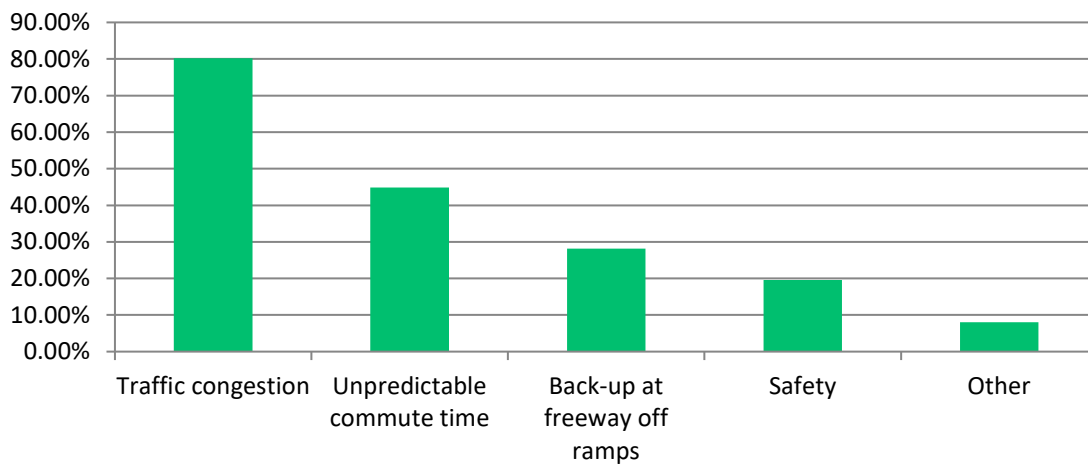


OCTA SOCMTS PUBLIC INPUT SURVEY

**What is the primary challenge to using freeways/highways in south Orange County?
(pick two)**

| Answer Choices | Responses | |
|------------------------------|-----------|------------|
| Traffic congestion | 80.17% | 279 |
| Unpredictable commute time | 44.83% | 156 |
| Back-up at freeway off ramps | 28.16% | 98 |
| Safety | 19.54% | 68 |
| Other | 8.05% | 28 |
| Answered | | 348 |
| Skipped | | 3 |

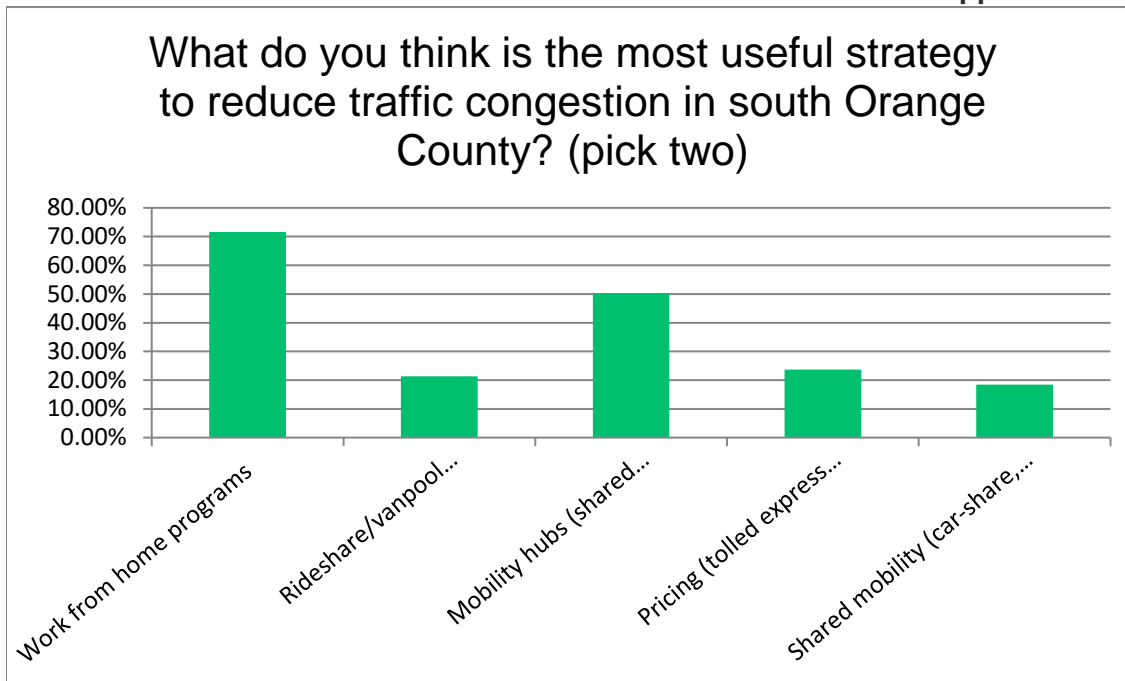
What is the primary challenge to using freeways/highways in south Orange County? (pick two)



OCTA SOCMTS PUBLIC INPUT SURVEY

What do you think is the most useful strategy to reduce traffic congestion in south Orange County? (pick two)

| Answer Choices | Responses | |
|---|-----------|------------|
| Work from home programs | 71.64% | 245 |
| Rideshare/vanpool programs and facilities | 21.35% | 73 |
| Mobility hubs (shared activity centers for connecting bus/shuttle/rides | 50.29% | 172 |
| Pricing (tolled express lanes, charge for parking) | 23.68% | 81 |
| Shared mobility (car-share, bike-share, scooter-share) | 18.42% | 63 |
| Answered | | 342 |
| Skipped | | 9 |

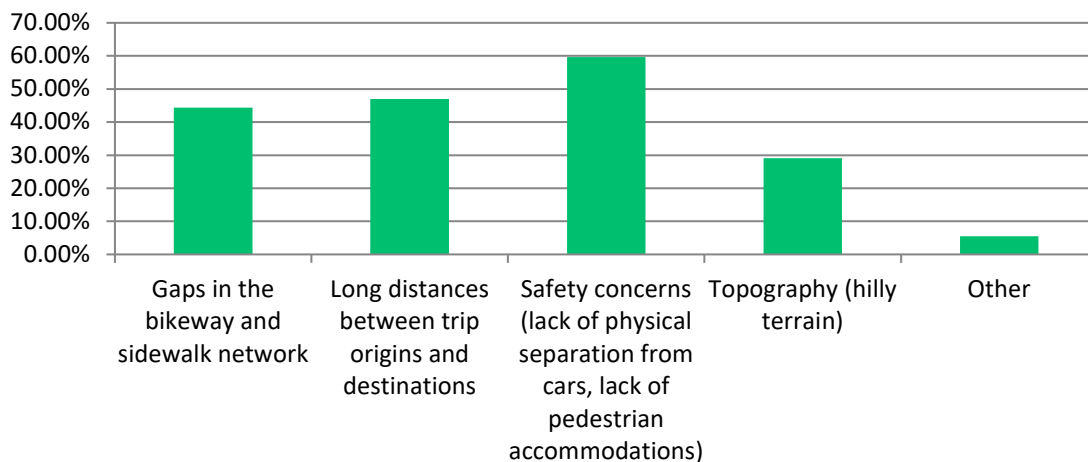


OCTA SOCMTS PUBLIC INPUT SURVEY

What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (pick two)

| Answer Choices | Responses | |
|---|-----------|------------|
| Gaps in the bikeway and sidewalk network | 44.38% | 154 |
| Long distances between trip origins and destinations | 46.97% | 163 |
| Safety concerns (lack of physical separation from cars, lack of pedes | 59.65% | 207 |
| Topography (hilly terrain) | 29.11% | 101 |
| Other | 5.48% | 19 |
| Answered | | 347 |
| Skipped | | 4 |

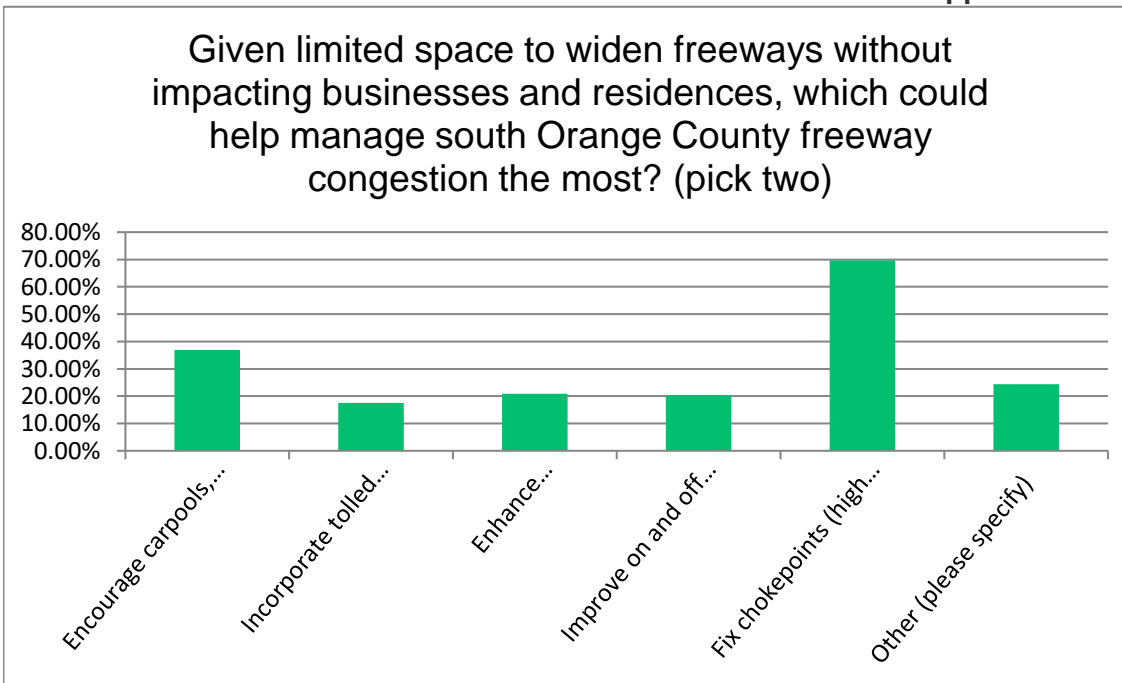
What is the most significant barrier to active transportation (walking, cycling) in south Orange County? (pick two)



OCTA SOCMTS PUBLIC INPUT SURVEY

Given limited space to widen freeways without impacting businesses and residences, which could help manage south Orange County freeway congestion the most? (pick two)

| Answer Choices | Responses | |
|---|-----------|------------|
| Encourage carpools, vanpools and ridesharing | 36.96% | 129 |
| Incorporate tolled express lanes onto existing freeways (91 Express | 17.48% | 61 |
| Enhance infrastructure to accommodate autonomous (self-driving) v | 20.92% | 73 |
| Improve on and off ramps | 20.34% | 71 |
| Fix chokepoints (high congestion areas) | 69.63% | 243 |
| Other (please specify) | 24.36% | 85 |
| Answered | | 349 |
| Skipped | | 2 |



| Respondents | Response Date | Other (please specify) | Tags |
|-------------|----------------------|--|------|
| | Oct 27 2020 06:59 PM | Express bus service on OC freeways linking OC and LA County. | |
| | Oct 27 2020 04:18 PM | Work with business to gain extra dataset in terms of business hours # of employees ect | |
| | Oct 25 2020 10:42 PM | mass transit | |
| | Oct 25 2020 02:31 PM | More bus and train service | |
| | Oct 25 2020 02:14 PM | Restrict all commercial trucks to use between 8pm and 8am | |
| | Oct 23 2020 05:12 PM | trains for long distances to hubs with buses & cabs for local | |
| | Oct 23 2020 02:42 PM | Implement first and last mile mobility devices. | |

| | | |
|----|-------------|---|
| | Oct 23 2020 | |
| 8 | 01:14 PM | Double Track Railroad Properly maintain existing roadways |
| | Oct 22 2020 | anticipating |
| 9 | 12:21 PM | autonomous increases |
| | Oct 22 2020 | |
| 10 | 09:07 AM | Fix rail! more public transportation - train at better prices and more frequency during the whole day. Think like big city! |
| | Oct 22 2020 | |
| 11 | 09:05 AM | |
| | Oct 21 2020 | |
| 12 | 09:20 PM | More Metrolink! |
| | Oct 21 2020 | Close bicycle facility gaps. Please. |
| 13 | 03:32 PM | Encouraging higher capacity use of toll roads to take pressure off the 5; example: reduced cost use for 3+ vehicles or free use by an OCTA BRT route. Also, expand neighborhood "leisure" public transportation in more communities (e.g. trolleys in Laguna, Dana Point, San Clemente could be expanded to Laguna Niguel, Mission Viejo, Aliso Viejo, etc.). Land use planning that puts more jobs within walking distance of Metrolink stations. |
| | Oct 21 2020 | |
| 14 | 02:49 PM | Designate more lots where carpools could leave their cars. (eg. Walnut in Irvine near the 5 Fwy.) |
| | Oct 21 2020 | |
| 15 | 09:19 AM | more transit/rail infrastructure |
| | Oct 21 2020 | |
| 16 | 08:33 AM | Fix Metrolink and expand bike parking! A small residential area doesn't need bike share, but I would ride my bike to the trains station if I could keep it there safely for my commute! |
| | Oct 21 2020 | |
| 17 | 06:00 AM | |

| | | |
|----|-------------------------|--|
| 18 | Oct 20 2020 07:45 PM | eliminate toll fees so that all people including lower income utilize these underutilized lane resources Better place bike parking (security of locked bikes) and ensure bike lanes on MSRs |
| 19 | Oct 20 2020 12:23 PM | Construct the 241-South Toll Rd, using the former Green Alignment, which was killed only due to a major mis-information campaign by environmental activists. |
| 20 | Oct 20 2020 11:59 AM | South, there is no other reasonable option to manage congestion, it is a shame folks from South County do not realize that. If there is an emergency, I-5 is the only lifeline, pretty shortsighted to not include Foothill south in every conceivable alternative if a real solution is desired. Carpools, vanpools and ridesharing have proven since the 1970s to not be a solution to manage congestion. Hanging your hat on autonomous vehicles would be very shortsighted, only a small proportion of vehicles by your horizon year would be autonomous. Fixing chokepoints and ramps is a bandaid that is not a true solution, sure those are helpful, but |
| 21 | Oct 20 2020 11:00 AM | Increased frequencies of trains and buses. |
| 22 | Oct 20 2020 08:19 AM | Incorporating a much better light-rail/subway type travel network |
| 23 | Oct 19 2020 03:48 PM | |

| | | |
|----|-------------|--|
| | Oct 19 2020 | Make it easier for local traffic to choose ebike or golf cart |
| 24 | 09:39 AM | |
| | Oct 18 2020 | |
| 25 | 10:47 AM | better public transit |
| | Oct 18 2020 | |
| 26 | 10:18 AM | eliminate car pool lanes |
| | Oct 18 2020 | |
| 27 | 09:20 AM | Work at home. |
| | | Connect Portola Parkway to minimize traffic on Sand Canyon and Bake/Alton |
| 28 | 08:01 PM | Use multi modal sidewalks for golf carts. No green house gas emissions, easy for seniors, require small parking footprint. |
| | Oct 16 2020 | |
| 29 | 05:07 PM | Develop and encourage public transit |
| | Oct 16 2020 | |
| 30 | 04:48 PM | Add more free public transportation options using the bus. |
| | Oct 16 2020 | |
| 31 | 04:39 PM | Schedules must match route time more closely |
| | Oct 15 2020 | |
| 32 | 11:50 AM | municipal transportation lanes |
| | Oct 15 2020 | |
| 33 | 10:22 AM | DON'T continue building unless you have the space for roads to accommodate the new people. |
| | Oct 15 2020 | |
| 34 | 09:45 AM | SIMPLE! |
| | Oct 15 2020 | |
| 35 | 09:31 AM | Shared cars at train stations |
| | | Don't widen freeways |
| | Oct 14 2020 | ..constant construction worse |
| 36 | 04:01 PM | Improve other modes of travel to compete with freeway |
| | Oct 14 2020 | |
| 37 | 03:17 PM | encourage work from home |
| | Oct 14 2020 | |
| 38 | 11:44 AM | More Trolley's. More Train Sprinters. |
| | Oct 13 2020 | |
| 39 | 02:21 PM | Incentivize carpools, vanpools, ridesharing with vouchers or something similar |
| | Oct 13 2020 | |
| 40 | 11:38 AM | more frequent, free, fast buses |
| | Oct 12 2020 | |
| 41 | 11:39 AM | |

| | | |
|----|----------------------|--|
| | | Limit population growth commensurate with infrastructure capacity & efficiency. |
| 42 | Oct 10 2020 03:29 PM | don't do any of these -- you will only increase traffic. Consider congestion tolls |
| 43 | Oct 10 2020 05:44 AM | Improve public transportation as in europe |
| 44 | Oct 09 2020 10:45 PM | Light rail or dedicated bus service in center medians |
| 45 | Oct 08 2020 09:38 PM | add train / light rail along I-5 and I-405 freeway corridors w/ connections to bus |
| 46 | Oct 08 2020 06:05 PM | limit new track home building in areas, thus creating chokepoints... |
| 47 | Oct 08 2020 05:18 PM | It's impossible to get to airports using public transportation. This needs to be fixed. And the drop off point should be at the airport not 20 minutes away from it leaving you still trying to get there. |
| 48 | Oct 08 2020 08:58 AM | |
| 49 | Oct 07 2020 10:16 PM | Better OCTA Service |
| 50 | Oct 07 2020 12:33 PM | Run public transportation along highway corridors get people to live near jobs; bring jobs to bedroom type communities |
| 51 | Oct 06 2020 09:11 PM | |
| 52 | Oct 06 2020 07:43 PM | Light rail |
| 53 | Oct 06 2020 06:28 PM | Get people out of cars onto bikes and buses. |
| 54 | Oct 06 2020 11:20 AM | Public transportation intercity shuttles that start and end at metro link |
| 55 | Oct 05 2020 09:16 PM | |
| 56 | Oct 05 2020 03:21 PM | Truck Management: hours/lanes/\$\$ |
| 57 | Oct 05 2020 11:12 AM | Create and improve safe cycling lanes and connecting bike paths |

| | | |
|----|-------------------------|---|
| 58 | Oct 05 2020 11:00 AM | offer more public transit |
| 59 | Oct 05 2020 10:52 AM | Rail that is frequent Make it easier and safer to travel by bike away from cars |
| 60 | Oct 04 2020 01:24 PM | Resurface the freeways as was paid for but not done! |
| 61 | Oct 04 2020 12:12 PM | Construct additional rail/subway commuter system that is user- friendly |
| 62 | Oct 04 2020 11:22 AM | Toll Lanes make traffic WORSE NOT BETTER! I used to live in Corona and saw the devastation they have caused on the 91. Why anyone is still pushing for them after the 91 debacle is beyond me. |
| 63 | Oct 04 2020 10:56 AM | self driving cars will mitigate most of the problems for a long time, but we have weird choke points where you lose 3 lanes suddenly. The toll roads are terrible because they generate massive jams where they terminate onto the freeways. No more toll roads. |
| 64 | Oct 04 2020 09:32 AM | Complete roadway gaps. Connecting La Pata to Antonio Parkway is the best example. The Portola Parkway gap should be expedited as a roadway and protected bikeway. |
| 65 | Oct 02 2020 07:29 PM | Increase quality of public transport (bus and rail travel) |
| 66 | Oct 02 2020 06:56 PM | |

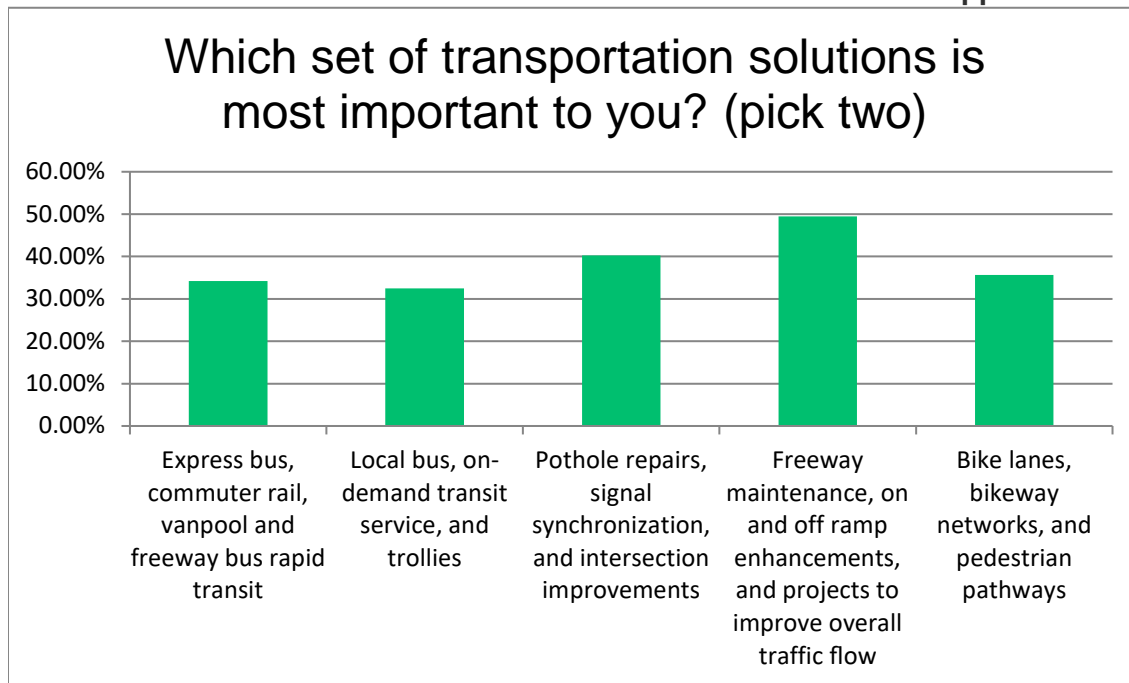
| | | |
|----|-------------------------|--|
| | | Double deck freeways, Purchase land (e.g. not allow a person or business to privately hold property within 200 yards of all freeways) along both sides of every freeway and rent back until enough land has been purchased to widen a freeway. |
| 67 | Oct 02 2020 04:59 PM | |
| 68 | Oct 02 2020 04:20 PM | improve bus transport options eliminate the tolls and carpool lanes. If the toll roads were free, then lower income people could use them, and traffic would be reduced on the "freeways", likewise a reduction in travel time average for all, if carpool lanes were available to all vehicles. |
| 69 | Oct 02 2020 09:43 AM | |
| 70 | Oct 02 2020 08:30 AM | stop widespread development Begin building and utilizing multi modal trails. We have over 1300 golf carts in our city. Great for seniors, ghg not used |
| 71 | Oct 01 2020 04:30 PM | More options for public transit with more time slots |
| 72 | Oct 01 2020 12:35 PM | better driver training, non-personal vehicles should only be allowed in the two rightmost lanes and the CHP should fine them for using other lanes. I'm constantly seeing big rigs SB 5 using the 3rd lane from the right. |
| 73 | Oct 01 2020 07:21 AM | Train - more light rail. |
| 74 | Sep 30 2020 06:26 PM | Buses sit in the same traffic. |
| 75 | Sep 30 2020 04:27 PM | Encourage train and bicycle trips |
| 76 | Sep 30 2020 03:53 PM | Add carpool lanes on the 73 and 241 |
| 77 | Sep 30 2020 02:33 PM | More busses |

| | | |
|----|-------------------------|---|
| 78 | Sep 30 2020 01:43 PM | Add protected bicycle lanes |
| 79 | Sep 30 2020 12:57 PM | multi modal options change work schedule |
| 80 | Sep 30 2020 11:30 AM | to an earlier or later start work time. Be like the bay area build a freeway on top of the freeway, get more bravo bus routes with less stops to destinations that people actually wanna go. More |
| 81 | Sep 30 2020 10:53 AM | Light Rail would be cool as well. Encourage more higher wage industries (not retail) to have locations in So. OC so people won't have to commute on freeways. |
| 82 | Sep 30 2020 09:18 AM | |
| 83 | Sep 29 2020 10:32 AM | Finish the 241 |
| 84 | Sep 28 2020 08:11 AM | build public transportation, light rail |
| 85 | Sep 26 2020 05:54 PM | Better bus and commuter rail service |

OCTA SOCMTS PUBLIC INPUT SURVEY

Which set of transportation solutions is most important to you? (pick two)

| Answer Choices | Responses | |
|---|-----------|------------|
| Express bus, commuter rail, vanpool and freeway bus rapid transit | 34.20% | 119 |
| Local bus, on-demand transit service, and trolleys | 32.47% | 113 |
| Pothole repairs, signal synchronization, and intersection improvements | 40.23% | 140 |
| Freeway maintenance, on and off ramp enhancements, and projects to improve overall traffic flow | 49.43% | 172 |
| Bike lanes, bikeway networks, and pedestrian pathways | 35.63% | 124 |
| Answered | | 348 |
| Skipped | | 3 |

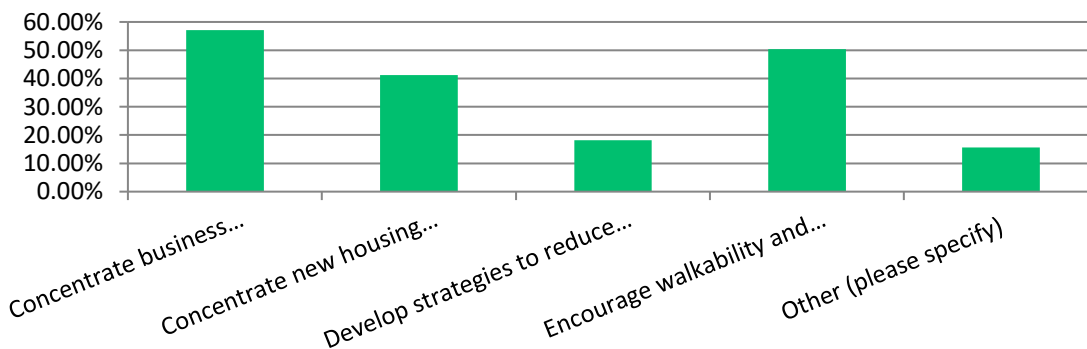


OCTA SOCMTS PUBLIC INPUT SURVEY

What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (pick two)

| Answer Choices | Responses | |
|--|-----------|------------|
| Concentrate business development around transit (bus/rail) centers | 57.06% | 198 |
| Concentrate new housing developments around transit (bus/rail) centers | 41.21% | 143 |
| Develop strategies to reduce automobile dependency (i.e., charge for parking) | 18.16% | 63 |
| Encourage walkability and complete streets (streets designed and operated for all modes of travel) | 50.43% | 175 |
| Other (please specify) | 15.56% | 54 |
| Answered | | 347 |
| Skipped | | 4 |

What is the best way to address traffic congestion through land-use planning (coordinating new development with transportation) in south Orange County? (pick two)



| Respondents | Response Date | Other (please specify) | Tags |
|-------------|------------------------|---|------|
| | | let private parties determine how development works in their particular community | |
| | Oct 29 2020 1 09:12 AM | You're too late. Too many communities have been developed that can ONLY utilize already established arterials meant for that community. | |
| | Oct 28 2020 2 03:21 PM | Encourage bicycling, walking, jogging, alternatives to cars | |
| | Oct 24 2020 3 02:44 AM | Not charge for parking. | |
| | Oct 23 2020 4 05:12 PM | Trains supplemented by local cabs, etc | |
| | Oct 23 2020 5 01:14 PM | Improve rail by double tracking | |

| | | |
|----|-------------------------|--|
| 6 | Oct 22 2020 09:15 AM | Develop an Uber style service run by the OCTA MIXED USE near rail :) Like the "One Paseo" development in North San Diego |
| 7 | Oct 22 2020 09:07 AM | Offer parallel roads to high traffic roads (eg.Ortega hwy) to alleviate high traffic and bottle necking (eg El Toro Rd has Los Aliso as an alternative when El Toro has excess traffic) |
| 8 | Oct 21 2020 05:05 PM | charging for parking favors affluent and harms lower income, eliminate the tolls from toll roads. toll free holidays and rush hours |
| 9 | Oct 20 2020 07:45 PM | Require developers to first construct an appropriately-sized road network that meets the projected vehicle capacity increase before a single building facility is approved for construction. No final project approval until the vehicle transportation network is in place. |
| 10 | Oct 20 2020 11:59 AM | |

transit in south county is not a real option, sure some people ride metrolink but does someone really think transit in south county is the solution to anything? This is very shortsighted. Based on the last 100 years, it should be clear that land-use planning is market based and to think it will change is folly. This county is auto dependent and always will be, you cannot change the mindset of a vast majority of the population so why try? People that travel in south county that are impacted by congestion do not care about walkability or complete streets, if you get on the freeway, active modes are not an option for your trip to begin with, not hard to figure out.

expanding rail travel locations

reduce number of houses being built

More bikeways and golf cart friendly streets

raise cost of new development

Build more roads

Work from home option

Add more public transportation

Read question #9. You need infrastructure before you bring more people and cars!

Make public transportation easy, safe and available

Not approving new development without water permits.

Oct 20 2020
11 11:00 AM
Oct 19 2020
12 03:48 PM
Oct 19 2020
13 02:10 PM
Oct 19 2020
14 09:39 AM
Oct 18 2020
15 07:57 PM
Oct 16 2020
16 07:12 PM
Oct 16 2020
17 05:07 PM
Oct 16 2020
18 04:39 PM
Oct 15 2020
19 09:45 AM
Oct 14 2020
20 02:20 PM
Oct 14 2020
21 11:44 AM

| | | |
|----|-------------|---|
| | Oct 13 2020 | Construct transit centers around EXISTING housing development |
| 22 | 11:38 AM | |
| | Oct 10 2020 | |
| 23 | 04:43 PM | Stop developing! Encourage businesses to allow work-from-home and 4-day workweeks |
| | Oct 10 2020 | |
| 24 | 02:00 PM | Develop mixed use areas (vs. separate business and resident) |
| | Oct 08 2020 | |
| 25 | 06:05 PM | that connect to transit DON'T Charge for parking, then we can meet with others and carpool One parking charge is more than the gas to get there and back. |
| | Oct 08 2020 | |
| 26 | 05:18 PM | discontinue groups like you |
| | Oct 08 2020 | |
| 27 | 02:12 PM | Better bus routes, e.g. Aliso Creek (movie & shopping) |
| | Oct 07 2020 | |
| 28 | 03:46 PM | Get rid of toll lanes since the toll roads have been paid for than let people drive them without a toll |
| | Oct 04 2020 | |
| 29 | 05:41 PM | Always develop with wide lanes and room to grow/expand |
| | Oct 04 2020 | |
| 30 | 03:07 PM | Hyper-proximity cities (15-minute cities) |
| | Oct 04 2020 | |
| 31 | 02:58 PM | Restrict new development |
| | Oct 04 2020 | |
| 32 | 01:09 PM | End high density housing developments now!! |
| | Oct 04 2020 | |
| 33 | 12:12 PM | Have developer pay for arterial roads when developing an area and ONLY when studies show they are necessary (not BEFORE) |
| | Oct 04 2020 | |
| 34 | 10:56 AM | new main roads to accommodate new large developments |
| | Oct 04 2020 | |
| 35 | 10:13 AM | |

| | | |
|----|-------------------------|---|
| | | stop trying to price people from activities, like parking pricing, toll roads and the rest, it is a regressive tax, we already pay for the highways, stop tolling them. Stop throwing a ton of houses into areas without having gotten the infrastructure resolved first. |
| 36 | Oct 04 2020 09:32 AM | |
| 37 | Oct 03 2020 03:37 PM | Limit new housing development! |
| 38 | Oct 03 2020 09:16 AM | Smart intersections, signal synchronization county-wide |
| 39 | Oct 02 2020 07:29 PM | Remove bikeways from streets by investing in pedestrian/bike bridges |
| 40 | Oct 02 2020 02:51 PM | limit growth. Increasing density through unbridled development results in greater tripmaking and traffic. Control growth instead of merely attempting to accomodate growth. |
| 41 | Oct 02 2020 12:30 PM | |
| 42 | Oct 02 2020 11:35 AM | Not a fan of restricting development rights. enough with the charging to impact behavior. It adversely affects lower income people. Make parking free around train and bus terminals. |
| 43 | Oct 02 2020 09:43 AM | increase bus safety; people are afraid to ride mass transit |
| 44 | Oct 02 2020 08:30 AM | |
| 45 | Oct 01 2020 06:16 PM | Stop development |
| 46 | Oct 01 2020 04:30 PM | Multi modal trails and small electronic mobility devices for individual housing on one end of (bus/rail) and business on the other end |
| 47 | Oct 01 2020 02:10 PM | |

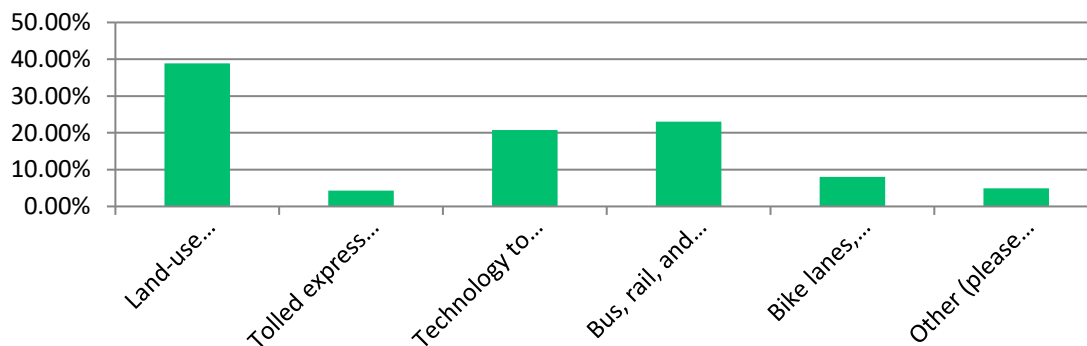
| | | |
|----|-------------------------|--|
| | | Land use planning is not the issue. Most bus/rail centers are located in highly developed areas now. The key to reducing congestion is to move more cars through the freeway/toll roads more quickly. Congestion pricing will do more to reduce congestion than land use planning. |
| 48 | Oct 01 2020 10:25 AM | better synconized stop lights, similar stores on both sides of the street thus eliminating the need to turn left and interrupting the flow of traffic in opposite direction. |
| 49 | Oct 01 2020 07:21 AM | Provide adequate thoroughfares in and around residential development |
| 50 | Sep 30 2020 02:32 PM | well lit bus and light rail service pick up and drop off points |
| 51 | Sep 30 2020 11:30 AM | how about making pch into a toll road or build a toll road somewhere else extend the 241 already. Its only taken what 5 years. I live in the bay area now and almost dont wanna come back to oc cause it sucks for busses and trains worse than la. |
| 52 | Sep 30 2020 10:53 AM | |
| 53 | Sep 26 2020 07:14 AM | City shuttle service |
| 54 | Sep 25 2020 12:35 PM | Affordable Senior transportation |

OCTA SOCMTS PUBLIC INPUT SURVEY

Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?

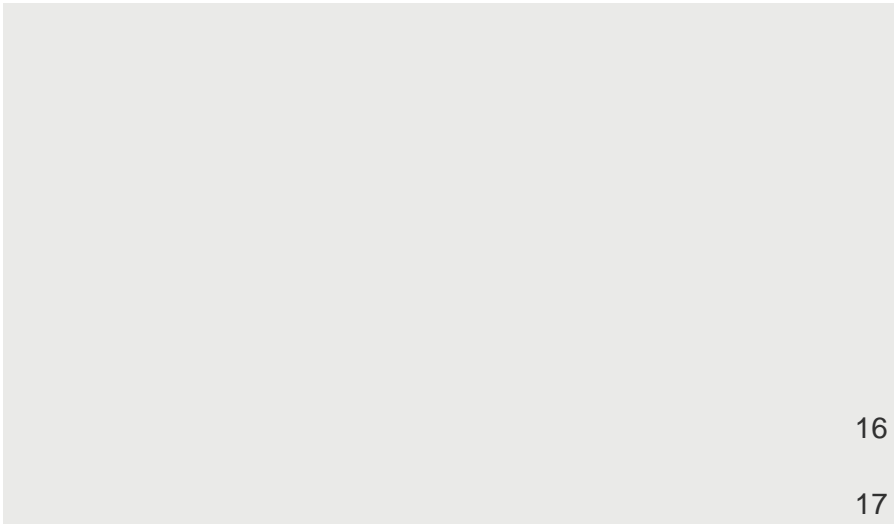
| Answer Choices | Responses | |
|--|-----------|-----|
| Land-use planning (coordinating new development with transportation) | 38.90% | 135 |
| Tolled express lanes on existing freeways | 4.32% | 15 |
| Technology to minimize traffic (signal synchronization, autonomous vehicles) | 20.75% | 72 |
| Bus, rail, and other transit services | 23.05% | 80 |
| Bike lanes, sidewalks/crosswalks, and paved trails | 8.07% | 28 |
| Other (please specify) | 4.90% | 17 |
| Answered | | 347 |
| Skipped | | 4 |

Considering that south Orange County's population is expected to continue growing into the foreseeable future, which strategy would provide the most long-term benefits?



| Respondents | Response Date | Other (please specify) | Tags |
|-------------|----------------------|--|------|
| | Oct 22 2020 09:15 AM | Develop an uber style service | |
| 1 | Oct 20 2020 11:59 AM | See my response to the previous question. | |
| 2 | Oct 18 2020 09:20 AM | Work at home | |
| 3 | Oct 16 2020 07:12 PM | Build more roads, highway lanes and finish the 241 | |
| 4 | Oct 15 2020 09:45 AM | I don't mind land use planning BUT you need to address capacity of the town or city. | |
| 5 | Oct 14 2020 11:44 AM | Synchronization of lights, working at home benefits, & autonomous vehicles. | |
| 6 | | | |

| | | |
|----|----------------------|---|
| | | Encourage less dependence on vehicles, and more bike/walk to local destinations. Further destinations would use bus/rail. Freeways are so congested and don't trust Caltrans to manage budget, schedule or prioritize local community needs. Want to keep local |
| 7 | Oct 08 2020 06:05 PM | funds to serve local needs. |
| 8 | Oct 08 2020 02:12 PM | Stop making the problem worst as you are doing. |
| 9 | Oct 07 2020 03:46 PM | Electric automobiles |
| 10 | Oct 04 2020 05:41 PM | Reduce the toll road cost. Lower the price dramatically |
| 11 | Oct 04 2020 12:12 PM | Resurface freeways. End all toll roads to improve utilization! |
| | | Again, Tolled express lanes are a horrible idea. Developers should build arterial roads when they build new communities WHERE THEY ARE NEEDED. NO MORE TOLL ROADS/NO MORE TOLL ROAD |
| 12 | Oct 04 2020 10:56 AM | EXTENSIONS/NO MORE TOLL LANES! |
| 13 | Oct 03 2020 03:37 PM | Limit new housing development! |
| 14 | Oct 02 2020 12:30 PM | See response to previous question. eliminate the toll on toll roads. I would use toll roads 261 and 241 |
| 15 | Oct 01 2020 07:21 AM | instead of Jamboree if it was free. |



Stop building on whatever is left of our open spaces. Educate people on rules of the road. Make bike lanes safer. We have a tandem that we would ride everywhere. We finally stopped riding due to people not paying attention while driving.

Sep 30 2020
16 11:22 AM
Sep 25 2020
17 12:35 PM

Affordable senior transportation

OCTA SOCMTS PUBLIC INPUT SURVEY

What is your worksite zip code if you have one?

Answered 272

Skipped 79

| Respondents | Response Date | Responses | Tags |
|-------------|----------------|-----------|------|
| 1 | Oct 30 2020 0: | 90740 | |
| 2 | Oct 29 2020 0: | 92672 | |
| 3 | Oct 29 2020 0: | 92653 | |
| 4 | Oct 29 2020 0: | 92688 | |
| 5 | Oct 29 2020 1: | 92673 | |
| 6 | Oct 29 2020 1: | 92866 | |
| 7 | Oct 29 2020 0: | 92805 | |
| 8 | Oct 29 2020 0: | 92692 | |
| 9 | Oct 29 2020 0: | 92677 | |
| 10 | Oct 29 2020 0: | 92688 | |
| 11 | Oct 29 2020 0: | 92653 | |
| 12 | Oct 29 2020 0: | 92805 | |
| 13 | Oct 28 2020 0: | 92863 | |
| 14 | Oct 28 2020 0: | 92688 | |
| 15 | Oct 28 2020 0: | 92704 | |
| 16 | Oct 28 2020 0: | 92704 | |
| 17 | Oct 27 2020 0: | 92672 | |
| 18 | Oct 27 2020 0: | 92627 | |
| 19 | Oct 27 2020 0: | 90245 | |
| 20 | Oct 27 2020 0: | 92653 | |
| 21 | Oct 27 2020 0: | 92804 | |
| 22 | Oct 27 2020 0: | 92866 | |
| 23 | Oct 27 2020 0: | 92672 | |
| 24 | Oct 25 2020 0: | 92675 | |
| 25 | Oct 24 2020 0: | 92704 | |
| 26 | Oct 24 2020 0: | 92704 | |
| 27 | Oct 24 2020 0: | Retired | |
| 28 | Oct 23 2020 0: | 92626 | |
| 29 | Oct 23 2020 0: | - | |
| 30 | Oct 23 2020 0: | 92704 | |
| 31 | Oct 23 2020 0: | 92704 | |
| 32 | Oct 23 2020 0: | 92630 | |
| 33 | Oct 23 2020 0: | 92673 | |
| 34 | Oct 23 2020 1: | 92868 | |
| 35 | Oct 23 2020 1: | 92626 | |
| 36 | Oct 23 2020 1: | 92677 | |
| 37 | Oct 23 2020 1: | 92677 | |

| | | |
|----|----------------|-------|
| 38 | Oct 23 2020 11 | 92677 |
| 39 | Oct 22 2020 11 | 92618 |
| 40 | Oct 22 2020 09 | 92675 |
| 41 | Oct 22 2020 09 | 90804 |
| 42 | Oct 22 2020 09 | 92629 |
| 43 | Oct 21 2020 09 | 92673 |
| 44 | Oct 21 2020 09 | 92618 |
| 45 | Oct 21 2020 09 | 92701 |
| 46 | Oct 21 2020 09 | 92653 |
| 47 | Oct 21 2020 09 | 92618 |
| 48 | Oct 20 2020 09 | 92672 |
| 49 | Oct 20 2020 09 | 92675 |
| 50 | Oct 20 2020 09 | 92697 |
| 51 | Oct 20 2020 11 | 92612 |
| 52 | Oct 20 2020 11 | 92672 |
| 53 | Oct 20 2020 11 | N/A |
| 54 | Oct 20 2020 11 | 92660 |
| 55 | Oct 20 2020 11 | 92410 |
| 56 | Oct 20 2020 09 | 92623 |
| 57 | Oct 19 2020 09 | 92614 |
| 58 | Oct 19 2020 09 | 92673 |
| 59 | Oct 19 2020 09 | 92673 |
| 60 | Oct 18 2020 09 | 92625 |
| 61 | Oct 18 2020 09 | 92868 |
| 62 | Oct 18 2020 09 | 92660 |
| 63 | Oct 18 2020 09 | 92626 |
| 64 | Oct 18 2020 11 | 92630 |
| 65 | Oct 18 2020 11 | 92672 |
| 66 | Oct 18 2020 11 | na |
| 67 | Oct 17 2020 09 | 92620 |
| 68 | Oct 17 2020 09 | 92614 |
| 69 | Oct 17 2020 11 | 92660 |
| 70 | Oct 17 2020 11 | 92660 |
| 71 | Oct 17 2020 11 | 92612 |
| 72 | Oct 17 2020 09 | 92618 |
| 73 | Oct 16 2020 09 | 92691 |
| 74 | Oct 16 2020 09 | 92692 |
| 75 | Oct 16 2020 09 | 92637 |
| 76 | Oct 16 2020 09 | 92630 |
| 77 | Oct 16 2020 09 | 92629 |
| 78 | Oct 16 2020 09 | 92657 |
| 79 | Oct 15 2020 09 | 92672 |
| 80 | Oct 15 2020 09 | 92677 |
| 81 | Oct 15 2020 09 | 92630 |
| 82 | Oct 15 2020 09 | 92612 |

| | | |
|-----|---------------|---------------|
| 83 | Oct 15 2020 0 | 92674 |
| 84 | Oct 15 2020 0 | 92672 |
| 85 | Oct 15 2020 1 | 92660 |
| 86 | Oct 15 2020 1 | 92673 |
| 87 | Oct 15 2020 1 | 92672 |
| 88 | Oct 15 2020 1 | na |
| 89 | Oct 15 2020 1 | 92672 |
| 90 | Oct 15 2020 0 | 92672 |
| 91 | Oct 15 2020 0 | 92673 |
| 92 | Oct 15 2020 0 | 92672 |
| 93 | Oct 14 2020 0 | 92705 |
| 94 | Oct 14 2020 0 | 92660 |
| 95 | Oct 14 2020 0 | 92868 |
| 96 | Oct 14 2020 0 | 92651 |
| 97 | Oct 14 2020 0 | 92660 |
| 98 | Oct 14 2020 0 | 92688 |
| 99 | Oct 14 2020 1 | 92672 |
| 100 | Oct 13 2020 1 | 92672 |
| 101 | Oct 13 2020 0 | 92780 |
| 102 | Oct 13 2020 0 | 92672 |
| 103 | Oct 13 2020 0 | 92672 |
| 104 | Oct 13 2020 1 | 92673 |
| 105 | Oct 12 2020 0 | None |
| 106 | Oct 12 2020 1 | N.A. |
| 107 | Oct 11 2020 0 | 90041 |
| 108 | Oct 11 2020 1 | 92806 |
| 109 | Oct 10 2020 0 | 92675 |
| 110 | Oct 10 2020 0 | 92618 |
| 111 | Oct 10 2020 0 | 92618 |
| 112 | Oct 09 2020 1 | 92691 |
| 113 | Oct 09 2020 1 | 92691 |
| 114 | Oct 09 2020 1 | 92691 |
| 115 | Oct 09 2020 1 | 92691 |
| 116 | Oct 09 2020 1 | 92691 |
| 117 | Oct 09 2020 1 | 92691 |
| 118 | Oct 09 2020 1 | 92691 |
| 119 | Oct 09 2020 1 | 92691 |
| 120 | Oct 09 2020 1 | 92691 |
| 121 | Oct 09 2020 1 | 92691 |
| 122 | Oct 09 2020 0 | 92612 |
| 123 | Oct 09 2020 1 | 92831 |
| 124 | Oct 08 2020 0 | 92612 / 92618 |
| 125 | Oct 08 2020 0 | *2630 |
| 126 | Oct 08 2020 0 | 92623 |
| 127 | Oct 08 2020 0 | 92868 |

| | | |
|-----|----------------|------------------------|
| 128 | Oct 08 2020 0: | 92673 |
| 129 | Oct 08 2020 0: | 92673 |
| 130 | Oct 08 2020 0: | 92831 |
| 131 | Oct 08 2020 0: | 92651 |
| 132 | Oct 08 2020 0: | 92618 |
| 133 | Oct 08 2020 0: | 30144 |
| 134 | Oct 08 2020 0: | 92677 |
| 135 | Oct 08 2020 0: | 92843 |
| 136 | Oct 08 2020 0: | 90045 |
| 137 | Oct 08 2020 0: | 92660 |
| 138 | Oct 07 2020 1: | 92629 |
| 139 | Oct 07 2020 1: | 90014 |
| 140 | Oct 07 2020 1: | 92688 |
| 141 | Oct 07 2020 0: | 92701 |
| 142 | Oct 07 2020 0: | 92629 |
| 143 | Oct 07 2020 0: | Retired / home / 92651 |
| 144 | Oct 07 2020 0: | 92868 |
| 145 | Oct 07 2020 0: | 92660 |
| 146 | Oct 07 2020 1: | 92656 |
| 147 | Oct 07 2020 1: | 92677 |
| 148 | Oct 07 2020 0: | 92651 |
| 149 | Oct 07 2020 0: | 92656 |
| 150 | Oct 07 2020 0: | 92656 |
| 151 | Oct 06 2020 0: | N/a |
| 152 | Oct 06 2020 0: | 92691 |
| 153 | Oct 06 2020 0: | 92677 |
| 154 | Oct 06 2020 0: | 92692 |
| 155 | Oct 06 2020 0: | 92630 |
| 156 | Oct 06 2020 1: | 92629 |
| 157 | Oct 06 2020 1: | N/A |
| 158 | Oct 06 2020 0: | 92660 |
| 159 | Oct 06 2020 0: | 92688 |
| 160 | Oct 06 2020 0: | 92610 |
| 161 | Oct 05 2020 0: | 90240 |
| 162 | Oct 05 2020 0: | 92610 |
| 163 | Oct 05 2020 0: | 92630 |
| 164 | Oct 05 2020 0: | 92660 |
| 165 | Oct 05 2020 0: | 92630 |
| 166 | Oct 05 2020 0: | 92624 |
| 167 | Oct 05 2020 0: | 92626 |
| 168 | Oct 05 2020 1: | 92646 |
| 169 | Oct 05 2020 1: | 92656 |
| 170 | Oct 05 2020 1: | 92630 |
| 171 | Oct 05 2020 1: | 92782 |
| 172 | Oct 05 2020 0: | 92868 |

| | |
|-----|---------------------|
| 173 | Oct 04 2020 0:92606 |
| 174 | Oct 04 2020 0:92618 |
| 175 | Oct 04 2020 0:92624 |
| 176 | Oct 04 2020 0:92602 |
| 177 | Oct 04 2020 0:92673 |
| 178 | Oct 04 2020 0:90660 |
| 179 | Oct 04 2020 1:na |
| 180 | Oct 04 2020 1:92672 |
| 181 | Oct 04 2020 1:92673 |
| 182 | Oct 04 2020 0:92647 |
| 183 | Oct 04 2020 0:92626 |
| 184 | Oct 04 2020 0:92624 |
| 185 | Oct 04 2020 0:90017 |
| 186 | Oct 04 2020 0:92672 |
| 187 | Oct 04 2020 0:92691 |
| 188 | Oct 03 2020 1:92653 |
| 189 | Oct 03 2020 0:92806 |
| 190 | Oct 03 2020 0:90601 |
| 191 | Oct 03 2020 0:92691 |
| 192 | Oct 03 2020 0:92675 |
| 193 | Oct 02 2020 0:92691 |
| 194 | Oct 02 2020 0:92677 |
| 195 | Oct 02 2020 0:92618 |
| 196 | Oct 02 2020 0:92677 |
| 197 | Oct 02 2020 0:92691 |
| 198 | Oct 02 2020 0:92660 |
| 199 | Oct 02 2020 0:91708 |
| 200 | Oct 02 2020 0:92630 |
| 201 | Oct 02 2020 0:90003 |
| 202 | Oct 02 2020 0:92637 |
| 203 | Oct 02 2020 0:90089 |
| 204 | Oct 02 2020 1:92692 |
| 205 | Oct 02 2020 1:92675 |
| 206 | Oct 02 2020 0:92675 |
| 207 | Oct 02 2020 0:92868 |
| 208 | Oct 02 2020 0:92630 |
| 209 | Oct 01 2020 1:92705 |
| 210 | Oct 01 2020 0:92780 |
| 211 | Oct 01 2020 0:92630 |
| 212 | Oct 01 2020 0:92637 |
| 213 | Oct 01 2020 0:92618 |
| 214 | Oct 01 2020 0:92863 |
| 215 | Oct 01 2020 0:92868 |
| 216 | Oct 01 2020 0:92704 |
| 217 | Oct 01 2020 1:92806 |

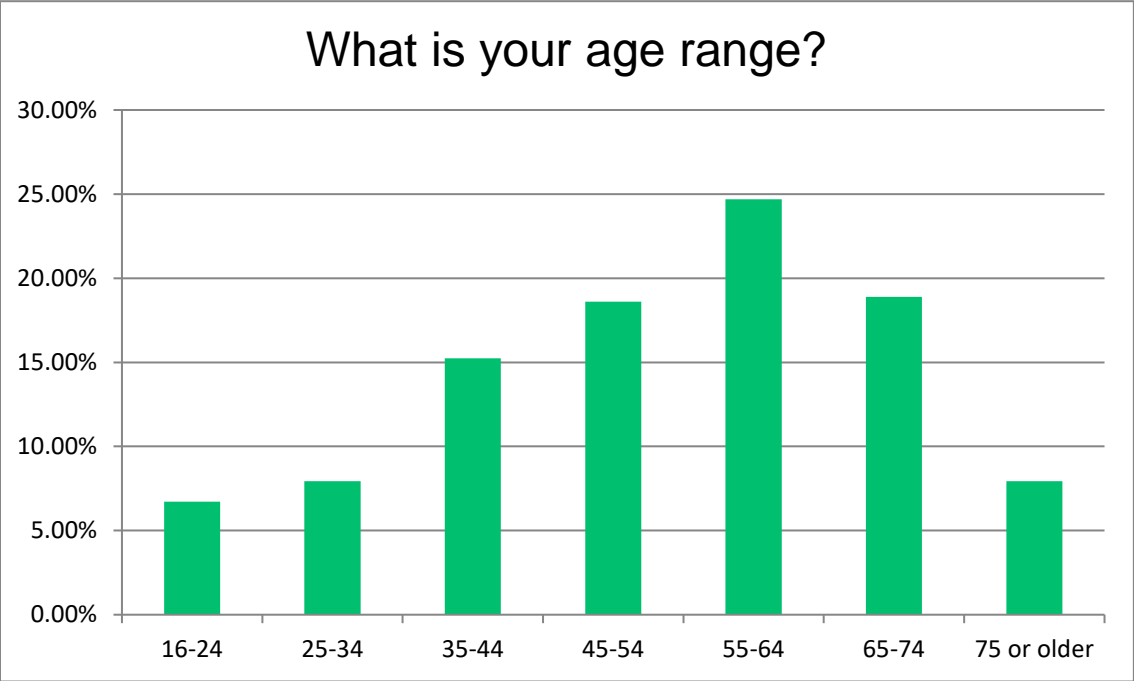
| | | |
|-----|---------------|--------------------|
| 218 | Oct 01 2020 1 | 92691 |
| 219 | Oct 01 2020 1 | 92691 |
| 220 | Oct 01 2020 1 | 92691 |
| 221 | Oct 01 2020 1 | 92691 |
| 222 | Oct 01 2020 1 | 92691 |
| 223 | Oct 01 2020 1 | 92691 |
| 224 | Oct 01 2020 1 | 92691 |
| 225 | Oct 01 2020 1 | 92630 |
| 226 | Oct 01 2020 1 | 92618 |
| 227 | Oct 01 2020 0 | 91765 |
| 228 | Oct 01 2020 1 | 92704 |
| 229 | Sep 30 2020 1 | 90015 |
| 230 | Sep 30 2020 1 | 92707 |
| 231 | Sep 30 2020 0 | 92130 |
| 232 | Sep 30 2020 0 | 92614 |
| 233 | Sep 30 2020 0 | 92630 |
| 234 | Sep 30 2020 0 | 92623 |
| 235 | Sep 30 2020 0 | n/a |
| 236 | Sep 30 2020 0 | 92868 |
| 237 | Sep 30 2020 0 | 92626 |
| 238 | Sep 30 2020 0 | No comments at all |
| 239 | Sep 30 2020 0 | 92807 |
| 240 | Sep 30 2020 0 | 92630 |
| 241 | Sep 30 2020 0 | 92688 |
| 242 | Sep 30 2020 0 | 92691 |
| 243 | Sep 30 2020 0 | n/a |
| 244 | Sep 30 2020 0 | 92715 |
| 245 | Sep 30 2020 0 | 92630 |
| 246 | Sep 30 2020 1 | 92705 |
| 247 | Sep 30 2020 1 | 92844 |
| 248 | Sep 30 2020 1 | 92630 |
| 249 | Sep 30 2020 1 | 92663 |
| 250 | Sep 30 2020 1 | 92618 |
| 251 | Sep 30 2020 1 | 92868 |
| 252 | Sep 30 2020 1 | 95448 |
| 253 | Sep 30 2020 1 | 92679 |
| 254 | Sep 30 2020 1 | 92604 |
| 255 | Sep 30 2020 1 | 92656 |
| 256 | Sep 30 2020 0 | 92630 |
| 257 | Sep 30 2020 0 | 92630 |
| 258 | Sep 30 2020 0 | 92630 |
| 259 | Sep 30 2020 0 | 92610 |
| 260 | Sep 30 2020 0 | 92630 |
| 261 | Sep 30 2020 0 | 92691 |
| 262 | Sep 29 2020 0 | 92614 |

| | |
|-----|---------------------|
| 263 | Sep 29 2020 0 92618 |
| 264 | Sep 29 2020 1 92614 |
| 265 | Sep 28 2020 0 92604 |
| 266 | Sep 26 2020 0 92610 |
| 267 | Sep 26 2020 1 92675 |
| 268 | Sep 26 2020 0 92692 |
| 269 | Sep 25 2020 1 92646 |
| 270 | Sep 25 2020 1 N/A |
| 271 | Sep 25 2020 1 92693 |
| 272 | Sep 25 2020 1 92693 |

OCTA SOCMTS PUBLIC INPUT SURVEY

What is your age range?

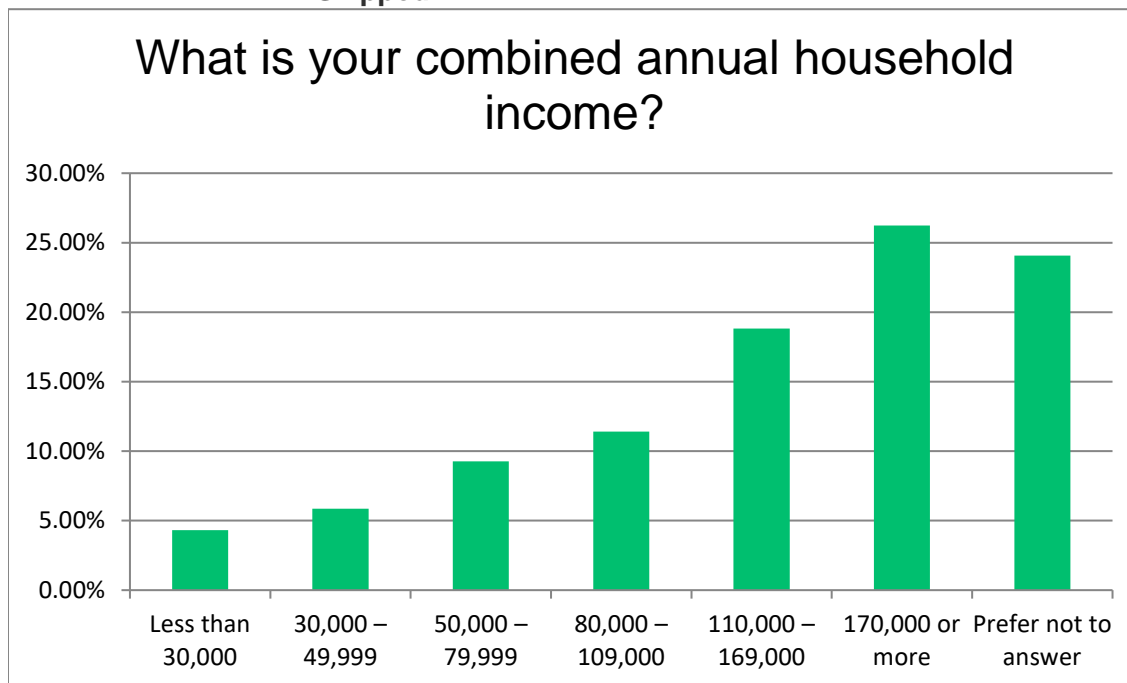
| Answer Choices | Responses | |
|-----------------|-----------|------------|
| 16-24 | 6.71% | 22 |
| 25-34 | 7.93% | 26 |
| 35-44 | 15.24% | 50 |
| 45-54 | 18.60% | 61 |
| 55-64 | 24.70% | 81 |
| 65-74 | 18.90% | 62 |
| 75 or older | 7.93% | 26 |
| Answered | | 328 |
| Skipped | | 23 |



OCTA SOCMTS PUBLIC INPUT SURVEY

What is your combined annual household income?

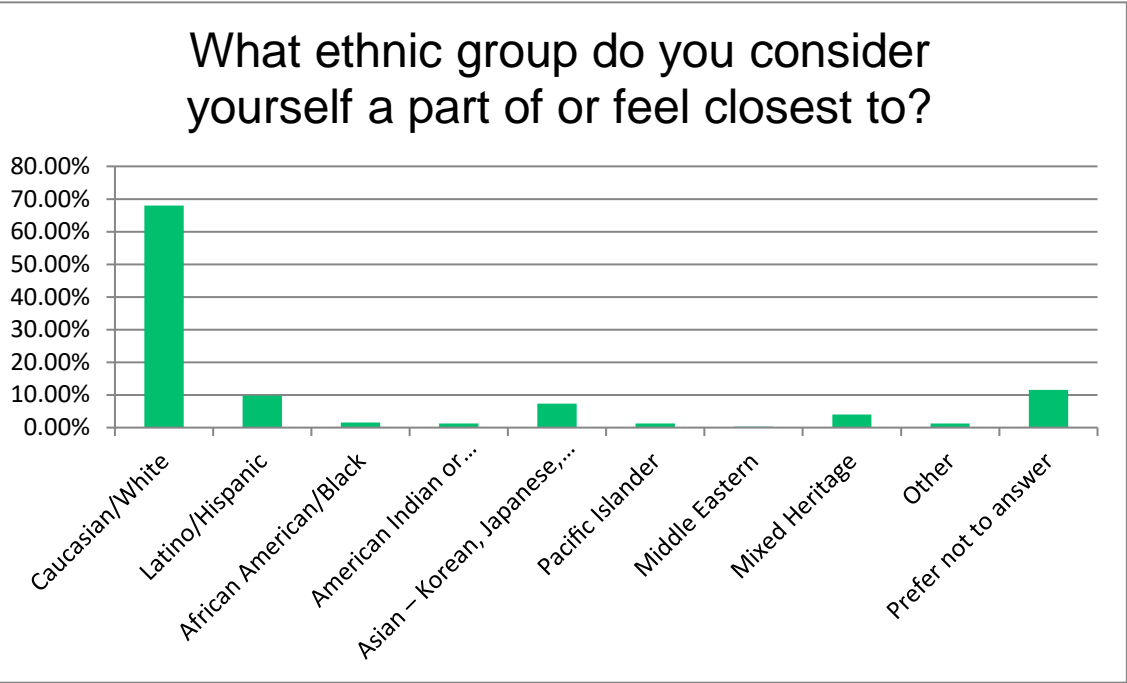
| Answer Choices | Responses | |
|----------------------|-----------|------------|
| Less than 30,000 | 4.32% | 14 |
| 30,000 – 49,999 | 5.86% | 19 |
| 50,000 – 79,999 | 9.26% | 30 |
| 80,000 – 109,000 | 11.42% | 37 |
| 110,000 – 169,000 | 18.83% | 61 |
| 170,000 or more | 26.23% | 85 |
| Prefer not to answer | 24.07% | 78 |
| Answered | | 324 |
| Skipped | | 27 |



OCTA SOCMTS PUBLIC INPUT SURVEY

What ethnic group do you consider yourself a part of or feel closest to?

| Answer Choices | Responses | |
|---|-----------|-----|
| Caucasian/White | 67.99% | 223 |
| Latino/Hispanic | 9.76% | 32 |
| African American/Black | 1.52% | 5 |
| American Indian or Alaskan Native | 1.22% | 4 |
| Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other A | 7.32% | 24 |
| Pacific Islander | 1.22% | 4 |
| Middle Eastern | 0.30% | 1 |
| Mixed Heritage | 3.96% | 13 |
| Other | 1.22% | 4 |
| Prefer not to answer | 11.59% | 38 |
| Answered | | 328 |
| Skipped | | 23 |



Appendix B

Appendix B.3 Spanish Survey Results

OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es su código postal?

Answered 8

Skipped 0

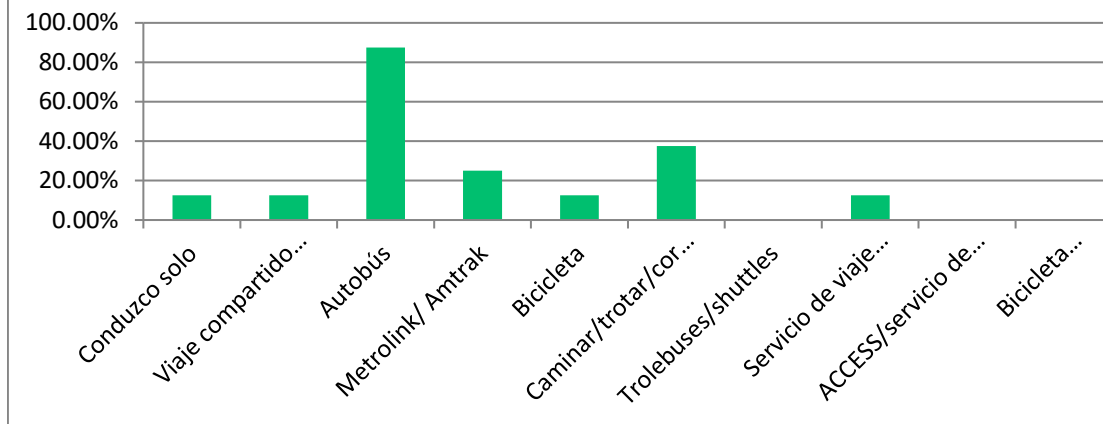
| Respondents | Response Date | Responses | Tags |
|-------------|---------------|-----------|------|
| 1 | Oct 30 2020 0 | 92866 | |
| 2 | Oct 29 2020 0 | 92675 | |
| 3 | Oct 27 2020 1 | 92701 | |
| 4 | Oct 19 2020 0 | 92703 | |
| 5 | Oct 18 2020 0 | 92801 | |
| 6 | Oct 17 2020 1 | 92704 | |
| 7 | Oct 16 2020 0 | 92688 | |
| 8 | Sep 27 2020 0 | 92801 | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

Cuando viaja por el condado de Orange, ¿cómo se desplaza habitualmente de un lugar a otro? Puede seleccionar hasta tres opciones.

| Answer Choices | Responses | |
|---|-----------|----------|
| Conduzco solo | 12.50% | 1 |
| Viaje compartido en coche/van | 12.50% | 1 |
| Autobús | 87.50% | 7 |
| Metrolink/ Amtrak | 25.00% | 2 |
| Bicicleta | 12.50% | 1 |
| Caminar/trotar/correr | 37.50% | 3 |
| Trolebuses/shuttles | 0.00% | 0 |
| Servicio de viaje compartido a demanda (como Uber o Lyft) | 12.50% | 1 |
| ACCESS/servicio de paratransito | 0.00% | 0 |
| Bicicleta eléctrica/scooter eléctrico | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |

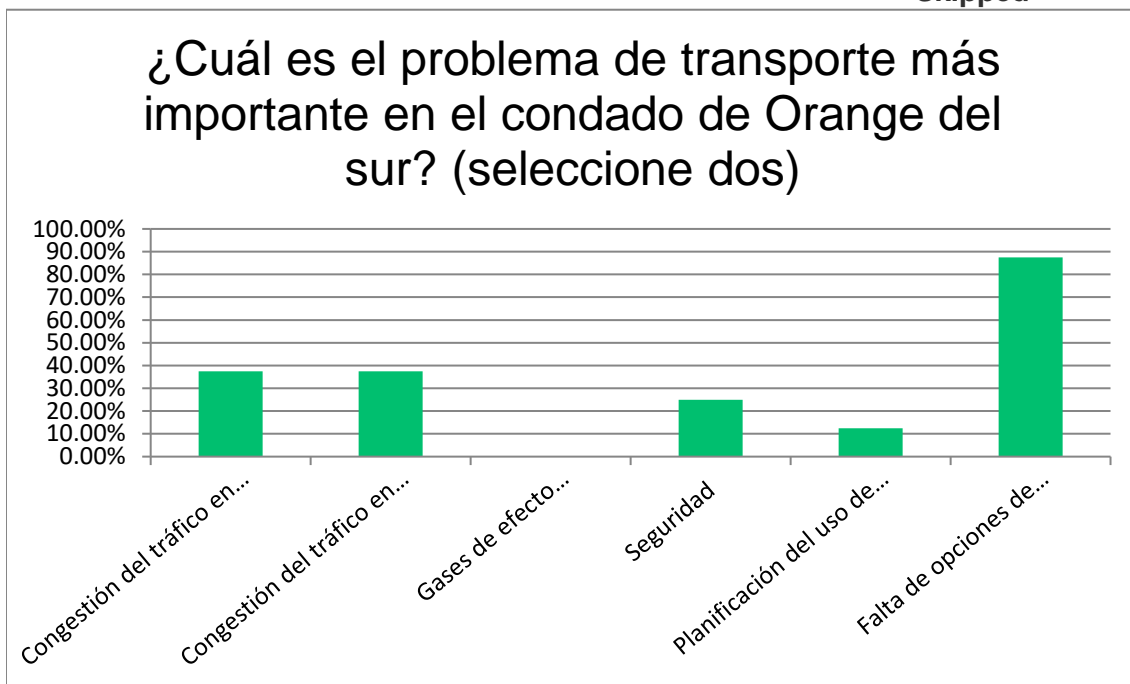
Cuando viaja por el condado de Orange, ¿cómo se desplaza habitualmente de un lugar a otro? Puede seleccionar hasta tres opciones.



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el problema de transporte más importante en el condado de Orange del sur? (seleccione dos)

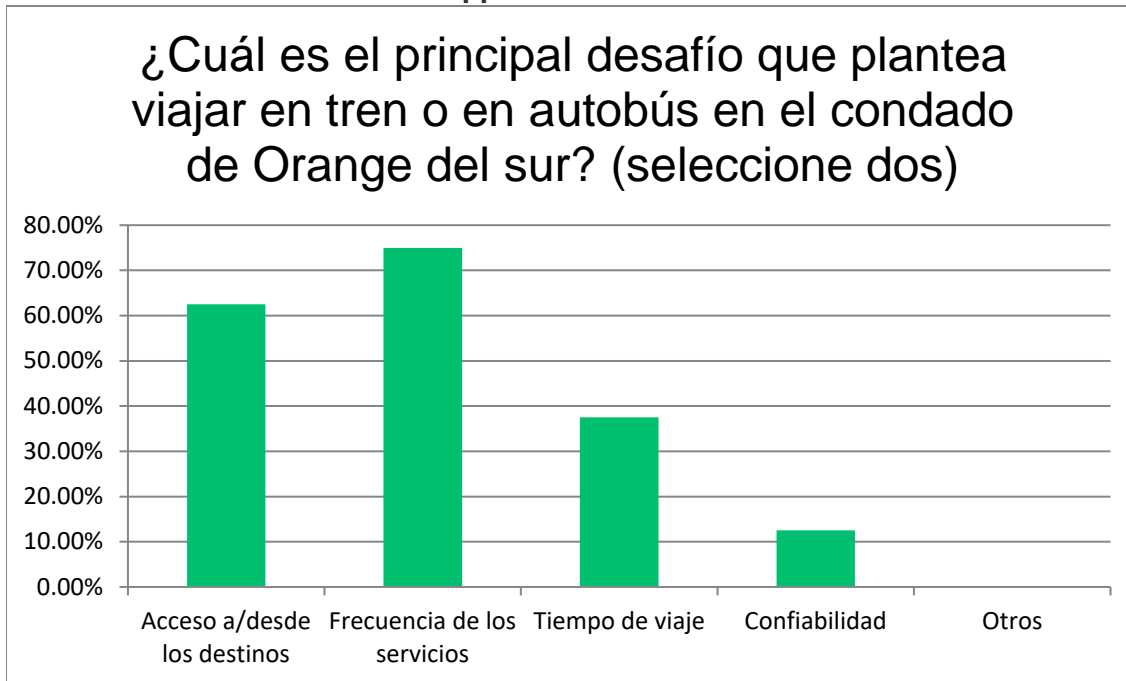
| Answer Choices | Responses | |
|--|-----------------|----------|
| Congestión del tráfico en las calles locales y carreteras | 37.50% | 3 |
| Congestión del tráfico en las autopistas | 37.50% | 3 |
| Gases de efecto invernadero (resolución del cambio climático) | 0.00% | 0 |
| Seguridad | 25.00% | 2 |
| Planificación del uso de la tierra (coordinación de los nuevos desarrollos con el transporte) | 12.50% | 1 |
| Falta de opciones de transporte suficientes (autobús, tren, o servicio de microtránsito a demanda) | 87.50% | 7 |
| | Answered | 8 |
| | Skipped | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el principal desafío que plantea viajar en tren o en autobús en el condado de Orange del sur? (seleccione dos)

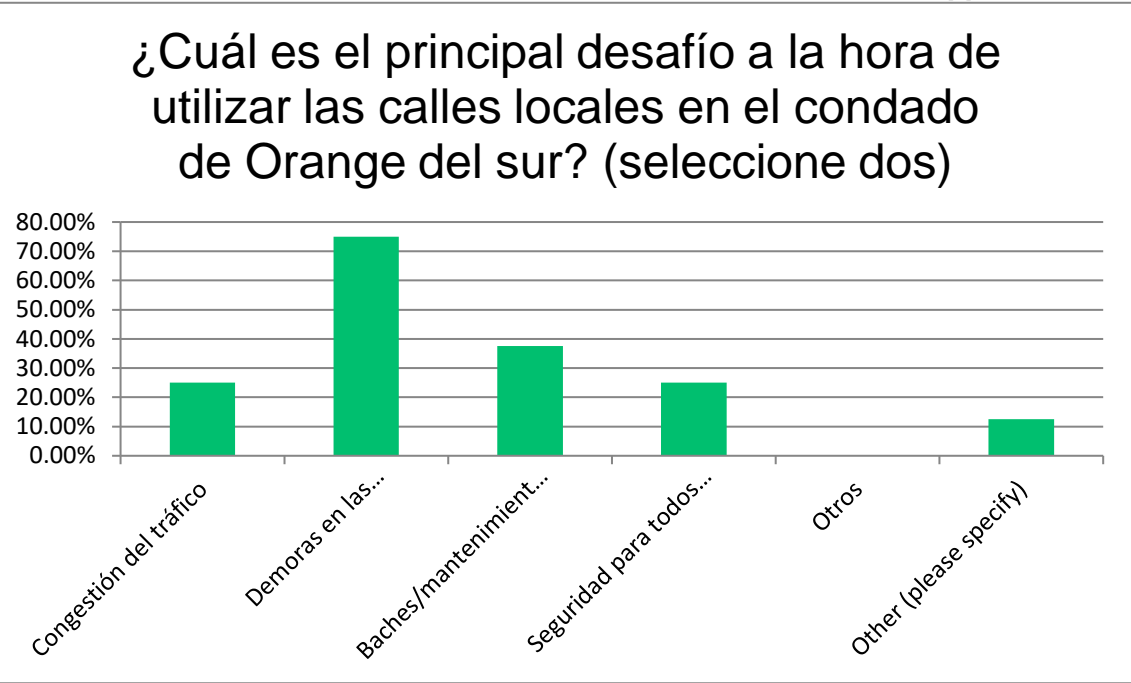
| Answer Choices | Responses | |
|-----------------------------|-----------|----------|
| Acceso a/desde los destinos | 62.50% | 5 |
| Frecuencia de los servicios | 75.00% | 6 |
| Tiempo de viaje | 37.50% | 3 |
| Confiabilidad | 12.50% | 1 |
| Otros | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el principal desafío a la hora de utilizar las calles locales en el condado de Orange del sur? (seleccione dos)

| Answer Choices | Responses | |
|--|-----------|---|
| Congestión del tráfico | 25.00% | 2 |
| Demoras en las intersecciones | 75.00% | 6 |
| Baches/mantenimiento de las calles | 37.50% | 3 |
| Seguridad para todos los usuarios (conductores, peatones, ciclistas) | 25.00% | 2 |
| Otros | 0.00% | 0 |
| Other (please specify) | 12.50% | 1 |
| Answered | | 8 |
| Skipped | | 0 |

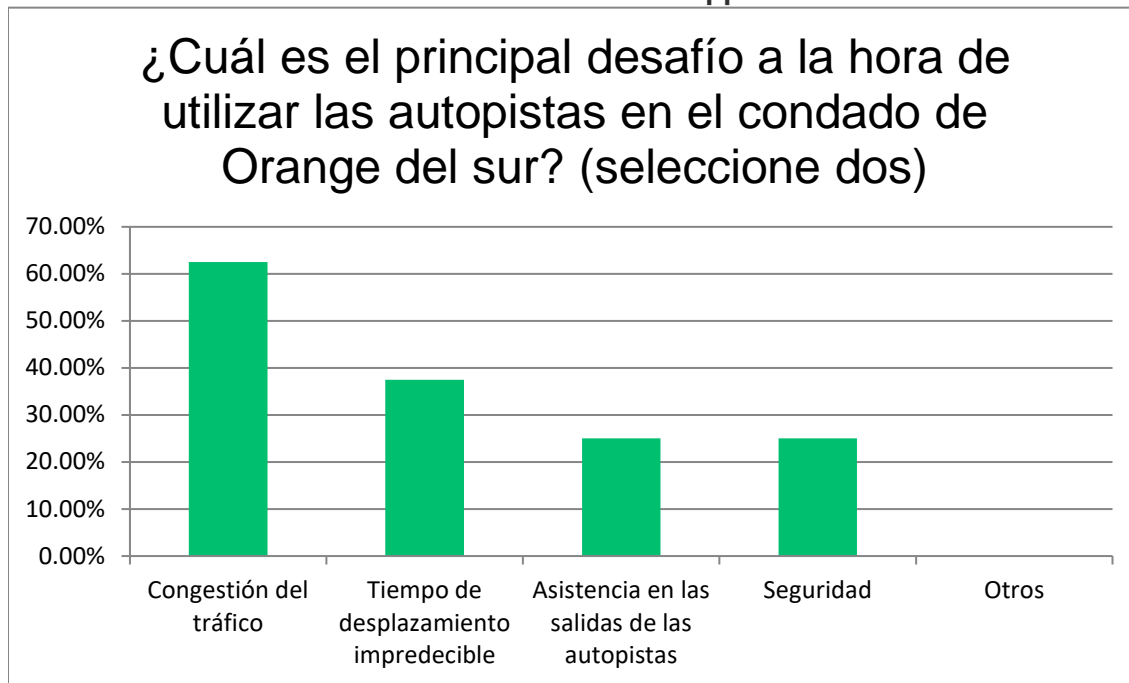


| Respondents | Response Date | Other (please specify) | Tags |
|-------------|---------------------------|--|------|
| | Oct 29 2020 1 07:03 AM | desamparadas que en el bus huelen bastante a cigarro o a pipí ,aveces ocupan varios asientos para sus cosas,una vez bajo una de ellas y yo me senté en un asiento y se mojo mi ropa por que había líquido ay . | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el principal desafío a la hora de utilizar las autopistas en el condado de Orange del sur? (seleccione dos)

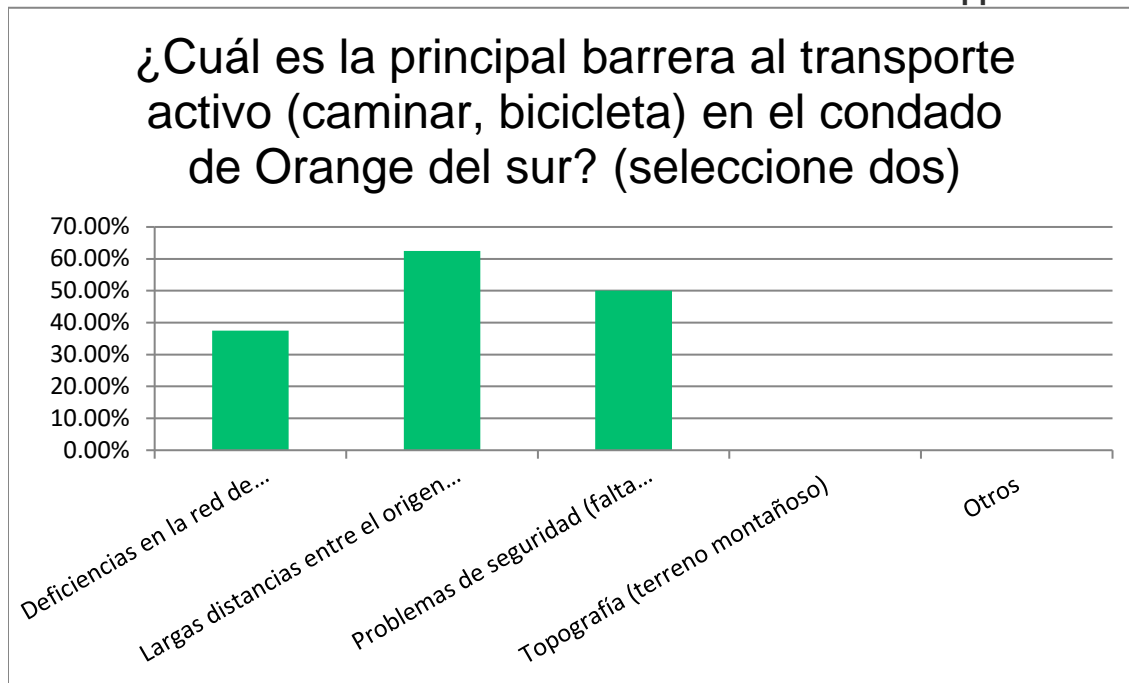
| Answer Choices | Responses | |
|---|-----------|----------|
| Congestión del tráfico | 62.50% | 5 |
| Tiempo de desplazamiento impredecible | 37.50% | 3 |
| Asistencia en las salidas de las autopistas | 25.00% | 2 |
| Seguridad | 25.00% | 2 |
| Otros | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es la principal barrera al transporte activo (caminar, bicicleta) en el condado de Orange del sur? (seleccione dos)

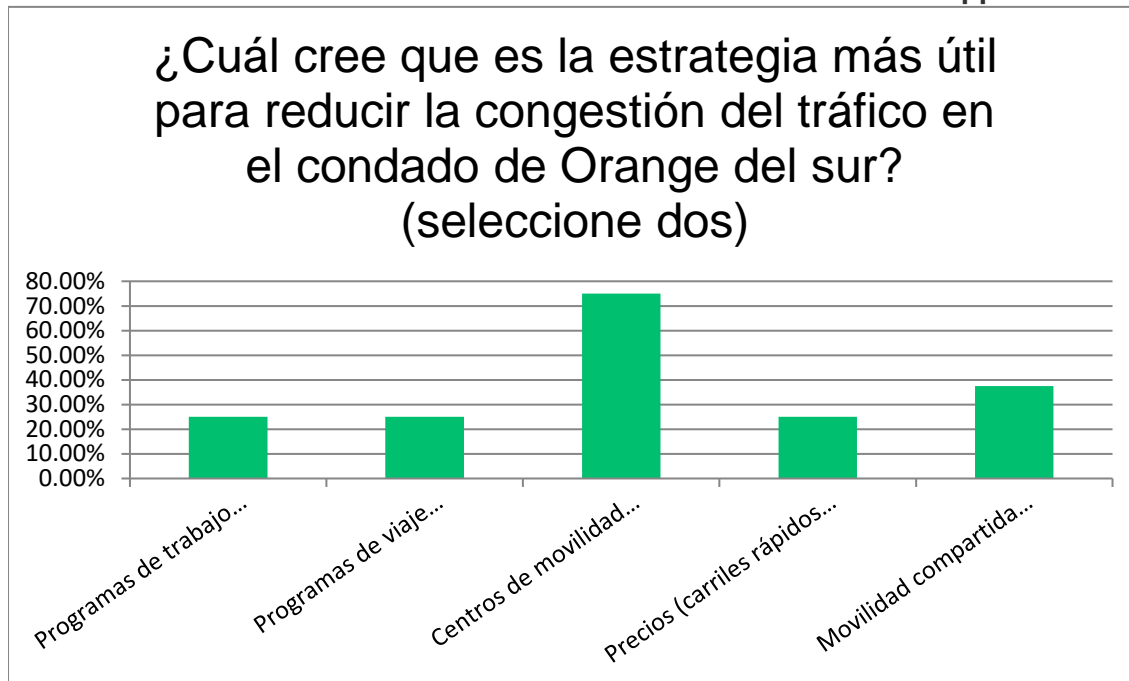
| Answer Choices | Responses | |
|--|-----------|----------|
| Deficiencias en la red de bicisendas y sendas peatonales | 37.50% | 3 |
| Largas distancias entre el origen y destino de los viajes | 62.50% | 5 |
| Problemas de seguridad (falta de separación física respecto de los vehículos, falta de adaptaciones para peatones) | 50.00% | 4 |
| Topografía (terreno montañoso) | 0.00% | 0 |
| Otros | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

**¿Cuál cree que es la estrategia más útil para reducir la congestión del tráfico en el condado de Orange del sur?
(seleccione dos)**

| Answer Choices | Responses | |
|--|-----------|----------|
| Programas de trabajo en casa | 25.00% | 2 |
| Programas de viaje compartido e instalaciones | 25.00% | 2 |
| Centros de movilidad (centros de actividad compartida para conectar los servicios de autobuses/viaje compartido, etc.) | 75.00% | 6 |
| Precios (carriles rápidos con peaje, estacionamiento de pago) | 25.00% | 2 |
| Movilidad compartida (servicio compartido de vehículos, bicicletas y scooters) | 37.50% | 3 |
| Answered | | 8 |
| Skipped | | 0 |

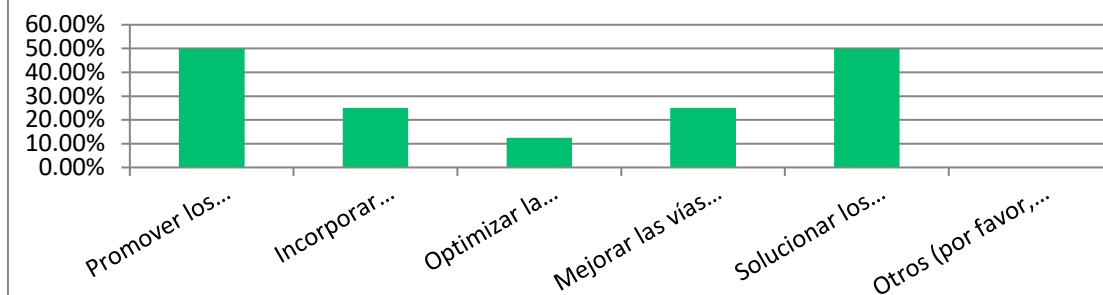


OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

Dado el espacio limitado para ampliar el ancho de las autopistas sin impactar en los comercios y residencias, ¿qué medida contribuiría más a gestionar la congestión de las autopistas en el condado de Orange del sur? (seleccione dos)

| Answer Choices | Responses | |
|---|-----------|----------|
| Promover los viajes compartidos | 50.00% | 4 |
| Incorporar carriles exprés con peaje a las autopistas existentes (91 carriles exprés) | 25.00% | 2 |
| Optimizar la infraestructura para acomodar los vehículos autónomos | 12.50% | 1 |
| Mejorar las vías de entrada y salida de las autopistas | 25.00% | 2 |
| Solucionar los cuellos de botella (zonas de alta congestión) | 50.00% | 4 |
| Otros (por favor, especificar) | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |

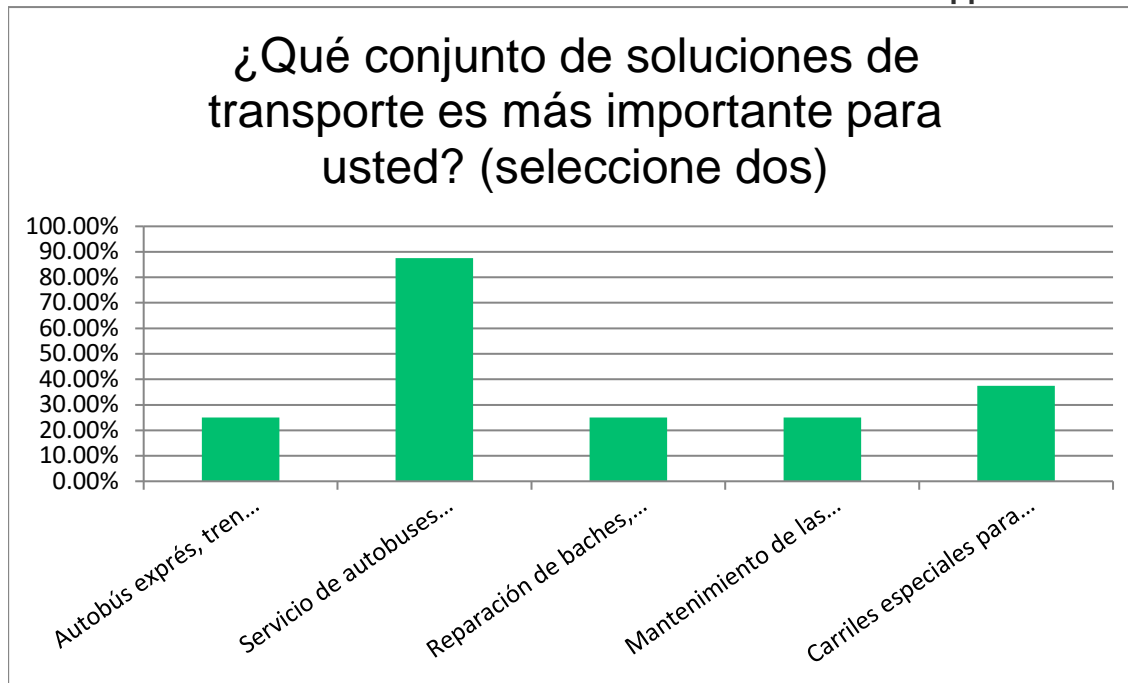
Dado el espacio limitado para ampliar el ancho de las autopistas sin impactar en los comercios y residencias, ¿qué medida contribuiría más a gestionar la congestión de las autopistas en el condado de Orange del sur?...



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Qué conjunto de soluciones de transporte es más importante para usted? (seleccione dos)

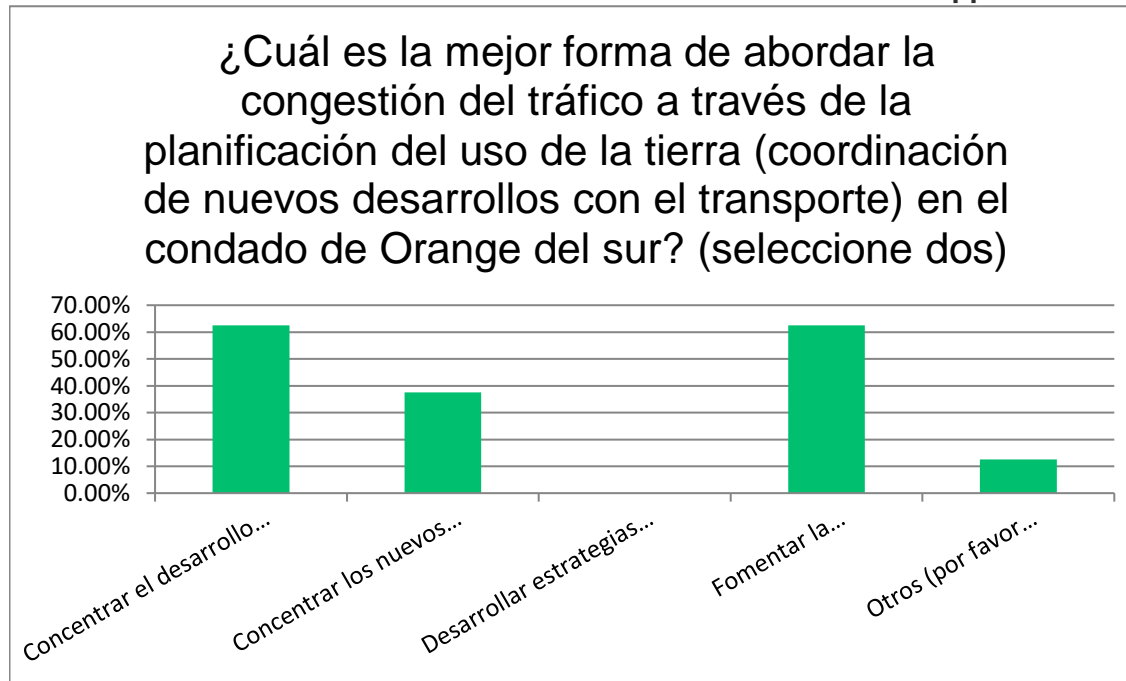
| Answer Choices | Responses | |
|---|-----------|----------|
| Autobús exprés, tren interurbano, viaje compartido en van y tránsito rápido de autobús por autopista | 25.00% | 2 |
| Servicio de autobuses locales, tránsito a demanda y trolebuses | 87.50% | 7 |
| Reparación de baches, sincronización de señales y mejoras en las intersecciones | 25.00% | 2 |
| Mantenimiento de las autopistas, mejoras en las vías de entrada y salida y proyectos para optimizar el flujo del tráfico en general | 25.00% | 2 |
| Carriles especiales para bicicletas, redes de bicisendas y sendas peatonales | 37.50% | 3 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es la mejor forma de abordar la congestión del tráfico a través de la planificación del uso de la tierra (coordinación de nuevos desarrollos con el transporte) en el condado de Orange del sur? (seleccione dos)

| Answer Choices | Responses | |
|--|-----------|---|
| Concentrar el desarrollo de los negocios en torno a los centros de tránsito (autobús/tren) | 62.50% | 5 |
| Concentrar los nuevos desarrollos de viviendas en torno a los centros de tránsito (autobuses/trenes) | 37.50% | 3 |
| Desarrollar estrategias para reducir la dependencia al automóvil (es decir, estacionamiento de pago) | 0.00% | 0 |
| Fomentar la infraestructura para caminar y finalizar las obras en las calles (calles diseñadas y operadas de manera segura para todos los usuarios, como conductores, ciclistas, peatones) | 62.50% | 5 |
| Otros (por favor especificar) | 12.50% | 1 |
| Answered | | 8 |
| Skipped | | 0 |

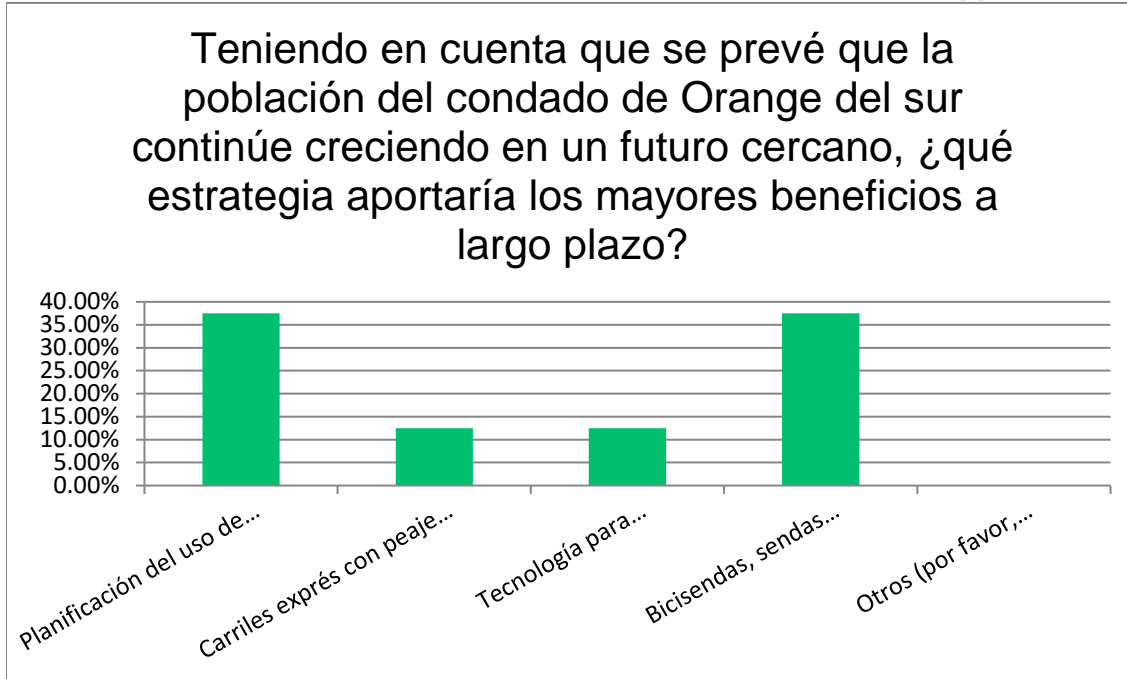


| Respondents | Response Date | Otros (por favor especificar) | Tags |
|-------------|---------------|-------------------------------|------|
| 1 | Oct 27 2020 1 | Más rutas de los buses | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

Teniendo en cuenta que se prevé que la población del condado de Orange del sur continúe creciendo en un futuro cercano, ¿qué estrategia aportaría los mayores beneficios a largo plazo?

| Answer Choices | Responses | |
|--|-----------|----------|
| Planificación del uso de la tierra (coordinación de los nuevos desarro | 37.50% | 3 |
| Carriles exprés con peaje en las autopistas existentes | 12.50% | 1 |
| Tecnología para minimizar el tráfico (sincronización de señales, vehíc | 12.50% | 1 |
| Bicisendas, sendas peatonales y sendas pavimentadas | 37.50% | 3 |
| Otros (por favor, especificar) | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el código postal de su lugar de trabajo, si corresponde?

Answered 8

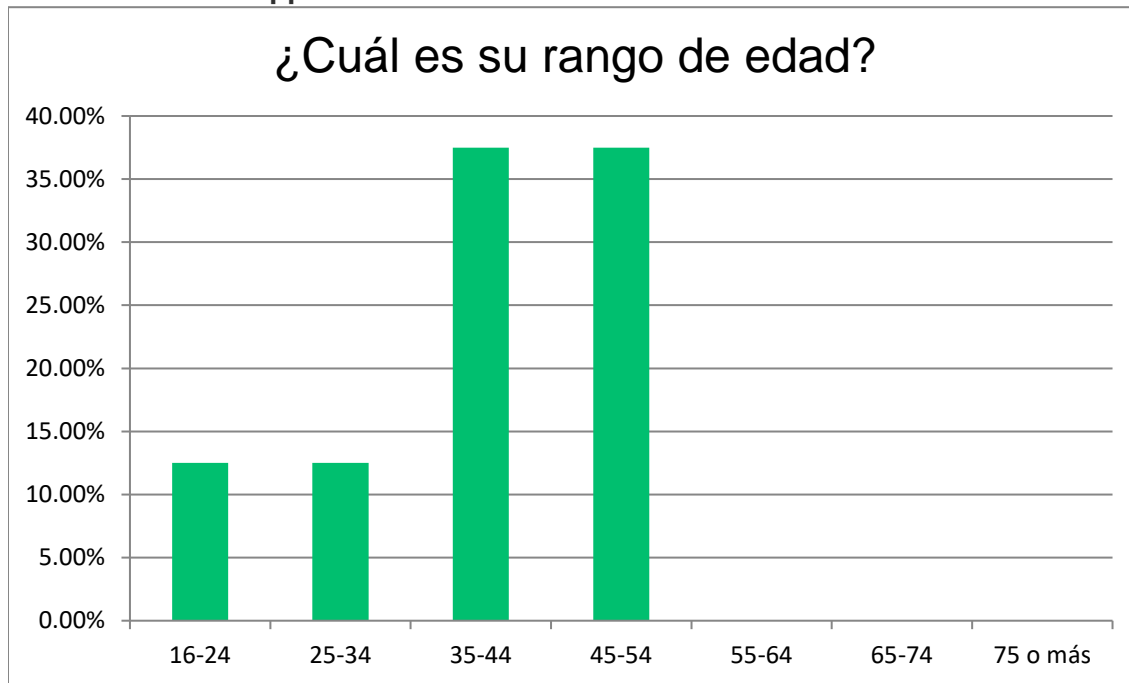
Skipped 0

| Respondents | Response Date | Responses | Tags |
|-------------|---------------|-----------|------|
| 1 | Oct 30 2020 0 | 92917 | |
| 2 | Oct 29 2020 0 | 92637 | |
| 3 | Oct 27 2020 1 | 92701 | |
| 4 | Oct 19 2020 0 | 92780 | |
| 5 | Oct 18 2020 0 | 92703 | |
| 6 | Oct 17 2020 1 | 92701 | |
| 7 | Oct 16 2020 0 | 92694 | |
| 8 | Sep 27 2020 0 | 92801 | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es su rango de edad?

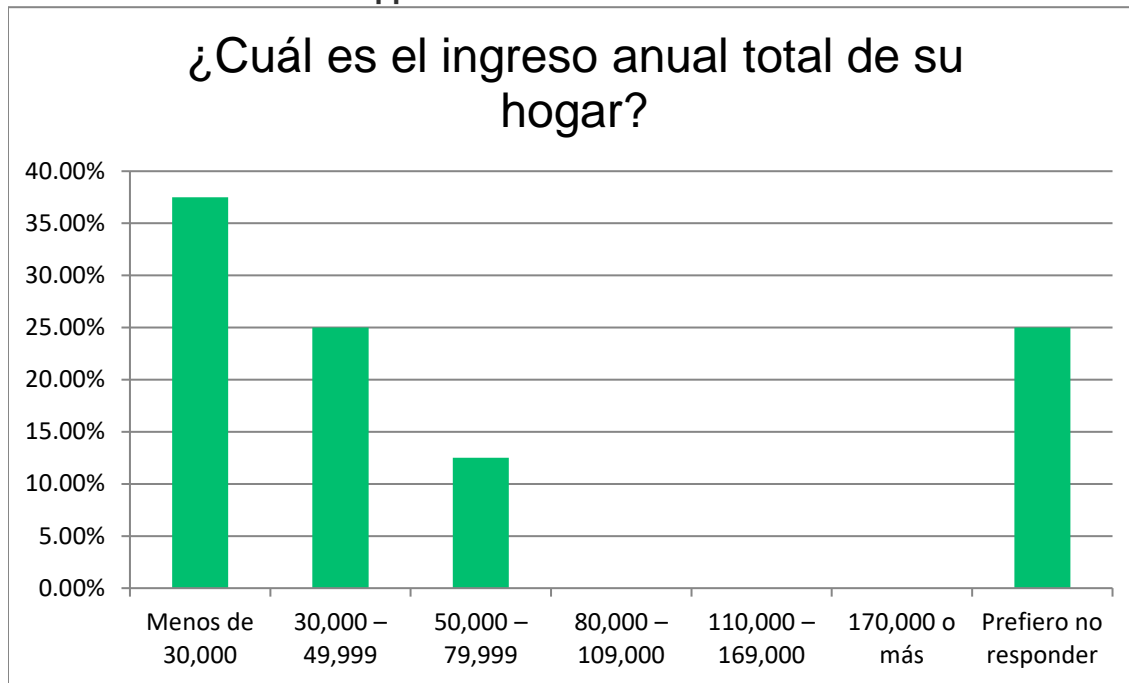
| Answer Choices | Responses | |
|-----------------|-----------|----------|
| 16-24 | 12.50% | 1 |
| 25-34 | 12.50% | 1 |
| 35-44 | 37.50% | 3 |
| 45-54 | 37.50% | 3 |
| 55-64 | 0.00% | 0 |
| 65-74 | 0.00% | 0 |
| 75 o más | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿Cuál es el ingreso anual total de su hogar?

| Answer Choices | Responses | |
|-----------------------|-----------|----------|
| Menos de 30,000 | 37.50% | 3 |
| 30,000 – 49,999 | 25.00% | 2 |
| 50,000 – 79,999 | 12.50% | 1 |
| 80,000 – 109,000 | 0.00% | 0 |
| 110,000 – 169,000 | 0.00% | 0 |
| 170,000 o más | 0.00% | 0 |
| Prefiero no responder | 25.00% | 2 |
| Answered | | 8 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Spanish

¿A qué grupo étnico cree que pertenece o con cuál se siente más identificado?

| Answer Choices | Responses | |
|---|-----------|----------|
| Caucásico/Blanco | 0.00% | 0 |
| Latino/Hispano | 100.00% | 8 |
| Afroamericano/Negro | 0.00% | 0 |
| Indio americano o nativo de Alaska | 0.00% | 0 |
| Asiático – coreano, japonés, chino, vietnamita, filipino u otro | 0.00% | 0 |
| Isleño del Pacífico | 0.00% | 0 |
| Procedente de Medio Oriente | 0.00% | 0 |
| Herencia mixta | 0.00% | 0 |
| Otros | 0.00% | 0 |
| Prefiero no responder | 0.00% | 0 |
| Answered | | 8 |
| Skipped | | 0 |



Appendix B

Appendix B.4 Mandarin Survey Results

OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您的住家邮政编码是什么？

Answered 1

Skipped 0

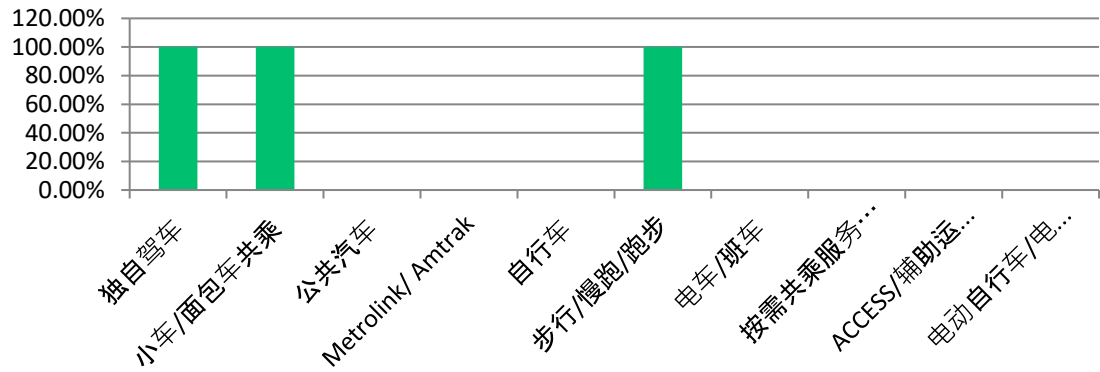
| Respondents | Response Date | Responses | Tags |
|-------------|---------------------|-----------|------|
| 1 | Oct 19 2020 1:92620 | | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您在橙县及其周围出行时，通常如何从一个地方到另一个地方？您可以最多选择三项。

| Answer Choices | Responses | |
|-------------------|-----------|---|
| 独自驾车 | 100.00% | 1 |
| 小车/面包车共乘 | 100.00% | 1 |
| 公共汽车 | 0.00% | 0 |
| Metrolink/ Amtrak | 0.00% | 0 |
| 自行车 | 0.00% | 0 |
| 步行/慢跑/跑步 | 100.00% | 1 |
| 电车/班车 | 0.00% | 0 |
| 按需共乘服务（例如 Ube | 0.00% | 0 |
| ACCESS/辅助运输服务 | 0.00% | 0 |
| 电动自行车/电动踏板车 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

您在橙县及其周围出行时，通常如何从一个地方到另一个地方？您可以最多选择三项。

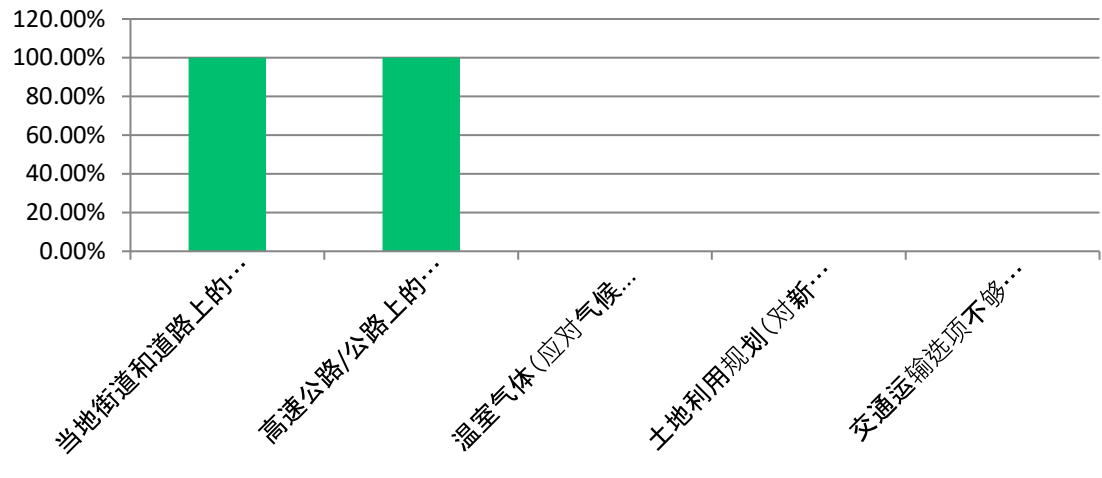


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

关于橙县南部的交通，最重要的问题是什么？（选择两个）

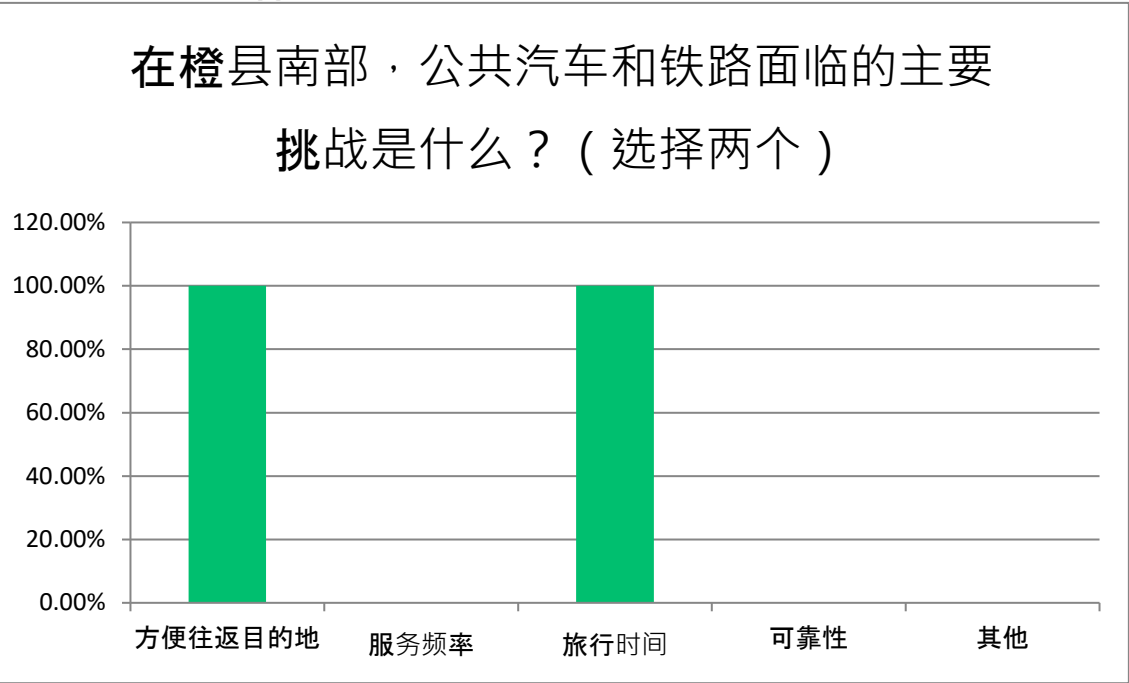
| Answer Choices | Responses | |
|------------------------------|-----------|---|
| 当地街道和道路上的交通拥堵 | 100.00% | 1 |
| 高速公路/公路上的交通拥堵 | 100.00% | 1 |
| 温室气体（应对气候变化） | 0.00% | 0 |
| 土地利用规划（对新开发和交通进行协调） | 0.00% | 0 |
| 交通运输选项不够（公共汽车，铁路或者按需的微型公交服务） | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

关于橙县南部的交通，最重要的问题是什么？（选择两个）



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin
在橙县南部，公共汽车和铁路面临的主要挑战是什么？（选择两个）

| Answer Choices | Responses | |
|----------------|-----------|---|
| 方便往返目的地 | 100.00% | 1 |
| 服务频率 | 0.00% | 0 |
| 旅行时间 | 100.00% | 1 |
| 可靠性 | 0.00% | 0 |
| 其他 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

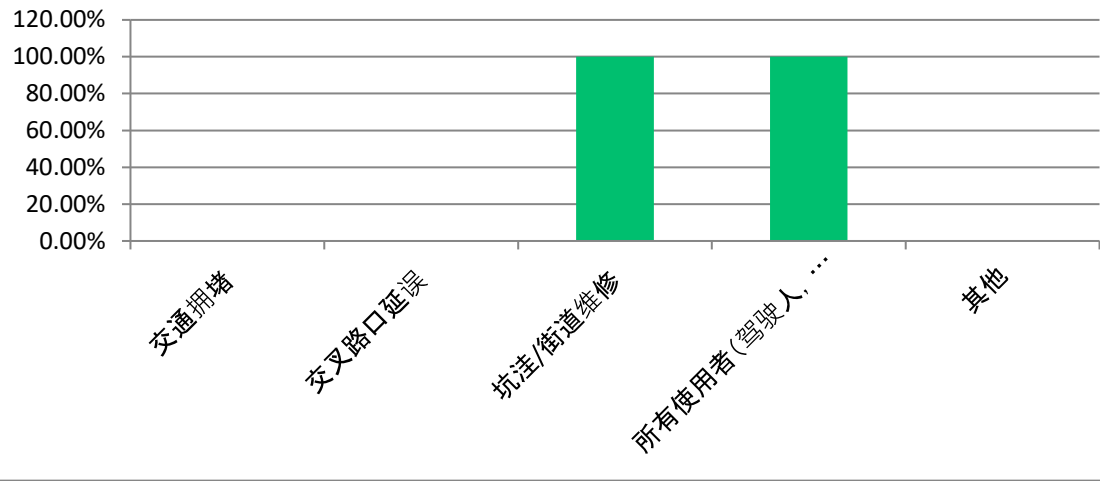


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

在橙县南部，使用当地街道的主要挑战是什么？（选择两个）

| Answer Choices | Responses | |
|-------------------------|-----------|---|
| 交通拥堵 | 0.00% | 0 |
| 交叉路口延误 | 0.00% | 0 |
| 坑洼/街道维修 | 100.00% | 1 |
| 所有使用者（驾驶人，行人，骑自行车的人）的安全 | 100.00% | 1 |
| 其他 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

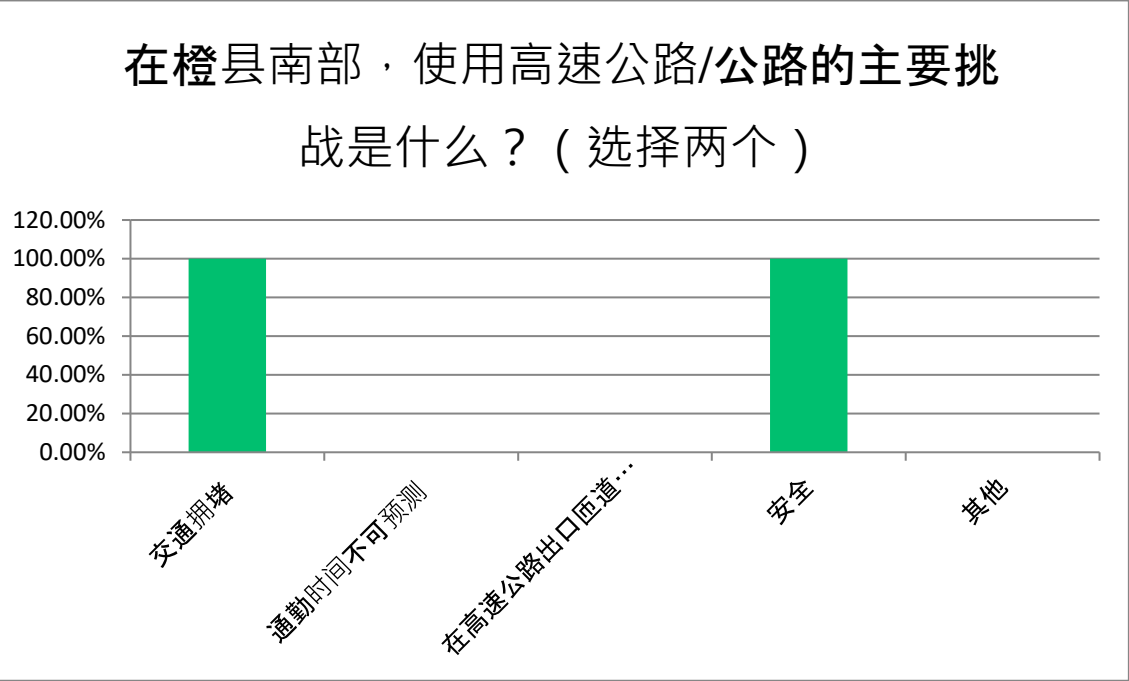
在橙县南部，使用当地街道的主要挑战是什么？（选择两个）



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

在橙县南部，使用高速公路/公路的主要挑战是什么？（选择两个）

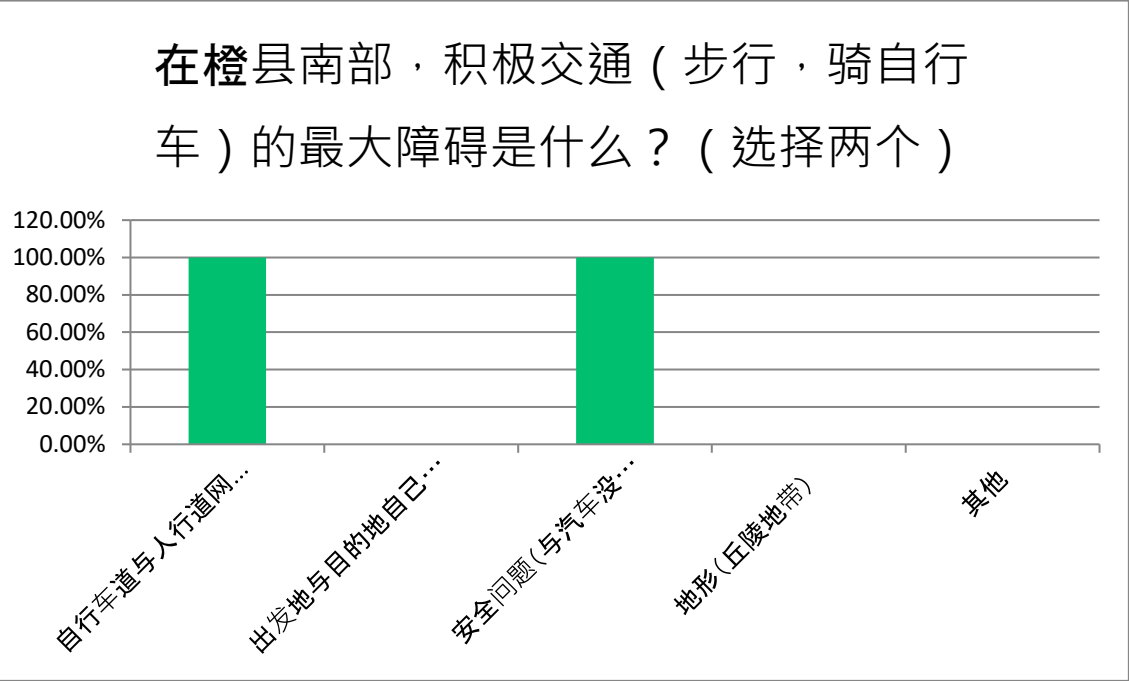
| Answer Choices | Responses | |
|----------------|-----------|---|
| 交通拥堵 | 100.00% | 1 |
| 通勤时间不可预测 | 0.00% | 0 |
| 在高速公路出口匝道排队等候 | 0.00% | 0 |
| 安全 | 100.00% | 1 |
| 其他 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

在橙县南部，积极交通（步行，骑自行车）的最大障碍是什么？（选择两个）

| Answer Choices | Responses | |
|--------------------------|-----------|---|
| 自行车道与人行道网络中的空隙 | 100.00% | 1 |
| 出发地与目的地自己的距离较远 | 0.00% | 0 |
| 安全问题（与汽车没有物理隔离，没有信任转让设施） | 100.00% | 1 |
| 地形（丘陵地带） | 0.00% | 0 |
| 其他 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

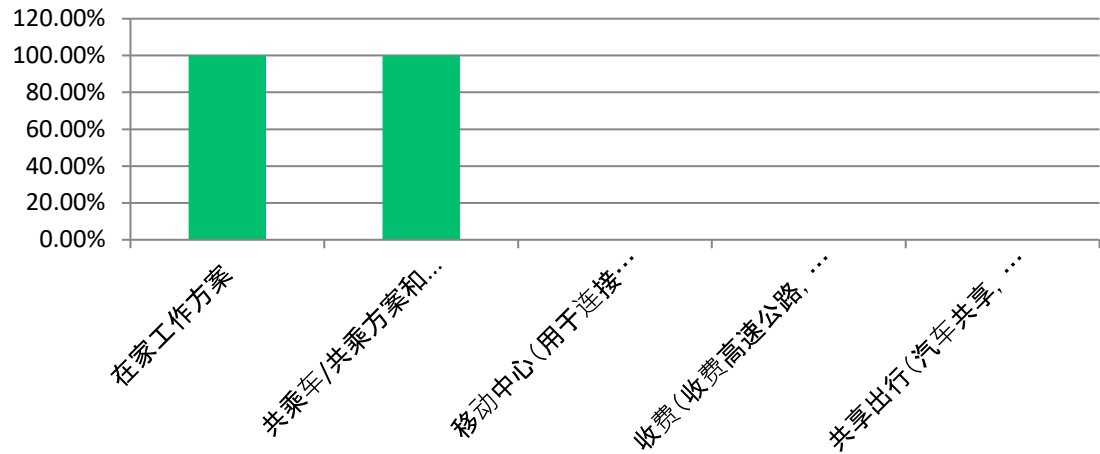


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您认为减少橙县南部交通拥堵的最有效策略是什么？（选择两个）

| Answer Choices | Responses | |
|------------------------------|-----------|---|
| 在家工作方案 | 100.00% | 1 |
| 共乘车/共乘方案和设施 | 100.00% | 1 |
| 移动中心（用于连接公共汽车/班车/共乘车的共享活动中心） | 0.00% | 0 |
| 收费（收费高速公路，停车费） | 0.00% | 0 |
| 共享出行（汽车共享，自行车共享，踏板车共享） | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

您认为减少橙县南部交通拥堵的最有效策略是什么？（选择两个）

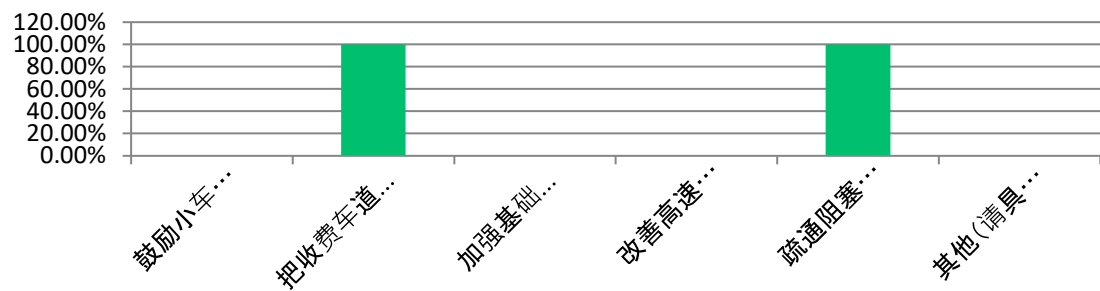


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

在不影响企业和住宅的前提下利用有限的空间来拓宽高速公路，哪一项可以最大程度地管理橙县南部高速公路的拥堵？（选择两个）

| Answer Choices | Responses | |
|---------------------------|-----------|---|
| 鼓励小车共乘，面包车共乘和拼车 | 0.00% | 0 |
| 把收费车道纳入现有的高速公路（91号公路快速车道） | 100.00% | 1 |
| 加强基础设施以适用自动（自动驾驶）车辆 | 0.00% | 0 |
| 改善高速公路出入口坡道 | 0.00% | 0 |
| 疏通阻塞点（高拥挤区域） | 100.00% | 1 |
| 其他（请具体说明） | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

在不影响企业和住宅的前提下利用有限的空间来拓宽高速公路，哪一项可以最大程度地管理橙县南部高速公路的拥堵？（选择两个）

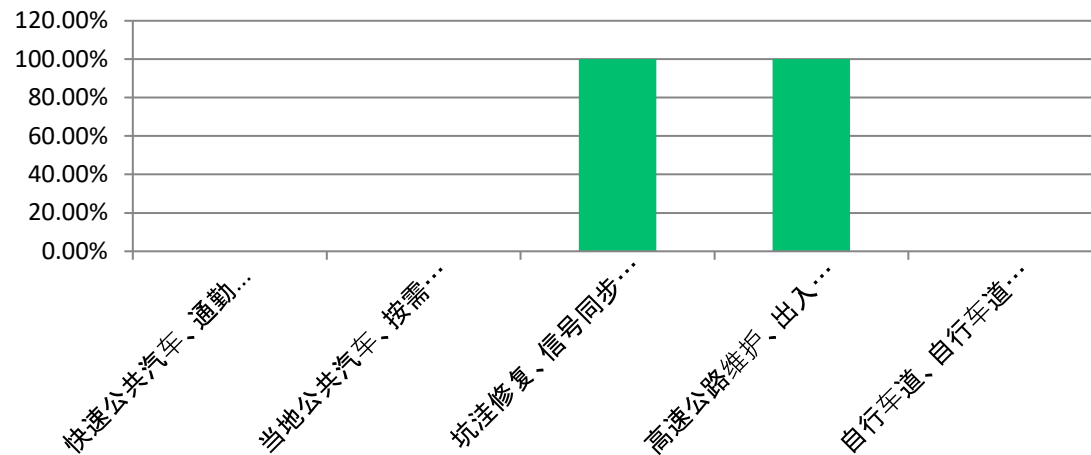


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您认为哪一组交通运输解决方案最重要？（选择两个）

| Answer Choices | Responses | |
|--------------------------------|-----------|----------|
| 快速公共汽车、通勤铁路、面包车共乘和高速公路公共汽车快速运输 | 0.00% | 0 |
| 当地公共汽车、按需公交服务和电车 | 0.00% | 0 |
| 坑洼修复、信号同步和交叉路口改善 | 100.00% | 1 |
| 高速公路维护、出入口坡道改善和改善整体交通流量的项目 | 100.00% | 1 |
| 自行车道、自行车道网络和人行道 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

您认为哪一组交通运输解决方案最重要？
（选择两个）

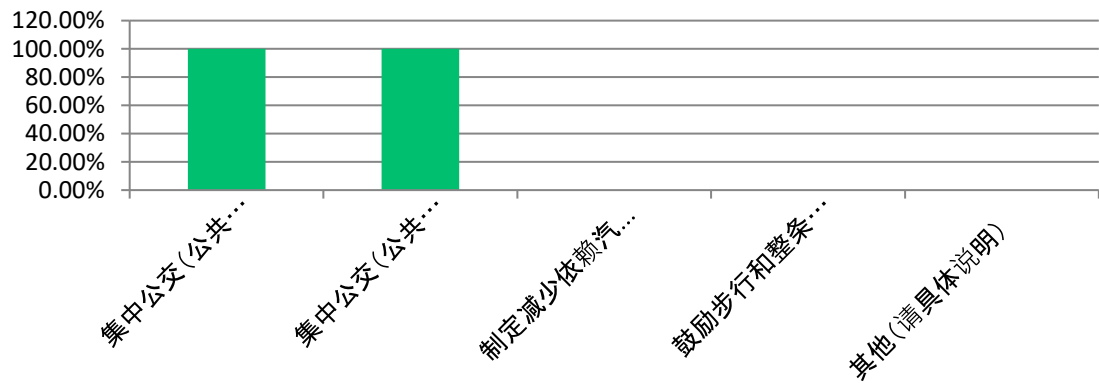


OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

在橙县南部，通过土地利用规划（对新开发和交通进行协调）解决交通拥堵的最佳方法是什么？（选择两个）

| Answer Choices | Responses | |
|---|-----------|---|
| 集中公交（公共汽车/铁路）中心周围的业务发展 | 100.00% | 1 |
| 集中公交（公共汽车/铁路）中心周围的住房开发 | 100.00% | 1 |
| 制定减少依赖汽车的策略（即收停车费） | 0.00% | 0 |
| 鼓励步行和整条街道（为驾驶人、骑自行车的人和行人等所有志愿者安全设计和运营的街道） | 0.00% | 0 |
| 其他（请具体说明） | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |

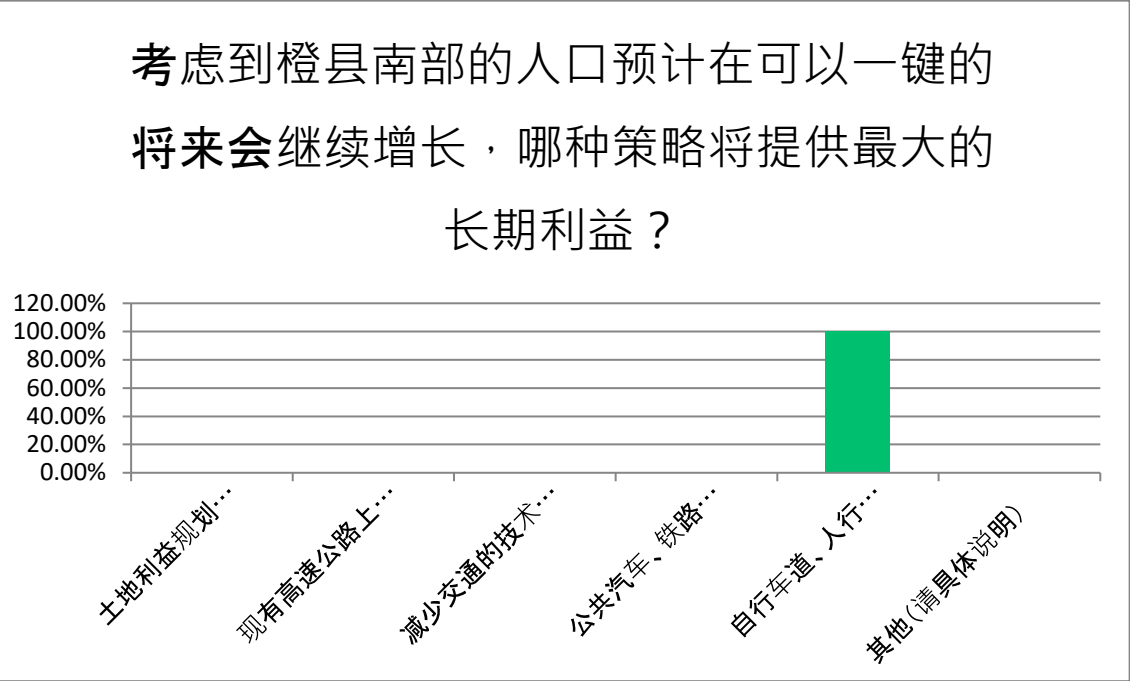
在橙县南部，通过土地利用规划（对新开发和交通进行协调）解决交通拥堵的最佳方法是什么？（选择两个）



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

考虑到橙县南部的人口预计在可以一键的将来会继续增长，哪种策略将提供最大的长期利益？

| Answer Choices | Responses | |
|----------------------|-----------|---|
| 土地利益规划（对新开发和交通进行协调） | 0.00% | 0 |
| 现有高速公路上的收费快车道 | 0.00% | 0 |
| 减少交通的技术（信号同步，自动驾驶车辆） | 0.00% | 0 |
| 公共汽车、铁路和其他公交服务 | 0.00% | 0 |
| 自行车道、人行道/人行横道和铺面小径 | 100.00% | 1 |
| 其他（请具体说明） | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

如果有的话，您的工作地点的邮政编码是什么？

Answered 1

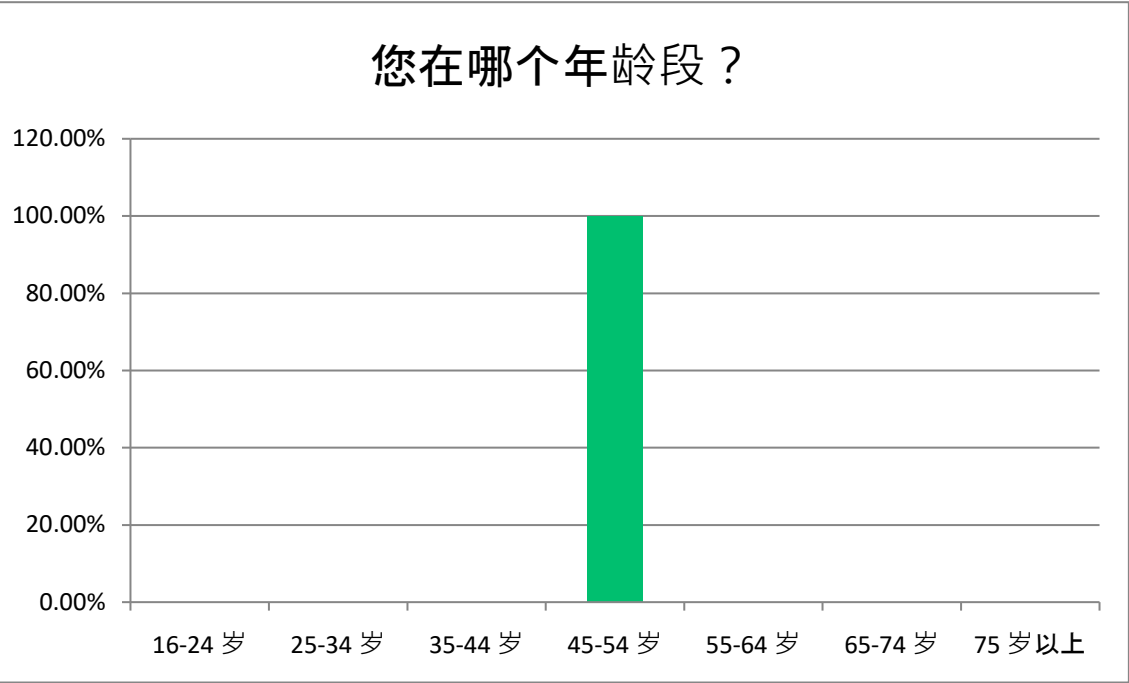
Skipped 0

| Respondents | Response Date | Responses | Tags |
|-------------|---------------------|-----------|------|
| 1 | Oct 19 2020 1:92602 | | |

OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您在哪个年龄段？

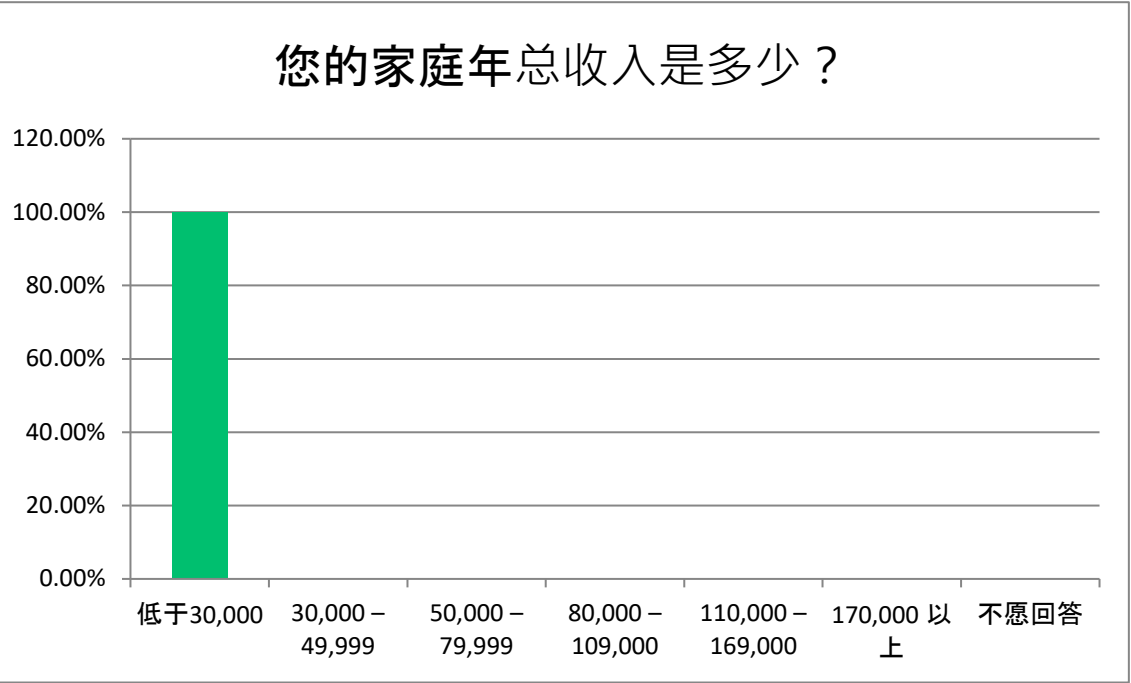
| Answer Choices | Responses | |
|----------------|-----------|---|
| 16-24 岁 | 0.00% | 0 |
| 25-34 岁 | 0.00% | 0 |
| 35-44 岁 | 0.00% | 0 |
| 45-54 岁 | 100.00% | 1 |
| 55-64 岁 | 0.00% | 0 |
| 65-74 岁 | 0.00% | 0 |
| 75 岁以上 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您的家庭年总收入是多少？

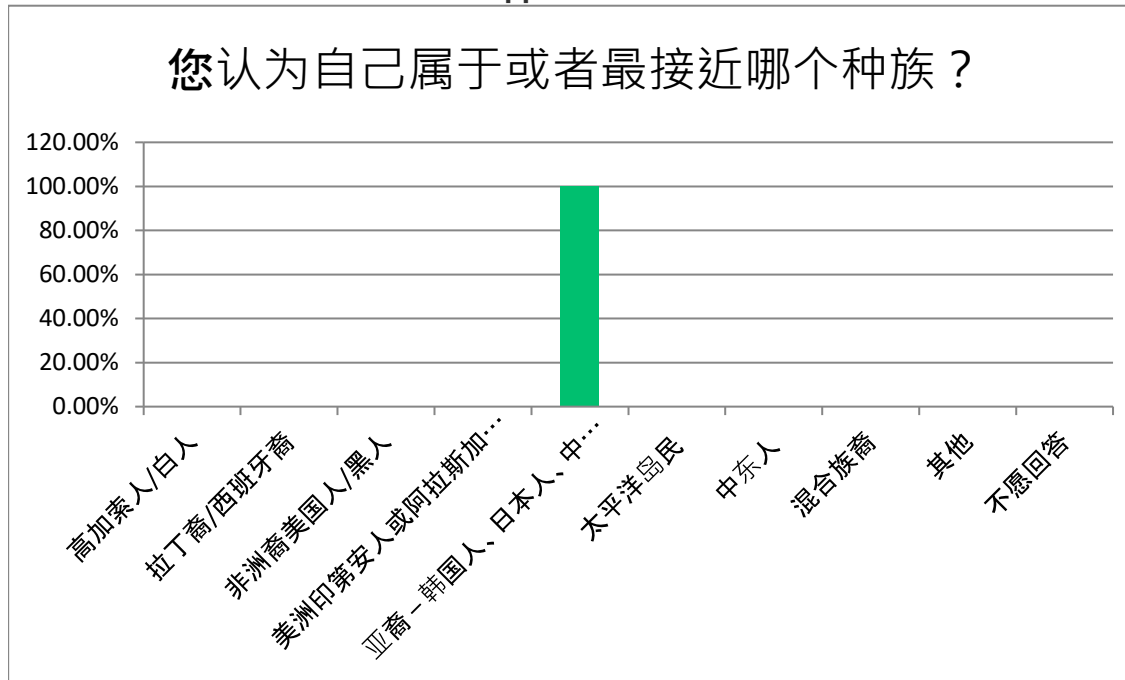
| Answer Choices | Responses | |
|-------------------|-----------|---|
| 低于30,000 | 100.00% | 1 |
| 30,000 – 49,999 | 0.00% | 0 |
| 50,000 – 79,999 | 0.00% | 0 |
| 80,000 – 109,000 | 0.00% | 0 |
| 110,000 – 169,000 | 0.00% | 0 |
| 170,000 以上 | 0.00% | 0 |
| 不愿回答 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

您认为自己属于或者最接近哪个种族？

| Answer Choices | Responses | |
|-------------------|-----------|----------|
| 高加索人/白人 | 0.00% | 0 |
| 拉丁裔/西班牙裔 | 0.00% | 0 |
| 非洲裔美国人/黑人 | 0.00% | 0 |
| 美洲印第安人或阿拉斯加原住民 | 0.00% | 0 |
| 亚裔 – 韩国人、日本人、中国人、 | 100.00% | 1 |
| 太平洋岛民 | 0.00% | 0 |
| 中东人 | 0.00% | 0 |
| 混合族裔 | 0.00% | 0 |
| 其他 | 0.00% | 0 |
| 不愿回答 | 0.00% | 0 |
| Answered | | 1 |
| Skipped | | 0 |



OCTA SOCMTS PUBLIC INPUT SURVEY – Mandarin

注册接收项目更新资讯和会议邀请

Answered **0**

Skipped **1**

Appendix C

Notification Materials

- Appendix C.1 Stakeholder Communications Toolkit**
- Appendix C.2 Study Website**
- Appendix C.3 News Release**
- Appendix C.4 Study Blog Article**
- Appendix C.5 On the Move Article**
- Appendix C.6 Eblast #1 — Community Meeting and Survey Invite**
- Appendix C.7 Eblast #2 —Survey Reminder**
- Appendix C.8 Community Meeting/Survey Postcard (English; Spanish; Mandarin; Korean; Vietnamese)**

Appendix C.9 Facebook Posts

Appendix C.10 Twitter Posts

Appendix C

Appendix C.1 Stakeholder Communications Toolkit

Help us plan for SOUTH ORANGE COUNTY'S TRANSPORTATION FUTURE



Dear Stakeholder,

The Orange County Transportation Authority (OCTA), is conducting a transportation study that will consider transportation needs of residents, commuter, and visitors in south Orange County. The South Orange County Multimodal Transportation Study (SOCMTS) will identify improvements for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.

As a key stakeholder, we are reaching out to you to offer optional methods for sharing project and community survey details with your community. These efforts are intended to complement the other public notification methods that OCTA is using to promote this project. Below are some *suggested options* on ways to share project and community survey details:

1. **Distribute electronically via email:** Share the community survey (*Survey Link Placeholder*) with your e-mail contacts. You can link to the survey [HERE](#).
2. **Post to your website:** You can use the image provided in the email to post to your homepage. The image would then need to be linked to the following [LINK](#) for the project's webpage.
3. **Social media posting:** Download our OCTA image [HERE](#), post it on your social media profiles (Facebook, Twitter, Instagram, etc.), and share the following link (SouthOCStudySurvey.com) on your post.
4. **Newsletter Announcement:** Provide information regarding the project and community survey via your organization's newsletter.

Please see the next page for simple copy-and-paste-ready text you may use to share this information with your community.

If you have any questions, please contact Marissa Espino at mespino@octa.net or at 714-560-5607. We thank you for your support and look forward to working with you in spreading the word about this project and capturing valuable survey results!



ADDITIONAL INSTRUCTIONS

1. Distribute electronically via email:

A. You can use [this image](#) to share meeting information with your contacts/membership. Link the image to the following [LINK](#).

B. Or copy and paste the following text into the body of an email:

The Orange County Transportation Authority (OCTA), is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. We want your input on how to improve modes of transportation in south Orange County by taking a short community survey at [SouthOCStudysurvey.com](#) or take the survey on our information line at 833-711-8070. For more information, visit [octa.net/SouthOCStudy](#).

2. Post to your website: You can use [this image](#) to post to your homepage. Link the image to the following [LINK](#) ([SouthOCStudysurvey.com](#)).

3. Social media posting: Post this [LINK](#) ([SouthOCStudysurvey.com](#)) on your social media page(s) or copy and paste the following text and [this image](#) into your social media accounts:

A. **Facebook:** @goOCTA is conducting a study that will consider transportation needs of residents, commuters, and visitors in south Orange County. We want your input on how to improve modes of transportation in south Orange County by taking a short community survey at [SouthOCStudysurvey.com](#) or take the survey on our information line at 833-711-8070. For more information, visit [octa.net/SouthOCStudy](#).

B. **Twitter:** @goOCTA is conducting a study that will consider transportation needs of residents, commuters, and visitors in south Orange County. Tell us how to improve mobility in south OC at [SouthOCStudysurvey.com](#) or call in at 833-711-8070. For more information, visit [octa.net/SouthOCStudy](#).

C. **Instagram:** @goOCTA is conducting a study that will consider transportation needs of residents, commuters, and visitors in south Orange County. We want your input on how to improve modes of transportation in south Orange County by taking a short community survey at [SouthOCStudysurvey.com](#) or take the survey on our information line at 833-711-8070. For more information, visit [octa.net/SouthOCStudy](#).

4. Newsletter Announcement: Provide information regarding the project and the community survey via your organization's newsletter. Copy and paste the following text into the body of the newsletter:

The Orange County Transportation Authority (OCTA), is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. We want your input on how to improve modes of transportation in south Orange County by taking a short community survey at [SouthOCStudysurvey.com](#). For more information, visit [octa.net/SouthOCStudy](#).



Appendix C

Appendix C.2 Study Website



Overview

Over the next 25 years, the population in south Orange County is anticipated to grow by 16 percent (about 170,000 residents), and employment is expected to grow by 18 percent (about 130,000 jobs). This growth will result in more people traveling throughout south Orange County and more time lost in traffic if we don't plan ahead. Therefore, the Orange County Transportation Authority (OCTA) is conducting a strategic transportation study that will consider transportation needs of residents, commuters, and visitors to the area. Through collaboration with local stakeholders, the South Orange County Multimodal Transportation Study (SOCMTS) will identify a broad range of improvement recommendations for all modes of transportation, including streets, transit, freeways and bikeways. The study will address south Orange County's mobility needs beyond the year 2045.

OCTA SOCMTS Community Meeting 10/06/20



Study objectives

- Work collaboratively with stakeholders
- Leverage all modes of transportation
- Address long-term mobility needs
- Develop consensus on a set of transportation improvements across all modes

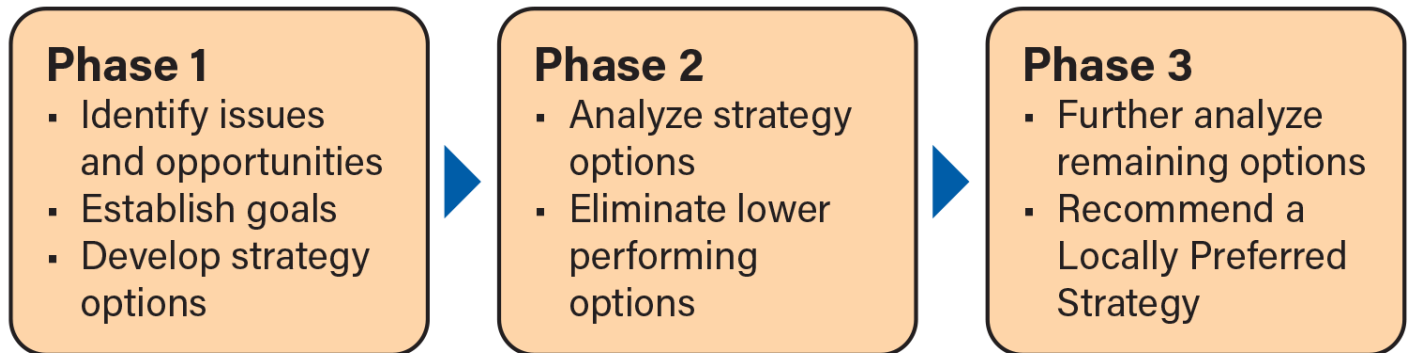
Study area

The Study area covers about 40 percent of the County from State Route 55 to the San Diego County line and from the coast to the foothills.

Project Status

The study is to be completed in late 2021 and the public and key stakeholders will be involved throughout the study process.

Study Phases:



If you have any questions or would like to share a comment about the study, email Community Relations Officer Marissa Espino(<mailto:mespino@octa.net>) or call the survey hotline at 833-711-8070.

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Appendix C

Appendix C.3 News Release



FOR MORE INFORMATION:
Eric Carpenter (714) 560-5697
Megan Abba (714) 560-5671

FOR IMMEDIATE RELEASE:
Oct. 1, 2020

OCTA Welcoming Input on South Orange County Transportation Study

Study will examine potential improvements to streets, highways, transit and bikeways for next 25 years as transportation evolves and population and job growth continues

ORANGE – The Orange County Transportation Authority is launching a strategic transportation study to address south Orange County’s transportation needs as the area continues to grow with new residents and jobs and as travel patterns and needs evolve.

The study, called the South Orange County Multimodal Transportation Study (SOCMTS), will examine a wide range of transportation needs over the next 25 years, including improvements to streets, bus and other transit options, highways and bikeways.

The area covered by the study encompasses about 40 percent of Orange County, generally south of State Route 55 to the San Diego County line, and from the coast to the foothills.

A virtual public meeting is planned from 5:30 to 6:30 p.m. on Tuesday, Oct. 6.

Information about accessing the meeting online or by telephone is available at www.octa.net/SouthOCStudy.

A recording of the virtual meeting also will be available at that website following the meeting.

OCTA also welcomes comments through an [online survey](#) to hear from those who live, work and visit south Orange County. The brief 12-question survey, with a few additional optional questions, is available online in English, Spanish, Mandarin, Korean and Vietnamese.

“Developing solutions to meet the long-term transportation needs of South County can only succeed if we build community consensus for projects and that’s why early input and opinions are tremendously important,” said OCTA Chairman Steve Jones, also the mayor of Garden Grove. “We look forward to hearing your ideas to help shape the future of South County.”

A link to the survey can be found at www.octa.net/SouthOCStudy or can be completed by calling toll-free to (833) 711-8070.

OCTA, which is Orange County’s transportation planning agency, is responsible for providing a balanced and sustainable transportation system for the entire county. The focus

on south Orange County is necessary because over the next 25 years, projections show population growing by 170,000 residents and an additional 130,000 jobs are expected.

At the same time, travel patterns and transportation needs have continued to evolve since OCTA's last major transportation study of the area in 2008. The projects from that study have resulted in a more than \$1.5 billion investment in the area, including the I-5 carpool lane project between San Juan Creek Road and Avenida Pico, and the I-5 widening between SR-73 and El Toro Road now under construction.

Since the 2008 study, other significant changes have occurred, including the elimination of the SR-241 Toll Road extension in favor of a non-tolled extension of Los Patrones Parkway, a decline in traditional transit ridership, the introduction of mobile transportation apps and on-demand services such as Uber and Lyft, as well as the introduction of community transit options like shuttles and trolleys.

The South County study will continue in phases through the end of 2021 and residents, business owners and other key stakeholders will be asked to participate throughout.

#

About OCTA: The Orange County Transportation Authority is the county transportation planning commission, responsible for funding and implementing transit and capital projects for a balanced and sustainable transportation system that reflects the diverse travel needs of the county's 34 cities and 3.2 million residents. With the mission of keeping Orange County moving, this includes freeways and express lanes, bus and rail transit, rideshare, commuter rail and active transportation.

Appendix C

Appendix C.4 Study Blog Article



SOUTH ORANGE COUNTY

Help OCTA Plan for the future of Multimodal Transportation in South Orange County

Wednesday, October 7, 2020



Share



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Share

During the next 25 years, the population in south Orange County is anticipated to grow by 16 percent (about 170,000 residents), and employment is expected to grow by 18 percent (about 130,000 jobs). This growth will result in more people traveling throughout south Orange County.

OCTA is conducting a strategic transportation study that will consider the future transportation needs of residents, commuters, and visitors. Through collaboration with local stakeholders, the study will identify a broad range of improvement recommendations for all modes of transportation, including streets, transit, freeways and bikeways. The area covered by the study encompasses about 40 percent of Orange County, generally south of State Route 55 to the San Diego County line, and from the coast to the foothills.

"Developing solutions to meet the long-term transportation needs of South County can only succeed if we build community consensus for projects and that's why early input and opinions are tremendously important," said OCTA Chairman Steve Jones, also the mayor of Garden Grove. "We look forward to hearing your ideas to help shape the future of South County."

Your input is extremely valuable as we address south Orange County's mobility needs through the year 2045. Please take this [online survey](#) or dial in at 833-711-8070 until Oct. 30. The brief 12-question survey, with a few additional optional questions, is available in English, Spanish, Mandarin, Korean and Vietnamese.

In addition, a recording of a virtual meeting conducted earlier in October is available on the [website](#).

For more information about the South Orange County Multimodal Transportation Study, click [here](#).

Travel patterns and transportation needs have continued to evolve since OCTA's last major transportation study of the area in 2008. The projects from that study have resulted in a more than \$1.5 billion investment in the area, including the I-5 carpool lane project between San Juan Creek Road and Avenida Pico, and the I-5 widening between SR-73 and El Toro Road now under construction.

Since the 2008 study, other significant changes have occurred, including the elimination of the SR-241 Toll Road extension in favor of a non-tolled extension of Los Patrones Parkway, a decline in traditional transit ridership, the introduction of mobile transportation apps and on-demand services such as Uber and Lyft, as well as the introduction of community transit options like shuttles and trolleys.

As Orange County's transportation planning agency, OCTA is responsible for providing a balanced and sustainable transportation system for the entire county.

Related Posts



Appendix C

Appendix C.5 On the Move Article

From: OCTA On the Move <onthemove@email-octa.net>

Sent: Thursday, October 8, 2020 12:01 PM

To: Marissa Espino <mespino@octa.net>

Subject: OCTA on the Move - October 8, 2020



For the past 29 years, OCTA has been recognized each year by the leading association of government finance professionals for excellence and transparency in financial reporting. The Government Finance Officers Association of the United States and Canada last month awarded OCTA the Certificate of Achievement for Excellence in Financial Reporting. OCTA prides itself on being transparent with the taxpayers of Orange County and this award is another clear indication that we are achieving that goal.



A handwritten signature in black ink, appearing to read 'Darrell E. Johnson'.

Darrell E. Johnson

Chief Executive Officer

[Find recent Board Actions here](#)

About OCTA

Help OCTA Plan for the future of Multimodal Transportation in South Orange County

This study will consider transportation needs in the area generally south of SR-55 to the San Diego County line, and from the coast to the foothills. Provide your input by taking an online survey.

Financial Reporting Award Indicative of OCTA's Transparency to Taxpayers

For the past 29 years, OCTA has been recognized each year by the leading association of government finance professionals for excellence and transparency in financial reporting.

Appendix C

Appendix C.6 Eblast #1 — Community Meeting and Survey Invite

[View this email in your browser](#)

Help us plan for SOUTH ORANGE COUNTY'S TRANSPORTATION FUTURE



How would you improve streets, bus and rail transit, highways, and bikeways in south Orange County? The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify improvements for all types of transportation through the year 2045.

We Want To Hear From You!

Please take this short survey below to provide your input and help OCTA improve transportation in south Orange County.

Survey link:
surveymonkey.com/r/JDWFD25

Survey Phone Number:
(833) 711-8070

VIRTUAL MEETING

Join us for a virtual community meeting to learn more about the Study and ask questions.



WHEN

Date: Tuesday, October 6, 2020

Time: 5:30-6:30 p.m.

(virtual presentation to begin once the meeting starts)

A recording of the presentation will be available on the project website following the meeting.



WHERE

Online: bit.ly/2RBVOaX

US Phone: +1 669 900 9128

Webinar ID: 815 2472 5112

Passcode: 889572

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Past Issues

Languages and Other Needs

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All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contacting Marissa Espino at mespino@octa.net or (833) 711-8070.

Todas las solicitudes sobre adaptaciones razonables a necesidades especiales y/o servicios deben realizarse tres días laborales (72 horas) antes de la reunión programada, contactando a Marissa Espino por correo electrónico (mespino@octa.net) o llamando al (833) 711-8070.

所有有关合理便利设施和/或语言服务的要求必须在预定的会议召开日期的三个工作日(72小时)之前提出, 请发送电子邮件至 mespino@octa.net 或致电 (833) 711-8070 与Marissa Espino联系。

장애자를 위한 편의 제공이나 통역 요청은 반드시 회의 예정일 3 영업일(72시간) 전에 해야 합니다. 연락처는 마리사 에스피노(Marissa Espino) mespino@octa.net 또는 전화 (833) 711-8070.

Tất cả các yêu cầu về tiện nghi hợp lý và / hoặc dịch vụ ngôn ngữ phải được thông báo ba ngày làm việc (72 giờ) trước ngày họp được ấn định bằng cách liên lạc với Marissa Espino tại mespino@octa.net hoặc (833) 711-8070.

Para ver la invitación en español, visite: octa.net/SouthOCStudy.

以简体中文查看邀请, 请访问: octa.net/SouthOCStudy.

한국어 초대장을 보시려면, 을 방문하십시오: octa.net/SouthOCStudy.

Để xem lời mời bằng tiếng Việt, xin vui lòng truy cập: octa.net/SouthOCStudy.

Marissa Espino, Community Relations Officer

Email: mespino@octa.net

Phone: 833.711.8070

Project Site: octa.net/SouthOCStudy

This email was sent to mespino@octa.net

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Orange County Transportation Authority · 550 S. Main Street · Orange, CA 92868 · USA

Appendix C

Appendix C.7 Eblast #2 — Survey Reminder

From: Marissa Espino <mespino@octa.net>
Sent: Wednesday, October 21, 2020 1:11 PM
To: Marissa Espino <mespino@octa.net>
Subject: Tell Us How to Improve Transportation in South County

Help us plan for
SOUTH ORANGE COUNTY'S
TRANSPORTATION FUTURE



WE VALUE YOUR INPUT!

How would you improve streets, bus and rail transit, highways, and bikeways in south Orange County? The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. Please take this short survey [here](#) or by phone @ **(833) 711-8070** to provide your input and help OCTA improve transportation in south Orange County.

Learn more about the South Orange County Multimodal Transportation Study [here](#).



Appendix C

Appendix C.8 Community Meeting/Survey Postcard (English; Spanish; Mandarin; Korean; Vietnamese)

Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

*Help us plan for SOUTH ORANGE COUNTY'S
TRANSPORTATION FUTURE*



WE VALUE YOUR INPUT! / WE VALUE YOUR INPUT!

The Orange County Transportation Authority (OCTA) is conducting a strategic transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify a broad range of improvement recommendations for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.

*The Orange County Transportation Authority (OCTA) is conducting a strategic transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify a broad range of improvement recommendations for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.*

VIRTUAL MEETING / VIRTUAL MEETING

Join us for a virtual community meeting to learn more about the Study and ask questions.

Join us for an online community meeting to learn more about the Study and ask questions.



WHEN / WHEN

Date/Date: Tuesday, October 6, 2020

Martes 6 de Octubre de 2020

Time/Time: 5:30-6:30 p.m.

(virtual presentation to begin once the meeting starts)

(virtual presentation to begin once the meeting starts)

A recording of the presentation will be available on the project website following the meeting.

A recording of the presentation will be available on the project website following the meeting.



WHERE / WHERE

Online / Online: Webinar Link or webinar

We Want To Hear From You! / We Want To Hear From You!

Please take this short survey below to provide your valuable input and help OCTA improve mobility and transportation in south Orange County.

Please take this short survey below to provide your valuable input and help OCTA improve mobility and transportation in south Orange County.

Survey link / Survey link:

<http://something.com>

Survey Phone Number / Survey Phone Number:

123.456.7890

Languages and Other Needs / Languages and Other Needs

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

To view the invitation in Korean, please visit the project website: octa.net/XXX.

To view the invitation in Mandarin, please visit the project website: octa.net/XXX.

To view the invitation in Vietnamese, please visit the project website: octa.net/XXX.



Marissa Espino
Community Relations Officer



mespino@octa.net



833.711.8070



octa.net/SouthOCStudy

Help us plan for **SOUTH ORANGE CONTY'S** TRANSPORTATION FUTURE

*Help us plan for SOUTH ORANGE CONTY'S
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Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

Ayúdenos a planificar el FUTURO DEL TRANSPORTE del condado de Orange del sur.



The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify improvements for all modes of transportation, including streets, bus and rail transit, highways and bikeways through the year 2045.

La Autoridad de Transporte del Condado de Orange (OCTA) está realizando un estudio sobre transporte que ayudará a mejorar el transporte de los residentes, viajeros y visitantes en el condado de Orange del sur. El Estudio sobre Transporte Multimodal del Condado de Orange del Sur (SOCMTS) identificará mejoras para todas las modalidades de transporte, incluyendo calles, tránsito, autopistas y bicisendas hasta el año 2045.

We Want To Hear From You!

¡Queremos saber su opinión!

Please take this short survey below to provide your input and help OCTA improve transportation in south Orange County.

Por favor realice esta breve encuesta para darnos su opinión y ayudar a la OCTA a mejorar el transporte en el condado de Orange del sur.

Survey link / Enlace a la encuesta:
www.surveymonkey.com/r/JDWFD25

Survey Phone Number / Número de teléfono de la encuesta:
(833) 711-8070

Languages and Other Needs / Idiomas y otras necesidades

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

Todas las solicitudes sobre adaptaciones razonables a necesidades especiales y/o servicios deben realizarse tres días laborales (72 horas) antes de la reunión programada, contactando a Marissa Espino por correo electrónico (mespino@octa.net) o llamando al (833) 711-8070.

VIRTUAL MEETING REUNIÓN VIRTUAL

Join us for a virtual community meeting to learn more about the Study and ask questions.

Acompáñenos en nuestra reunión virtual de la comunidad para conocer más acerca del estudio y hacer preguntas.

WHEN / CUANDO

Date / Fecha:

Tuesday, October 6, 2020

Martes 6 de Octubre de 2020

Time / Horario:

5:30-6:30 p.m.

(virtual presentation to begin once the meeting starts)

(la presentación virtual empezará una vez comience la reunión)

A recording of the presentation will be available on the project website following the meeting.

La grabación de la presentación estará disponible en el sitio en Internet del proyecto después de la reunión.

WHERE / DÓNDE

Online / En línea: <https://bit.ly/2RBVOaX>

US Phone: +1 669 900 9128

Webinar ID: 815 2472 5112

Passcode: 889572

한국어 초대장을 보시려면, 을 방문하십시오:
octa.net/SouthOCStudy

以简体中文查看邀请, 请访问: octa.net/SouthOCStudy

Để xem lời mời bằng tiếng Việt, xin vui lòng truy cập:
octa.net/SouthOCStudy

Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

*Ayúdenos a planificar el FUTURO DEL
TRANSPORTE del condado de Orange del sur.*



Orange County Transportation Authority
C/O Marissa Espino
PO Box 14184
Orange, CA 92863-1584

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Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

帮助我们为橙县南部的交通未来
做好计划



The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify improvements for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.

橙县交通管理局 (OCTA) 正在进行交通研究。这项研究将有助于改善橙县南部居民、通勤者和游客的交通。**橙县南部多式交通研究 (SOCMTS)** 将确定到2045年所有交通方式的改进，包括街道、公交、高速公路和自行车。

We Want To Hear From You!

我们希望收到您的来信!

Please take this short survey below to provide your input and help OCTA improve transportation in south Orange County.

请完成下面的这项简短调查，提供您的看法并且帮助 OCTA 改善橙县南部的交通。

Survey link / 调查链接:

www.surveymonkey.com/r/JDWFD25

Survey Phone Number / 调查电话号码:

(833) 711-8070

Languages and Other Needs / 语言和其他需求

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

所有有关合理便利设施和/或语言服务的要求必须在预定的会议召开日期的三个工作日 (72小时) 之前提出，请发送电子邮件至 mespino@octa.net 或致电 (833) 711-8070 与 Marissa Espino 联系。

VIRTUAL MEETING

虚拟会议

Join us for a virtual community meeting to learn more about the Study and ask questions.

加入我们的虚拟社区会议，了解有关研究的更多信息并提出问题。



WHEN / 何时

Date / 日期:

Tuesday, October 6, 2020

2020年10月6日星期二

Time / 时间:

5:30-6:30 p.m. / 下午5 时30分至6 时30 分

(virtual presentation to begin once the meeting starts)

(一旦会议开始，便开始虚拟演示)

A recording of the presentation will be available on the project website following the meeting.

会议结束后，将在项目网站上提供演示的记录。



WHERE / 地点

Online / 在线: <https://bit.ly/2RBVOaX>

US Phone: +1 669 900 9128

Webinar ID: 815 2472 5112

Passcode: 889572

Para ver la invitación en español, visite:
octa.net/SouthOCStudy

한국어 초대장을 보시려면, 을 방문하십시오:
octa.net/SouthOCStudy

Để xem lời mời bằng tiếng Việt, xin vui lòng truy cập:
octa.net/SouthOCStudy



Marissa Espino
Community Relations Officer



mespino@octa.net



833.711.8070



octa.net/SouthOCStudy

Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

帮助我们为橙县南部的交通未来
做好计划



Orange County Transportation Authority
C/O Marissa Espino
PO Box 14184
Orange, CA 92863-1584

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Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

남부 오렌지 카운티의 교통 미래를 계획할 수 있도록 저희들을 도와주세요.



The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify improvements for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.

오렌지 카운티 교통국(OCTA)은 남부 오렌지 카운티 주민들과 통근자들, 그리고 방문자들을 위해 교통수단 개선 연구를 하고 있습니다. **남부 오렌지 카운티 복합 교통수단 연구(SOCMTS)**는 2045년에 걸쳐 자동차 도로, 대중 교통, 프리웨이 및 자전거 도로를 포함한 모든 교통수단에 대한 개선책들을 강구할 것입니다.

We Want To Hear From You!

여러분들의 의견을 듣고 싶습니다!

Please take this short survey below to provide your input and help OCTA improve transportation in south Orange County.

아래 짧은 설문조사에서 의견을 주시어 OCTA가 남부 오렌지 카운티의 교통을 개선하는데 도움을 주시길 바랍니다.

Survey link / 설문조사 링크:

www.surveymonkey.com/r/JDWFD25

Survey Phone Number / 설문조사 전화번호:

(833) 711-8070

Languages and Other Needs / 통역 및 기타 편의 제공

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

장애자를 위한 편의 제공이나 통역 요청은 반드시 회의 예정일 3 영업일(72시간) 전에 해야 합니다. 연락처는 마리사 에스피노(Marissa Espino) mespino@octa.net 또는 전화 (833) 711-8070.

VIRTUAL MEETING

화상 회의

Join us for a virtual community meeting to learn more about the Study and ask questions.

화상 커뮤니티 회의에 참여하여 이 연구에 대해 자세히 알아보고 질문하십시오.



WHEN / 언제

Date / 날짜:

Tuesday, October 6, 2020

2020년 10월 6일 화요일

Time / 시간:

5:30-6:30 p.m. / 오후 5시 30분 ~ 6시 30분

(virtual presentation to begin once the meeting starts)

(회의가 시작되면 화상 발표 시작)

A recording of the presentation will be available on the project website following the meeting.

회의 후 프로젝트 웹 사이트에서 녹화된 발표 자료를 보실 수 있습니다



WHERE / 장소

Online / 온라인 : <https://bit.ly/2RBVOaX>

US Phone: +1 669 900 9128

Webinar ID: 815 2472 5112

Passcode: 889572

Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

남부 오렌지 카운티의 교통 미래를 계획할 수
있도록 저희들을 도와주세요.



Orange County Transportation Authority
C/O Marissa Espino
PO Box 14184
Orange, CA 92863-1584

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Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

Hãy giúp chúng tôi lập kế hoạch cho **TƯƠNG LAI VẬN CHUYỂN** tron khu vực phía nam Quận Cam.



The Orange County Transportation Authority (OCTA) is conducting a transportation study that will consider transportation needs of residents, commuters, and visitors in south Orange County. The **South Orange County Multimodal Transportation Study (SOCMTS)** will identify improvements for all modes of transportation, including streets, transit, freeways and bikeways through the year 2045.

Cơ quan Vận chuyển Quận Cam (OCTA) đang tiến hành một cuộc nghiên cứu về vận chuyển và điều đó sẽ giúp cải thiện phương tiện đi lại cho các cư dân, người đi làm và du khách ở khu vực phía nam Quận Cam. **Cuộc Nghiên cứu về Vận chuyển Đa phương thức (SOCMTS)** sẽ xác định những cải tiến cho tất cả các phương thức giao thông, bao gồm đường phố, phương tiện công cộng, xa lộ và đường dành cho xe đạp cho đến hết năm 2045.

We Want To Hear From You!

Chúng Tôi Muốn Nghe Ý Kiến của Quý Vị!

Please take this short survey below to provide your input and help OCTA improve transportation in south Orange County.

Vui lòng tham gia cuộc khảo sát ngắn dưới đây để đóng góp ý kiến của quý vị và giúp OCTA cải thiện hoạt động vận chuyển ở phía nam Quận Cam.

Survey link / Liên kết khảo sát:

www.surveymonkey.com/r/JDWFD25

Survey Phone Number / Số Điện thoại Khảo sát:

(833) 711-8070

VIRTUAL MEETING

Cuộc Họp Trực tuyến (Virtual Meeting)

Join us for a virtual community meeting to learn more about the Study and ask questions.

Hãy tham gia một cuộc họp cộng đồng trực tuyến với chúng tôi để tìm hiểu thêm về Cuộc Nghiên cứu và nêu thắc mắc.



WHEN / Khi nào

Date / Ngày:

Tuesday, October 6, 2020

Thứ Ba, ngày 6 tháng 10 năm 2020

Time / Thời gian:

5:30 - 6:30 p.m. / 5:30 đến 6:30 chiều

(virtual presentation to begin once the meeting starts)

(bài thuyết trình trực tuyến sẽ bắt đầu khi cuộc họp bắt đầu)

A recording of the presentation will be available on the project website following the meeting.

Bản ghi âm của bài thuyết trình sẽ được đăng trên trang web của dự án sau cuộc họp.



WHERE / Địa điểm

Online / Trên mạng: <https://bit.ly/2RBVOaX>

US Phone: +1 669 900 9128

Webinar ID: 815 2472 5112

Passcode: 889572

Languages and Other Needs / Các Ngôn ngữ và các Nhu cầu Khác

All requests for reasonable accommodations and/or language services must be made three working days (72 hours) in advance of the scheduled meeting date by contact Marissa Espino at mespino@octa.net or (833) 711-8070.

Tất cả các yêu cầu về tiện nghi hợp lý và / hoặc dịch vụ ngôn ngữ phải được thông báo ba ngày làm việc (72 giờ) trước ngày họp được ấn định bằng cách liên lạc với Marissa Espino tại mespino@octa.net hoặc (833) 711-8070.

Para ver la invitación en español, visite: octa.net/SouthOCStudy

한국어 초대장을 보시려면, 방문하십시오: octa.net/SouthOCStudy

以简体中文查看邀请, 请访问: octa.net/SouthOCStudy



Marissa Espino
Community Relations Officer



mespino@octa.net



833.711.8070



octa.net/SouthOCStudy

Help us plan for **SOUTH ORANGE COUNTY'S** TRANSPORTATION FUTURE

Hãy giúp chúng tôi lập kế hoạch cho TƯƠNG LAI
VẬN CHUYỂN tron khu vực phía nam Quận Cam.



Orange County Transportation Authority
C/O Marissa Espino
PO Box 14184
Orange, CA 92863-1584

PRSRT STD
ECRWSS
U.S. POSTAGE
PAID
SANTA ANA, CA
PERMIT NO. 985



Appendix C

Appendix C.9 Facebook Posts

9/25 – Facebook Post



OCTA
Published by Liz Mazariegos · September 25 ·

OCTA is kicking off a study that will consider transportation needs of residents, commuters, and visitors in south Orange County. Tell us how to better connect south OC through a brief survey at SouthOCStudySurvey.com or call in at 833-711-8070. For more information, visit octa.net/SouthOCStudy.

Edit

9 · 1 Comment · 2 Shares

Like · Comment · Share ·

Most Relevant

Nancy Freeman
It's about time.
Like · Reply · Message · 10w

Comment as OCTA · · ·

10/1- Facebook Advertisement English



OCTA

October 1 · 🌐



We want to hear from you! OCTA is launching a study to improve transportation in south Orange County. Join us at a virtual community meeting on Tuesday, October 6 at 5:30-6:30pm to learn more about the study and provide your input. For more information on the meeting and to take our short survey, visit octa.net/SouthOCStudy.



**Join our virtual
community meeting**
Tuesday, October 6
from 5:30-6:30pm



10

4 Comments 4 Shares

👍 Like

💬 Comment

➦ Share



Most Relevant ▼

10/5 – Facebook Advertisement Spanish



OCTA

October 5 · 🌐

...

¡Queremos escuchar de usted! OCTA está lanzando un estudio para mejorar el transporte en el sur del condado de Orange. Únase a nosotros en una reunión comunitaria virtual el martes, 6 de octubre a las 5:30-6:30 pm para aprender más acerca del estudio y brindar su opinión. Para obtener más información sobre la reunión y realizar nuestra breve encuesta, visite octa.net/SouthOCStudy.

We want to hear from you! OCTA is launching a study to improve transportation in southern Orange County. Join us for a virtual community meeting on Tuesday, October 6 at 5:30-6:30 pm to learn more about the study and deliver your opinion. For more information about the meeting and taking our short survey, visit octa.net/SouthOCStudy.

⚙ · Hide original · Rate this translation



SOUTH ORANGE COUNTY
MULTIMODAL TRANSPORTATION STUDY



**Únase a nuestra
reunión
comunitaria virtual**

Martes, 6 de octubre
de 2020 de 5:30-6:30pm

**OCTA**

Sponsored · 

OCTA is kicking off a study that will consider transportation needs of residents, commuters, and visitors in south Orange County. Tell us how to better connect south OC through a brief survey at SouthOCStudySurvey.com or call in at 833-711-8070. For more information, visit octa.net/SouthOCStudy.

Help us plan for
South Orange County's
Transportation Future



OCTA

Official Facebook page for Orange County Trans...

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**OCTA**
Sponsored · 

OCTA está iniciando un estudio que considerará las necesidades de transporte de los residentes, viajeros y visitantes en el sur del Condado de Orange. Díganos cómo conectar mejor el sur de OC a través de una breve encuesta en SouthOCStudySurvey.com o llame al 833-711-8070. Para obtener más información, visite octa.net/SouthOCStudy.

See Translation

Ayúdenos a planificar
el futuro del transporte del
sur del condado de **Orange**



OCTA
Official Facebook page for Orange County Trans...

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**OCTA**
Sponsored · 

OCTA 正在启动一项研究。该研究将考虑橙县南部居民、通勤者和访客的交通需求。请在SouthOCStudySurvey.com上或者致电 833-711-8070 通过完成简短调查告诉我们如何更好地把橙县南部连接起来。欲了解更多信息，请访问 octa.net/SouthOCStudy.com

See Translation





OCTA
Official Facebook page for Orange County Trans...

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OCTA

Sponsored · 🌐

...

오렌지 카운티 교통국(OCTA)은 지역 주민들, 통근자들 및 남부 오렌지 카운티 방문객들의 교통 요구를 고려하는 교통 연구를 시작하고 있습니다. SouthOCStudySurvey.com로 가셔서 어떻게 하면 남부 오렌지 카운티를 보다 더 잘 연결할 수 있는지 간단한 설문 조사를 통해 말씀해 주십시오. 또는 833-711-8070으로 전화하십시오. 더 자세한 정보는 octa.net/SouthOCStudy를 방문하십시오.

See Translation

남부오렌지카운티의
교통 미래를 계획하는데
도움을 주십시오



OCTA

Official Facebook page for Orange County Trans...

👍 Like Page

👍 Like

💬 Comment

➦ Share



**OCTA**
Sponsored · 

OCTA đang khởi động một cuộc nghiên cứu nhằm xem xét nhu cầu đi lại của cư dân, người đi làm và du khách ở vùng phía nam Quận Orange. Hãy cho chúng tôi biết ý kiến về cách kết nối khu vực miền nam OC một cách khả quan hơn thông qua một cuộc khảo sát ngắn gọn tại SouthOCstudysurvey.com hoặc gọi số 833-711-8070. Để biết thêm thông tin, hãy truy cập octa.net/SouthOCStudy.

See Translation

Xin giúp chúng tôi lập kế hoạch cho
Tương lai Giao thông Vận chuyển
của khu phía Nam Quận Orange



OCTA
Official Facebook page for Orange County Trans...

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**OCTA**
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LAST CHANCE! Submit your thoughts on transportation in south Orange County. This Friday is the last day to take our survey on the transportation needs of residents, commuters, and visitors in south Orange County. We value your input and ask that you please take this short survey at SouthOCStudysurvey.com or take the survey on our hotline at 833-711-8070.

Last chance!
Take our survey at
SouthOCStudysurvey.com
or call 833-711-8070.



OCTA
Official Facebook page for Orange County Trans...

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**OCTA**
Sponsored · 

...

¡LA ÚLTIMA OPORTUNIDAD! Comunique sus opiniones sobre el transporte en el sur del Condado de Orange. Este viernes es el último día para tomar nuestra encuesta sobre las necesidades de transito de los residentes, viajeros y visitantes en el sur del condado de Orange. Valoramos su opinión y le pedimos que por favor realice esta breve encuesta en SouthOCStudysurvey.com o realice la encuesta en nuestra línea directa al 833-711-8070.

See Translation

¡La última oportunidad!
Realice nuestra encuesta en
SouthOCStudysurvey.com
o llame al 833-711-8070.



OCTA
Official Facebook page for Orange County Trans...

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OCTA

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...

最后的机会！提交您的对橙县南部交通的想法。这个星期五时我们对橙县南部居民、通勤者和访客进行交通需求调查的最后一天。我们重视您的意见，<http://xn--southocstudysurvey-0c85ayz8jb74hctua0p0e.com/>上完成这项简短的调查，或者拨打我们的热线 833-711-8070 完成调查。

See Translation

最后的机会！请上网
SouthOCStudysurvey.com
或者致电 833-711-8070
完成调查。



OCTA

Official Facebook page for Orange County Trans...

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**OCTA**
Sponsored · 

마지막 기회! 남부 오렌지 카운티의 교통에 대한 여러분의 의견을 제출 하십시오. 이번 금요일은 남부 오렌지 카운티의 주민들, 통근자들 및 방문객들의 교통 수요에 대한 설문 조사를 실시하는 마지막 날입니다. 여러분의 의견을 저희들에게 소중합니다. SouthOCStudysurvey.com에서 이 간단한 설문에 응해 주시거나 저희 핫라인 833-711-8070에서 설문 에 응해 주시기 바랍니다.

See Translation

마지막 기회!
SouthOCStudysurvey.com
에서 설문 조사에 응해
주시거나 833-711-8070
으로 전화하십시오.



OCTA
Official Facebook page for Orange County Trans...

 **Like Page**

 **Like**  **Comment**  **Share** 

**OCTA**
Sponsored · 

CƠ HỘI CUỐI CÙNG! Hãy đóng góp suy nghĩ của quý vị về phương tiện đi lại ở khu phía nam Quận Cam. Thứ Sáu này là ngày cuối cùng chúng tôi thực hiện cuộc khảo sát về nhu cầu đi lại của các cư dân, người đi làm và du khách ở khu phía nam Quận Cam. Chúng tôi đánh giá cao ý kiến đóng góp của quý vị và xin quý vị vui lòng tham gia cuộc khảo sát ngắn này tại SouthOCStudysurvey.com hoặc tham gia cuộc khảo sát trên đường dây nóng của chúng tôi theo số 833-711-8070.

See Translation

Cơ hội cuối cùng!
Hãy tham gia cuộc khảo sát của chúng tôi tại SouthOCStudysurvey.com hoặc gọi số 833-711-8070.



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Appendix C

Appendix C.10 Twitter Posts

9/25- Twitter Post



OCTA
@goOCTA

...

OCTA is kicking off a study that will consider transportation needs of residents, commuters, and visitors in South Orange County. Tell us how to better connect South OC with a brief survey at SouthOCStudySurvey.com or call 833-711-8070. For more, visit octa.net/SouthOCStudy.



9:37 AM · Sep 25, 2020 · Sprinklr Publisher

1 Like



9/30- Twitter Post



OCTA
@goOCTA

...

Join us for a virtual community meeting on 10/6, 5:30-6:30 pm to learn more about the South OC transportation study and provide your input. For more information and to take our short survey, visit octa.net/SouthOCStudy.



9:40 AM · Sep 30, 2020 · Sprinklr Publisher

2 Retweets 5 Likes



10/6- Twitter Post



OCTA
@goOCTA

...

Join us tonight at the south Orange County Multimodal Transportation Study virtual meeting at 5:30! For more information and to access the virtual community meeting, visit octa.net/SouthOCStudy.



8:42 AM · Oct 6, 2020 · Sprinklr Publisher

1 Retweet 2 Likes



10/12- Twitter Post



OCTA
@goOCTA

...

We had our first virtual community meeting for the south OC Transportation Study! If you would like to view the meeting materials and meeting recording, please visit octa.net/SouthOCStudy.



10:44 AM · Oct 12, 2020 · Sprinklr Publisher

1 Retweet **2** Likes



10/20- Twitter Post



OCTA
@goOCTA

...

The study will consider future transportation needs south of SR-55 to the San Diego County line, and from the coast to the foothills. Please share your feedback.



Help OCTA Plan for the future of Multimodal Transportation in...
During the next 25 years, the population in south Orange County is anticipated to grow by 16 percent (about 170,000 ...
blog.octa.net

8:00 AM · Oct 20, 2020 · Sprinklr Publisher

1 Retweet 1 Quote Tweet 2 Likes



10/27 Twitter Post



OCTA
@goOCTA

...

We need your input! Please take this short survey to help us improve transportation, including streets, transit, freeways and bikeways through the year 2045. Take the survey at SouthOCStudysurvey.com.



8:48 AM · Oct 27, 2020 · Sprinklr Publisher

4 Retweets **1** Like



South Orange County Multimodal Transportation Study Initial Alternative Strategies

The following initial set of alternative strategies will be evaluated as part of the South Orange County Multimodal Transportation Study. They are not intended to be cumulative and are not necessarily multimodal in nature at this point of the study. Reflecting the exploratory nature of these alternative strategies, they are labeled as scenarios. For the purposes of initial screening, the intent is to understand how the specific improvements and strategies identified within each scenario would affect travel in south Orange County and address the study's Purpose and Need Statement. The results of the initial screening will be used to create multimodal alternative strategies for more detailed evaluation in subsequent study tasks.

- Maximize Rail and Transit. This scenario emphasizes investments in the local and regional transportation system that could maximize rail and transit mobility and accessibility both within and through south Orange County. Local investments could include first/last-mile connections, mobility hubs, and expansion of on-demand/microtransit services. Regional investments could include track improvements to increase passenger rail service frequencies. The intent of this scenario is to examine how the increased availability and convenience of transit could attract new passengers, encourage greater use of non-single occupant vehicle travel modes, and enhance overall transportation system performance.
- Revise Roadway System Operations. This includes operational improvements that maximize the efficiency of the roadway system and manage congestion without building new capacity. This may control traffic flows in real time and optimize operations of the full transportation system. The intent is to examine how strategies to revise roadway system operations, such as dynamic ramp metering and integrated corridor management, could help manage travel demand and increase travel reliability in south Orange County.
- Eliminate Roadway Bottlenecks. Improvements specifically focused on eliminating key bottlenecks in the transportation system might include the addition of auxiliary lanes and elimination of lane drops on freeways. This scenario will examine to what extent the elimination of bottlenecks improves travel in south Orange County.
- Repurpose Road Space - Enhance Transit/Active Transportation. This scenario considers repurposing road space to enhance opportunities for transit and active transportation, such as Complete Streets treatment on select arterials. It could also consider targeted Master Plan of Arterial Highways build-out for greater implementation of transit and active transportation improvements on the roadway and creation of transit lanes on highways.

South Orange County Multimodal Transportation Study Initial Alternative Strategies

- Demand Management - Support Tele-Everything. This scenario considers policies or improvements aimed at managing travel demand by expanding the capability to “tele-everything” within south Orange County. This includes use of roadway right of way for fiber/communications lines, and work-from-home support/guidance for employers.
- Demand Management - Emphasize User Pricing and Managed Lanes. This scenario focuses on using pricing strategies and managed lanes as the primary means of either reducing the number of vehicles on the roadway or redistributing trips to underutilized roads or to less congested periods of the day, with the ultimate goal of relieving traffic congestion. This could include policies such as congestion pricing or high-occupancy toll lanes on study area highways. This scenario considers how the implementation of user pricing strategies would change travel behaviors and affect travel demand in south Orange County.
- Demand Management - Subsidize Mode Shift. While the above scenario uses pricing strategies to manage travel demand, this scenario focuses on incentives to change travel behaviors and encourage a shift in travel modes. This could include strategies such as employer subsidies for transit or subsidies for micro-mobility and ridesharing. This scenario considers how the use of subsidies and incentives would change travel behaviors and affect travel demand in south Orange County.
- Maximize Emerging Technologies. This scenario considers investments in technologies such as autonomous/connected vehicles. The improvements and actions are focused on accommodating and better adapting to upcoming changes and trends in transportation technology, in addition to addressing human-error safety concerns. The intent is to examine the impact of emerging technologies on mobility in south Orange County.



SOUTH ORANGE COUNTY

MULTIMODAL TRANSPORTATION STUDY

Study Objectives

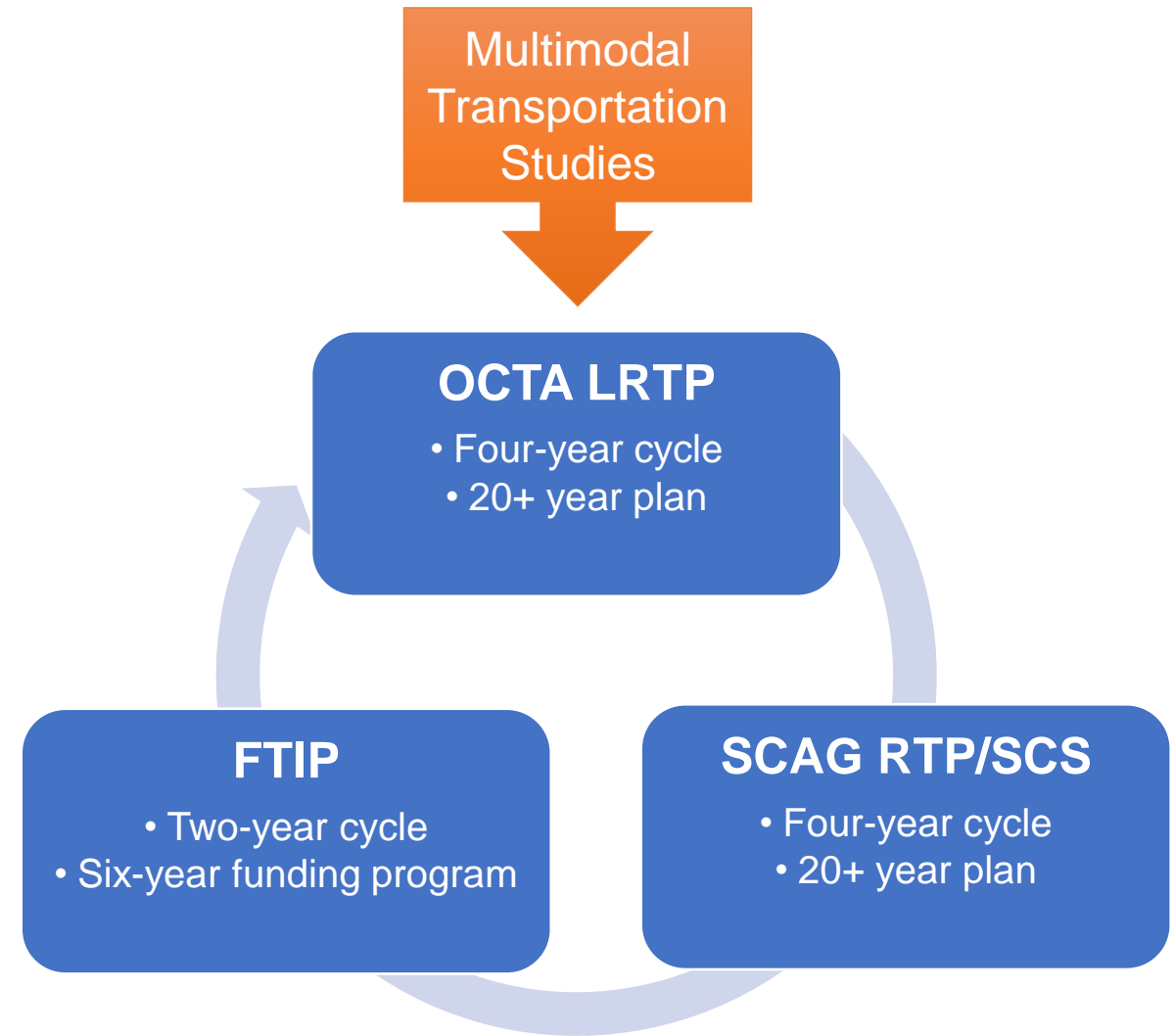
Develop community consensus on a set of long-term multimodal transportation improvements

- Update to the 2008 South Orange County Major Investment Study
- Reflect progress and latest planning assumptions



Study Background

- Multimodal studies present a financially unconstrained vision for the transportation system to address long-term needs
- With consensus on a set of multimodal transportation strategies, projects can be considered in financially constrained planning and programming documents



Study Scope Highlights

Phase 1

- Identify Issues and Opportunities
- Develop Purpose and Need Statement
- Develop Initial Alternative Strategies

2020



Phase 2

- Screening Alternative Strategies
- Select Reduced Set of Alternative Strategies



Phase 3

- Analysis of Reduced Set
- Recommend a Locally Preferred Strategy

2021

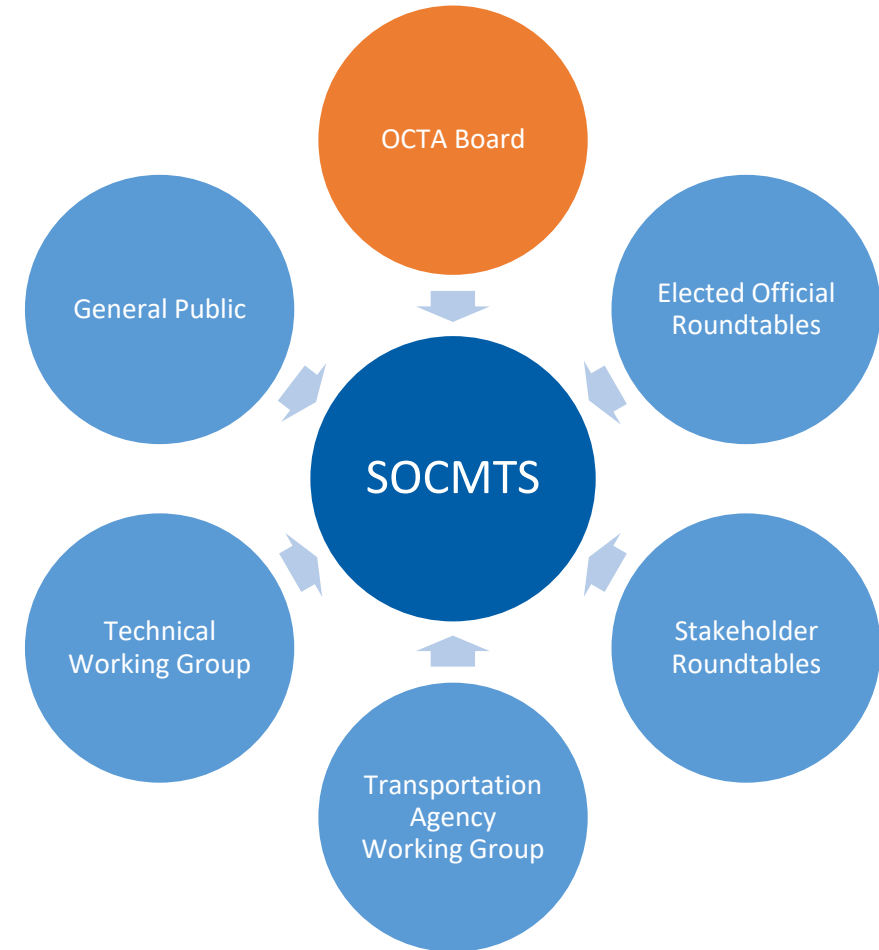
Public and Partner Agency Engagement

Study input solicited from:

- General Public
- Stakeholders
- Elected Officials
- Cities/County
- Partner Agencies

Online survey and public webinar

- Online survey in English, Spanish, Mandarin, Korean, and Vietnamese
- Hotline available in multiple languages
- Digital media (social media, blogs, eblasts)



Transportation Issues and Opportunities

Highways, Toll Roads, and Arterials

Weekday, weekend, and seasonal congestion | Low travel-time reliability (unexpected delays) | Critical bottlenecks on Interstate 5 and Interstate 405 | Dependence on east-west arterials

Transit

Limited transit accessibility attributable to low-density land-use patterns | Infrequent service, inconsistent reliability | Less convenient than driving (wait times, transfers)

Active Transportation

Gaps in the active transportation network | Low usage due to circuitous road network, long trip distances | Safety concerns for pedestrians and bicyclists

Transportation Demand Management (TDM)

Long-distance, peak-period commute trips to north Orange County and other counties (especially Los Angeles) | Low transit mode share in south Orange County

Purpose and Need Statement

Development patterns and transportation network favor driving

Increase availability of using non-single occupant vehicle modes | Provide convenient connections between travel modes | Provide options competitive to driving | Coordinate with land-use changes

Growing travel demand on a constrained system

Reduce travel demand | Enhance transportation safety and efficiency | Better utilize available highway, managed lane, and arterial capacity

Environmental and economic sustainability challenges

Increase zero-emission vehicles | Improve access to clean, affordable travel options | Improve transportation resilience | Minimize adverse environmental impacts | Support economic development and community enhancement

Evolving travel behaviors in a rapidly changing world

Adopt flexible recommendations | Pursue proven technologies | Support equity and innovation

Conceptual Strategies

Conceptual strategies that could be considered for evaluation



Active transportation



"Complete" freeways



Mobility-as-a-Service



Mobility hubs



New arterial capacity



Optimize existing capacity



Pricing



Increase transit appeal



Support sustainable technology

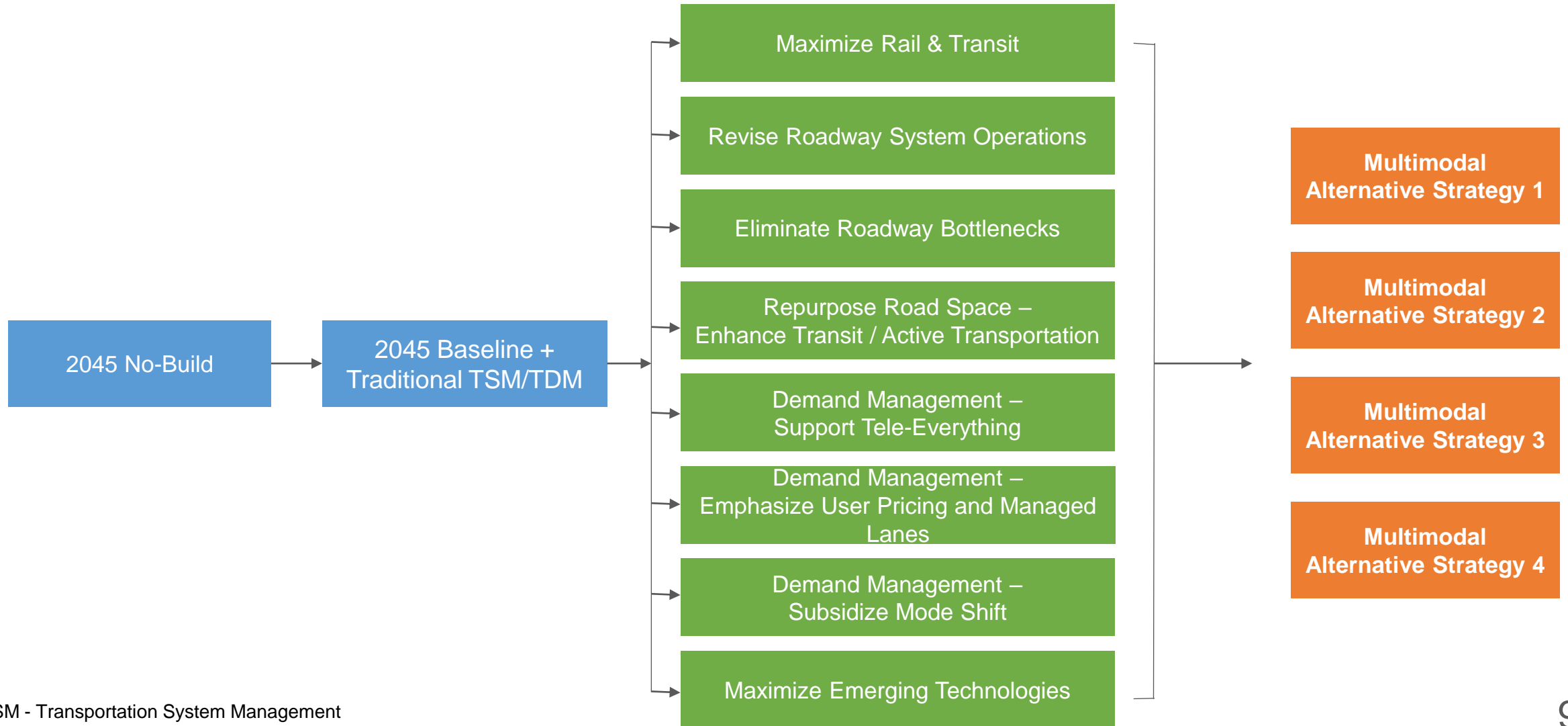


Manage transportation demand

Initial Alternative Strategies - Scenarios

INITIAL SCREENING

DETAILED EVALUATION



Next Steps

- Review scenario performance
- Engage with the public, stakeholders, and partner agencies on development of a reduced set of multimodal alternative strategies

