



AGENDA

Regional Planning and Highways Committee Meeting

Committee Members

Mark A. Murphy, Chairman
Barbara Delgleize, Vice Chair
Lisa A. Bartlett
Doug Chaffee
Patrick Harper
Gene Hernandez
Joe Muller
Vicente Sarmiento

Orange County Transportation Authority
Headquarters
Conference Room 07
550 South Main Street
Orange, California

Thursday, September 2, 2021 at 10:30 a.m.

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the Orange County Transportation Authority (OCTA) Clerk of the Board, 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 are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

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 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.

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/>



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

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 **90 minutes prior to the start time of the Board and Committee meeting date.**

Call to Order

Roll Call

Pledge of Allegiance

Director Sarmiento

1. Public Comments

Special Calendar

There are no Special Calendar matters.

Consent Calendar (Items 2 through 11)

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

2. Approval of Minutes

Approval of the minutes of the Regional Planning and Highways Committee meeting of August 2, 2021.



3. Cooperative Agreement with the California Department of Transportation for the State Route 55 Improvement Project Between Interstate 5 and State Route 91

Jeannie Lee/James G. Beil

Overview

The Orange County Transportation Authority proposes to enter into a cooperative agreement with the California Department of Transportation to define roles, responsibilities, and funding obligations for the preparation of plans, specifications, and estimates, and advertisement and award of the construction contract for the State Route 55 Improvement Project between Interstate 5 and State Route 91.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3642 between the Orange County Transportation Authority and the California Department of Transportation, in the amount of \$500,000, to provide oversight of the plans, specifications, and estimate, and to advertise and award the construction contract for the State Route 55 Improvement Project between Interstate 5 and State Route 91.

4. Amendment to Agreement for Additional Design Services for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5

Jeannie Lee/James G. Beil

Overview

On September 11, 2017, the Orange County Transportation Authority Board of Directors authorized an agreement with WKE, Inc., for the preparation of plans, specifications, and estimates for the State Route 55 Improvement Project between Interstate 405 and Interstate 5. An amendment to the existing agreement is required for additional design services.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-7-1719 between the Orange County Transportation Authority and WKE, Inc., in the amount of \$563,183, for additional design services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$19,867,709.



5. Contract Change Orders for the Interstate 405 Improvement Project from State Route 73 to Interstate 605

Jeff Mills/James G. Beil

Overview

On November 14, 2016, the Orange County Transportation Authority Board of Directors approved Agreement No. C-5-3842 with OC 405 Partners, a joint venture, for the design and construction of the Interstate 405 Improvement Project from State Route 73 to Interstate 605. Contract change orders are needed at this time to compensate OC 405 Partners for additional design and construction efforts related to the removal of an encroaching building overhang adjacent to the Magnolia Street northbound on-ramp, to provide bridge lighting on seven overcrossing bridges, to provide electrical conduit extensions and pull boxes at nine overcrossing bridges for future bridge lighting, and for pavement reconstruction at the Harbor Boulevard northbound on-ramp.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 101 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$230,838, to remove an encroaching building overhang adjacent to the Magnolia Street northbound on-ramp.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 106 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$925,000, to provide bridge lighting on seven overcrossing bridges.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 107 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$420,000, to provide conduit extensions and pull boxes for future bridge lighting on nine overcrossing bridges.
- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 109 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of 410,000, to provide full pavement reconstruction to part of the Harbor Boulevard northbound on-ramp.



6. Amendment to Cooperative Agreement with the City of Westminster for the Interstate 405 Improvement Project

Jeff Mills/James G. Beil

Overview

On March 14, 2016, the Orange County Transportation Authority Board of Directors approved Cooperative Agreement No. C-5-3615 with the City of Westminster for city services required during the design-build implementation of the Interstate 405 Improvement Project. The cooperative agreement needs to be amended for additional city support services during construction of the project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-5-3615 between the Orange County Transportation Authority and the City of Westminster, in the amount of \$998,652, for additional city services for the Interstate 405 Improvement Project. This will increase the maximum obligation of the cooperative agreement to a total value of \$3,661,331.

7. 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.



8. Grant Awards for the Garden Grove-Santa Ana Rails-to-Trails Gap Closure and Bus Stop Safety and Accessibility Study
Roslyn Lau/Kia Mortazavi

Overview

The Orange County Transportation Authority was awarded \$3,000,000 for the Garden Grove-Santa Ana Rails-to-Trails Gap Closure through the statewide Active Transportation Program, and \$300,000 for the Bus Stop Safety and Accessibility Study through the regional Sustainable Communities Program. To utilize these grants, Board of Directors' approval is requested to accept the awards and enter into agreements with the granting agencies.

Recommendations

- A. Adopt Orange County Transportation Authority Resolution No. 2021-071 and authorize the Chief Executive Officer, or designee, to accept the Active Transportation Program \$3,000,000 grant award and execute required grant-related agreements with the California Department of Transportation and California Transportation Commission.
- B. Adopt Orange County Transportation Authority Resolution No. 2021-072 and authorize the Chief Executive Officer, or designee, to accept the Sustainable Communities Program \$300,000 grant award and execute grant-related agreements with the Southern California Association of Governments.
- C. Authorize the Chief Executive Officer, or designee, to amend the Federal Transportation Improvement Program and process all necessary amendments to facilitate the recommendations above.

9. 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 in response to changing circumstances, which may require funding revisions. Board of Directors' authorization is required to provide funding for current or planned freeway, grade separation, and transit capital projects.

9. (Continued)

Recommendations

- A. Consistent with right-of-way phase estimates for the Interstate 5 Improvement Project from Yale Avenue to State Route 55 (Segment 2), authorize the use of \$23.926 million from the following fund sources:
- Surface Transportation Block Grant (\$17.5 million),
 - Measure M2 freeway funds (\$5.575 million),
 - Repurposed earmarks (up to \$0.851 million), contingent on Federal Highway Administration approval, and
 - Additional Measure M2 freeway funds in lieu of \$0.851 million of repurposed earmarks, in the event the federal funds are not available.
- B. Consistent with updated design phase estimates for the State Route 55 Improvement Project from Interstate 5 to State Route 91, authorize the use of the funding below, increasing total funding for the phase from \$8.921 million to \$11 million, and reducing Measure M2 funds by \$3.921 million:
- Surface Transportation Block Grant (\$3.359 million), and
 - Highway Infrastructure Program (\$2.641 million).
- C. Authorize the use of \$1.720 million in Measure M2 for the State Route 55 Improvement Project from Interstate 405 to Interstate 5 to support anticipated increased costs for the design phase, changing the total project estimated cost from \$504 million to \$505.720 million.
- D. Consistent with the forecasted cost for the environmental phase for the Interstate 5 Managed Lanes Project from the Orange County/San Diego County line to Avenida Pico, authorize the use of \$0.907 million in additional Surface Transportation Block Grant funds to fund this change in the project cost estimate from \$5.5 million to \$6.407 million.
- E. Authorize the use of up to \$3.207 million in additional Measure M2 Regional Capacity Program funds for the OC Bridges Railroad Grade Separation Program in lieu of federal Congestion Mitigation and Air Quality improvement funding.



9. (Continued)

- F. Authorize the use of \$12.526 million in Congestion Mitigation and Air Quality Improvement Program funds for 173 bus engine repowers.
- G. 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.

10. Amendments to On-Call Traffic Engineering and Intelligent Transportation Systems Services Agreements

Alicia Yang/Kia Mortazavi

Overview

On January 13, 2020, the Orange County Transportation Authority Board of Directors approved agreements with four traffic engineering firms to provide consultant services for on-call traffic engineering and intelligent transportation systems services for the Measure M2 Regional Traffic Signal Synchronization Program for five years with two, one-year option terms. Amendments to the existing agreements are necessary for additional on-call services to implement recommendations approved as part of the 2021 Comprehensive Transportation Funding Program competitive call for projects

Recommendation

Authorize the Chief Executive Officer to negotiate and execute amendments between the Orange County Transportation Authority and the following consultants for on-call traffic engineering and intelligent transportation systems services agreements: Agreement No. C-9-1513 with DKS Associates, Inc.; Agreement No. C-9-1810 with AGA Engineers, Inc.; Agreement No. C-9-1811 with KOA Corporation; Agreement No. C-9-1812 with Iteris, Inc., in a shared amount of \$10,547,425. This will increase the maximum obligation for all the on-call firms for a total combined aggregate contract value of \$15,875,425.



- 11. Draft 2021 Orange County Congestion Management Program Report Release for Public Review**
Sam Sharvini/Kia Mortazavi

Overview

The Orange County Transportation Authority is responsible for monitoring and reporting on the Orange County Congestion Management Program every two years. In accordance with state requirements, a draft 2021 Orange County Congestion Management Program Report has been prepared for public review and will be circulated to local agencies upon direction by the Board of Directors.

Recommendation

Direct staff to release the draft 2021 Orange County Congestion Management Program Report for public review and set November 22, 2021, as a public hearing date for adoption of the final 2021 Orange County Congestion Management Program.

Regular Calendar

- 12. 2022 State Transportation Improvement Program**
Ben Ku/Kia Mortazavi

Overview

Every two years, the Orange County Transportation Authority develops a program of projects for funding through the State Transportation Improvement Program. Project recommendations are presented for Board of Directors' consideration and approval. These recommendations are consistent with the Board of Directors' programming policies.

Recommendations

- A. Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27.
- B. Authorize the use of \$11.396 million in Measure M2 funds for the Interstate 5 Improvement Project from Interstate 405 to Yale Avenue (Segment 1).



12. (Continued)

- C. Consistent with construction phase estimates for the Transit Security and Operations Center, authorize the use of \$27.234 million from the following fund sources:
- \$19.650 million in Local Partnership Program Formula funds,
 - \$3.924 million in additional State of Good Repair, and
 - \$3.660 million Coronavirus Response and Relief Supplemental Appropriations Act, 2021.
- D. Authorize staff to make all necessary amendments to the State Transportation Improvement Program and the Federal Transportation Improvement Program and execute and necessary agreements to facilitate the recommendations above.

13. Long-Range Transportation Plan Challenges and Goals

Gregory Nord/Kia Mortazavi

Overview

The Long-Range Transportation Plan provide Orange County's program of projects for the Regional Transportation Plan, prepared by the Southern California Association of Governments. The plan also serves as the policy framework for future transportation investments in Orange County. Over the planning period for the Long-Range Transportation Plan (2019-2045), many challenges have been identified that may influence how transportation facilities, services, and needs evolve. To provide context and guidance for the development of the Long-Range Transportation Plan, these challenges and the proposed goals are presented for review.

Recommendation

Receive and file as an information item.

Discussion Items

14. Chief Executive Officer's Report

15. Committee Members' Reports



AGENDA

Regional Planning and Highways Committee Meeting

16. Closed Session

There are no Closed Session items scheduled.

17. Adjournment

The next regularly scheduled meeting of this Committee will be held at **10:30 a.m. on Monday, October 4, 2021**, at the Orange County Transportation Authority Headquarters, Conference Room 07, 550 South Main Street, Orange, California.



MINUTES

Regional Planning and Highways Committee Meeting

Committee Members Present via Teleconference

Mark A. Murphy, Chairman
Barbara Delgleize, Vice Chair
Lisa A. Bartlett
Doug Chaffee
Patrick Harper
Gene Hernandez
Vicente Sarmiento

Staff Present

Darrell E. Johnson, Chief Executive Officer
Jennifer L. Bergener, Deputy Chief Executive Officer
Allison Cheshire, Clerk of the Board Specialist, Senior
Gina Ramirez, Clerk of the Board Specialist, Senior

Via Teleconference:

Cassie Trapesonian, Assistant General Counsel
OCTA Staff Members

Committee Members Absent

Joe Muller

Call to Order

The August 2, 2021 regular meeting of the Regional Planning and Highways Committee was called to order by Committee Chairman Murphy at 10:32 a.m.

Roll Call

The Clerk of the Board conducted an attendance roll call and announced a quorum of the Committee.

Pledge of Allegiance

Director Hernandez led in the Pledge of Allegiance.

1. Public Comments

There were no Public Comments received.

Special Calendar

There were no Special Calendar matters.

Consent Calendar (Items 2 through 5)

2. Approval of Minutes

A motion was made by Director Hernandez, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to approve the minutes of the Regional Planning and Highways Committee meeting of July 1, 2021.



3. Measure M2 Comprehensive Transportation Funding Programs – 2022 Annual Calls for Projects

A motion was made by Director Hernandez, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to:

- A. Approve proposed revisions to the Comprehensive Transportation Funding Programs Guidelines.
- B. Authorize staff to issue the 2022 annual call for projects for the Regional Capacity Program.
- C. Authorize staff to issue the 2022 annual call for projects for the Regional Traffic Signal Synchronization Program.

4. Comprehensive Transportation Funding Programs - Project X, Tier 1 Fiscal Year 2021-22 Call for Projects Programming Recommendations

A motion was made by Director Hernandez, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to approve ten projects in the amount of \$2,697,424 for the 2021 Environmental Cleanup Program Tier 1 call for projects.

5. Cooperative Agreements for Regional Traffic Signal Synchronization Program Projects

A motion was made by Director Hernandez, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to:

- A. Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3597 between the Orange County Transportation Authority and the cities of Irvine and Lake Forest for the Alton Parkway Regional Traffic Signal Synchronization Program Project, with local agency in-kind services and cash matching funds totaling \$759,558.
- B. Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3598 between the Orange County Transportation Authority and the cities of Huntington Beach, Santa Ana, Tustin, Westminster, and the County of Orange for the First Street/Bolsa Avenue Regional Traffic Signal Synchronization Program Project, with local agency in-kind services and cash matching funds totaling \$774,378.



5. (Continued)

- C. Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3599 between the Orange County Transportation Authority and the cities of Lake Forest, Mission Viejo, and Rancho Santa Margarita for the Portola Parkway/Santa Margarita Parkway Regional Traffic Signal Synchronization Program Project with local agency in kind services and cash matching funds totaling \$575,550.

Regular Calendar

6. 2022 State Transportation Improvement Program Overview

Adriann Cardoso, Department Manager, Planning, provided a PowerPoint presentation on this item.

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

7. Interstate 405 Improvement Project Update

Jeff Mills, Program Manager, Senior, and Chris Boucly, Section Manager III, Public Outreach, provided a PowerPoint presentation on this item.

Director Harper inquired about the longer schedule for the Brookhurst and Warner bridges and asked how residents could sign up for project notifications.

Mr. Mills responded that the Brookhurst bridge is moving forward in two phases and will take longer to complete but will accommodate the larger traffic volume that utilizes the bridge. The Warner bridge was moved to a single phase build but the size of the bridge is driving the longer schedule. Additionally both bridge locations have undergone soil replacement which required about two months to allow for soil settlement.

Mr. Boucly suggested that interested parties sign up for project information at 405Project@octa.net.

Committee Vice Chair Delgleize suggested signage for on-ramp lane access in the area of the Warner bridge area be updated.

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



Discussion Items

8. Chief Executive Officer's Report

Darrell Johnson, Chief Executive Officer, reported the following:

Procurement Award

- The Orange County Transportation Authority (OCTA) was awarded the prestigious 2021 Achievement of Excellence in Procurement Award from the National Procurement Institute.
- This is the eleventh consecutive year that OCTA has received this award for demonstrating best practices in procuring public contracts.
- Mr. Johnson, CEO, congratulated the procurement staff for their continued hard work.

College Pass Program

- Mr. Johnson, CEO, stated that Irvine Valley College asked to join the College Pass program starting this fall last week.
- When on-campus instruction resumes later this month, more than 12,000 Irvine Valley College students will be able to use the OC Bus system to get to school or wherever they need to go.
- With nearly all Orange County community colleges now participating in the College Pass program, staff is continuing to work with the remaining schools to join the program in the future. This program dovetails nicely with the Youth Ride Free campaign launching soon, and as part of our ongoing effort to attract new bus riders.

9. Committee Members' Reports

There were no Committee Members' Reports.

10. Closed Session

There were no Closed Session items scheduled.



11. Adjournment

The meeting adjourned at 11:08 a.m.

The next regularly scheduled meeting of this Committee will be held at **10:30 a.m. on Thursday, September 2, 2021**, at the Orange County Transportation Authority Headquarters, Conference Room 07, 550 South Main Street, Orange, California.

ATTEST

Mark A. Murphy
Committee Chairman

Allison Cheshire
Clerk of the Board Specialist, Senior



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Cooperative Agreement with the California Department of Transportation for the State Route 55 Improvement Project Between Interstate 5 and State Route 91

Overview

The Orange County Transportation Authority proposes to enter into a cooperative agreement with the California Department of Transportation to define roles, responsibilities, and funding obligations for the preparation of plans, specifications, and estimates, and advertisement and award of the construction contract for the State Route 55 Improvement Project between Interstate 5 and State Route 91.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3642 between the Orange County Transportation Authority and the California Department of Transportation, in the amount of \$500,000, to provide oversight of the plans, specifications, and estimates, and to advertise and award the construction contract for the State Route 55 Improvement Project between Interstate 5 and State Route 91.

Discussion

The State Route 55 (SR-55) Improvement Project between Interstate 5 (I-5) and State Route 91 (SR-91) (Project) is part of Project F in the Measure M2 (M2) freeway program and is included in the updated Next 10 Delivery Plan, adopted by the Orange County Transportation Authority (OCTA) Board of Directors (Board) in April 2021. The Project is scheduled to move into the design phase using previously approved M2 and federal funding.

The Project will add a general purpose lane in each direction between I-5 and State Route 22 and provide operational improvements on southbound (SB) ramps at Katella Avenue and Lincoln Avenue. An additional lane will be added

to the SB SR-55 Katella Avenue off- and on-ramps and the existing SB SR-55 Lincoln Avenue off-ramp relocated 1,300 feet to the south, next to the existing SB SR-55 Lincoln Avenue hook on-ramp. The final environmental document was signed on March 30, 2020, and the build alternative was identified as the preferred alternative by the project development team.

OCTA proposes to enter into a cooperative agreement with the California Department of Transportation (Caltrans) to define the roles and responsibilities of both agencies. OCTA is the implementing agency for the plans, specifications, and estimates (PS&E), and Caltrans will provide oversight and independent quality assurance of the PS&E production to ensure the Project meets Federal Highway Administration and Caltrans standards. Caltrans' oversight of the PS&E will be at no cost to OCTA.

Caltrans will be responsible for the advertisement and award of the construction contract. As part of the PS&E phase, OCTA will reimburse Caltrans, in the amount of \$500,000, for the direct support costs associated with the final contract document packaging, advertisement, and award of the Project's construction contract. The construction phase roles, responsibilities, and funding will be the subject of a separate future cooperative agreement.

Staff will return to the Board with a separate item to seek approval to release a request for proposals to procure a consultant for PS&E services for the Project.

Fiscal Impact

Funding for the Project is included in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, Account No. 0017-7519-FF102-0X0, and will be funded with a combination of federal and local funds.

Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3642 with the California Department of Transportation, in the amount of \$500,000, to provide oversight of the plans, specifications, and estimates, and to advertise and award the construction contract for the State Route 55 Improvement Project between Interstate 5 and State Route 91.

Attachment

None.

Prepared by:



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

Approved by:



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



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Additional Design Services for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5

Overview

On September 11, 2017, the Orange County Transportation Authority Board of Directors authorized an agreement with WKE, Inc., for the preparation of plans, specifications, and estimates for the State Route 55 Improvement Project between Interstate 405 and Interstate 5. An amendment to the existing agreement is required for additional design services.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-7-1719 between the Orange County Transportation Authority and WKE, Inc., in the amount of \$563,183, for additional design services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$19,867,709.

Discussion

The State Route 55 (SR-55) Improvement Project between Interstate 405 (I-405) and Interstate 5 (I-5) (Project) is part of Project F in the Measure M2 (M2) freeway program. The updated Next 10 Delivery Plan, adopted by the Orange County Transportation Authority (OCTA) Board of Directors (Board) in April 2021, identified the Project as one of the M2 freeway projects to be completed by 2026. The Project will add general purpose and high-occupancy vehicle lanes in each direction between I-405 and I-5, and will also add auxiliary lanes between interchanges.

Amendment to Agreement for Additional Design Services for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5 *Page 2*

At the December 2 and December 3, 2020, California Transportation Commission (CTC) meeting, the CTC awarded OCTA \$140,000,000 in competitive SB 1 (Chapter 5, Statutes of 2017) funds. On January 11, 2021, the Board authorized staff to accept the funds for the project construction phase. The required applications for the competitive funds included the project schedule that shows construction to begin in mid-2022. The plans, specifications, and estimates (PS&E) are currently being finalized, so the construction bid package can be prepared and then advertised for construction bids in December 2021.

Additional project scope has been identified, which requires further effort to complete the design on schedule. An amendment to the project design contract is recommended for the following additional services:

Roadway Design

- The California Department of Transportation (Caltrans) requested additional freeway safety lights with electrical conduits to be included along southbound SR-55 adjacent to Ritchey Street. Modifications to the concrete barrier design are required to allow the lights to be mounted on the barrier.
- The City of Santa Ana requested architectural imprints to be designed and added on two large retaining walls and concrete median barriers to enhance the aesthetics of these project elements. Adding aesthetics to project elements is common.
- The Design Standard Decision Document is a report that supports exception decisions for Caltrans design standards. After the report was submitted for signatures, Caltrans required additional documentation for other facilities within the Caltrans right-of-way (ROW). Additional review comments were also provided that require resolution and report modifications.

Utility Relocation Design and Coordination

- Significant coordination effort is required with various utility companies, including MCI, Southern California Edison (SCE), Southern California Gas Company (SCGC), and Irvine Ranch Water District (IRWD) to assist with the relocation design and ensure that relocated utilities do not conflict with Project improvements.
- MCI, SCE, SCGC, and IRWD have utilities that must be relocated prior to the start of freeway construction. The advanced utility relocation work will ensure that these facilities will not interfere with nor delay the freeway construction. Oversight of the four utility companies is

necessary to ensure that relocation work is performed in accordance with the approved utility plans.

- Several utilities, located within local arterials within Caltrans ROW and interchange access control, require documentation to remain within the access control. The utility encroachment exception permit and documentation involve extensive coordination with Caltrans and utility companies.

Design Survey

- Oversight of the advance utility relocations includes field staking of the relocated utility alignments to ensure that relocation work was performed in accordance with the approved utility plans.
- At the request of three property owners that are impacted by the Project, the limits of fee acquisitions and temporary construction easements are staked on the properties for visual locations.
- Revised survey data on legal descriptions and plats were necessary as part of the ROW acquisition effort for ten parcels.

Environmental Services

- The Project includes the widening of four freeway undercrossing bridges, which are common roosting locations for bats. Approximately one year prior to the start of construction, field surveys and identification of any bat habitat, along with mitigation measures, must be documented in a report. Based on the project schedule and environmental procedures, an additional bat survey is required.
- Bird surveys are also required to identify nesting of endangered species. The surveys will be conducted seven days prior to the start of construction.

Procurement Approach

This procurement was handled in accordance with OCTA's Board-approved procedures for architectural and engineering services which conform to both state and federal laws. The original firm-fixed price agreement was issued on February 5, 2018, in the amount of \$16,891,455, for the preparation of project PS&E. The agreement was amended previously as shown in Attachment A. It has become necessary to amend the existing agreement to include additional design services so that the design can be finalized on schedule.

OCTA staff negotiated the required level of effort with WKE, Inc. to provide the additional design services as described above. OCTA found WKE, Inc.'s price proposal, in the amount of \$563,183, to be fair and reasonable relative to the

Amendment to Agreement for Additional Design Services for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5 **Page 4**

negotiated level of effort. Proposed Amendment No. 7 to Agreement No. C-7-1719 will increase the total contract value to \$19,867,709.

Fiscal Impact

Funding for the Project is included in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, Account No. 0017-7519-FF101-0KU, and is funded with M2 funds.

Summary

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-7-1719 between the Orange County Transportation Authority and WKE, Inc., to increase funding, in the amount of \$563,183, for additional design services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.

Attachment

- A. WKE, Inc., Agreement No. C-7-1719 Fact Sheet

Prepared by:



Jeannie Lee, P.E.
Senior Project Manager
(714) 560-5735



Pia Veasapen
Director, Contracts Administration and
Materials Management
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Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
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WKE, Inc.
Agreement No. C-7-1719 Fact Sheet

1. September 11, 2017, Agreement No. C-7-1719, \$16,891,455, approved by the Board of Directors (Board).
 - The agreement was executed on February 5, 2018, to prepare plans, specifications, and estimates (PS&E) for the State Route 55 (SR-55) Improvement Project between Interstate 405 and Interstate 5 (Project).
2. June 10, 2019, Amendment No. 1 to Agreement No. C-7-1719, \$248,784, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - Additional project management for coordination with California Department of Transportation (Caltrans) District 12 and Orange County Flood Control District.
 - Assistance to Caltrans design for the identification of new and modified design exceptions.
 - Design of a non-standard retaining wall.
 - Right-of-way (ROW) design support.
3. November 18, 2019, Amendment No. 2 to Agreement No. C-7-1719, \$248,925, approved by the CAMM Department.
 - Additional surveying to resolve aerial mapping.
 - Environmental re-validation for geometric refinements, including supplemental reports to six environmental technical studies.
 - Pressure reducing station site investigation, feasibility study, and coordination with City of Santa Ana.
4. December 9, 2019, Amendment No. 3 to Agreement No. C-7-1719, \$1,219,977, approved by the Board.
 - ROW requirement parcels and letters, coordination with Caltrans, and development of temporary construction easement documents.
 - Design services for Lane Channel reconstruction.
 - Pressure reducing station design, coordination with City of Santa Ana, and development of utility encroachment exception for two utility facilities.
 - Electrical design for new signalized intersection and fiber optic upgrade.
 - Development of environmental permit packages and bat study.
 - Development of Design Standard Decision Document (DSDD) and geotechnical exploration services to support Caltrans.
5. April 27, 2020, Amendment No. 4 to Agreement No. C-7-1719, \$249,878, approved by the CAMM Department.
 - Freeway ramp pavement analysis and justification.
 - Design modification to Lane Channel to address maintenance and minimize ROW requirement, including hydraulic calculations.
 - Two additional utility encroachment exception requests to Caltrans.

6. September 16, 2020, Amendment No. 5 to Agreement No. C-7-1719, \$198,957, approved by the CAMM Department.
 - Preparation of legals and plats for street improvements, Lane Channel access ramps, Southern California Edison relocations, Ricoh building, and seven sub-parcels.
 - Additional design at the Santa Ana pressure reducing station to address radio repeater panel and landscaping with irrigation.
 - Four environmental permit coordination and applications to three agencies.
 - Construction support services for the Santa Ana pressure reducing station.
7. March 3, 2021, Amendment No. 6 to Agreement No. C-7-1719, \$246,550, approved by the CAMM Department.
 - Additional project management services.
 - Development of three geometric alternatives for the northbound auxiliary lane between Dyer Road and Edinger Avenue.
 - Additional traffic analysis for the three geometric alternatives.
 - One additional and five modifications to utility encroachment exception permits.
 - Modifications to the landscaping and irrigation plans as required by Caltrans.
8. September 13, 2021, Amendment No. 7 to Agreement No. C-7-1719, \$563,183, pending Board approval.
 - Additional freeway safety lighting with electrical conduits and modified concrete barrier.
 - Architectural imprints on two large retaining walls and concrete median barriers.
 - Revision to the DSDD for additional facilities and to address multiple new comments.
 - Coordination with four utility companies for relocation design and oversight of relocation work.
 - Utility encroachment exception permit for Caltrans and utility companies.
 - Field staking for advance utility relocation work.
 - Field staking for ROW requirements at three properties.
 - Revisions to survey data on legals and plats for ten parcels.
 - Bat surveys one year prior to the start of construction.
 - Bird surveys seven days prior to the start of construction.

Total funds committed to WKE, Inc. after approval of Amendment No. 7 to Agreement No. C-7-1719: \$19,867,709.



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Contract Change Orders for the Interstate 405 Improvement Project from State Route 73 to Interstate 605

Overview

On November 14, 2016, the Orange County Transportation Authority Board of Directors approved Agreement No. C-5-3843 with OC 405 Partners, a joint venture, for the design and construction of the Interstate 405 Improvement Project from State Route 73 to Interstate 605. Contract change orders are needed at this time to compensate OC 405 Partners for additional design and construction efforts related to the removal of an encroaching building overhang adjacent to the Magnolia Street northbound on-ramp, to provide bridge lighting on seven overcrossing bridges, to provide electrical conduit extensions and pull boxes at nine overcrossing bridges for future bridge lighting, and for pavement reconstruction at the Harbor Boulevard northbound on-ramp.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 101 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$230,838, to remove an encroaching building overhang adjacent to the Magnolia Street northbound on-ramp.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 106 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$925,000, to provide bridge lighting on seven overcrossing bridges.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 107 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$420,000, to provide conduit extensions and pull boxes for future bridge lighting on nine overcrossing bridges.

- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 109 to Agreement No. C-5-3843 between the Orange County Transportation Authority and OC 405 Partners, a joint venture, in the amount of \$410,000, to provide full pavement reconstruction to part of the Harbor Boulevard northbound on-ramp.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans), is implementing the Interstate 405 (I-405) Improvement Project from State Route 73 (SR-73) to Interstate 605 (I-605) (Project). The Project will add one general purpose lane from Euclid Street to I-605, consistent with Measure M2 (M2) Project K, and will add an additional lane in each direction that would combine with the existing high-occupancy vehicle lane to provide dual express lanes in each direction on I-405 from SR-73 to I-605, otherwise known as the 405 Express Lanes.

On November 14, 2016, the OCTA Board of Directors (Board) approved Agreement No. C-5-3843 with OC 405 Partners (OC405), a joint venture, for the design and construction of the Project. The contract was executed and Notice to Proceed (NTP) No. 1 was issued to OC405 on January 31, 2017. On July 27, 2017, NTP No. 2 was issued to OC405 for the full design and construction of the Project.

The recommended contract change orders (CCO) are described in more detail below.

Encroaching Building Overhang at Magnolia Street Northbound On-Ramp

In accordance with the contract documents, OC405 is required to reconstruct the Magnolia Street on-ramp to northbound I-405. The on-ramp is directly adjacent to a building located at 16575-16595 Magnolia Street, referred to as the "Sit n' Sleep" property in the City of Westminster. As part of the Project, OCTA acquired the surface rights to this property, including the building. A small portion of the building's roof and overhang encroaches into the area where the new on-ramp has been constructed. The overhang directly conflicts with improvements to the noted on-ramp and must be removed to safely operate the new on-ramp. OCTA directed OC405 to remove the conflicting overhang and dispose of the waste, including asbestos-containing hazardous materials. The additional work was not anticipated in the original scope of work and a CCO is now needed, in the amount of \$230,838, for OC405 to comply with this directive.

Overcrossing Bridge Lighting

In accordance with the contract documents, OC405 is required to reconstruct seven overcrossing bridges in the City of Fountain Valley (City) over the I-405 freeway. OC405 is also required to install conduit and pedestals for future lighting on the bridges. As part of significant schedule mitigations that were implemented in the City, the City requested OCTA to install the lighting systems onto the bridges as part of the Project. The noted schedule mitigations agreed to by the City saved significant time on the overall Project schedule. OCTA agreed with the request to install the lighting systems and issued a directive letter to OC405 to design and install lighting systems on each of the seven bridges. A CCO is now needed, in the amount of \$925,000, for OC405 to comply with this directive.

Electrical Conduit Extensions

In accordance with the contract documents, OC405 is required to reconstruct several overcrossing bridges in the cities of Huntington Beach and Westminster. Each bridge is to include conduit and pedestals for future lighting systems. The design of nine bridges and approaches included retaining walls and barriers immediately adjacent to the bridge abutments that would have required significant reconstruction at a later date to install future conduit to connect the bridge lighting systems to a power source. The agreement did not require extension of the conduits beyond the bridge. To avoid future reconstruction of the retaining walls and barriers, OCTA issued a directive to OC405 to include conduit extensions and pull boxes along the approach to the overcrossings. A CCO is now needed, in the amount of \$420,000, for OC405 to comply with this directive.

Harbor Boulevard Northbound On-Ramp Pavement

In accordance with the contract documents, OC405 is required to design and reconstruct the Harbor Boulevard northbound I-405 on-ramp to a specific location where the newly built ramp would join the existing ramp pavement. OC405 designed the ramp alignment to join the existing pavement approximately 200 feet from the on-ramp bridge. This design, although compliant with the contract documents, would have resulted in leaving a segment of old pavement in poor condition. The agreement did not require OC405 to reconstruct this segment of the ramp pavement, and OCTA issued a directive letter to design and reconstruct this remaining piece of the ramp to be consistent with the remainder of the ramp. A CCO is now needed, in the amount of \$410,000, for OC405 to comply with this directive.

Procurement Approach

The procurement was handled in accordance with the best-value selection process authorized by AB 401 (Chapter 586, Statutes of 2013) for design-build (DB) projects, and with OCTA's Board-approved procedures for public works projects, which conform to both federal and state requirements.

On November 14, 2016, the Board authorized Agreement No. C-5-3843 with OC405, in the amount of \$1,217,065,000, for the design and construction of the Project through a DB contract.

Proposed CCO No. 101, in the amount of \$230,838, will provide compensation to OC405 for additional efforts to remove an encroaching building overhang adjacent to the Magnolia Street northbound on-ramp.

Proposed CCO No. 106, in the amount of \$925,000, will provide compensation to OC405 for additional design and construction necessary to provide bridge lighting on seven overcrossing bridges.

Proposed CCO No. 107, in the amount of \$420,000, will provide compensation to OC405 for additional design and construction necessary to provide conduit extensions and pull boxes for future bridge lighting on nine overcrossing bridges.

Proposed CCO No. 109, in the amount of \$410,000, will provide compensation to OC405 for additional design and construction necessary to provide full pavement reconstruction to part of the Harbor Boulevard northbound on-ramp.

The four CCOs will increase the cumulative value of the contract by a total of \$ 1,985,838. Attachment A lists the CCOs that have been executed to date, and the CCOs that are pending execution with OC405.

Fiscal Impact

Funding for this work was approved in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, account nos. 0017-9084-FK101-0GM and 0037-9017-A9510-0GM, and is funded with a combination of federal, state, and local funds. M2 funds will be used for improvements specific to M2 Project K, and non-M2 funds will be used for improvements specific to the 405 Express Lanes. The costs of CCO Nos. 101, 106, 107, and 109 are funded from the project contingency and are not anticipated to increase the total project estimate of \$2.08 billion.

Summary

Staff recommends the Board authorize the Chief Executive Officer to negotiate and execute CCO No. 101 to Agreement No. C-5-3843 with OC405, in the amount of \$230,838, CCO No. 106 to Agreement No. C-5-3843 with OC405, in the amount of \$925,000, CCO No. 107 to Agreement No. C-5-3843 with OC405, in the amount of \$420,000, and CCO No. 109 to Agreement No. C-5-3843 with OC405, in the amount of \$410,000, for additional design and construction efforts.

Attachment

- A. OC 405 Partners, Agreement No. C-5-3843, Contract Change Order Log

Prepared by:



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**OC 405 Partners
Agreement No. C-5-3843
Contract Change Order Log**

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
001	Technical Provisions – Execution Version	Approved	6/14/2017	\$0.00
002	Notice to Proceed No. 1 Payment Cap Increase and Substantial Completion Deadline Modifications	Approved	6/21/2017	\$0.00
003	Extra Maintenance Work (Provisional Sum)	Approved	7/28/2017	\$200,000.00
003.1	Amendment to Change Order to Add Additional Funds for Extra Maintenance Work	Approved	10/2/2018	\$200,000.00
003.1.1	Provisional Sum for Extra Maintenance Work-Unilateral	Approved	10/10/2019	\$400,000.00
003.1.2	Supplemental Extra Maintenance Work	Approved	1/16/2020	\$350,000.00
003.1.3	Supplemental Extra Maintenance Work	Approved	8/4/2020	\$350,000.00
003.2	Additional Extra Maintenance Work	Approved	12/22/2020	\$500,000.00
003.2.1	Extra Maintenance Work (Supplemental)	Approved	3/19/2021	\$500,000.00
004	Design-Builder Personnel Changes (Appendices 7 and 23)	Approved	12/20/2017	\$0.00
005	Dispute Review Board (Provisional Sum)	Approved	9/13/2017	\$50,000.00
005.1	Increase in Provisional Sum per Contract Section 19.4 Disputes Board	Approved	7/1/2019	\$50,000.00
006	Partnering (Provisional Sum)	Approved	9/13/2017	\$50,000.00
006.1	Partnering per Contract Section 19.1	Approved	7/1/2019	\$50,000.00
007	Implementation of California Department of Transportation (Caltrans) Guidance on Six-Inch Wide Longitudinal Traffic Lines and Non-Reflective Raised Pavement Markers	Approved	3/15/2018	\$0.00
008	Collection and Disposal of Unknown Hazardous Materials (Provisional Sum)	Approved	9/13/2018	\$100,000.00
008.1	Supplemental Unknown Hazardous Materials	Approved	9/11/2019	\$100,000.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
008.2	Supplemental Unknown Hazardous Materials	Approved	11/25/2019	\$250,000.00
008.2.1	Supplemental Unknown Hazardous Materials	Approved	3/11/2020	\$150,000.00
008.3	Supplemental Unknown Hazardous Materials	Approved	5/4/2020	\$500,000.00
008.3.1	Supplemental for Additional collection and disposal of Unknown Hazardous Materials	Approved	11/2/2020	\$500,000.00
009	Repair of Caltrans' Fiber Optic Line	Approved	5/16/2018	\$31,753.69
010	Five Project Funding Identification Signs (Provisional Sum)	Approved	7/2/2018	\$32,644.25
011	Revised Right-of-Way (ROW) Availability Date of Caltrans Parcel No. 102919 Used by Mike Thompson's RV Super Store	Approved	6/28/2018	\$0.00
012	Credit to OCTA for Elimination of the Street Widening Improvements Along Eastbound Edinger Avenue	Approved	9/13/2018	-\$237,982.39
013	Additional Design and Construction Cost Compensation Related to: City Bridge Width; Construction Changes to Minimize ROW Impacts; Revised Design Concept at Ellis Avenue On-Ramp to Southbound I-405; State Route 73 Overhead Sign Structures; Sendero Apartments Left-Turn Pocket on Magnolia Street; Newland Street Waterline Extension; and Signal Improvements at Ellis Avenue/ Bushard Street	Approved	2/25/2019	\$8,560,556.00
013.1	Permanent Traffic Signal at the intersection of Warner Avenue and Greenleaf Street	Approved	12/5/2019	\$460,327.00
014	Thrust Blocks for the City of Fountain Valley Water Lines	Approved	10/29/2018	\$88,021.00
015	Slater Bridge Construction Shuttle Services	Approved	12/4/2018	\$175,000.00
016	Construction Zone Speed Reduction	Approved	12/3/2018	\$70,000.00
016.1	Additional Speed Reduction Signs	Approved	12/31/2019	\$4,512.00
017	Relocation of Water Lines for the City of Fountain Valley	Approved	3/8/2019	\$800,000.00
018	Enhanced Gawk Screen at Bolsa Chica Road	Approved	1/25/2019	\$56,395.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
019	Brookhurst Street Overhead Sign Location Redesign	Approved	1/25/2019	\$11,484.00
020	Differing Site Conditions – Pavement Thickness at Magnolia	Approved	1/29/2019	\$4,095.00
021	Polymer Fibers in All Concrete Bridge Decks	Approved	3/19/2019	\$1,463,020.00
022	Temporary Construction Easement Reduction at La Quinta	Approved	3/19/2019	\$85,573.00
023	Updated FastTrack Logos (Unilateral)	Approved	2/21/2019	\$20,532.00
024	Express Lanes Channelizers	Approved	3/12/2019	\$122,778.00
025	Stainless Steel Inserts at Fairview Road Overcrossing	Approved	3/12/2019	-\$9,293.00
026	OCTA PlanGrid Software Licenses	Approved	3/28/2019	\$35,994.00
026.1	Supplemental for OCTA PlanGrid Software Licenses	Approved	9/11/2019	\$8,570.00
026.2	Additional PlanGrid Software Licenses	Approved	3/8/2021	\$46,278.00
027	Utility potholing on Milton Avenue	Approved	9/12/2019	\$61,731.87
027.1	Electrical Infrastructure Work at Milton Avenue	Approved	1/16/2020	\$278,282.28
028	Mesa Water District 12-inch Water Line (CN-1127)	Approved	5/7/2019	\$208,600.00
029	Magnolia Loop Ramp CMS Deletion	Approved	5/15/2019	-\$74,319.00
030	Motel 6 Sound Wall 791 Elimination	Approved	5/15/2019	-\$130,000.00
031	Sound Wall 956 Reduction	Approved	5/22/2019	-\$30,000.00
033	Edinger Channel Pavement Rehabilitation	Approved	7/30/2019	\$176,465.00
034	Chevron and Crimson Utility Relocation at Goldenwest Crossing	Approved	8/2/2019	\$75,000.00
034.1	Chevron and Crimson Utility Relocation Support	Approved	12/31/2019	\$12,018.00
034.2	Chevron and Crimson Goldenwest Relocation Assistance	Approved	2/18/2020	\$110,000.00
034.3	Chevron and Crimson Goldenwest Relocation Assistance	Approved	8/4/2020	\$10,982.00
034.4	Chevron and Crimson Goldenwest Relocation Assistance	Approved	9/21/2020	\$300,000.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
035	Incompatible Specifications – Adjacent to Continually Reinforced Concrete Pavement	Approved	6/26/2019	\$2,900,557.00
036	Minor Construction Support for Dry Utilities	Approved	5/11/2020	\$100,000.00
037	Sound Wall 375 Protect in Place	Approved	6/4/2019	\$200,000.00
040	High Density Polyethylene in Lieu of Reinforced Concrete Pipe	Approved	7/9/2019	-\$7,418.68
041	Emergency Vehicle Preemption Devices at Fairview	Approved	7/9/2019	\$44,147.00
042	Executed Utility Agreements (Unilateral)	Approved	11/4/2019	\$0.00
043	Early Partial Removal of Sound Wall 328	Approved	9/16/2019	\$14,414.18
044	Field survey for Frontier at Westminster	Approved	1/7/2020	\$12,908.42
045	Water Line Betterments (CN 1012 & 6044) at Warner Avenue	Approved	10/12/2019	\$256,244.00
046	Additional Water Lines at Brookhurst Street and Talbert Avenue in the City of Fountain Valley	Approved	12/5/2019	\$389,878.00
047	Additional Water Line Valves for the City of Fountain Valley	Approved	12/5/2019	\$266,828.00
048	Temporary Construction Easement Reduction at Sit n' Sleep (CPN 103026)	Approved	10/17/2019	\$129,243.00
049	Beach Blvd Lane Widths Reduction (Necessary Basic Configuration Change)	Approved	10/17/2019	\$160,000.00
050	Vibration Sensitive Receptors (McFadden OC Abutment 3)	Approved	10/17/2019	\$59,383.87
051	Exercising Water Valves for the City of Fountain Valley	Approved	1/16/2020	\$50,000.00
052	McFadden Avenue Interconnect Between Beach Boulevard and Sugar Drive	Approved	11/14/2019	\$0.00
053	Traffic Signal Modification at Beach and McFadden	Approved	11/14/2019	-\$128,118.00
054	Differing Site Conditions – Pavement Against Median K-Rail	Approved	12/31/2019	\$11,133.00
055	LA Fitness at Retaining Wall 717	Approved	12/31/2019	\$8,428.29
056	Additional Speed Reduction Signs and Radar Packages	Approved	12/31/2019	\$148,397.00
057	Archaeological Treatment Plan	Approved	6/4/2020	\$200,000.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
057.1	Archaeological Treatment Plan	Approved	7/9/2020	\$500,000.00
057.1.1	Archaeological and Native American Monitors at Goldenwest Street and Bolsa Avenue (Supplemental)	Approved	8/27/2020	\$500,000.00
057.1.2	Supplemental Environmental Monitoring at Bolsa Overcrossing	Approved	10/30/2020	\$300,000.00
057.2	Archaeological Treatment Plan and Native American Monitoring	Approved	3/4/2021	\$500,000.00
057.2.1	Additional Archaeological and Native American Monitoring Treatment Plan	Approved	7/12/2021	\$500,000.00
058	Biological Monitoring Naval Weapons Station (Unilateral)	Approved	6/29/2020	\$50,000.00
058.1	Biological Monitor at Naval Weapon Station Seal Beach	Approved	12/10/2021	\$50,000.00
059	Pavement Limits for Beach Boulevard and Edinger Avenue	Approved	2/18/2020	\$33,573.00
060	Heil Pedestrian Overcrossing and Switchback Ramp (Unilateral)	Approved	2/25/2020	\$1,044,927.00
061	Plant Establishment Period	Approved	2/26/2020	\$1,600,000.00
062	Senate Bill 1: Diesel Fuel Sales Tax Rate Increase	Approved	3/9/2020	\$1,764,164.64
063	Bracing for Southern California Edison Power Poles at CN 2012	Approved	3/5/2020	\$169,770.00
064	City Sales and Use Tax Increases (Unilateral)	Approved	4/22/2020	\$28,657.00
065	Traffic Studies to Analyze Schedule Mitigation	Approved	4/22/2020	\$70,854.00
066	Combined Authority-accepted Extra Work	Approved	5/14/2020	\$18,826.00
067	Southern California Edison Conduit at Heil Avenue	Approved	5/14/2020	\$109,219.00
068	Archaeological Monitoring for all Ground disturbing activities at Naval Weapons Station	Approved	8/27/2020	\$100,000.00
068.1	Archaeological and Native American Monitors at Naval Weapon Station Seal Beach	Approved	12/10/2021	\$100,000.00
068.2	Lighting Management System Specifications	Approved	5/26/2021	\$75,000.00
069	Drainage System 757 Access	Approved	5/14/2020	\$60,374.00
070	Amendments to Contract Sections 19.3.4 and 19.5.2 No Cost	Approved	5/19/2020	\$0.00
071	Union Pacific Railroad Flagging Costs	Approved	6/13/2020	\$200,000.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
072	SCE and Frontier Electrical Infrastructure Work at Almond Avenue	Approved	5/19/2020	\$1,843,329.00
073	Shadow Striping on Portland Cement Concrete Pavement	Approved	4/19/2021	\$200,000.00
074	Combined Authority Accepted Extra Work (PCOs 169 and 122G)	Approved	7/7/2020	\$6,965.39
075	Bushard Pile Conflict with Existing Piles	Approved	7/21/2020	\$28,867.00
076	Combined Authority Accepted Extra Work (PCOs 180 and 183)	Approved	9/16/2020	\$12,981.02
077	Toll Rate Changeable Message Signs (CMS)	Approved	9/8/2020	\$146,031.00
078	Parking Lot Improvements at United States Postal Service Property	Approved	10/27/2020	\$537,436.00
079	Extension of the Third Westbound Lane on Talbert Avenue to Cashew Street	Approved	12/2/2020	\$270,528.00
080	Temporary Bypass Waterline for the Goldenwest Street Bridge Phase 2	Approved	10/30/2020	\$579,604.00
081	Oceanview Channel Damaged Existing RCB	Approved	11/5/2020	\$59,806.16
082	Existing Buried Shoring Removal at Bella Terra Near RW 895 (Unilateral)	Approved	11/10/2020	\$19,637.23
083	Combined Authority Accepted Extra Work No. 4 (PCOs 237 and 258)	Approved	12/23/2020	\$7,963.82
084	Revised K-Rail Placement at Bolsa Chica Boulevard	Approved	12/23/2020	\$74,185.84
085	Modified Pavement Overlay for the City of Fountain Valley	Approved	12/15/2021	\$107,180.00
086	Global Settlement	Approved	12/17/2021	\$157,000,000.00
087	Retaining Wall 906 SCE Pole at Sugar Drive	Approved	3/30/2021	\$133,159.89
088	Valves at Corta Bella Apartments	Approved	3/17/2021	\$18,310.07
089	Unavailable Electrical Specifications	Approved	5/12/2021	\$578,348.00
090	Bolsa Chica Community Wall	Approved	5/12/2021	\$867,349.00
091	Traffic Signal Equipment at Multiple Intersections	Approved	5/12/2021	\$418,620.00
092	Protect Existing Facilities at Senior Center	Approved	5/12/2021	\$995,000.00
093	Shell Driveway at Brookhurst and Talbert	Approved	4/26/2021	\$4,489.12
094	Shiffer Park Fence Replacement	Approved	4/27/2021	\$54,818.00

Contract Change Order (CCO) No.	Title	Status	Date Executed	Cost
097	Combined Authority Accepted Extra Work (PCOs 263 and 274)	Approved	5/26/2021	\$43,898.43
098	Drainage System 387 and 356 Maintenance Access	Approved	5/26/2021	\$125,000.00
099	SR-22 and Garden Grove Boulevard Intersection Improvements	Approved	7/12/2021	\$470,000.00
100	Cultural Discoveries at Bixby Channel	Approved	7/7/2021	\$200,000.00
101	Sit 'n Sleep Overhang Removal	Pending		\$230,838.00
102	City of Fountain Valley Additional Traffic Signal Cabinet and Controller	Approved	7/1/2021	\$52,252.00
106	Bridge Lighting on Seven Overcrossing Bridges	Pending		\$925,000.00
107	Conduit Extensions and Pull Boxes for Future Bridge Lighting on Nine Overcrossing Bridges	Pending		\$420,000.00
109	Harbor North Bound On-Ramp Pavement Limits	Pending		\$410,000.00

Original Contract Price	\$1,217,065,000.00
Contingency Fund	<u>\$241,959,728.00</u>
Total Contract Allotment	\$1,459,024,728.00

Subtotal Approved CCOs	\$195,261,192.88
Subtotal Pending CCOs	<u>\$1,985,838.00</u>
Total CCOs	\$197,247,030.88

Proposed Revised Contract Price	\$1,414,312,030.88
Remaining Contingency Fund	\$44,712,697.12



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Cooperative Agreement with the City of Westminster for the Interstate 405 Improvement Project

Overview

On March 14, 2016, the Orange County Transportation Authority Board of Directors approved Cooperative Agreement No. C-5-3615 with the City of Westminster for city services required during the design-build implementation of the Interstate 405 Improvement Project. The cooperative agreement needs to be amended for additional city support services during construction of the project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-5-3615 between the Orange County Transportation Authority and the City of Westminster, in the amount of \$998,652, for additional city services for the Interstate 405 Improvement Project. This will increase the maximum obligation of the cooperative agreement to a total value of \$3,661,331.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans) and the cities of Costa Mesa, Fountain Valley, Huntington Beach, Westminster (City), and Seal Beach, is implementing the Interstate 405 (I-405) Improvement Project between State Route 73 (SR-73) and Interstate 605 (I-605) (Project). The Project will add one general purpose lane from Euclid Street to I-605, consistent with Measure M2 Project K, and will add an additional lane in each direction that would combine with the existing high-occupancy vehicle lane to provide dual express lanes in each direction on I-405 from SR-73 to I-605. The Project includes improvements to city-owned and operated streets, city traffic facilities, and city utilities impacted by the Project.

On March 14, 2016, the OCTA Board of Directors (Board) approved a cooperative agreement with the City for city services to be provided during the design-build implementation of the Project. A significant amount of construction is within the City. The reimbursement to the City includes costs for review and approval of plans, specifications and reports, oversight of construction inspection services for City facilities, review and acceptance of the transportation management plan, traffic engineering, police services during construction of the Project, and funding for project construction-related pavement repairs to city streets due to detours and other construction activities (Attachment A).

More specifically, the cooperative agreement reimburses the City to review and approve the construction staging plans, maintenance of traffic (MOT) plans, detour plans, and each temporary traffic control plan for work impacting city streets. City construction inspection and traffic signal operations support are also required for implementation of the MOT, detour and temporary traffic control elements, and are reimbursed through the cooperative agreement. The City provides its police traffic support on an as-needed basis.

Recently, OCTA staff worked with the City to implement construction schedule mitigation strategies. The construction of the Springdale Street and Edwards Street bridges was changed from two stages to one stage for each bridge, which reduces the overall construction schedule. To accommodate this change, environmental revalidations with traffic analyses in accordance with Caltrans requirements were prepared. In addition, revised design plans and revised construction staging and MOT plans on local streets were prepared. The review of these revised plans required the City to provide additional engineering review and construction support efforts beyond the original estimate.

Additionally, long term on- and off-ramp closures beyond the original durations were implemented at the Bolsa Chica Street, Westminster Boulevard, Goldenwest Street, and Bolsa Avenue bridges to address constructability issues related to the ramps. Weekend full street closures were also implemented at the Goldenwest Street, Bolsa Avenue, and Magnolia Avenue bridges to address constructability issues during traffic switches for these bridges being built in two stages. The review of the environmental revalidations, traffic analyses, revised construction staging, MOT, and detour plans to accommodate these longer ramp closures required additional city engineering review and construction support beyond the original estimate.

Nine out of the 18 bridges to be reconstructed by the Project are located within the City. Thus, a significant amount of construction is within the City, which requires close coordination and support by city staff. The original scope of work assumed the construction period and associated city support services to end in

early 2023. Additional City support is needed to accommodate the current construction completion milestone date of late 2023.

The review and implementation of the schedule mitigation strategies within the City provided a significant benefit to OCTA related to maintaining the current Project schedule. Additionally, the review and implementation of the longer ramp construction durations and weekend full closures of local streets to accommodate traffic switches from the first stage of bridge construction to the second stage of bridge construction also provide a significant benefit to OCTA related to maintaining the current Project schedule. To obtain City concurrence on these items, the City required more senior staff involvement and additional City staff efforts to coordinate, review, and implement these elements that allowed construction to proceed more efficiently. These increased efforts by the City account for approximately 75 percent of the additional funds requested. The extended construction period from the original early 2023 substantial completion date to the current late 2023 substantial completion date accounts for approximately 25 percent of the additional funds requested.

Attachment B to this report itemizes the revised reimbursement amount for city services. The proposed amendment will be funded from the Project contingency and is not anticipated to increase the total Project estimate of \$2.08 billion.

Fiscal Impact

Funding for this amendment is included in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, account nos. 0017-9084-FK101-012 and 0037-9017-A9510-012, and is funded with a combination of federal, state, and local funds.

Summary

Staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-5-3615 with the City, in the amount of \$998,652, for additional city services during construction of the Project.

Attachments

- A. City of Westminster, Cooperative Agreement No. C-5-3615 Fact Sheet
- B. Revised Schedule A, Reimbursement Schedule for Combined City Services for the City of Westminster

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**City of Westminster
Cooperative Agreement No. C-5-3615 Fact Sheet**

1. March 14, 2016, Cooperative Agreement No. C-5-3615, \$1,200,000, approved by the Board of Directors (Board).
 - To provide City of Westminster (City) services, including plan review and approval of plans, specifications, reports, and the traffic management plan, and oversight of construction and detour inspection services; traffic engineering and police services; and allow for future amendment for repairs to city street pavements impacted by signed, long-term detour routes for the Interstate 405 Improvement Project (Project).
2. November 12, 2018, Amendment No. 1 to Cooperative Agreement No. C-5-3615, \$623,888, approved by the Board.
 - To include costs for repair to city street pavements impacted by signed, long-term freeway detours during Project construction of the Project that were not accounted for in the original cooperative agreement.
3. March 9, 2020, Amendment No. 2 to Cooperative Agreement No. C-5-3615, \$838,791, approved by the Board.
 - To provide additional city services, including plan review and approval of plans, specifications, reports; oversight construction and detour inspection services; review and acceptance of the traffic management plan, traffic engineering, and police services.
4. September 13, 2021, Amendment No. 3 to Cooperative Agreement No. C-5-3615, \$998,652, pending Board approval.
 - To provide close project coordination and support by city staff and additional city services to accommodate the current construction schedule milestone date of late 2023. The additional services include plan review and approval of plans, specifications, reports, oversight construction and detour inspection services, review and acceptance of the traffic management plan, traffic engineering, and police services.

Total committed to the City after approval of Amendment No. 3 to Cooperative Agreement No. C-5-3615: \$3,661,331.

REVISED SCHEDULE A**REIMBURSEMENT SCHEDULE FOR COMBINED CITY SERVICES
FOR THE CITY OF WESTMINSTER**

<i>Item No.</i>	<i>Reimbursement Description</i>	<i>Maximum Reimbursement Amount⁽¹⁾</i>
1	Review and approval of plans, specifications, and other pertinent engineering plans and reports, Traffic Management Plan review and concurrence, and construction oversight inspection services related to CITY FACILITIES	\$1,933,900
2	Traffic engineering and detour inspection	\$729,543
3	Police services (including overtime costs)	\$374,000
4	Pavement mitigation	\$623,888
	TOTAL MAXIMUM REIMBURSEMENT	\$3,661,331

⁽¹⁾ Revised Schedule A shows estimated reimbursement amounts for each CITY SERVICES item of work. During the term of this agreement, the CITY may redistribute funds for items of work as needed; however, the total combined amount for CITY SERVICES shall not exceed the Total Maximum Reimbursement amount shown herein.



September 2, 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 analysis of transportation issues, and recommending a vision for the study area. This vision is often referred to as the locally preferred strategy (LPS).

Once a LPS is approved by the Board of Directors (Board), recommended improvements can be considered for inclusion in the OCTA's Long-Range Transportation Plan (LRTP) project list. This project list is used as input for the Regional Transportation Plan (RTP) developed by the Southern California Association of Governments (SCAG). Projects included in the RTP are eligible to proceed through project-level development and can compete for state and federal funding.

Achieving consensus on a LPS involves engagement of 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, the LPS recommendations represent a locally-supported vision for the study area's long-term transportation needs.

In August 2020 and February 2021, updates were provided to the Board on the South Orange County Multimodal Transportation Study (SOCMTS). The August 2020 item reviewed the study area (Attachment A), background, phasing, stakeholder, and partner agency engagement approach, as well as transportation issues and opportunities. The February 2021 item reviewed the study's Purpose and Need Statement (Attachment B) and the initial alternative strategies (Attachment C). The current update primarily focuses on the initial screening of alternative strategies and the approach for defining a reduced set of multimodal alternative strategies.

Discussion

The study is being informed by the technical analysis of the transportation system in the study area, and refined through stakeholder, partner agency, and public input. A full report, summarized below, of the latest online survey results and public engagement activities can be viewed in Attachment D.

- Six meetings of the Technical Working Group comprised of technical planning and public works staff from cities within the study area.
- Six 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 requested by and held with Caltrans, Metrolink, TCA, and the cities of Dana Point, Irvine, Laguna Beach, Laguna Hills, Laguna Niguel, Laguna Woods, and Newport Beach.
- Two city council presentations to the cities of Lake Forest and San Clemente.
- Two key stakeholder roundtables, two elected official roundtables, one public webinar, one telephone town hall, and two online surveys.
- The online surveys and promotional materials were available in Spanish, Mandarin, Vietnamese, and Korean, a telephone helpline was also offered in the multiple languages, and the telephone townhall included a Spanish simulcast. In addition, multilingual postcards were mailed to low-income and disadvantaged communities.

This winter, a third and final outreach campaign will be conducted to seek public feedback on the draft multimodal alternative strategies. Similar to the outreach campaigns for earlier study phases, the third phase will include a public webinar and a final online survey available in multiple languages, both of which will be promoted via social media, blogs, and eblasts. The telephone helpline will continue, postcards promoting the online survey and webinar will be distributed, and a third set of key stakeholders and elected official roundtables will be held.

Analysis of Initial Alternative Strategies

As indicated in the February 2021 item, an initial set of alternative strategies were developed that add to the 2045 Baseline scenario. These were analyzed to understand how well each focused strategy could address the study's Purpose and Need Statement.

The 2045 Baseline scenario includes transportation improvements from voter-approved Measure M2 (M2), currently funded capital improvement programs, and the following near-term projects identified at the conclusion of the SR-241 Toll Road extension efforts in south Orange County:

- Los Patrones Parkway extension from Cow Camp Road to Avenida La Pata as a non-tolled facility.
- Ortega Highway widening between Calle Entradero and Reata Road.
- Interstate 5 carpool lane extension from Avenida Pico to the San Diego County Line.

The initial set of alternative strategies evaluated during the second study phase included:

- 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.

Utilizing a combination of quantitative and qualitative analysis, as well as input from stakeholder agencies, these initial alternative strategies were evaluated by comparing the performance measures listed below to 2045 Baseline scenario conditions:

- Percentage of trips made by non-single-occupant vehicle (SOV) modes
 - Desired outcome: Increases the non-SOV mode share.

- Access to transit and active transportation
 - Desired outcome: Increase in geographic coverage of transit and active transportation for routine trips.
- Total daily vehicle trips
 - Desired outcome: Reduces the number of daily vehicle trips.
- Travel time savings
 - Desired outcome: Reduces daily person hours traveled.
- Vehicle Miles Traveled (VMT)
 - Desired outcome: Reduces total daily VMT.

Ease of implementation was also considered for each of the initial alternative strategies. This was a qualitative evaluation that considered factors, such as relative cost, environmental risks, and likely public and/or political support.

Reduced Set of Multimodal Alternatives

The analysis of the initial alternative strategies will be used to inform the development of a refined set of multimodal alternatives to consider in the ultimate goal of identifying a LPS. The reduced set of multimodal alternatives will evaluate different combinations of the most promising elements from the initial alternative strategies in addition to the 2045 Baseline scenario improvements.

Elements included in the reduced set of multimodal alternative strategies will include:

- OC Flex: A travel market analysis was conducted as part of the initial screening analysis to identify potential on-demand, micro-transit service areas in addition to the existing OC Flex zone in the Aliso Viejo/Laguna Niguel/Mission Viejo area. Potential additional service areas being considered in the multimodal alternative strategy development include:
 - Laguna Beach,
 - University of California, Irvine/Newport Center,
 - Tustin/Irvine,
 - Irvine Spectrum,
 - Laguna Hills/Lake Forest,
 - Newport Beach/Costa Mesa,
 - Dana Point/San Juan Capistrano, and
 - San Clemente.
- Local circulators/shuttles: Although the effects of local circulators/shuttles (M2 Project V) were not specifically analyzed as part of the initial screening analysis, support was voiced for these services during public and stakeholder engagement. Both currently operating and previously operating Project V circulators/shuttles (as some services were

suspended due to the coronavirus {COVID-19} pandemic) are being considered in the multimodal alternative strategy development, including:

- Dana Point,
 - Irvine,
 - Laguna Beach,
 - Mission Viejo,
 - Newport Beach,
 - San Clemente,
 - San Juan Capistrano,
 - Laguna Niguel, and
 - Lake Forest.
- Active transportation: The development of the multimodal alternative strategy includes a recommendation for a geographic alignment of active transportation investments and transit investments. Specifically, active transportation investments would be targeted in areas where they can best capture short trips (i.e., less than three miles) and/or first/last mile trips to and from transit stations and mobility hubs (i.e., places of connectivity where different travel options – walking, bicycling, transit, and shared mobility – come together).
- Roadway operational improvements: The multimodal alternative strategy development includes recommendations for roadway operational improvements (e.g., advanced traffic management systems, intelligent transportation systems, integrated corridor management, etc.) that can deliver increased roadway efficiency with relatively low cost and without providing new travel lanes that require additional right-of-way acquisition. Support for this type of investment was heard consistently during the public and stakeholder engagement process.
- High-frequency transit: High-frequency transit refers to investments in high quality services such as freeway bus rapid transit on Interstate 5 (I-5) and State Route 55 (SR-55). The high-frequency transit considered for the multimodal alternative strategy development is consistent with the high-frequency transit vision identified in OCTA's Transit Master Plan.
- Transportation Demand Management (TDM): TDM measures include strategies applicable to south Orange County, such as support for telework (e.g., work-from-home), support for carpool/vanpool/schoolpool, and transit subsidies. The TDM measures considered are aimed at reducing roadway congestion and demand by redistributing trips to alternative modes of travel, times outside of the peak period, and/or along less congested travel routes.

- Bottleneck improvements: The multimodal alternative strategy development recommendations includes spot capacity enhancements on freeways to address specific known bottlenecks that are not anticipated to be addressed by M2 projects. The bottleneck improvements currently under consideration for the multimodal alternative strategy include:
 - Braiding the southbound State Route 133 to southbound I-5 ramp with the southbound I-5 off-ramp to Alton Parkway.
 - Truck climbing lane on I-5 from Avenida Pico to Avenida Vaquero.
- Conversion of carpool lanes to express toll lane operation: The multimodal alternative strategy development assumes that by 2045 the California Department of Transportation will exercise its authority to make operational changes.

Based on the Purpose and Need Statement and performance measures described above, a set of performance targets will be developed that establish a vision for what a successful multimodal transportation system in south Orange County in the year 2045 would achieve. The performance measures will be used to evaluate the set of multimodal elements and determine whether the multimodal elements (as currently identified) can meet the set targets. If the identified multimodal elements are insufficient to meet the targets, some adjustments to the elements could be considered (e.g., more OC Flex zones, more high-frequency transit, more active transportation investment, etc.). It is anticipated that the recommended LPS will be comprised primarily of transportation programs (like the elements described above) rather than an extensive list of capital improvements.

Next Steps

During the next few months, OCTA will engage with the public, stakeholders, and partner agencies to review the performance of the reduced set of multimodal alternative strategies. Consistent with the Purpose and Need Statement, these recommended long-range multimodal 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

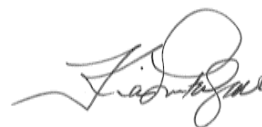
OCTA is developing strategies to improve travel in south Orange County. Study progress is presented for Board review. Technical analysis, in conjunction with input from stakeholder and public engagement efforts, will guide the development of the alternative strategies and be brought to the Board for consideration later this year.

Attachments

- A. South Orange County Multimodal Transportation Study Area
- B. South Orange County Multimodal Transportation Study Purpose and Need Statement
- C. South Orange County Multimodal Transportation Study Initial Alternative Strategies
- D. South Orange County Multimodal Transportation Study, Public Involvement Program Phase 2: Summary of Survey Results, July 2021

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South Orange County Multimodal Transportation Study Area



South Orange County Multimodal Transportation Study Purpose and Need Statement

The Purpose and Need Statement summarizes the existing and future transportation challenges in the study area (which is illustrated in Attachment A) and the desired study outcomes. The Purpose and Need Statement provides the basis for defining alternative strategies for consideration, comparing alternative strategies, and ultimately for selecting a locally preferred strategy for south Orange County. The Purpose and Need Statement is summarized in the following table.

Need	Purpose
Development patterns and transportation network that favor driving	<ul style="list-style-type: none">• Increase availability and convenience of using non-single-occupant vehicle (SOV) modes of travel• 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 travel options• 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

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.



Public Involvement Program Phase 2:

Summary of Survey Results July 2021



Prepared by:



TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
Public Engagement Approach	3
Public Engagement Survey	4
Key Findings.....	4
SURVEY OVERVIEW.....	6
Survey Format.....	6
Survey Outreach	6
SURVEY RESULTS ANALYSIS.....	10
Geographic Distribution	10
Home Zip Code	10
Work Zip Code	12
Priority Ranking - Transportation Needs	13
Set Your Budget – Transportation Strategy Budget Allocation	14
Effective Strategy Rating	15
Enhanced Train and Bus Service	15
Efficient Roads and Freeways.....	16
Improved Active Transportation.....	16
Reduced Car Dependency	17
Pricing Strategies	17
New Technologies.....	18
Stay Involved.....	18
CONCLUSION.....	19

Figures

Figure 1: Survey Respondents - Home Zip Code	11
Figure 2: Survey Respondents - Work Zip Code	12

Tables

Table 1: Summary of Key Findings.....	4
Table 2: Summary of Survey Outreach	7

Appendices

APPENDIX A Surveys

- Appendix A.1 Online Survey (English; Spanish; Mandarin; Korean; Vietnamese)
- Appendix A.2 Phone Survey Script

APPENDIX B Survey Results

- Appendix B.1 Compiled Survey Results

APPENDIX C Outreach Results and Analytics

- Appendix C.1 Virtual Meeting Room Google Analytics
- Appendix C.2 Geofencing Analytics
- Appendix C.3 Telephone Townhall Raw Data
- Appendix C.4 Comments Collected Matrix

APPENDIX D Notification Materials

- Appendix D.1 Stakeholder Communications Toolkit
- Appendix D.2 Study Website
- Appendix D.3 List of Organizations
- Appendix D.4 Eblast #1 — Telephone Townhall Meeting, Survey and Virtual Meeting Room Invite
- Appendix D.5 Eblast #2 — Survey and Virtual Meeting Room Reminder
- Appendix D.6 Eblast #3 — Survey and Virtual Meeting Room Last Chance
- Appendix D.7 Telephone Townhall Meeting, Survey and Virtual Meeting Room Postcard (English; Spanish; Mandarin; Korean; Vietnamese)
- Appendix D.8 Live Facebook Advertisement
- Appendix D.9 Facebook Posts
- Appendix D.10 Twitter Posts
- Appendix D.11 News Release
- Appendix D.12 Study Blog Article
- Appendix D.13 On the Move Article

EXECUTIVE SUMMARY

The Orange County Transportation Authority (OCTA) recently completed the second phase of public involvement for the South Orange County Multimodal Transportation Study ([Study](#)). The Study is looking at a wide range of transportation needs and solutions in south Orange County beyond 2045, 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](#)) which includes outreach during the three different Study phases. Phase One of the PIP took place in fall 2020 and included engagement to stakeholders, residents and elected officials as well as a survey. The survey was designed to assess public perception of transportation challenges and improvement strategies in south Orange County. Among the survey findings, the respondents said that they would like to see:

- Reduced traffic congestion
- Increased frequency and accessibility of multimodal transportation
- Increased safety and efficiency for all modes of travel, and
- Increased alternative transportation frequency and accessibility.

Public Engagement Approach

Phase Two of the PIP took place in Summer 2021 and included a virtual stakeholders roundtable, elected official's roundtable, a public Telephone Townhall and a Virtual Meeting Room (VMR). The VMR simulated an in-person meeting with project boards and a feedback station and allowed participants to join at their convenience. In addition, a survey was conducted which was designed to assess the public's priorities on draft strategies and transportation solutions in south Orange County. The survey was available June 7 to July 12, 2021, 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, targeted geofencing advertisements, and the OCTA Facebook and Twitter accounts.

To align with OCTA's diversity, equity, and inclusion goals, several outreach tactics were implemented in an effort to engage diverse and hard to reach communities to encourage meaningful engagement with all people regardless of ethnicity or socioeconomic backgrounds. An online survey and fact sheet were translated into Spanish, Vietnamese, Korean, and Mandarin. In addition, a helpline was available for people who prefer to call or do not have internet access so they could leave comments, ask questions and take a survey by phone. Multilingual speakers were available to help callers take the survey in language. Postcards were also mailed to identified disadvantaged and low-income communities in the South County area so they directly received information about the survey, helpline number and public meetings.

Communication tool kits were also sent to all south Orange County cities, key stakeholders and OCTA's Citizens Advisory Committee, Special Needs Advisory Committee and Diverse

Community Leaders Group. Targeted Facebook and geofencing ads were also placed in the aforementioned multiple languages.

Public Engagement Survey

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 3,273 individuals visited the survey website, and 1,708 surveys were collected (1,706 English, 2 Spanish).

Key Findings

The survey respondents prioritized the various opportunities to improve future transportation and mobility challenges within south Orange County that were proposed in Phase 1 of the study. From the 1,700+ people surveyed – who reflect a wide range of demographics and preferences – a majority would like OCTA to:

- Increase availability and make improvements to public transit/ rail
- Provide more alternatives to driving and enhance accessibility (trolleys, biking, light rail, walking, etc.)
- Offer flexible roadway pricing based on demand
- Not add more toll roads
- Focus on current roads and freeways to expand, improve and better connect paths for active transportation (pedestrian, bicycle, etc.)

The summary below presents the top-ranked results related to participants priorities on transportation and mobility strategies, improvements and goals. See Appendix B for the full survey results.

Table 1: Summary of Key Findings

Top Ranked	Second Ranked	Third Ranked
Priority Ranking – Transportation Needs (1,429 responses ranked a strategy as the top priority)		
Making public transit, bicycling, and walking more convenient and accessible	Protecting the environment and preserving transportation infrastructure	Decreasing the overall number of trips made each day

Top Ranked	Second Ranked	Third Ranked
28%	26%	24%
Set Your Budget – Transportation Strategy Budget Allocation (\$100 budget allocation)		
Reduce freeway bottlenecks	Make rail and transit improvements	Implement technology-based improvements
Average Amount: \$23.99	Average Amount: \$16.83	Average Amount: \$13.48
Effective Strategy Rating (1-5 star rating scale)		
Enhanced Train and Bus Service (1,677 individuals rated 5 stars)		
More Train Service 34%	Reliable Bus Service 26%	Freeway Bus Routes 20%
Efficient Roads and Freeways (1,832 individuals rated 5 stars)		
Technology 37%	Freeway Performance 37%	Freeway Access 26%
Improved Active Transportation (1,590 individuals ranked 5 stars)		
Safety Improvements 38%	Connect Paths 34%	Road Space Reconfiguration 28%
Reduced Car Dependency (1,590 individuals rated 5 stars)		
Transit 24%	Integrated Trip Planner 22%	Biking and Walking Incentives 20%
Pricing Strategies (687 individuals rated 5 stars)		
User Pricing 37%	Incentivize Toll Roads (e.g. 241 Toll Road) 33%	Price-Managed Lanes (e.g. tolled 91 Express Lanes) 29%
New Technologies (1,271 individuals rated 5 stars)		
Broadband 40%	Electric Vehicles 38%	Self-Driving Vehicles 21%

SURVEY OVERVIEW

Survey Format

The Phase 2 survey was offered in English, Spanish, Mandarin, Korean, and Vietnamese to accommodate the south Orange County population demographics. An online survey was created using MetroQuest to provide an interactive experience while collecting more detail responses. 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 23 questions that focused on prioritizing the transportation strategies based off the study's results from Phase 1.

The survey included several pages with different formats to respond to questions. After the "Welcome" page, respondents were taken to the "Transportation Needs" question, where they could rank 4 transportation goals by what was most important to them. The third page of the survey contained the "Set Your Budget" question. This question allowed respondents to virtually allocate tokens to invest in the transportation strategies they prefer. Following this question was the "Strategy Rating" page. Survey participants were asked to give 1-5 stars to rate how effective they believe each strategy is for improving transportation in south Orange County.

The survey concluded with optional demographic questions related to age, ethnicity, and location, as well as a sign-up to receive project updates and a link to the study's website. Participants were able to take the survey through a desktop or on their mobile device.

Survey Outreach

Several channels were utilized to notify the south Orange County community of the survey. The engagement methods included targeted advertisement through geofencing and Facebook, mailed postcards, online tools, social media, and communication toolkits distributed to cities and stakeholders within the project area. Reference Appendix D for all outreach efforts.

Geofencing, a location-based online advertising tool, was utilized to promote the survey to a wide audience and allowed the Project Team to focus on specific south Orange County zip codes to ensure the survey reached the target audience. Bilingual advertisements were promoted in Spanish, Mandarin, Korean, and Vietnamese. The multi-lingual geofencing ad campaign led to 400,009 impressions, which is the indicator of how many users saw the ad. These impressions led to an overall clickthrough rate (CTR) of .13% in one month compared to an industry average of 2% which is accumulated over multiple months. In relation to geofencing, the CTR is the ratio showing how often individuals who saw the study's ad ended up clicking on it. The ad campaign's CTR resulted in a total of 538 clicks. The number of clicks is the measurement of how many people engaged with the ad. See Appendix C for the geofencing raw data results.

The virtual meeting room provided a supplementary interactive experience for those interested in the study. Participants could learn more about the study, submit comments, register for future project updates, and access the study's survey link. OCTA's Study VMR gave south Orange County residents an additional opportunity to provide more feedback outside of the survey format. The VMR was promoted along with the survey in social media posts, advertisements, and email outreach.

Through the various outreach methodologies, the online survey was successfully distributed to a wide target audience which provided quality data for an analysis of the results. Refer to Table 2 for an overview 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"> Low income community Disadvantaged community Stakeholder database (including Phase 1 participants, community organizations, city staff, major businesses, and facilities, etc.) 	<ul style="list-style-type: none"> Mailed postcards to over 13,200 stakeholders (English/ Spanish; interpretation was offered in Korean, Mandarin and Vietnamese) Featured on project webpage
2.	Facebook Ads (also distributed through Facebook Messenger and Instagram) and Facebook Posts <ul style="list-style-type: none"> 15 Facebook Ads 4 Regular Posts 	<ul style="list-style-type: none"> South Orange County Zip codes with a high Spanish, Korean, Vietnamese and Mandarin Population 	<ul style="list-style-type: none"> English Ads Statistics <ul style="list-style-type: none"> Total Reach: 8,609 Total Link Clicks: 91 Spanish Ads Statistics <ul style="list-style-type: none"> Total Reach: 7,940 Total Link Clicks: 108 Korean Ads Statistics <ul style="list-style-type: none"> Total Reach: 4,994 Total Link Clicks: 47 Vietnamese Ads Statistics <ul style="list-style-type: none"> Total Reach: 5,146 Total Link Clicks: 53 Mandarin Ads Statistics <ul style="list-style-type: none"> Total Reach: 4,485 Total Link Clicks: 52

#.	Notification Method	Audience	Notes
			<ul style="list-style-type: none"> English Regular Post Statistics <ul style="list-style-type: none"> Total Reach: 2,670 Total Link Clicks: 62
3.	Twitter Posts	<ul style="list-style-type: none"> OCTA Twitter Followers and General Public 	<ul style="list-style-type: none"> 5 Posts <ul style="list-style-type: none"> Total Retweets: 7 Total Likes: 8
4.	Geofencing Ads	<ul style="list-style-type: none"> South Orange County Zip codes with a high Spanish, Korean, Vietnamese and Mandarin Population 	<ul style="list-style-type: none"> English/Spanish Statistics <ul style="list-style-type: none"> Total Impressions: 286,670 Total Clicks: 368 English/Korean Ads Statistics <ul style="list-style-type: none"> Total Impressions: 26,667 Total Clicks: 42 English/Vietnamese Ads Statistics <ul style="list-style-type: none"> Total Impressions: 26,672 Total Clicks: 51 English/Mandarin Ads Statistics <ul style="list-style-type: none"> Total Impressions: 60,000 Total Clicks: 77
5.	Communications Toolkit	<ul style="list-style-type: none"> South county cities and the County OCTA's Citizen's Advisory Committee, Special Needs Advisory Committee, and Diverse Community Leaders Group Transportation partners Environmental Community HOAs Chambers of Commerce 	<ul style="list-style-type: none"> Provided instructions to distribute the survey via electronically to the stakeholder's constituents.

#.	Notification Method	Audience	Notes
6.	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 Phase 1 participants, HOAs, community organizations, city staff, major businesses, and facilities, etc.) 	<ul style="list-style-type: none"> Eblast distributed to stakeholder database (over 800 stakeholders) and OCTA customer database (36,540). Blog article distributed to 12,700 readers
7.	Announcement at meetings	<ul style="list-style-type: none"> Stakeholder Roundtable Technical Working Group meetings Transportation Agency Working Group Meetings Telephone Townhall Meeting Presentation to the City of San Clemente, City of Lake Forest and South Orange County Economic Coalition Public Webinar Elected Officials Roundtable 	<ul style="list-style-type: none"> Survey link was provided at each meeting
8.	News Release	<ul style="list-style-type: none"> Media outlets 	<ul style="list-style-type: none"> The release promoted the Telephone Townhall as well as the online survey, Virtual Meeting Room and project information phone line.
9.	Virtual Meeting Room	<ul style="list-style-type: none"> South Orange County Stakeholder database (including Phase 1 participants, HOAs, community organizations, city staff, major businesses, and facilities, etc.) 	<ul style="list-style-type: none"> 171 users, with an average of 1 minute and 20 seconds of engagement time per session 14 registrations and 7 comment forms completed Open for the entirety of Phase 2 Survey link provided in VMR

SURVEY RESULTS ANALYSIS

The survey results were analyzed based on the 1,708 responses collected from the 23-question survey.

Geographic Distribution

Over half of the survey respondents indicated they both lived and worked in south Orange County.

Home Zip Code

Out of the 1,708 surveys collected, 76% of the respondents shared their home zip code (1,301) and 84% of those respondents shared they live within the project area as shown in Figure 1. 12% 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 (in Ladera Ranch) with some respondents immediately adjacent to the west of the project area. There was a higher concentration of survey participants in San Clemente, San Juan Capistrano, Laguna Niguel, Aliso Viejo and Rancho Santa Margarita. Although the responses are concentrated more in some areas than others, the responses collected are spread throughout the entire project area, especially when combined with the work zip codes.

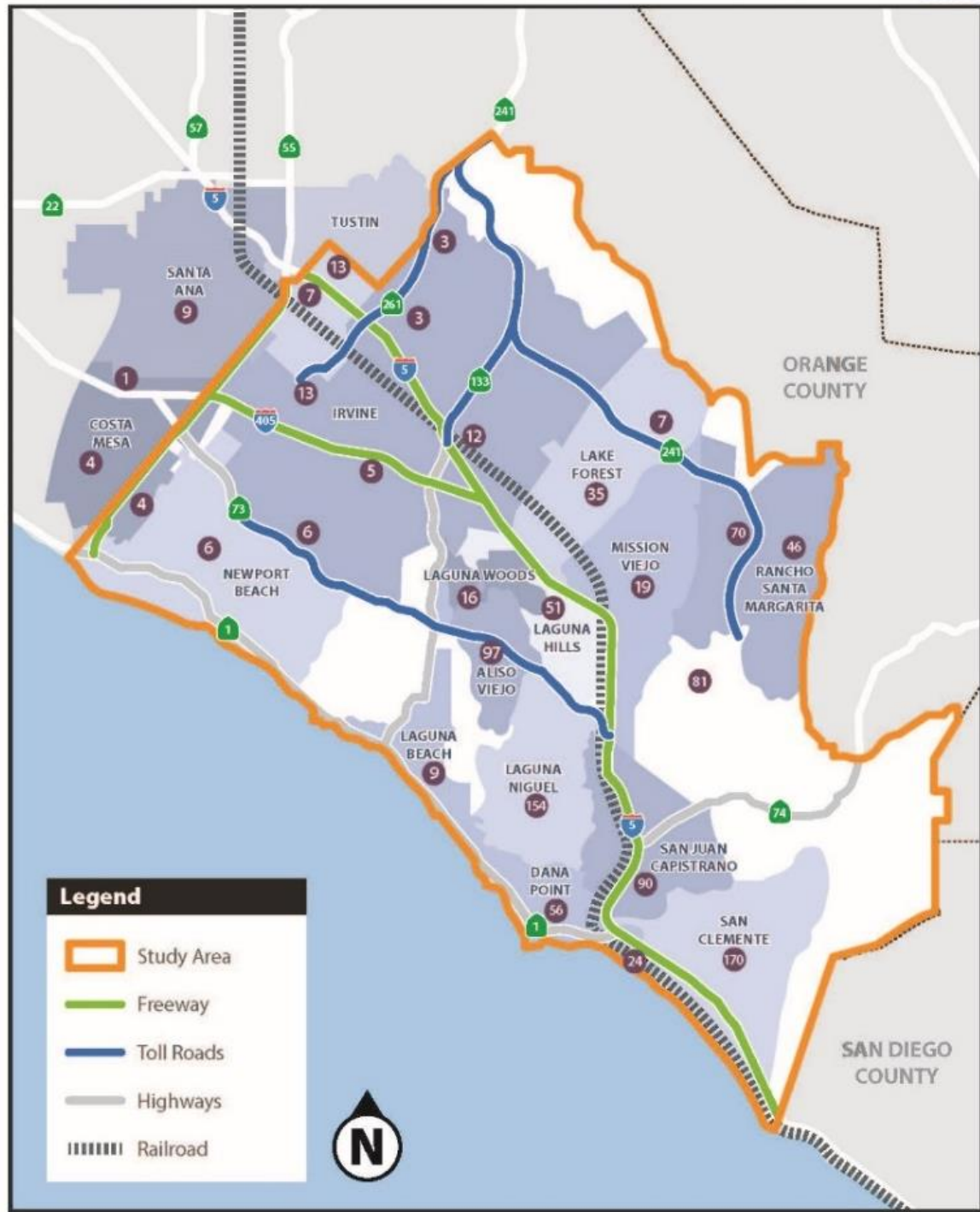


Figure 1: Survey Respondents - Home Zip Code

Work Zip Code

56% of the survey respondents (952) indicated their work zip code and from these respondents, 69% indicated their work zip code is within the project area. There was a higher concentration of survey participants in San Clemente, the south Irvine area, and Mission Viejo. The work zip codes varied from the home zip codes, having a higher number of respondents from the east project area. The overall number of work zip code responses collected are more evenly distributed throughout the entire project area compared to the home zip code distribution.

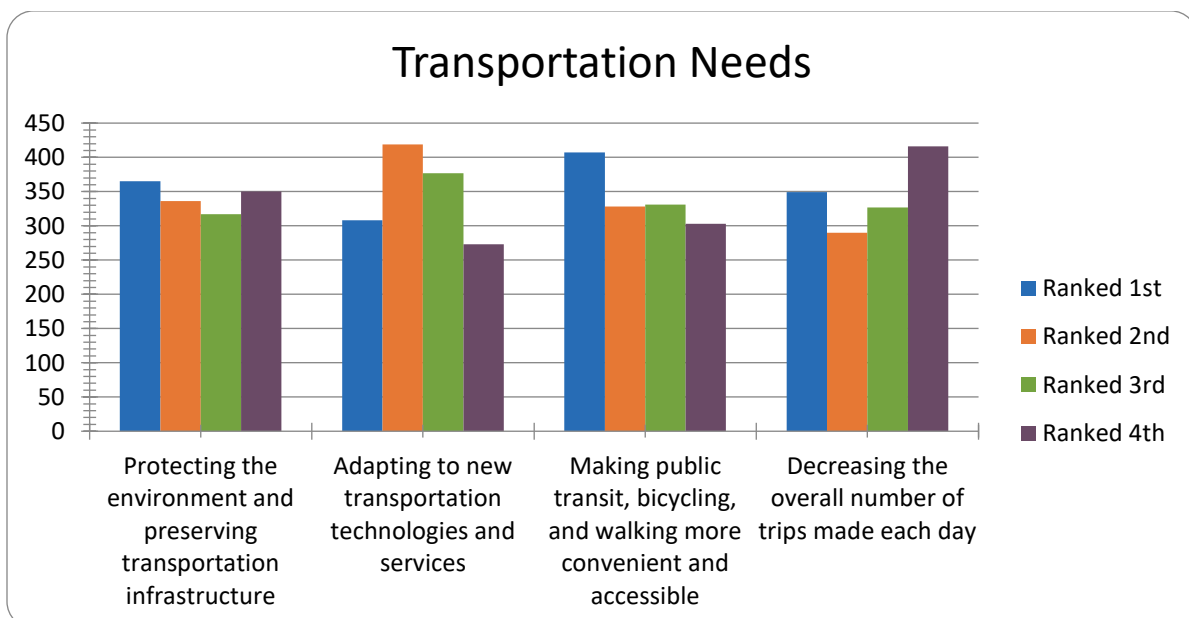


Figure 2: Survey Respondents - Work Zip Code

Priority Ranking - Transportation Needs

One question was asked to analyze the transportation needs most important to survey participants in south Orange County. The table below gives an overview of how many times each option was ranked in first, second, third, and fourth. Overall, the option “making public transit, bicycling, and walking more convenient and accessible” was ranked first the greatest number of times, revealing this was the most important transportation need to a majority of participants. Additional comments provided by survey participants on this question are also included in Appendix B.

Option	Ranked 1 st (Top)	Ranked 2 nd	Ranked 3 rd	Ranked 4 th
Protecting the environment and preserving transportation infrastructure <i>*Based on 1,368 respondents</i>	365	336	317	350
Adapting to new transportation technologies and services <i>*Based on 1,377 respondents</i>	308	419	377	273
Making public transit, bicycling, and walking more convenient and accessible <i>*Based on 1,369 respondents</i>	407	328	331	303
Decreasing the overall number of trips made each day <i>*Based on 1,382 respondents</i>	349	290	327	416



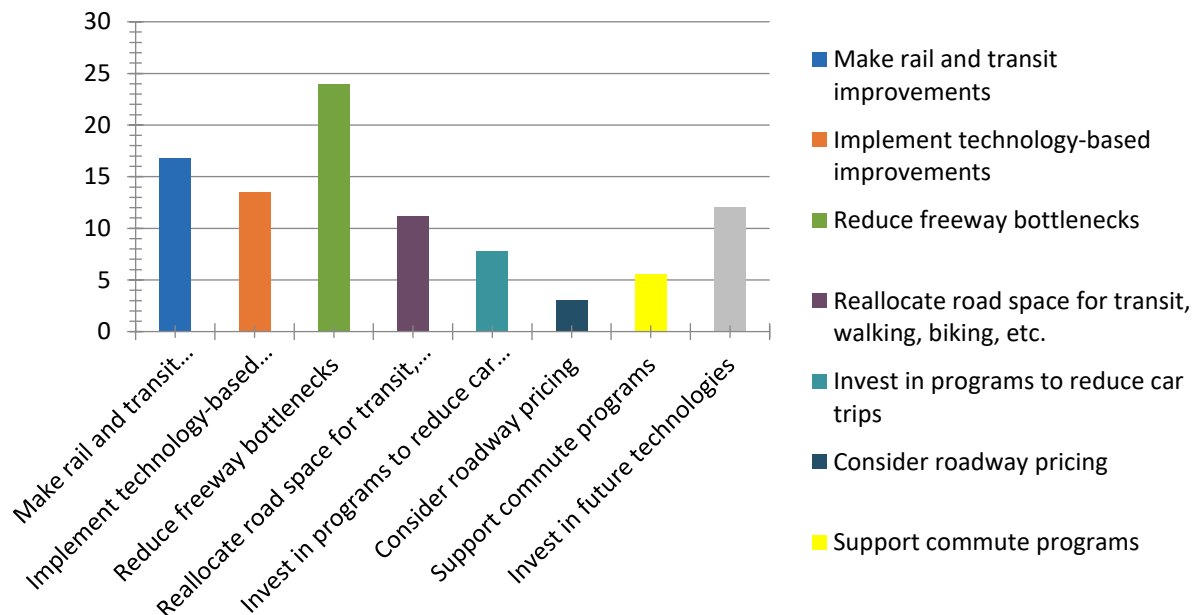
Set Your Budget – Transportation Strategy Budget Allocation

One question asked participants to allocate virtual tokens to represent the transportation strategies they believe should be invested in. Participants were allotted \$100 to distribute. Results are based off of 1,439 English participants and 1 Spanish participant. Survey respondents gave precedent to reducing freeway bottlenecks, making rail and transit improvements, and implementing technology-based improvements. Additional comments can be viewed in Appendix B.

#	Option	Average Dollar Amount
1.	Make rail and transit improvements	\$16.83
2.	Implement technology-based improvements	\$13.48
3.	Reduce freeway bottlenecks	\$23.99
4.	Reallocate road space for transit, walking, biking, etc.	\$11.22
5.	Invest in programs to reduce car trips	\$7.77
6.	Consider roadway pricing	\$3.07
7.	Support commute programs	\$5.57
8.	Invest in future technologies	\$12.08

* Based upon 1,440 respondents

Average Dollar Amount Allocated

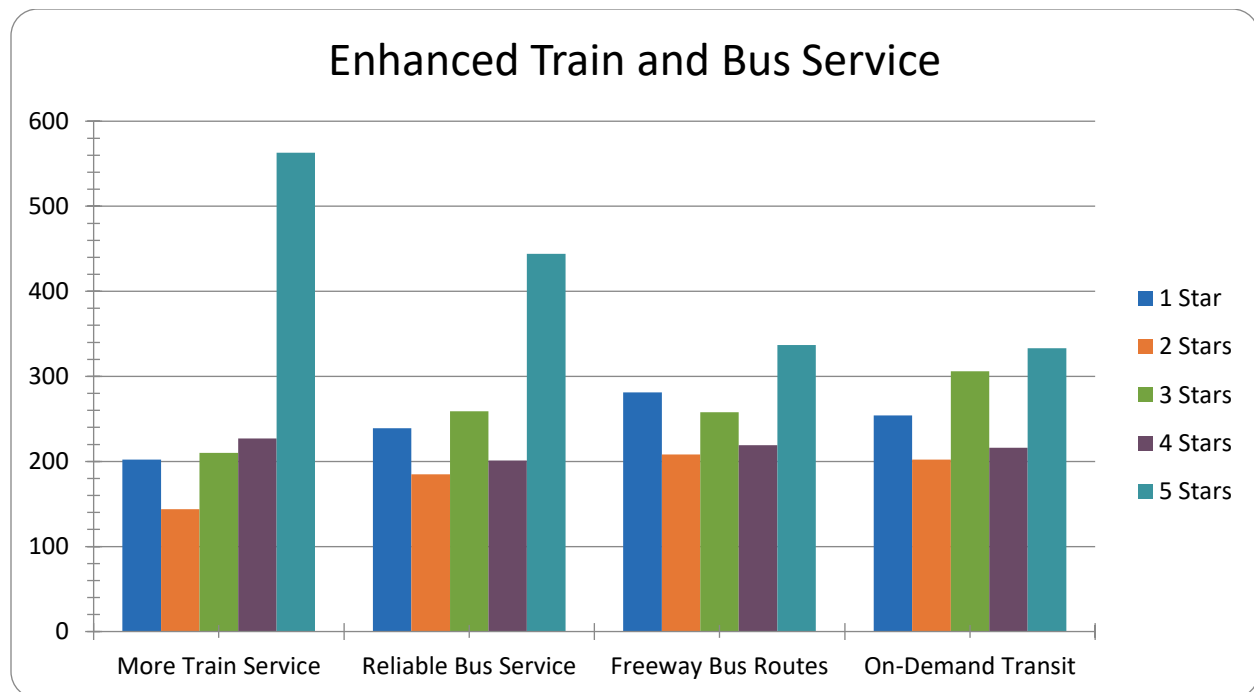


Effective Strategy Rating

Participants were asked to provide a 1-5 star rating, with 1 being the least, on how effective they think each strategy would be in improving travel in south Orange County. There was a total of 21 strategies to rate, organized by 6 categories. Only English participants provided feedback for this specific question.

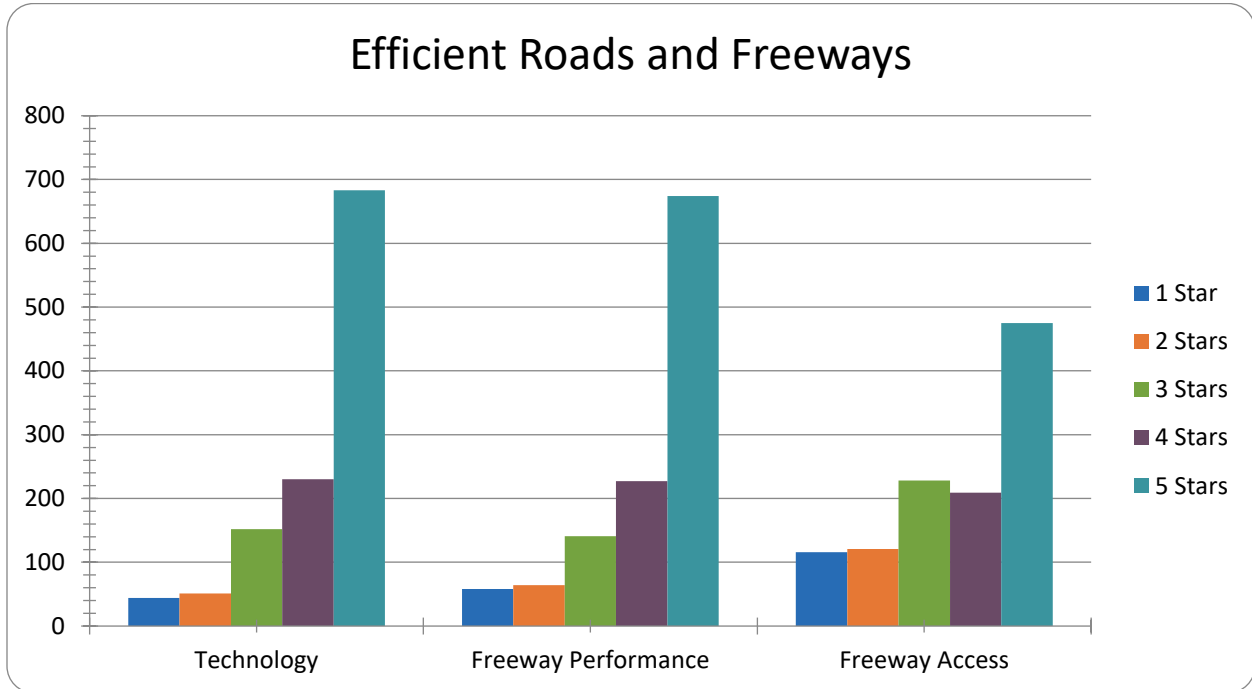
The rating of each option reveals the level of priority respondents believe each strategy should possess. The data from this question shows that the following from each category were rated 5 stars the most times: more train service, technology/ freeway performance, safety improvements, transit, price-managed lanes, and broadband. Survey participants believe focusing on these strategies would be the most beneficial to improving mobility. The bar graphs below provide detail on how many times each strategy was given a 1-5 star rating. Additional comments can be viewed in Appendix B.

Enhanced Train and Bus Service



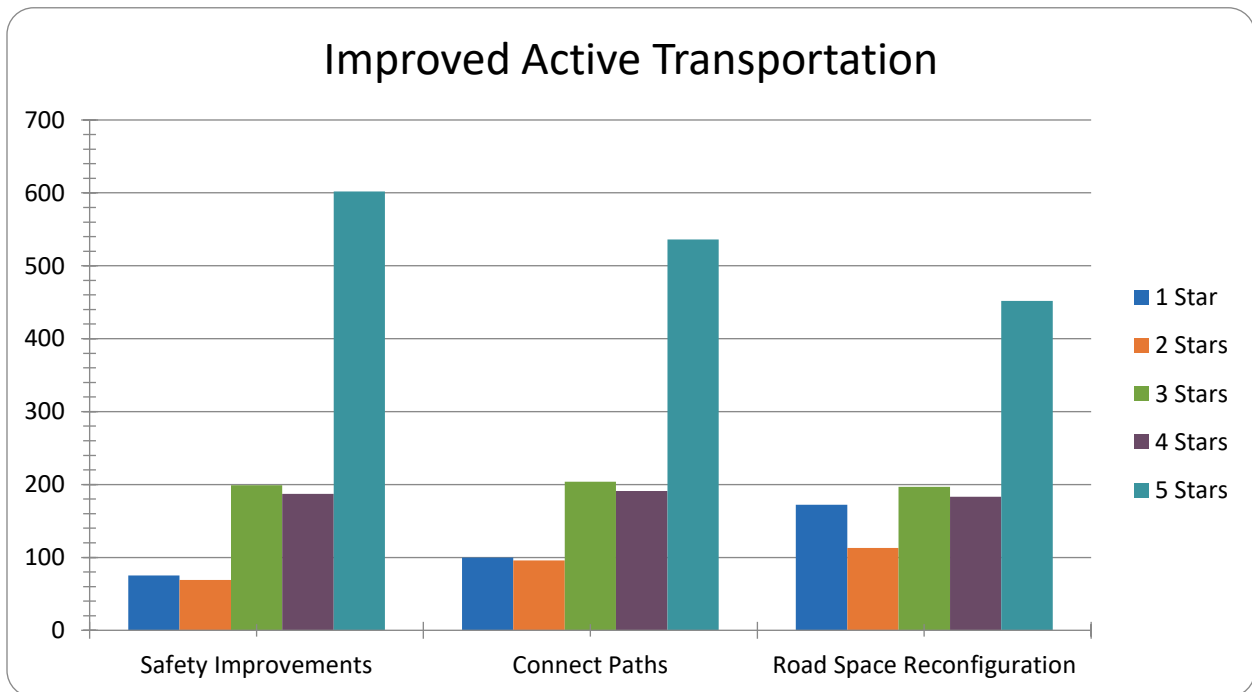
*Based upon 563 respondents

Efficient Roads and Freeways



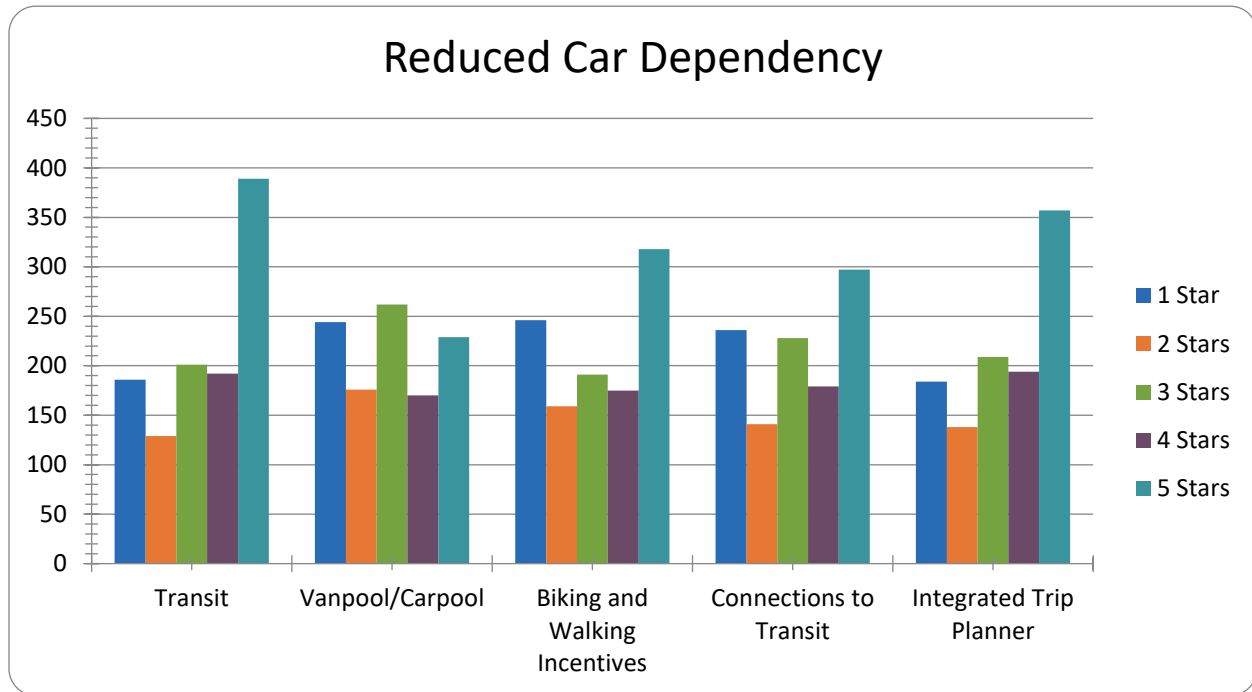
*Based upon 683 respondents

Improved Active Transportation



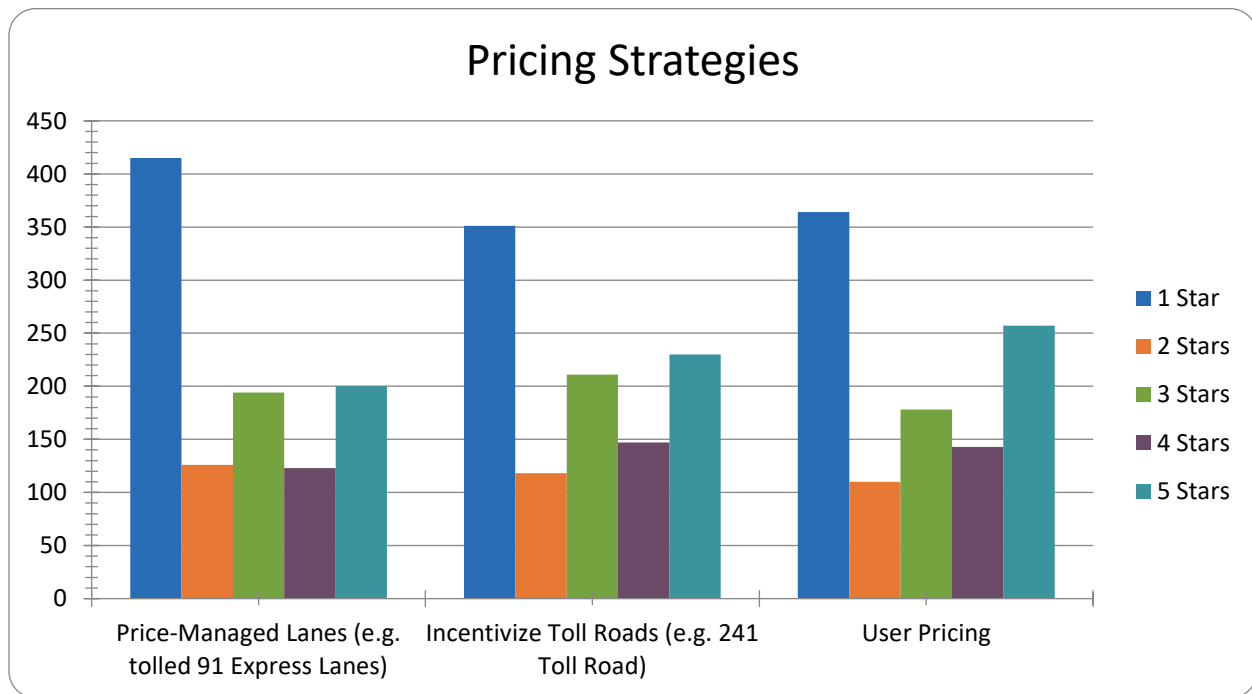
*Based upon 602 respondents

Reduced Car Dependency



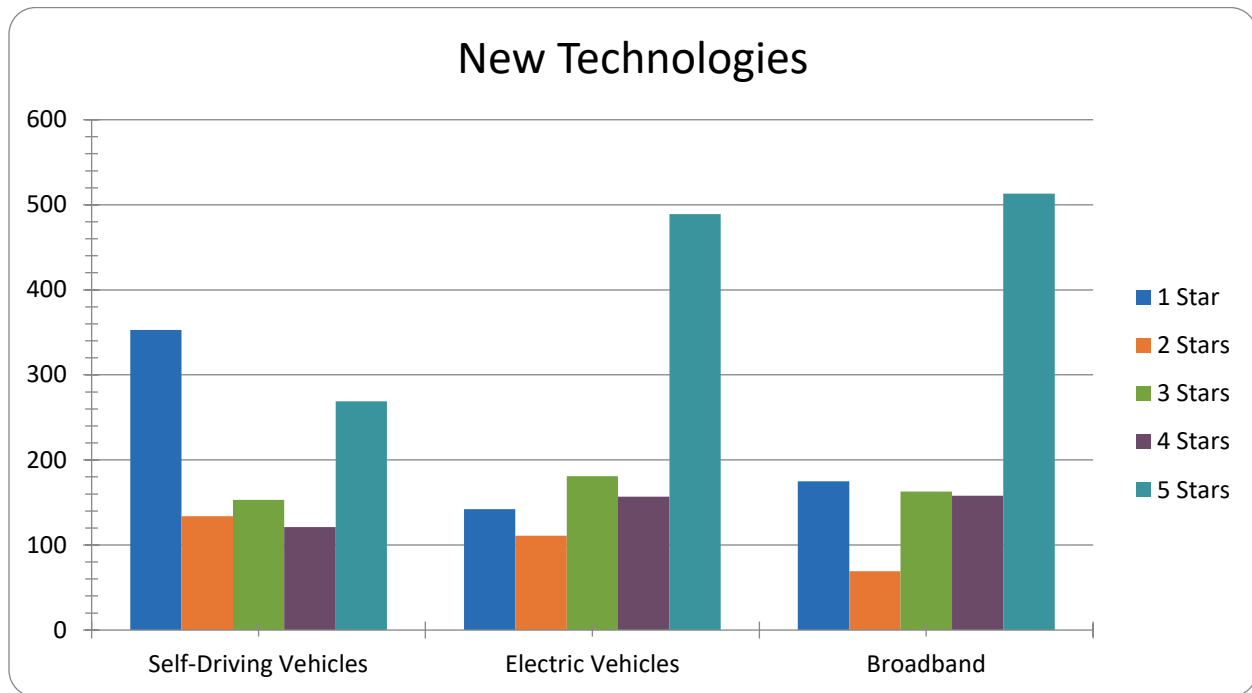
*Based upon 389 respondents

Pricing Strategies



*Based upon 415 respondents

New Technologies



*Based upon 513 respondents

Stay Involved

A total of 474 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 3.

CONCLUSION

The ranking question format in this survey allows the Project Team to review a broader spectrum of detailed responses. The survey's compiled results showed respondents value the following: increasing availability and making improvements to public transit/ rail; making driving alternatives more accessible (biking, walking, etc.); offering flexible roadway pricing based on demand; not adding more toll roads; and focusing on current roads and freeways to expand and improve.

During Phase 3 of the PIP, OCTA will further analyze the remaining strategy options in order to recommend a Locally Preferred Strategy (LPS). Analysis of the feedback garnered during Phases 1 and 2 will aid OCTA in creating and proposing the LPS to effectively improve future transportation in south Orange County.

Appendices

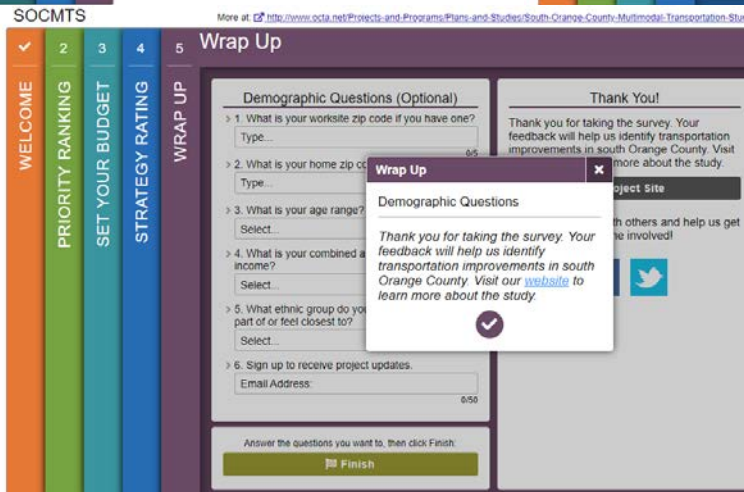
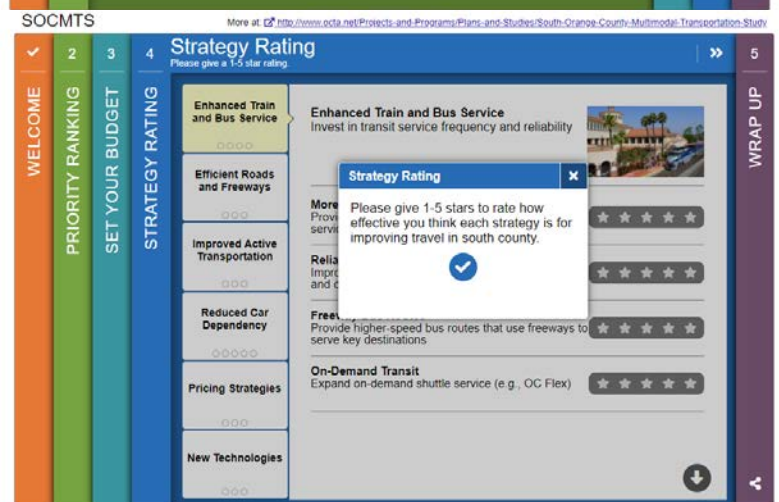
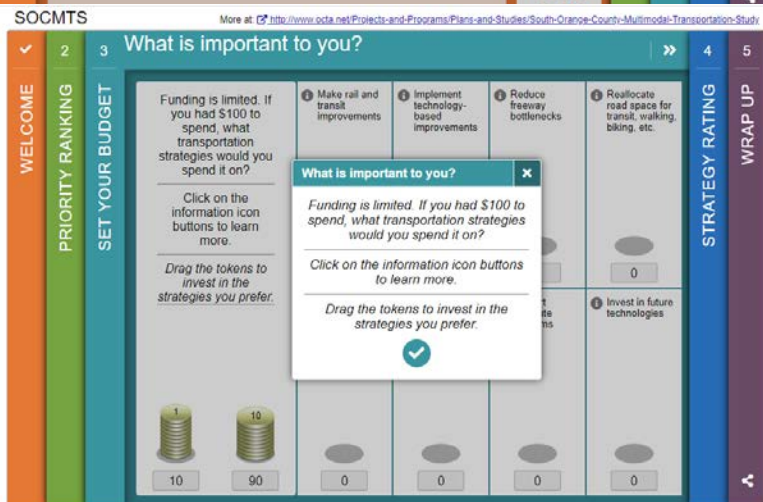
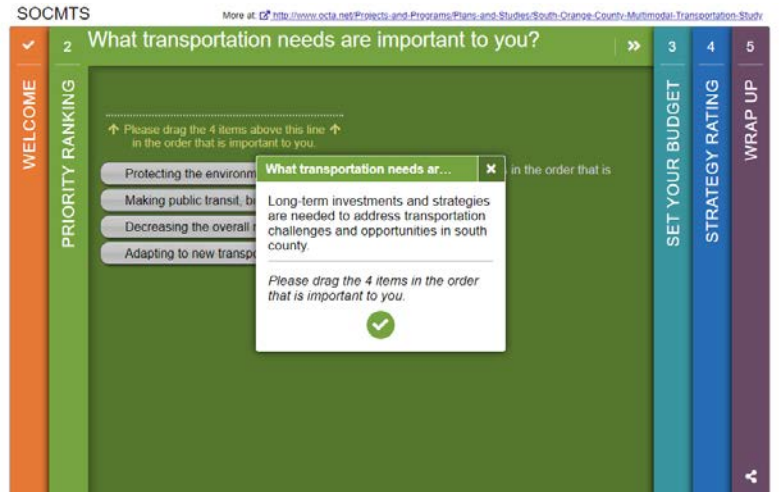
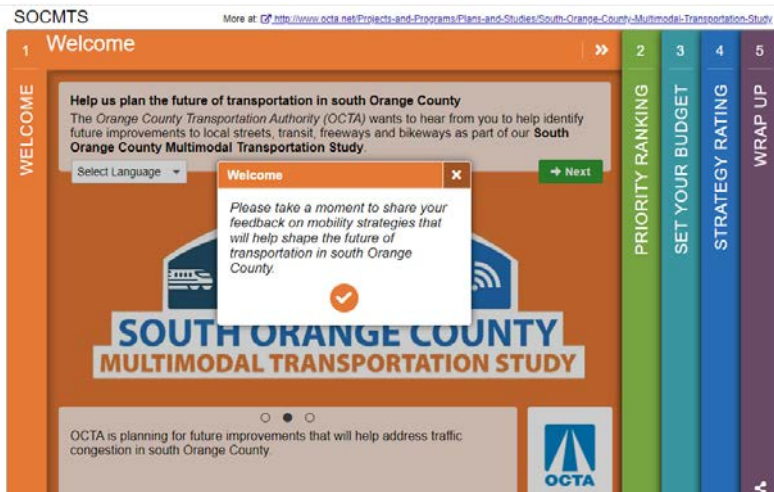
Appendix A Surveys

**Appendix A.1 Online Survey (English;
Spanish; Mandarin; Korean;
Vietnamese)**

Appendix A.2 Phone Survey Script

Appendix A

Appendix A.1 Online Survey (English; Spanish; Mandarin; Korean; Vietnamese)



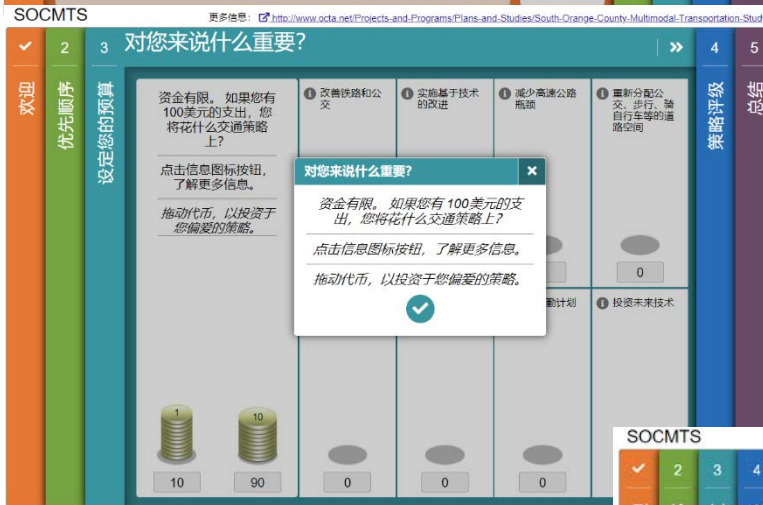
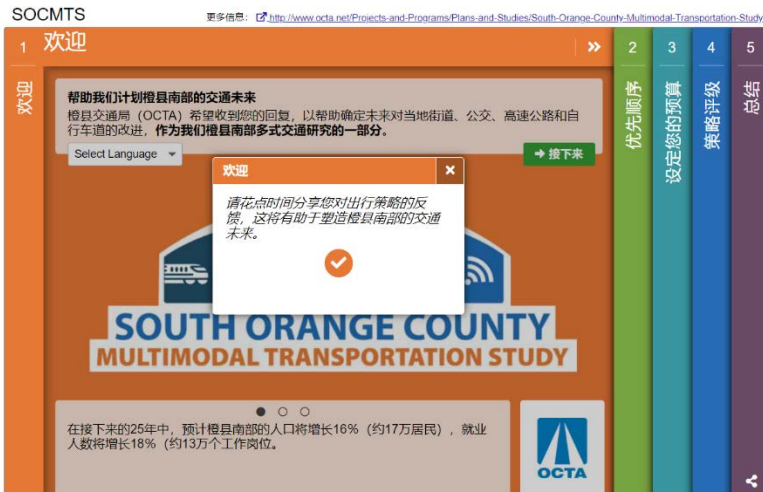
SOCMTS Para más información: <http://www.octa.net/Projects-and-Programs/Plans-and-Studies/South-Orange-County-Multimodal-Transportation-Study>

[Confidencialidad](#) - [Sobre MetroQuest](#)

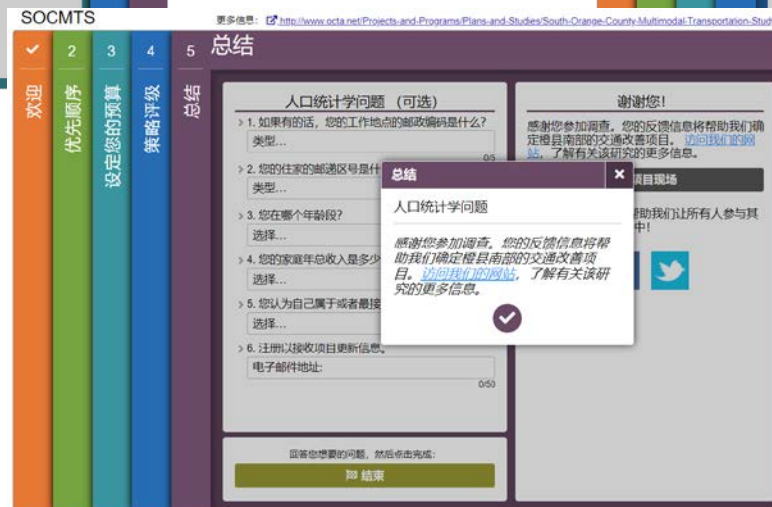
Confidencialidad - Sobre MetroQuest

Para más información: <http://www.octa.net/Projects-and-Programs/Plans-and-Studies/South-Orange-County-Multimodal-Transportation-Study>

[Confidencialidad](#) - [Sobre MetroQuest](#)



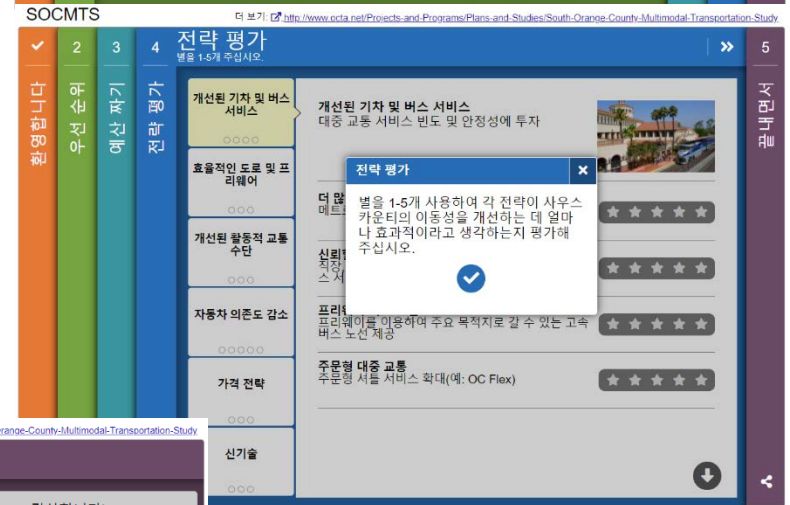
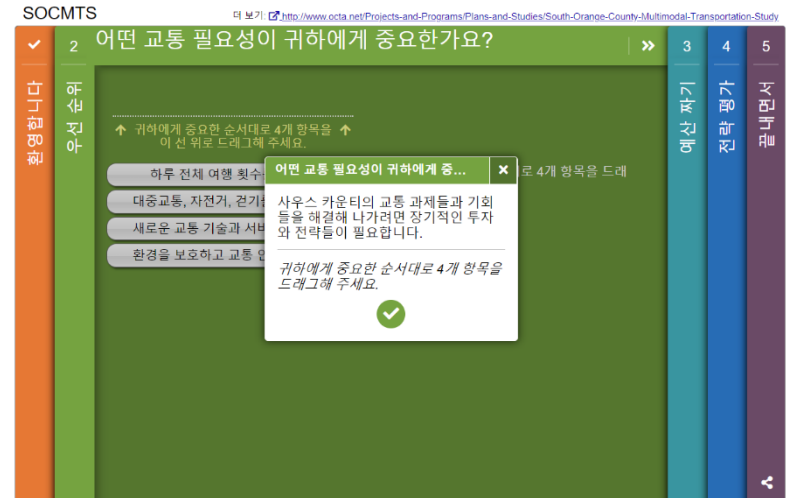
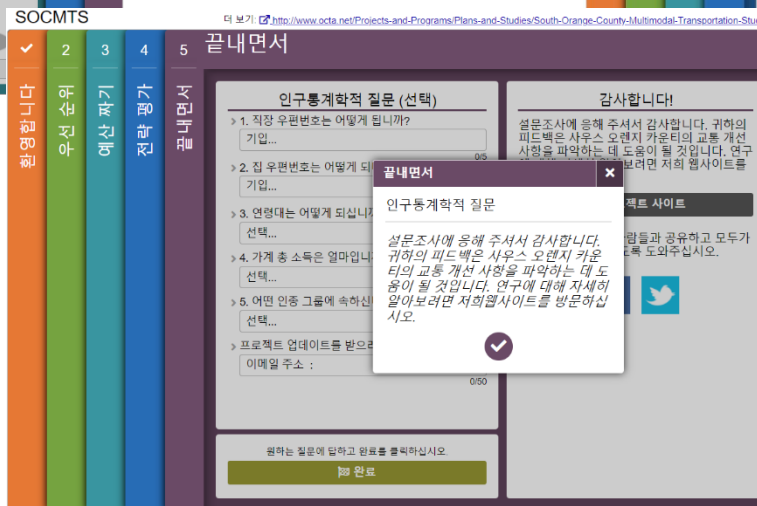
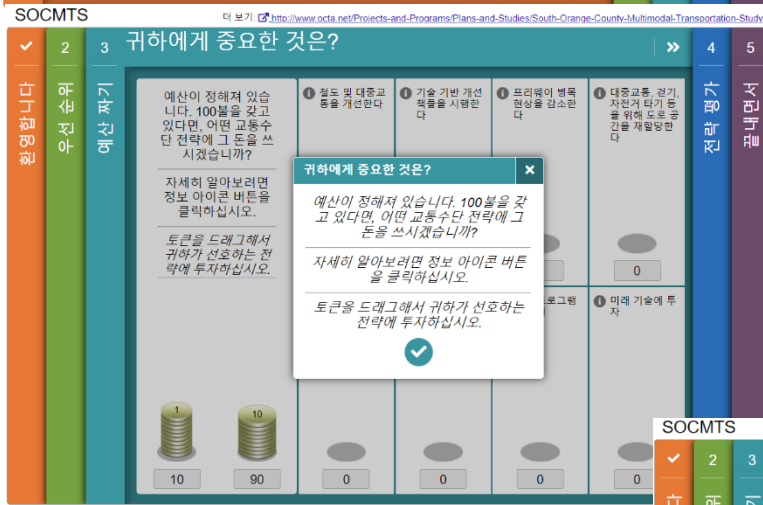
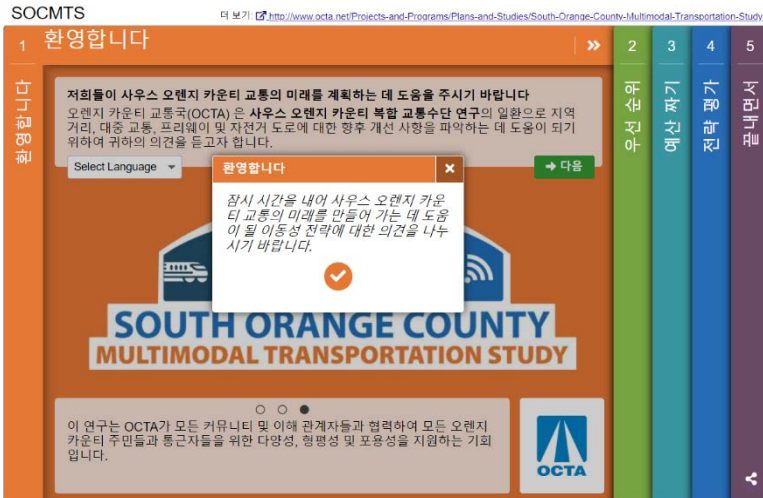
隐私 - 关于 MetroQuest

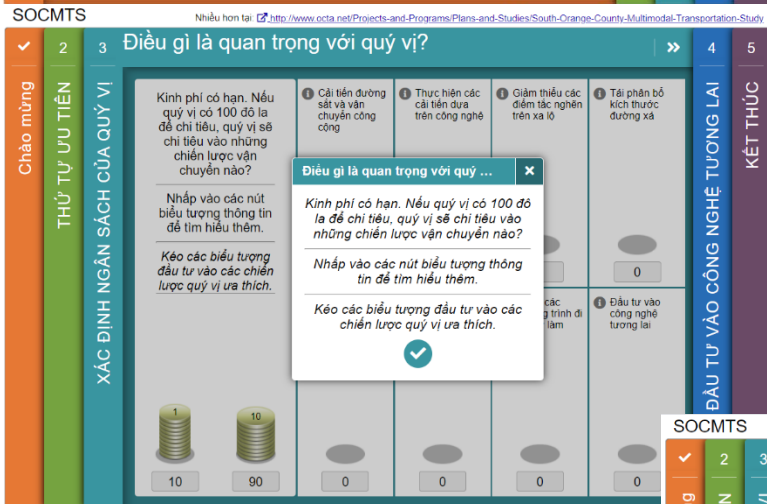
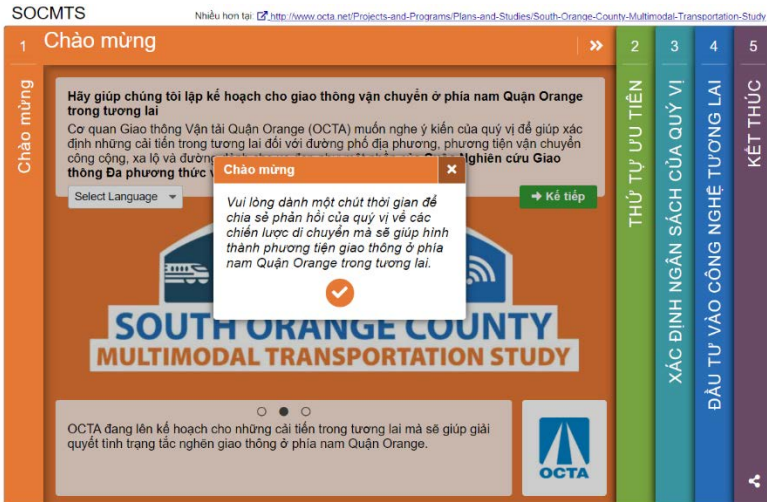


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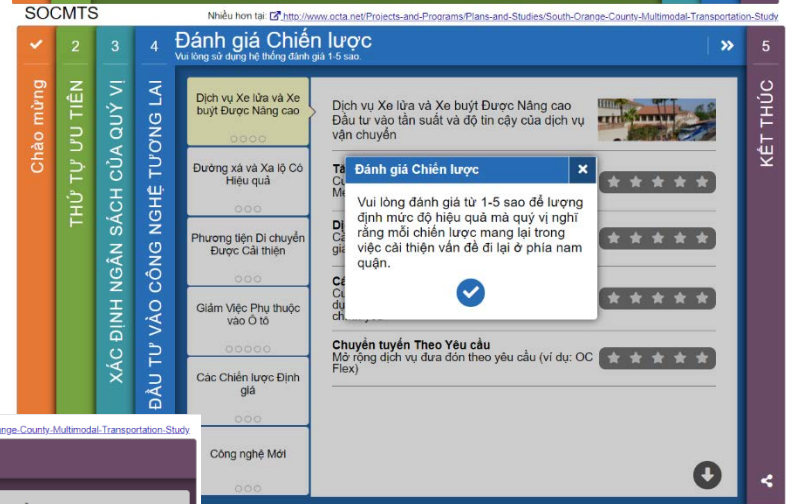


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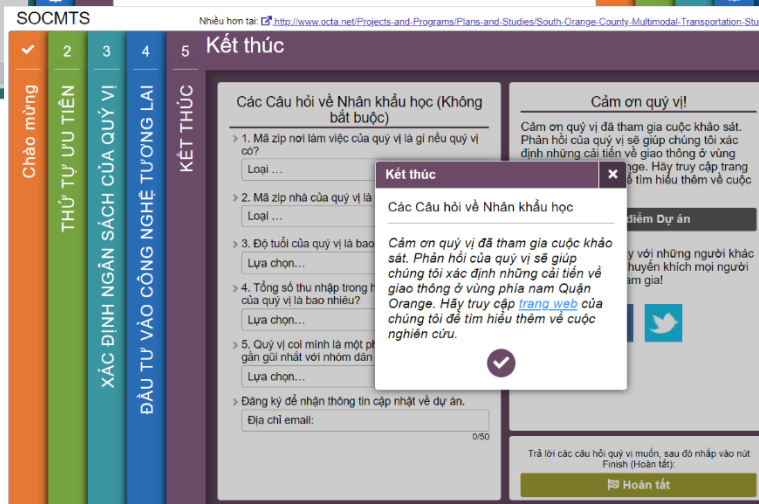




Riêng tư - Giới thiệu về MetroQuest



Riêng tư - Giới thiệu về MetroQuest



Riêng tư - Giới thiệu về MetroQuest

Appendix A

Appendix A.2 Phone Survey Script

OCTA SOCMTS Phase 2 Live Answer Phone Survey Script

English

Advise: "Thank you! The Orange County Transportation Authority (OCTA) is planning for future improvements that will help address traffic congestion in south Orange County. We want to hear from you to help identify future improvements to local streets, transit, freeways and bikeways as part of our study. I will now proceed with asking you the survey questions."

Ask VERBATIM: "Let's start by ranking the following transportation needs from most important to least important for you?"

A. Decreasing the overall number of trips made each day (Freeways and the street system near freeway interchanges in south county are consistently congested. Population and employment growth are projected to increase by approximately 20% by 2045, which would worsen traffic.)

B. Making public transit, bicycling, and walking more convenient and accessible (The automobile-focused street network in south county present challenges for providing efficient transit service, meeting the travel needs of non-drivers, and supporting safe travel conditions for all users. Land use patterns that are dominated by single family housing separated from shopping and jobs are another challenge.)

C. Adapting to new transportation technologies and services (Advancements in technologies such as autonomous vehicles, high-speed electric vehicle charging, and e-bikes could change travel behaviors and how traffic operates. Increased levels of telework and telemedicine and lingering COVID-19 concerns could decrease travel overall.)

D. Protecting the environment and preserving transportation infrastructure (Vehicular emissions negatively affect air quality and contribute to climate change. Risks like rising sea level, extreme heat events, and increased frequency of wildfires threaten the transportation network)

* Transportation Need (1st)

* Transportation Need (2nd)

* Transportation Need (3rd)

* Transportation Need (4th)

Ask VERBATIM: "Given funding is limited, which of the following transportation strategies are the most important to you? Please pick your top three. "

A. Make rail and transit improvements

B. Implement technology-based improvements

C. Reduce freeway bottlenecks

D. Reallocate road space for transit, walking, biking, etc.

E. Invest in programs to reduce car trips

F. Consider roadway pricing

G. Support commute programs

H. Invest in future technologies

* Transportation Strategy 1

* Transportation Strategy 2

* Transportation Strategy 3

Advise VERBATIM: "Please give 1-5 stars to rate how effective you think each strategy is for improving travel in south county."

Advise: "These first 4 strategies are in relation to Enhanced Train & Bus Service - Investing in transit service frequency and reliability."

1. More Train Service

Provide infrastructure needed to increase Metrolink service

* More Train Service # of Stars (1-5)

2. Reliable Bus Service

Improve bus service to jobs, education, shopping, and other activities

* Reliable Bus Service # of Stars (1-5)

3. Freeway Bus Routes

Provide higher-speed bus routes that use freeways to serve key destinations

* Freeway Bus Routes # of Stars (1-5)

4. On-Demand Transit

Expand on-demand shuttle service (e.g., OC Flex)

* On-Demand Transit # of Stars (1-5)

Advise: "These next 3 strategies are in relation to Efficient Roads and Freeways - Improving performance of roads."

1. Technology

Use signal timing and other technologies to reduce traffic congestion

* Technology # of Stars (1-5)

2. Freeway Performance

Implement strategies to address freeway bottlenecks

* Freeway Performance # of Stars (1-5)

3. Freeway Access

Add or improve freeway ramps to reduce congestion

* Freeway Access # of Stars (1-5)

Advise: "These next 3 strategies are in relation to Improved Active Transportation - Making bicycling and walking safer and more convenient."

1. Safety Improvements

Invest in safety improvements at locations with frequent accidents

* Safety Improvements # of Stars (1-5)

2. Connect Paths

Complete missing sidewalk and bike lane connections

* Connect Paths # of Stars (1-5)

3. Road Space Reconfiguration

Reconfigure some streets to provide safe facilities for pedestrians, bicyclists, and/or low-speed electric vehicles (e.g., e-bikes, electric scooters)

* Road Space Reconfig # of Stars (1-5)

Advise: "These next 5 strategies are in relation to Reduced Car Dependency - Encouraging transportation options other than driving alone."

1. Transit

Offer reduced fare programs to enhance access to bus and Metrolink services

* Transit # of Stars (1-5)

2. Vanpool/Carpool

Provide incentive and reward programs for vanpooling or carpooling

* Van/Carpool # of Stars (1-5)

3. Biking and Walking Incentives

Provide subsidies and education programs for people who use a form of active transportation

* Biking/Walking # of Stars (1-5)

4. Connections to Transit

Provide subsidies for rideshare services like Uber/Lyft to and from transit stations

* Connect to Transit # of Stars (1-5)

5. Integrated Trip Planner

Support smartphone apps that can plan, book, and pay for multiple mobility services (e.g., shared car or bike, train, bus) and get from point A to B based on preferred cost, time, and convenience

* Integrated Trip Planner # of Stars (1-5)

Advise: "These next 3 strategies are in relation to Pricing Strategies - Providing incentives or disincentives to manage use of roadways"

1. Price-Managed Lanes (e.g. tolled 91 Express Lanes)

Carpool lanes on freeways are free for vehicles with three or more persons, but others can use the lanes if they pay a toll

* Price-Managed Lanes # of Stars (1-5)

2. Incentivize Toll Roads (e.g. 241 Toll Road)

Provide incentives to encourage more drivers to use the toll roads.

* Incentivize Toll Roads # of Stars (1-5)

3. User Pricing

Charge drivers low or no fees at low-demand times and higher fees at high-demand times to ensure reliable travel conditions

* User Pricing # of Stars (1-5)

Advise: "These next 3 strategies are in relation to New Technologies - Supporting emerging transportation technologies and broadband infrastructure"

1. Self-Driving Vehicles

Require self-driving vehicles to operate in a designated freeway lane

* Self-Driving Vehicles # of Stars (1-5)

2. Electric Vehicles

Invest in charging infrastructure for electric vehicles

* Electric Vehicles # of Stars (1-5)

3. Broadband

Invest in broadband infrastructure to support increased work-from-home and new technologies like self-driving cars

* Broadband # of Stars (1-5)

Advise VERBATIM: "Thanks for your input! Now, please tell us a little about yourself. These next questions are optional so if you prefer not to answer a particular question then just let me know."

Ask VERBATIM: "What is your worksite zip code if you have one?"

* Worksite Zipcode

Ask VERBATIM: "What is your home zip code?"

* Home Zipcode

Ask VERBATIM: "What is your age range?"

* Age Range - Conditional:

16-24

25-34

35-44

45-54

55-64

65-74

75 or older

Prefer Not to Answer

Ask VERBATIM: "What is your combined annual household income?"

* Annual Household Income - Conditional:

Less than \$30,000

\$30,000 – \$49,999

\$50,000 – \$79,999

\$80,000 – \$109,000

\$110,000 – \$169,000

\$170,000 or more

Prefer Not to Answer

Ask VERBATIM: "What ethnic group do you consider yourself a part of or feel closest to?"

* Ethnic Group - Conditional:

Caucasian/White

Latino/Hispanic

African American/Black

American Indian or Alaskan Native

Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other Asian

Pacific Islander

Middle Eastern

Mixed Heritage

Other

Prefer Not to Answer

Ask VERBATIM: "Is there a good email address we can send any project updates to?"

* Email Address

Advise: "Thank you for your time and valuable input. Have a great day!"

Email (and DELIVER) Office (brad@mbimedia.com)

OCTA SOCMTS Phase 2 Live Answer Phone Survey Script

Spanish

"¡Gracias! La Autoridad de Transporte del Condado de Orange (OCTA) está planificando mejoras futuras que ayudarán a abordar la congestión del tráfico en el sur del Condado de Orange. Queremos saber de usted para ayudar a identificar mejoras futuras en las calles, el tránsito, las autopistas y las ciclovías locales como parte de nuestro estudio. Ahora procederé a hacerle las preguntas de la encuesta".

"¿Empecemos a clasificar las siguientes necesidades de transporte de las más importantes a las menos importantes para usted?"

A. Reducir el número total de viajes que realiza cada día. *(Las autopistas y las calles próximas a los intercambiadores de autopistas en el sur del condado siempre están congestionadas. Para el año 2050 se prevé un 20% de crecimiento de la población y el empleo, lo cual empeorará las condiciones de tráfico.)*

B. Permitir que el transporte público, el uso de bicicletas y caminar resulten más cómodos y accesibles. *(La red de calles del sur del condado, centrada en el automóvil, presenta desafíos para proporcionar un servicio de tránsito eficiente, y satisfacer las necesidades de viaje de individuos que no conducen y apoyar las condiciones de viaje seguras para todos los usuarios. Los patrones de uso del suelo dominados por viviendas unifamiliares separadas de las tiendas y los puestos de trabajo son otro reto.)*

C. Adaptación a las nuevas tecnologías y servicios de transporte. *(Los avances tecnológicos, como los vehículos autónomos, la recarga ultra rápida de los vehículos eléctricos y las bicicletas eléctricas, podrían cambiar los comportamientos de viaje y el funcionamiento del tráfico. El aumento de los niveles de teletrabajo y telemedicina y la persistente preocupación por el COVID-19 podrían disminuir los transportes en general.)*

D. Proteger el medio ambiente y preservar las infraestructuras de transporte *(Las emisiones de los vehículos afectan negativamente la calidad del aire y contribuyen al cambio climático. Los riesgos como el aumento del nivel del mar, los eventos de calor extremo y una mayor frecuencia de los incendios forestales amenazan la red de transporte.)*

* Transportation Need (1st)

* Transportation Need (2nd)

* Transportation Need (3rd)

* Transportation Need (4th)

"Dado que los fondos son limitados, ¿cuál de las siguientes estrategias de transporte es la más importante para usted? Elija las tres principales".

A. Realice mejoras en los trenes y el tránsito

B. Implementar mejoras basadas en tecnología

C. Reducir los cuellos de botella de las autopistas

D. Reasignar el espacio de la carretera para tránsito, caminar, andar en bicicleta, etc.

E. Invierta en programas para reducir los viajes en automóvil

F. Considere los precios de las carreteras

G. Apoyar los programas de viajes cotidianos

H. Invierta en tecnologías futuras

* Transportation Strategy 1

* Transportation Strategy 2

* Transportation Strategy 3

"Por favor, dé de 1 a 5 estrellas para calificar qué tan efectiva cree que es cada estrategia para mejorar los viajes en el sur del condado".

"Estas primeras 4 estrategias están relacionadas con el servicio mejorado de trenes y autobuses: invertir en la frecuencia y confiabilidad del servicio de tránsito".

1. Más servicio de tren - proporciona la infraestructura necesaria para aumentar el servicio de Metrolink

* More Train Service # of Stars (1-5)

2. Servicio de autobús confiable - Mejorar el servicio de autobús a trabajos, educación, compras y otras actividades.

* Reliable Bus Service # of Stars (1-5)

3. Rutas de autobús de la autopista - Proporcionar rutas de autobús de mayor velocidad que utilicen autopistas para dar servicio a destinos clave

* Freeway Bus Routes # of Stars (1-5)

4. Tránsito a pedido - Ampliar el servicio de transporte a pedido (por ejemplo, OC Flex)

* On-Demand Transit # of Stars (1-5)

"Estas tres estrategias siguientes están relacionadas con carreteras y autopistas eficientes: mejora del rendimiento de las carreteras".

1. Tecnología - Utilice la sincronización de la señal y otras tecnologías para reducir la congestión del tráfico.

* Technology # of Stars (1-5)

2. Rendimiento de la autopista - Implementar estrategias para abordar los cuellos de botella de las autopistas

* Freeway Performance # of Stars (1-5)

3. Acceso a la autopista - Agregue o mejore las rampas de la autopista para reducir la congestión

* Freeway Access # of Stars (1-5)

"Estas siguientes 3 estrategias están relacionadas con la mejora del transporte activo: hacer que andar en bicicleta y caminar sea más seguro y conveniente".

1. Mejoras de seguridad - Invierta en mejoras de seguridad en lugares con accidentes frecuentes

* Safety Improvements # of Stars (1-5)

2. Conectar rutas - Completar las conexiones faltantes de aceras y carriles para bicicletas

* Connect Paths # of Stars (1-5)

3. Reconfiguración del espacio vial - Reconfigurar algunas calles para proporcionar instalaciones seguras para peatones, ciclistas y / o vehículos eléctricos de baja velocidad (por ejemplo, bicicletas eléctricas, patinetes eléctricos).

* Road Space Reconfig # of Stars (1-5)

"Estas cinco estrategias siguientes están relacionadas con la reducción de la dependencia del automóvil: fomentar opciones de transporte distintas de conducir solo".

1. Tránsito - Ofrecer programas de tarifas reducidas para mejorar el acceso a los servicios de autobús y Metrolink

* Transit # of Stars (1-5)

2. Vanpool / Carpool - Proporcionar programas de incentivos y recompensas para viajes compartidos en furgoneta o viajes compartidos.

* Van/Carpool # of Stars (1-5)

3. Incentivos para caminar y andar en bicicleta - Proporcionar subsidios y programas educativos para las personas que utilizan una forma de transporte activo.

* Biking/Walking # of Stars (1-5)

4. Conexiones al tránsito - Proporcionar subsidios para servicios de viajes compartidos como Uber / Lyft hacia y desde estaciones de tránsito

* Connect to Transit # of Stars (1-5)

5. Planificador de viajes integrado - Admite aplicaciones de teléfonos inteligentes que pueden planificar, reservar y pagar múltiples servicios de movilidad (por ejemplo, automóvil o bicicleta compartidos, tren, autobús) y llegar del punto A al B según el costo, el tiempo y la conveniencia preferidos

* Integrated Trip Planner # of Stars (1-5)

"Estas siguientes 3 estrategias están relacionadas con las estrategias de precios: proporcionar incentivos o desincentivos para administrar el uso de las carreteras"

1. Carriles con precio administrado (por ejemplo, 91 carriles exprés con peaje) - Los carriles para viajes compartidos en las autopistas son gratuitos para vehículos con tres o más personas, pero otros pueden usar los carriles si pagan un peaje.

* Price-Managed Lanes # of Stars (1-5)

2. Incentivar las carreteras de peaje (por ejemplo, la carretera de peaje 241) - Brindar incentivos para alentar a más conductores a usar las carreteras de peaje.

* Incentivize Toll Roads # of Stars (1-5)

3. Precios de usuario - Cobrar a los conductores tarifas bajas o nulas en momentos de baja demanda y tarifas más altas en momentos de alta demanda para garantizar condiciones de viaje confiables

* User Pricing # of Stars (1-5)

"Estas tres estrategias siguientes están relacionadas con las nuevas tecnologías: el apoyo a las tecnologías de transporte emergentes y la infraestructura de banda ancha".

1. Vehículos autónomos - Exigir que los vehículos autónomos operen en un carril de autopista designado

* Self-Driving Vehicles # of Stars (1-5)

2. Vehículos eléctricos - Invertir en infraestructura de carga para vehículos eléctricos

* Electric Vehicles # of Stars (1-5)

3. Banda ancha - Invertir en infraestructura de banda ancha para respaldar un mayor trabajo desde casa y nuevas tecnologías como automóviles autónomos

* Broadband # of Stars (1-5)

VERBATIM: "¡Gracias por tu aporte! Ahora, cuéntanos un poco sobre ti. Estas siguientes preguntas son opcionales, así que si prefieres no responder una pregunta en particular, házmelo saber".

VERBATIM: "¿Cuál es el código postal de su lugar de trabajo si tiene uno?"

* Worksite Zipcode

VERBATIM: "¿Cuál es el código postal de su casa?"

* Home Zipcode

VERBATIM: "¿Cuál es su rango de edad?"

* Age Range - Conditional:

16-24

25-34

35-44

45-54

55-64

65-74

75 or older

Prefer Not to Answer

VERBATIM: "¿Cuál es su ingreso familiar anual combinado?"

* Annual Household Income - Conditional:

Less than \$30,000

\$30,000 – \$49,999

\$50,000 – \$79,999

\$80,000 – \$109,000

\$110,000 – \$169,000

\$170,000 or more

Prefer Not to Answer

VERBATIM: "¿De qué grupo étnico se considera parte o se siente más cercano?"

* Ethnic Group - Conditional:

Caucasian/White

Latino/Hispanic

African American/Black

American Indian or Alaskan Native

Asian – Korean, Japanese, Chinese, Vietnamese, Filipino, or other Asian

Pacific Islander

Middle Eastern

Mixed Heritage

Other

Prefer Not to Answer

VERBATIM: "¿Existe una buena dirección de correo electrónico a la que podamos enviar actualizaciones del proyecto?"

* Email Address

"Gracias por su tiempo y valiosos comentarios. ¡Que tenga un gran día!"

Email (and DELIVER) Office (brad@mbimedia.com;emazariegos@mbimedia.com)

Stop here

Appendix B

Survey Results

Appendix B.1 Compiled Survey Results

Appendix B

Appendix B.1 Compiled Survey Results

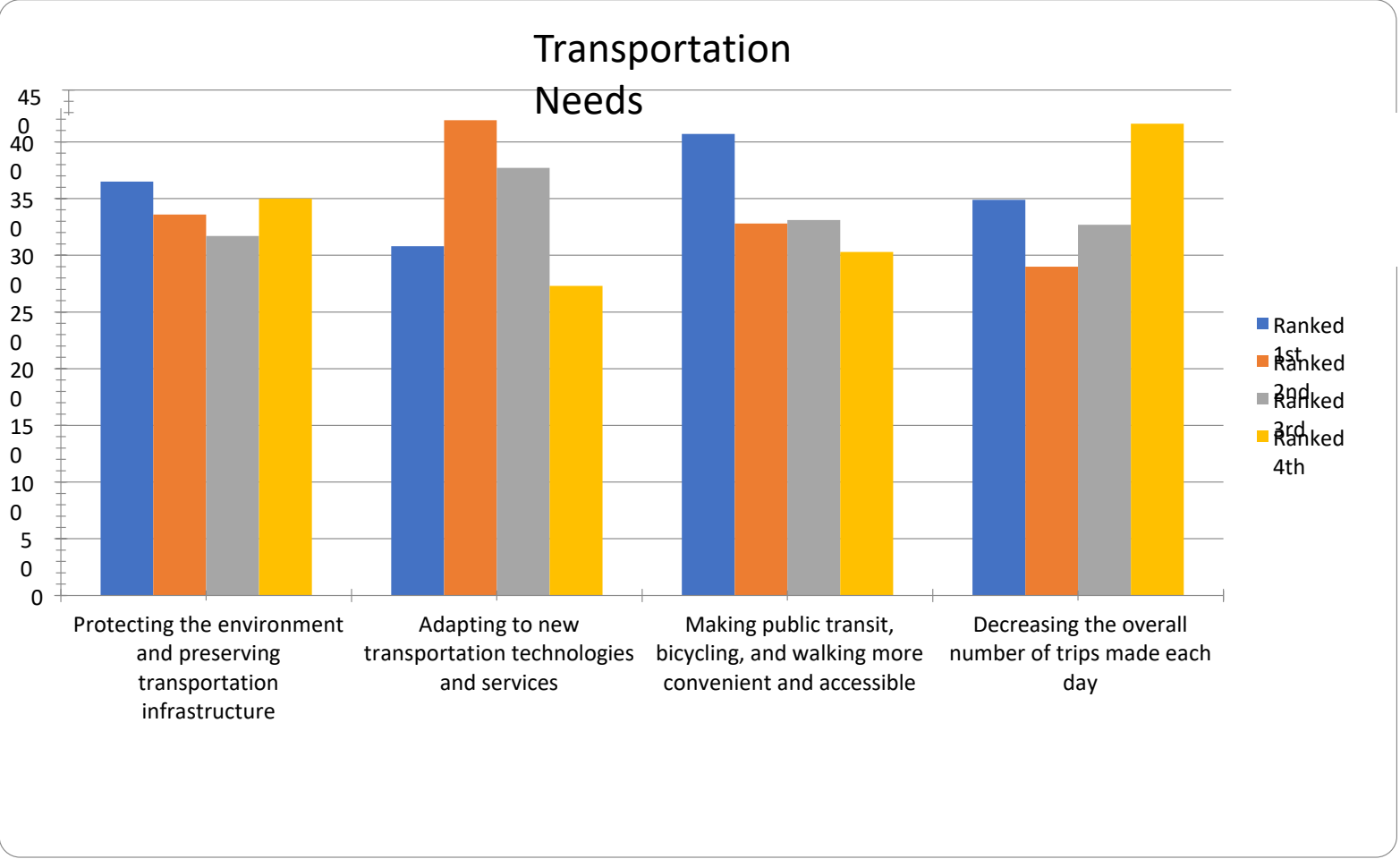
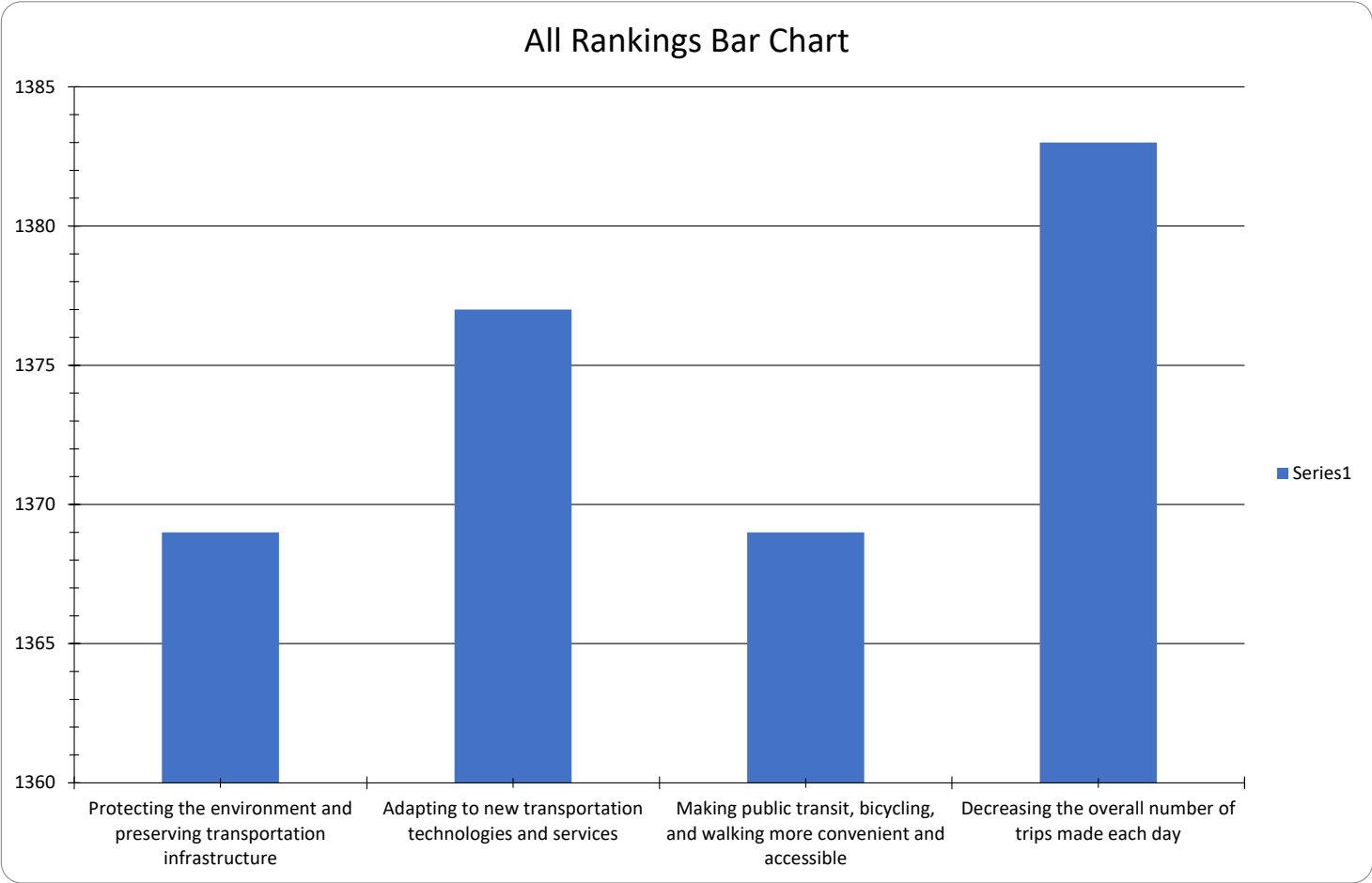
File contains all data collected as of July-13-2021 06:00:00-UTC. All data reported in UTC. Click the Refresh button in Data Center to download the latest dataset.

SiteVisited	Campaign	Visitors	Participants
st7h7p		3307	1707
st7h7p	fb	1	1

Item	# Inputs
Protecting the environment a	1369
Adapting to new transportatic	1377
Making public transit, bicyclin	1369
Decreasing the overall numbe	1383

Option	Ranked 1 (To	Ranked 2	Ranked 3	Ranked 4
Protecting th	365	336	317	350
Adapting to r	308	419	377	273
Making publi	407	328	331	303
Decreasing tr	349	290	327	416

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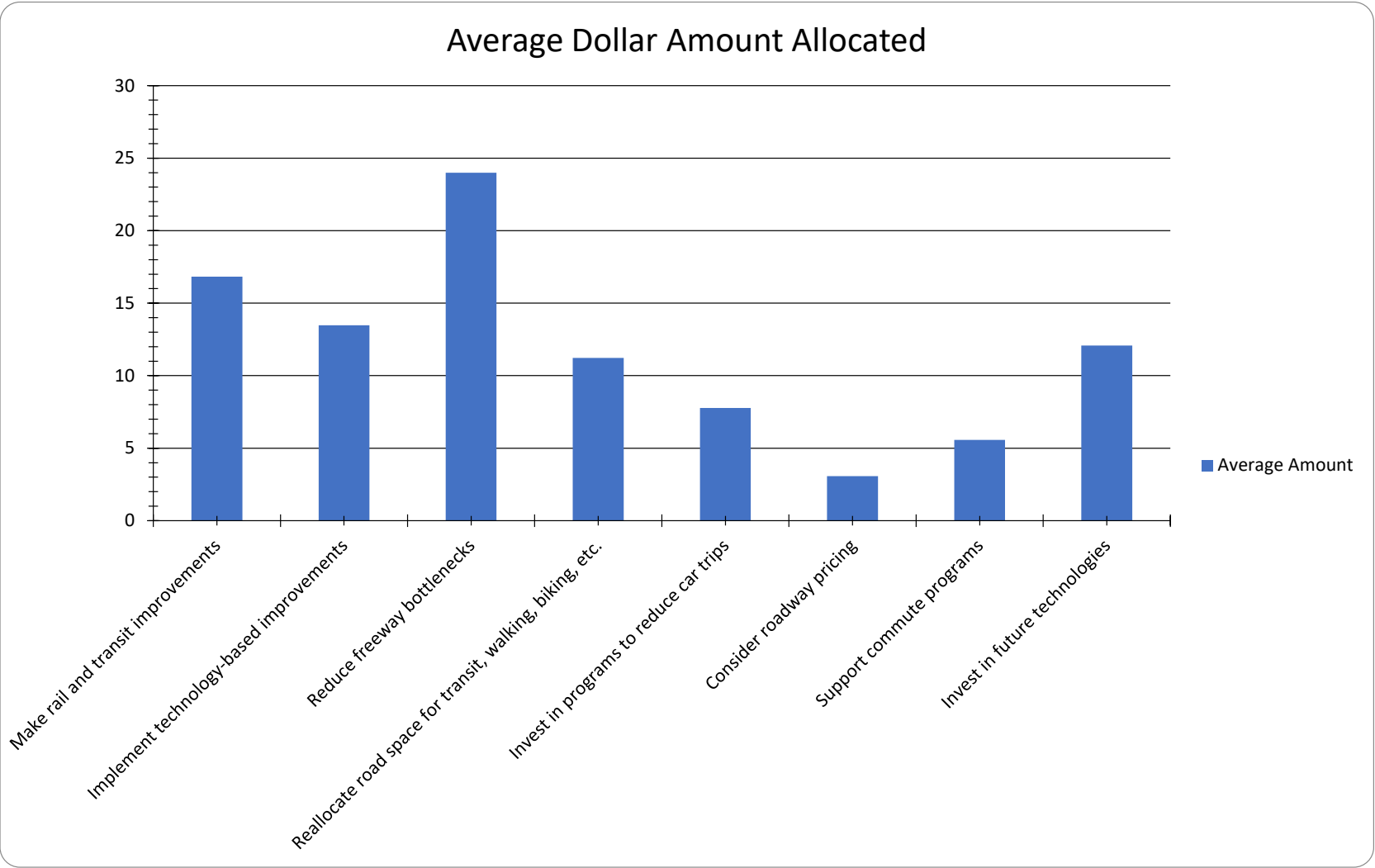


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VisitID	VisitTime	SiteVisited	Campaign	Platform	Set	Item	Comment	Negative	Neutral	Positive
373782	7-6-2021 18:30:03	st7h7p		web	General Comment	General Comment	Bicycling (convenience, accessibility, andsafety) should be our number one priority.	2%	56%	42%
					General Comment	General Comment	None of these needs address my needs. Improved bicycle/E-bike dedicated trails/lanes. Improved maintenance of automobile focused roadways/traffic signal coordination. Reduction of fuel costs/taxes/fees related to freedom of movement using personal vehicles that allow me to travel at my choice of time and destination and frequency. Retaining of single family housing developement.	4%	18%	78%
							Cannot read any of these options in theirentirety. This quiz is poorly designed for mobile.	75%	21%	4%
					General Comment	General Comment	Covid has changed work habits. Review needs now, before spending more money.	62%	28%	10%
							OC has NEVER taken into account the pervasive expansion and revision of hwy 5 over the past 20 years. The simple fact that this highway has been constantly modified for the past 20 years has contributed to a SIGNIFICANT percentage of travel time.			
					General Comment	General Comment	Please consider pedestrian bridges on Crown Valley Parkway between Medical Center Drive and Interstate 5. A bridge connecting The Shops at Mission Viejo with the Kaleidoscope center (with intermediate connection to the new restaurants next to the Chevron, would make the whole area more convenient and attractive for business and would reduce pedestrian-induced congestion on Crown Valley. A pedestrian bridge connecting Mission Hospital tothe other side of Crown Valley would help too.	3%	30%	67%
							Can't read selections on cell phone, no way to enlarge sentence	97%	2%	1%
					General Comment	General Comment	The statements need to be completed for meto respond rationally	24%	72%	4%
							The statements need to be completed for meto reply rationally	27%	70%	3%
					General Comment	General Comment	Why can I not choose none of these. Theseare horrible choices	100%	0%	0%
							where is the option to just build bigger and better roads?	1%	8%	91%
					General Comment	General Comment	I understand you need to limit the topics,though it is interesting what you pick.	1%	8%	91%
							None of those are good solutions. Delivermore roadway options.	61%	1%	38%
					General Comment	General Comment	The choices presented are incomplete and biased	100%	0%	0%

397208	22-6-2021 03:14:50	st7h7p	web	General Comment	General Comment	The 4 options are NOT most important to me. Automobiles are the only rational means to satisfying all the transportation needs in the area and should be the highest priority above all else.	2%	80%	18%
397289	22-6-2021 06:40:19	st7h7p	mobile	General Comment	General Comment	I can't choose because I'm only getting a partial statement & when I tap a choice it doesn't open	24%	76%	0%
398357	22-6-2021 21:14:47	st7h7p	web	General Comment	General Comment	I'm not sure what is meant by 'Decreasingthe overall number of trips made each day' as a 'need'.	6%	91%	3%
414666	30-6-2021 22:06:26	st7h7p	web	General Comment	General Comment	with the COV vaxx death toll coming freeways will not be anywhere NEAR as congested. Also, OC freeways are really not that congested...LA freeways are.	62%	6%	32%
424060	7-7-2021 18:11:21	st7h7p	web	General Comment	General Comment	These transportation needs are all of equal importance.	2%	86%	12%

Item	Average Dollar Amount	Count
Make rail and transit improvements	16.83	1439
Implement technology-based improvements	13.48	1440
Reduce freeway bottlenecks	23.99	1439
Reallocate road space for transit, walking, biking, etc.	11.22	1439
Invest in programs to reduce car trips	7.77	1439
Consider roadway pricing	3.07	1439
Support commute programs	5.57	1439
Invest in future technologies	12.08	1439

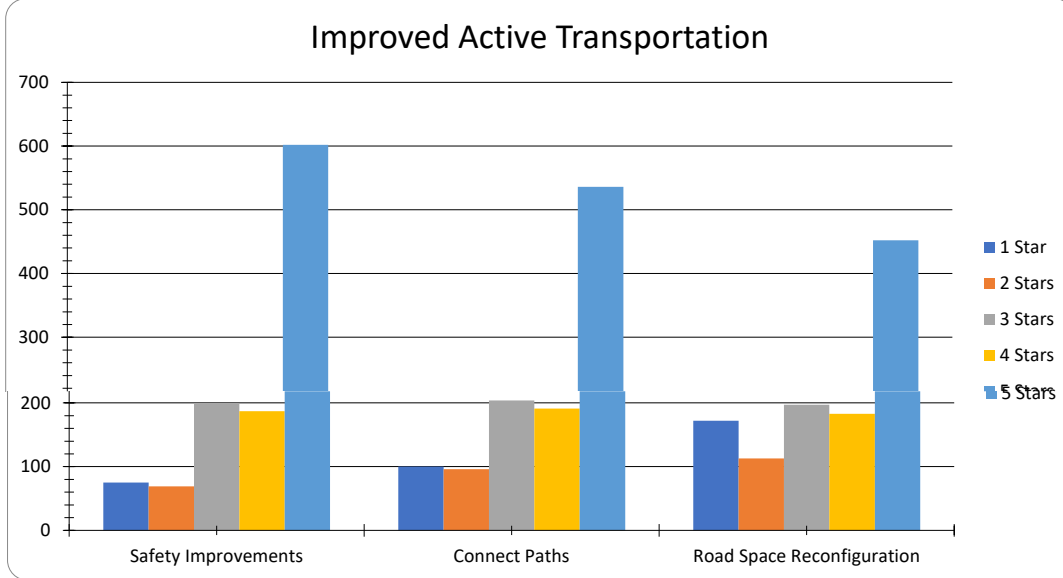
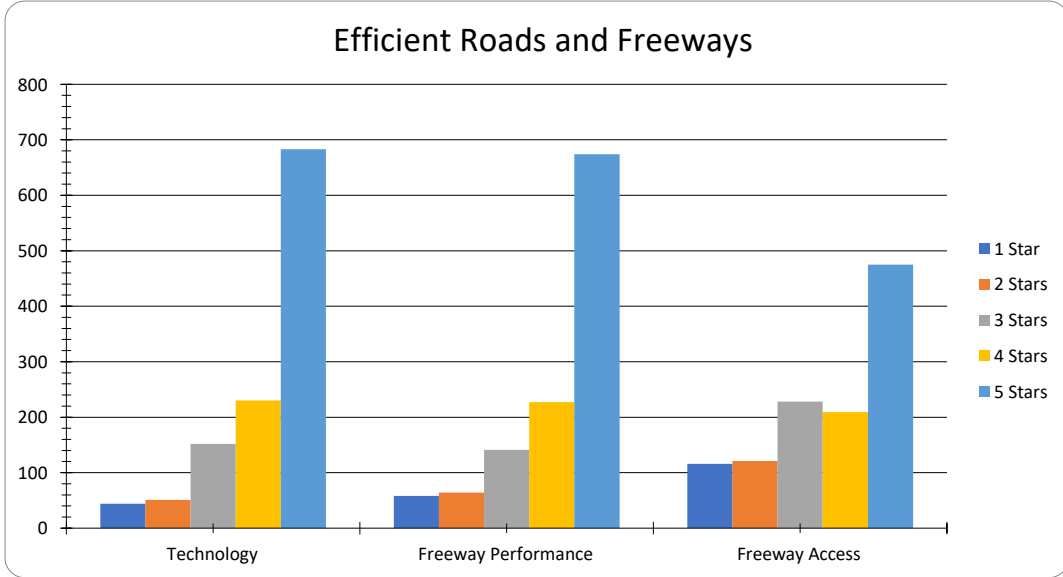
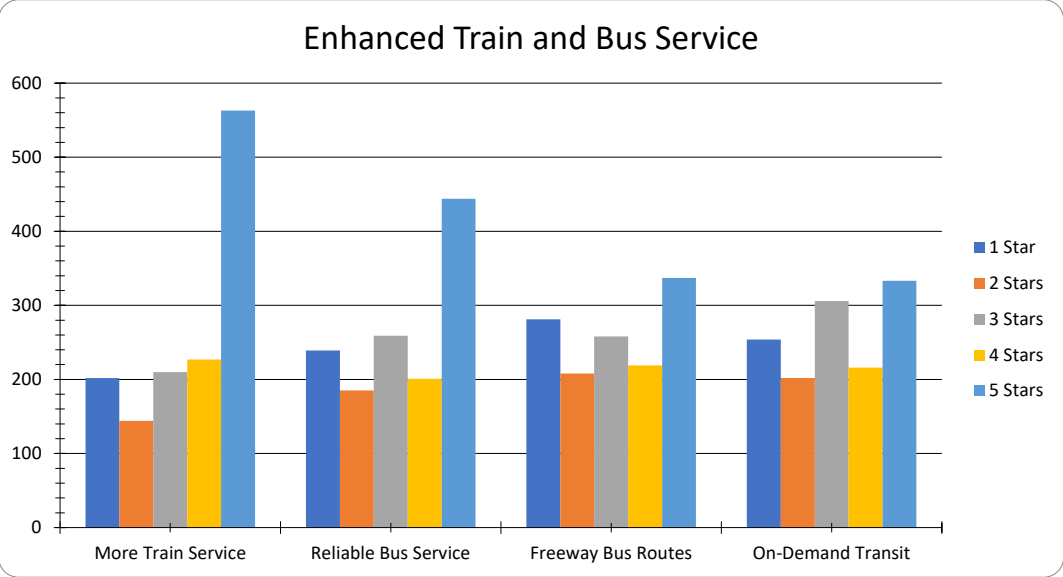
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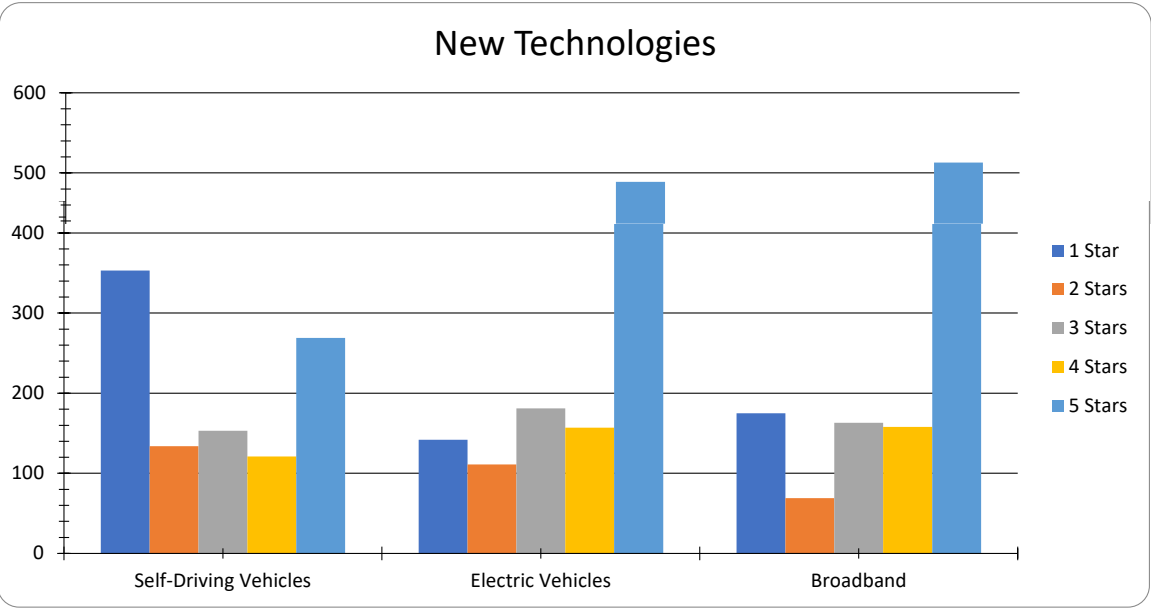
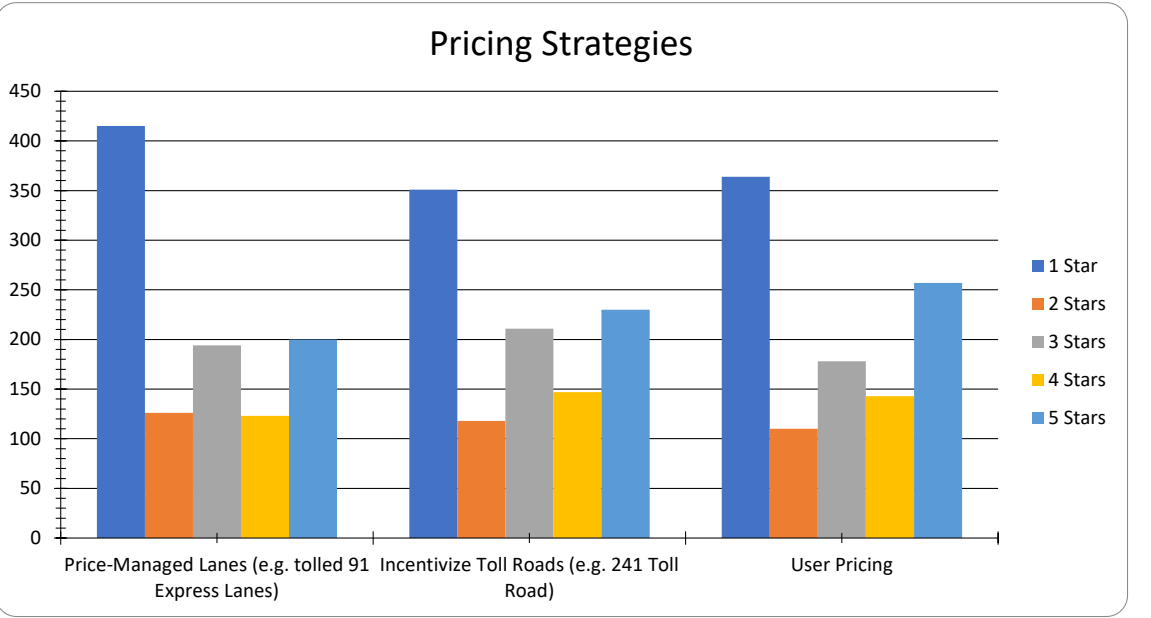
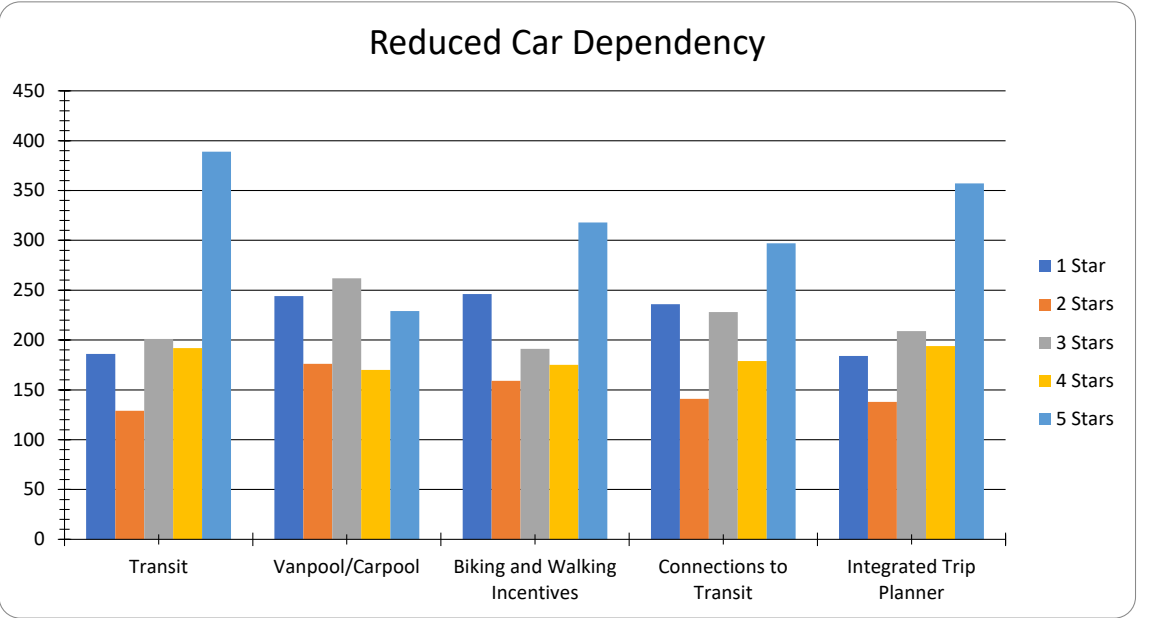
VisitID	VisitTime	SiteVisited	Campaign	Platform	Set	Item	Comment	Negative	Neutral	Positive
383791	12-6-2021 14:56:26	st7h7p		web	General Comment	General Comment	Would appreciate specifying what each item entails as far as implementation. Difficult to evaluate these without more information.	50%	2%	48%
386466	15-6-2021 03:15:45	st7h7p		mobile	General Comment	General Comment	Light rail and trollies	2%	92%	6%
391034	18-6-2021 01:09:55	st7h7p		web	General Comment	General Comment	90 cents should be spent on reducing freeway bottlenecks and the remainder on future technologies.	11%	86%	3%
392116	18-6-2021 19:55:55	st7h7p		web	General Comment	General Comment	NO MORE TOLL ROADS!!! The TCA has more debt than several Western STATES! I would choose to trust the children at my local lemonade stand rather than the TCA. We pay TOO MUCH TAX as is, and the dynamics of work are changing. I am working from home--right now--and my wife is on an international conference call downstairs. THIS is the future, not flex lanes.	59%	9%	32%
392265	18-6-2021 20:00:30	st7h7p		web	General Comment	General Comment	Future development and redevelopment should be designed around mixed use (commercial and residential) zoning and pedestrain, bicycle, and masstransit. Car-focused development should not be allowed.	11%	87%	2%
392342	18-6-2021 20:01:46	st7h7p		mobile	General Comment	General Comment	This survey is not convenient to use on a phone	100%	0%	0%
392452	18-6-2021 20:07:24	st7h7p		mobile	General Comment	General Comment	The allocation of funds part of your survey doesn't work. Like the toll roads	22%	63%	15%
392487	18-6-2021 20:17:04	st7h7p		web	General Comment	General Comment	It's interesting how common sense things,such as adding roads isn't even focused on this survey. The survey is so far heavily focused on impractical things that sound good on paper, but aren't practical for everyday, real life. People like to buy their car of choice and drive it on a road w/o tolls.	62%	26%	12%
393159	18-6-2021 22:50:41	st7h7p		web	General Comment	General Comment	You limit the choices that are not necessarily the best!! You do not stop building homes, but expect traffic reduction -	100%	0%	0%
393853	19-6-2021 07:49:55	st7h7p		mobile	General Comment	General Comment	We need public transportation to LAX: public bus or shuttle from different locations in OC	22%	69%	9%
397208	22-6-2021 03:20:40	st7h7p		web	General Comment	General Comment	Investments should go first to maximizing capacity and speed from first to last mile. Biking and walking offer practically no capacity or speed benefit.	30%	12%	58%
406209	26-6-2021 14:48:09	st7h7p		mobile	General Comment	General Comment	Can't pick answer	99%	1%	0%
414666	30-6-2021 22:07:38	st7h7p		web	General Comment	General Comment	with folks working from home...all is mute. Also, at last count, about 180,000 Californians have moved OUT OF state...for all the obvious reasons. SO, again, not seeing that big of an issue	84%	15%	1%

Set	Item	Rating	# Inputs
Enhanced Train and Bus Service	More Train Service	1 Star	202
Enhanced Train and Bus Service	Reliable Bus Service	1 Star	239
Enhanced Train and Bus Service	Freeway Bus Routes	1 Star	281
Enhanced Train and Bus Service	On-Demand Transit	1 Star	254
Enhanced Train and Bus Service	More Train Service	2 Stars	144
Enhanced Train and Bus Service	Reliable Bus Service	2 Stars	185
Enhanced Train and Bus Service	Freeway Bus Routes	2 Stars	208
Enhanced Train and Bus Service	On-Demand Transit	2 Stars	202
Enhanced Train and Bus Service	More Train Service	3 Stars	210
Enhanced Train and Bus Service	Reliable Bus Service	3 Stars	259
Enhanced Train and Bus Service	Freeway Bus Routes	3 Stars	258
Enhanced Train and Bus Service	On-Demand Transit	3 Stars	306
Enhanced Train and Bus Service	More Train Service	4 Stars	227
Enhanced Train and Bus Service	Reliable Bus Service	4 Stars	201
Enhanced Train and Bus Service	Freeway Bus Routes	4 Stars	219
Enhanced Train and Bus Service	On-Demand Transit	4 Stars	216
Enhanced Train and Bus Service	More Train Service	5 Stars	563
Enhanced Train and Bus Service	Reliable Bus Service	5 Stars	444
Enhanced Train and Bus Service	Freeway Bus Routes	5 Stars	337
Enhanced Train and Bus Service	On-Demand Transit	5 Stars	333
Efficient Roads and Freeways	Technology	1 Star	44
Efficient Roads and Freeways	Freeway Performance	1 Star	58
Efficient Roads and Freeways	Freeway Access	1 Star	116
Efficient Roads and Freeways	Technology	2 Stars	51
Efficient Roads and Freeways	Freeway Performance	2 Stars	64
Efficient Roads and Freeways	Freeway Access	2 Stars	121
Efficient Roads and Freeways	Technology	3 Stars	152
Efficient Roads and Freeways	Freeway Performance	3 Stars	141
Efficient Roads and Freeways	Freeway Access	3 Stars	228
Efficient Roads and Freeways	Technology	4 Stars	230
Efficient Roads and Freeways	Freeway Performance	4 Stars	227
Efficient Roads and Freeways	Freeway Access	4 Stars	209
Efficient Roads and Freeways	Technology	5 Stars	683
Efficient Roads and Freeways	Freeway Performance	5 Stars	674
Efficient Roads and Freeways	Freeway Access	5 Stars	475
Improved Active Transportation	Safety Improvements	1 Star	75
Improved Active Transportation	Connect Paths	1 Star	100
Improved Active Transportation	Road Space Reconfiguration	1 Star	172
Improved Active Transportation	Safety Improvements	2 Stars	69
Improved Active Transportation	Connect Paths	2 Stars	96
Improved Active Transportation	Road Space Reconfiguration	2 Stars	113
Improved Active Transportation	Safety Improvements	3 Stars	199
Improved Active Transportation	Connect Paths	3 Stars	204
Improved Active Transportation	Road Space Reconfiguration	3 Stars	197
Improved Active Transportation	Safety Improvements	4 Stars	187
Improved Active Transportation	Connect Paths	4 Stars	191
Improved Active Transportation	Road Space Reconfiguration	4 Stars	183
Improved Active Transportation	Safety Improvements	5 Stars	602
Improved Active Transportation	Connect Paths	5 Stars	536
Improved Active Transportation	Road Space Reconfiguration	5 Stars	452
Reduced Car Dependency	Transit	1 Star	186
Reduced Car Dependency	Vanpool/Carpool	1 Star	244
Reduced Car Dependency	Biking and Walking Incentives	1 Star	246
Reduced Car Dependency	Connections to Transit	1 Star	236



Reduced Car Dependency	Integrated Trip Planner	1 Star	184
Reduced Car Dependency	Transit	2 Stars	129
Reduced Car Dependency	Vanpool/Carpool	2 Stars	176
Reduced Car Dependency	Biking and Walking Incentives	2 Stars	159
Reduced Car Dependency	Connections to Transit	2 Stars	141
Reduced Car Dependency	Integrated Trip Planner	2 Stars	138
Reduced Car Dependency	Transit	3 Stars	201
Reduced Car Dependency	Vanpool/Carpool	3 Stars	262
Reduced Car Dependency	Biking and Walking Incentives	3 Stars	191
Reduced Car Dependency	Connections to Transit	3 Stars	228
Reduced Car Dependency	Integrated Trip Planner	3 Stars	209
Reduced Car Dependency	Transit	4 Stars	192
Reduced Car Dependency	Vanpool/Carpool	4 Stars	170
Reduced Car Dependency	Biking and Walking Incentives	4 Stars	175
Reduced Car Dependency	Connections to Transit	4 Stars	179
Reduced Car Dependency	Integrated Trip Planner	4 Stars	194
Reduced Car Dependency	Transit	5 Stars	389
Reduced Car Dependency	Vanpool/Carpool	5 Stars	229
Reduced Car Dependency	Biking and Walking Incentives	5 Stars	318
Reduced Car Dependency	Connections to Transit	5 Stars	297
Reduced Car Dependency	Integrated Trip Planner	5 Stars	357
Pricing Strategies	Price-Managed Lanes (e.g. tolled 91 Express Lanes)	1 Star	415
Pricing Strategies	Incentivize Toll Roads (e.g. 241 Toll Road)	1 Star	351
Pricing Strategies	User Pricing	1 Star	364
Pricing Strategies	Price-Managed Lanes (e.g. tolled 91 Express Lanes)	2 Stars	126
Pricing Strategies	Incentivize Toll Roads (e.g. 241 Toll Road)	2 Stars	118
Pricing Strategies	User Pricing	2 Stars	110
Pricing Strategies	Price-Managed Lanes (e.g. tolled 91 Express Lanes)	3 Stars	194
Pricing Strategies	Incentivize Toll Roads (e.g. 241 Toll Road)	3 Stars	211
Pricing Strategies	User Pricing	3 Stars	178
Pricing Strategies	Price-Managed Lanes (e.g. tolled 91 Express Lanes)	4 Stars	123
Pricing Strategies	Incentivize Toll Roads (e.g. 241 Toll Road)	4 Stars	147
Pricing Strategies	User Pricing	4 Stars	143
Pricing Strategies	Price-Managed Lanes (e.g. tolled 91 Express Lanes)	5 Stars	200
Pricing Strategies	Incentivize Toll Roads (e.g. 241 Toll Road)	5 Stars	230
Pricing Strategies	User Pricing	5 Stars	257
New Technologies	Self-Driving Vehicles	1 Star	353
New Technologies	Electric Vehicles	1 Star	142
New Technologies	Broadband	1 Star	175
New Technologies	Self-Driving Vehicles	2 Stars	134
New Technologies	Electric Vehicles	2 Stars	111
New Technologies	Broadband	2 Stars	69
New Technologies	Self-Driving Vehicles	3 Stars	153
New Technologies	Electric Vehicles	3 Stars	181
New Technologies	Broadband	3 Stars	163
New Technologies	Self-Driving Vehicles	4 Stars	121
New Technologies	Electric Vehicles	4 Stars	157
New Technologies	Broadband	4 Stars	158
New Technologies	Self-Driving Vehicles	5 Stars	269
New Technologies	Electric Vehicles	5 Stars	489
New Technologies	Broadband	5 Stars	513

File contains all data collected as of July-13-2021 06:00:00-UTC. All data reported in UTC. Click the Refresh button in Data Center to download the latest dataset.

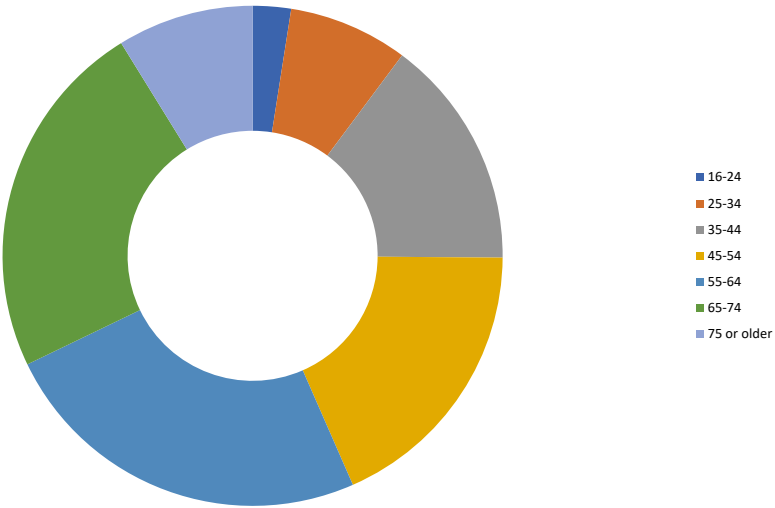


File contains all data collected as of July-13-2021 06:00:00-UTC. All data reported in UTC. Click the Refresh button in Data Center to download the latest dataset.

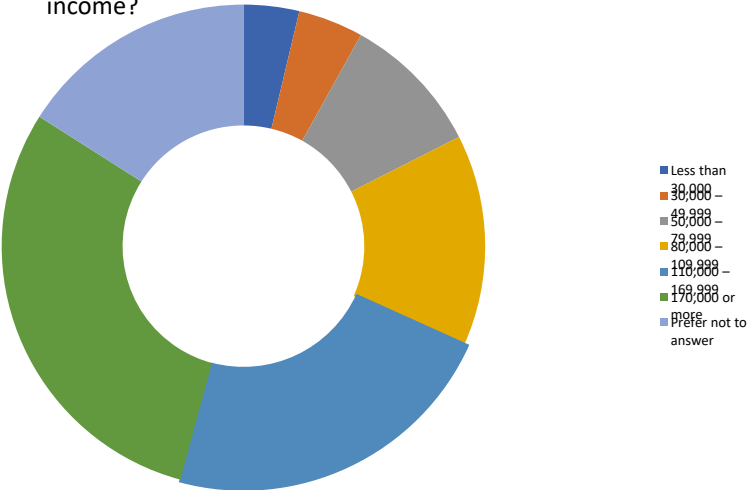
VisitID	VisitTime	SiteVisited	Campaign	Platform	Set	Item	Comment	Negative	Neutral	Positive
383791	12-6-2021 15:08:24	st7h7p		web	General Comment	General Comment	I disagree with relying on subsidies to get people to change behaviour. Would rather use money to finance physical improvements that make connections to transit , and Active transportation more convenient, safe, cost effective, and attractive. Without paying people directly. What incentives would be suggested to increase of toll roads? What percentage of workers work from home? What percentage of workers are required by the nature oftheir job to travel to a work location?	48%	4%	48%
384033	12-6-2021 18:48:11	st7h7p		web	General Comment	General Comment	Toll roads are inherently unequitable. They disenfranchise rural residents that frequent tolls by charging extra for essential travel. OrangeCounty does not need to be left behind when it comes to electric vehicles and broadband internet. Self-driving cars are also much safer than human operated.	0%	0%	100%
392116	18-6-2021 20:03:54	st7h7p		web	General Comment	General Comment	Any choices with a single star should actually be considered as ZERO. We PAY for our lanes now. ANY attempt to charge for roads that are already paid for with TAXES should not happen. Ridiculous. If the TCA is going to take another generation to pay itself off, it should at least experiment with more extreme flex charging (favoring the tax payer) and FREE use on holidays. They're supposed to be FREE now.	58%	19%	23%
392760	18-6-2021 20:56:44	st7h7p		web	General Comment	General Comment	Since it wasn't clear, I answered each ofthe Strategy Rating questions as it is TODAY, not as I wish it would work *someday*.	40%	55%	5%
393187	18-6-2021 22:55:43	st7h7p		web	General Comment	General Comment	Pricing Strategies effect those who need road access the most for affective living wages. Rich people could care less about pricing as the fees are negligible for their day-to-day expense.	12%	4%	84%
393159	18-6-2021 23:06:23	st7h7p		web	General Comment	General Comment	You should have increased both train and bus long before now!!!! As for freeway, toll lanes is not the answer. You hide the fees and not postthem so as not have the public comment. In the real world, you cause the public to pay a high fee and interesting how so many of the carpool lane are not fully used. Housing is built with out effective road support. High density house is built with NO road changes. Bikes do not have a place with cars - really!!! Flex alerts are happening now, elec cars??	72%	6%	22%
392392	18-6-2021 23:35:53	st7h7p		web	General Comment	General Comment	It's typically 1,000 F in southern California. Who wants to ride a bike in that? People respond to cost - some want to pay and others don't- they do what they want. That's best way to modulate traffic.	0%	0%	100%
429691	10-7-2021 19:08:14	st7h7p		web	General Comment	General Comment	I would rather live in a community with robust public transportation than one with self-driving vehicles.	7%	5%	88%

Set	Item	Count
3. What is your age range?	16-24	32
3. What is your age range?	25-34	100
3. What is your age range?	35-44	193
3. What is your age range?	45-54	237
3. What is your age range?	55-64	316
3. What is your age range?	65-74	302
3. What is your age range?	75 or older	114
4. What is your combined annual household income?	Less than 30,000	46
4. What is your combined annual household income?	30,000 – 49,999	54
4. What is your combined annual household income?	50,000 – 79,999	117
4. What is your combined annual household income?	80,000 – 109,999	176
4. What is your combined annual household income?	110,000 – 169,999	278
4. What is your combined annual household income?	170,000 or more	369
4. What is your combined annual household income?	Prefer not to answer	198
5. What ethnic group do you consider yourself a part of or feel closest to?	Caucasian/White	869
5. What ethnic group do you consider yourself a part of or feel closest to?	Latino/Hispanic	89
5. What ethnic group do you consider yourself a part of or feel closest to?	African American/Black	12
5. What ethnic group do you consider yourself a part of or feel closest to?	American Indian or Alaskan Native	1
5. What ethnic group do you consider yourself a part of or feel closest to?	Asian	69
5. What ethnic group do you consider yourself a part of or feel closest to?	Pacific Islander	4
5. What ethnic group do you consider yourself a part of or feel closest to?	Middle Eastern	18
5. What ethnic group do you consider yourself a part of or feel closest to?	Mixed Heritage	38
5. What ethnic group do you consider yourself a part of or feel closest to?	Other	17
5. What ethnic group do you consider yourself a part of or feel closest to?	Prefer not to answer	148
Sharing	Facebook Share	2
Sharing	Twitter Share	1

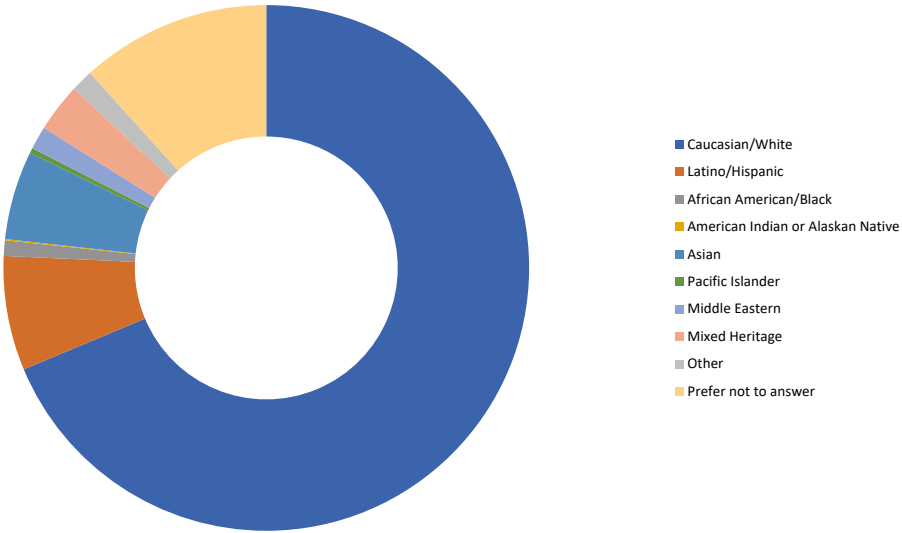
3. What is your age range?



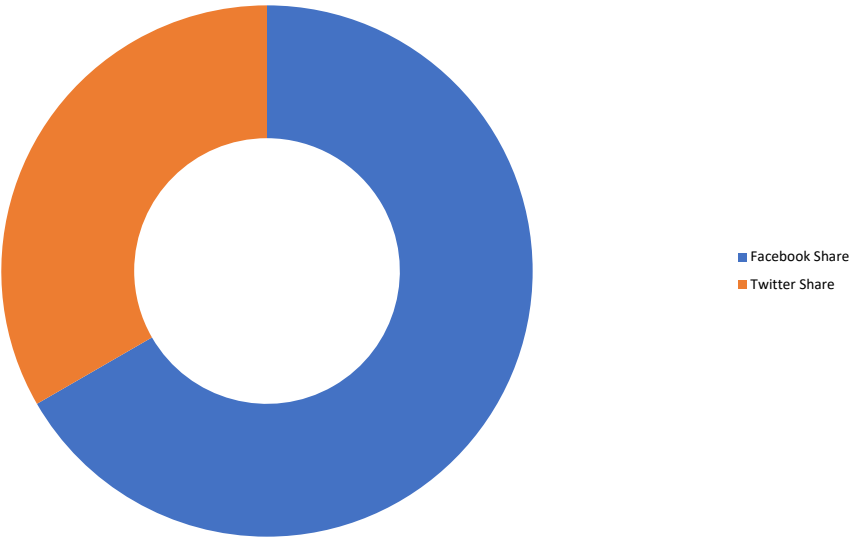
4. What is your combined annual household income?



5. What ethnic group do you consider yourself a part of or feel closest to?



Sharing



File contains all data collected as of July-13-2021 06:00:00-UTC. All data reported in UTC. Click the Refresh button in Data Center to download the latest dataset.										
VisitID	VisitTime	SiteVisited	Campaign	Platform	Set	Item	Comment	Negative	Neutral	Positive
393088	18-6-2021 22:34:35	st7h7p		web	General Comment	General Comment	After studying the problem of traffic congestion on del Obispo and Camino Capistrano from the freeway at Ortega, we must have a freeway southexit off ramp at Stonehill. Follow the traffic on del Obispo, it goes almost and to Dana Point. Please put in a freeway exit going South at Stonehill. Thank you.	50%	1%	49%
395299	20-6-2021 14:18:37	st7h7p		web	General Comment	General Comment	This is a weak and biased survey. More waste of tax payer dollars	100%	0%	0%

File contains all data collected as of July-13-2021 06:00:00-UTC. All data reported in UTC. Click the Refresh button in Data Center to download the latest dataset.											
VisitID	VisitTime	SiteVisited	Campaign	Platform	Set	Item	Answer				
393820	19-6-2021 07:37:56	st7h7p		web	Sharing	Twitter Share	Clicked				
393820	19-6-2021 07:38:40	st7h7p		web	Sharing	Facebook Share	Clicked				
429691	10-7-2021 19:09:24	st7h7p		web	Sharing	Facebook Share	Clicked				

Appendix C

Outreach Results and Analytics

Appendix C.1 Virtual Meeting Room Google Analytics

Appendix C.2 Geofencing Analytics

Appendix C.3 Telephone Townhall Raw Data

Appendix C.4 Comments Collected Matrix

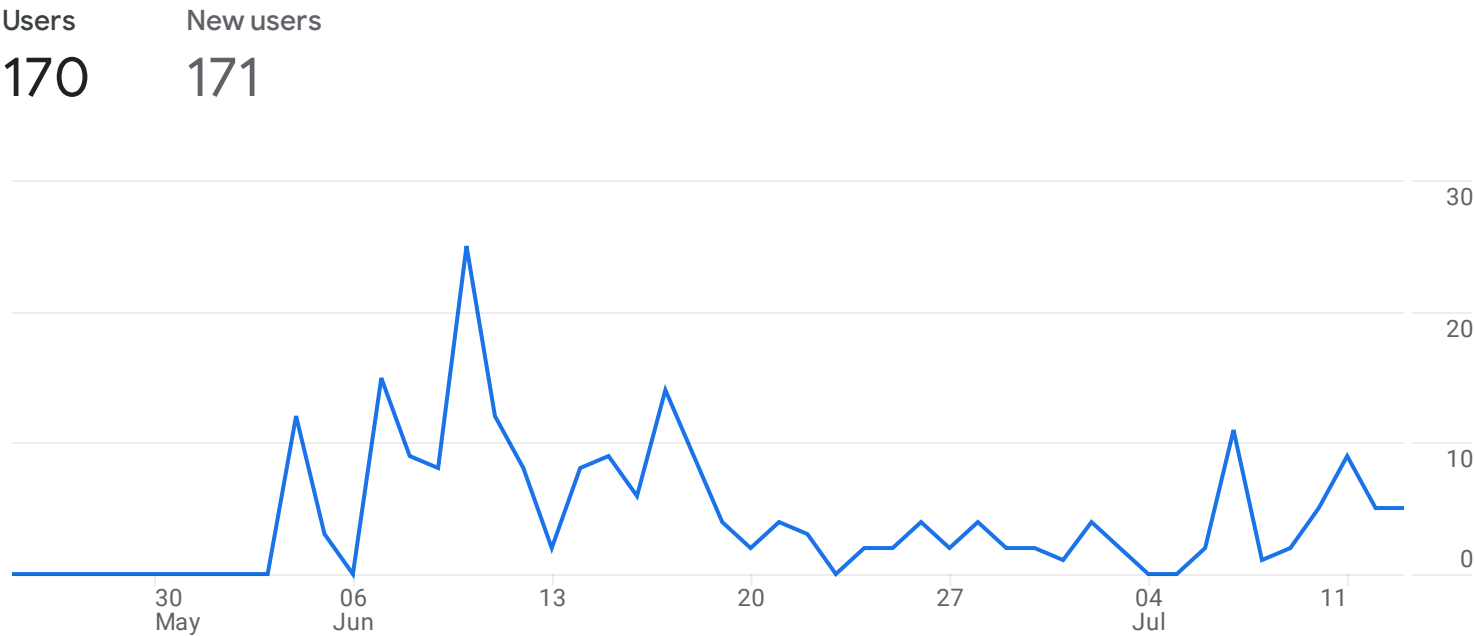
Appendix C

Appendix C.1 Virtual Meeting Room Google Analytics

Acquisition overview

Custom May 25 - Jul 13, 2021

All Users Add comparison



New users by User medium

FIRST USER MEDIUM	NEW USERS
referral	89
(none)	82

View user acquisition

Sessions by Session medium

SESSION MEDIUM	SESSIONS
referral	150
(none)	115

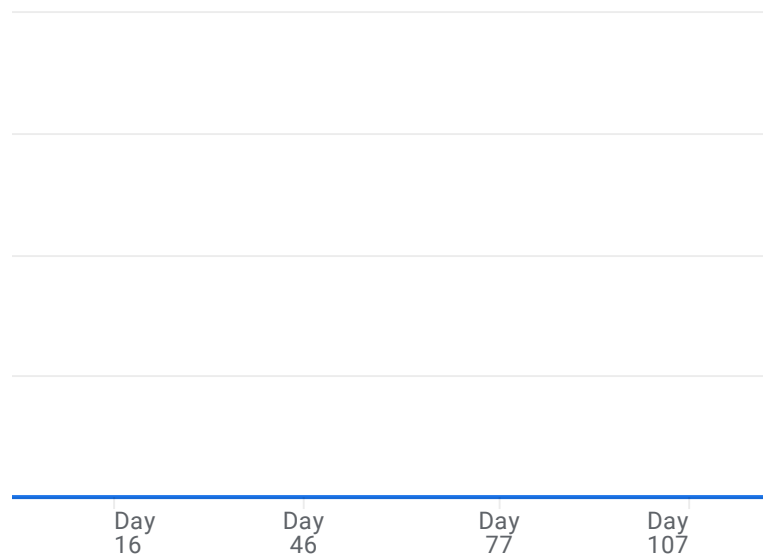
View traffic acquisition

Sessions by Session campaign

No data available

View Google Ads campaigns

Lifetime value



Last 120 days ending Jul 13

Engagement overview

Custom May 25 - Jul 13, 2021

All Users Add comparison

Average engagement time
2m 05s

Engaged sessions per user
1.2

Average engagement time per session
1m 20s



Views
2K

Event count
4.3K



Event count by Event name

EVENT NAME	EVENT COUNT
page_view	2K
scroll	1.4K
user_engagement	532
session_start	265
first_visit	171

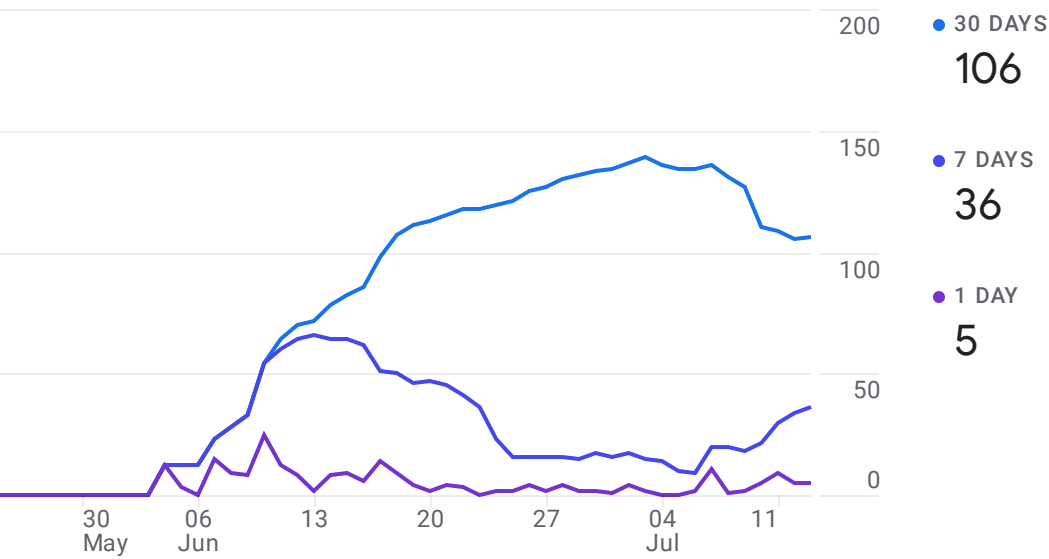
View events

Views by Page title and screen class

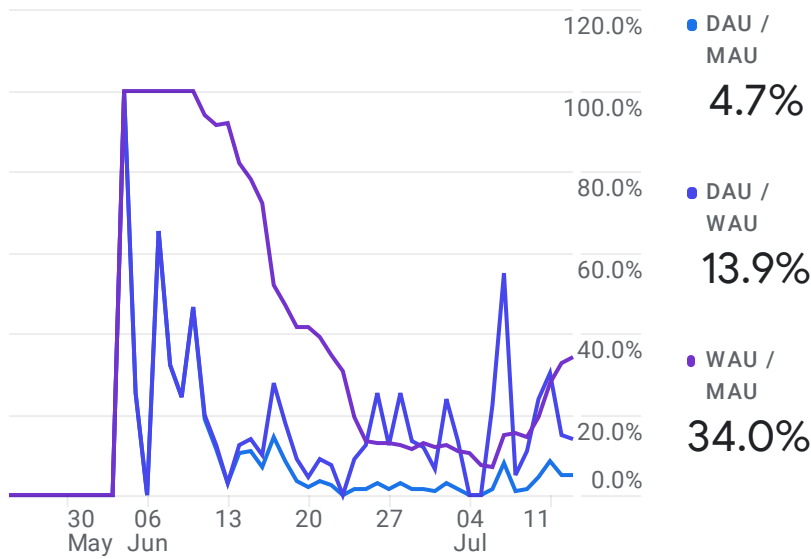
PAGE TITLE AND SCREEN CLASS	VIEWS
OCTA - Multimodal Transportation Study	1.7K
OCTA - SOCMTS	270

[View pages and screens](#) →

User activity over time



User stickiness



Appendix C

Appendix C.2 Geofencing Analytics

Static Ad Performance

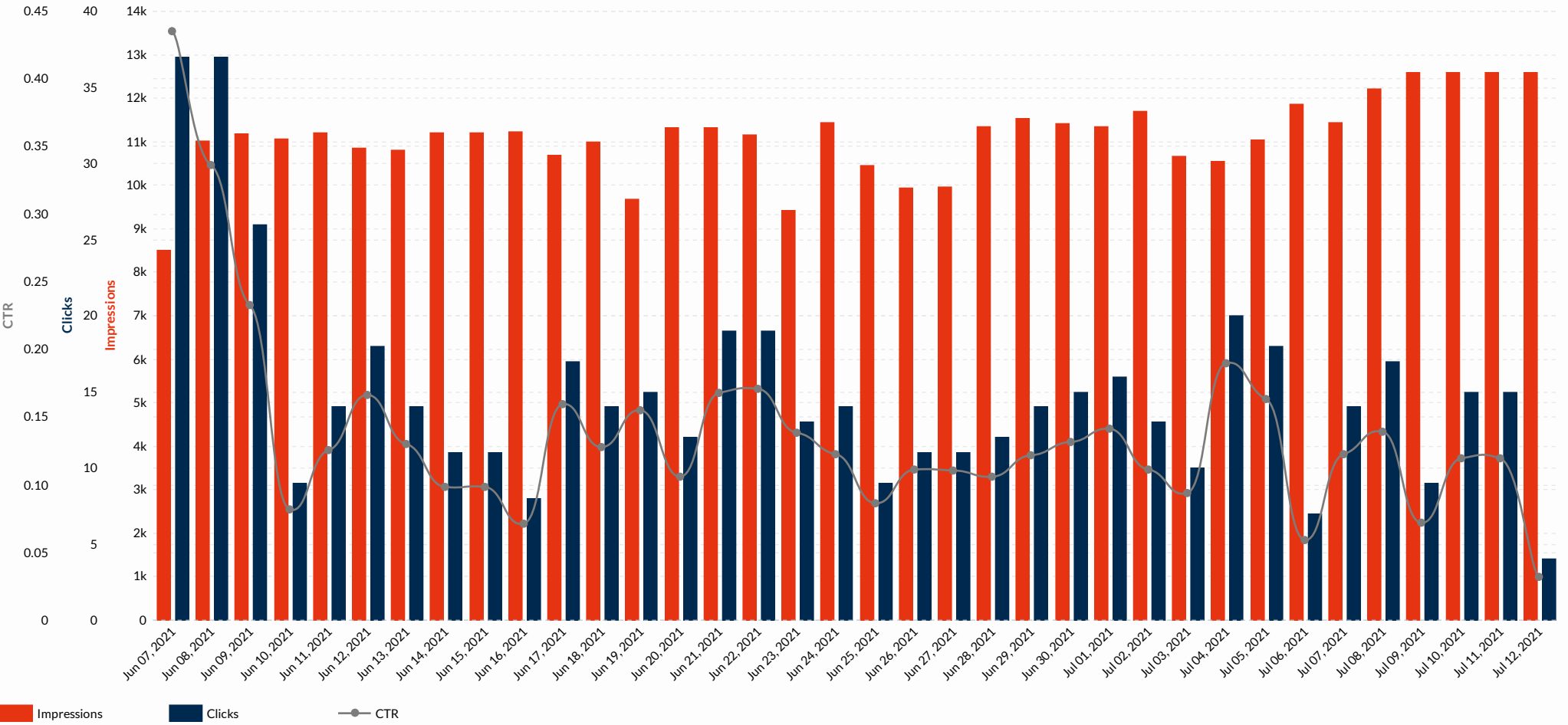


Campaign Breakdown

Grid contains more rows, but they have been clipped.

Client	Campaign	Impressions	Clicks	CTR	Video Completion Rate
Total ⓘ		400,009	538	0.13%	-
Orange County Transportation Authority	MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	286,670	368	0.13%	-
Orange County Transportation Authority	MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	60,000	77	0.13%	-
Orange County Transportation Authority	MBI Media_Orange County Transportation Authority_Vietnamese Language_AGF_6/7-7/12/21	26,672	51	0.19%	-

Overall Programmatic Trending Data



Device Breakdown

Device Type	Impressions	Clicks	CTR
Total ⓘ	399,889	538	0.13%
Mobile	244,246	354	0.14%
Desktops and Laptops	108,855	87	0.08%
Tablets	46,368	97	0.21%
Connected TV	420	0	0.00%

Android Performance

77.21K
IMPRESSIONS

113
CLICKS

0.15%
CTR

IOS Performance

322.80K
IMPRESSIONS

425
CLICKS

0.13%
CTR


What contextual categories of sites are my ads showing up in?

Grid contains more rows, but they have been clipped.

Context	Impressions	Clicks	CTR
Total ⓘ	364,571	496	0.14%
Arts & Entertainment	111,583	165	0.15%
Hobbies & Special Interests	98,072	150	0.15%
News	38,059	46	0.12%
Computer & Video Games	25,752	39	0.15%
Technology & Computing	13,066	15	0.11%
Boardgame & Puzzles	12,690	18	0.14%
Sports	12,476	14	0.11%
Interpersonal Relations	9,160	9	0.10%
Food & Drink	6,659	9	0.14%
Music	3,383	1	0.03%
Humor	2,443	2	0.08%
Business	2,181	3	0.14%
Photography	2,072	1	0.05%
Weather	1,881	2	0.11%
Shopping	1,861	0	0.00%







| SUMMARY GRIDS |

Zip+4 Performance

Campaign	Plat City	Plat Zip Code	Impressions	Clicks	CTR
Total 			400,009	538	0.13%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92612-0699	8,037	20	0.25%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Irvine	92602-2461	6,121	7	0.11%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92620-2501	5,971	4	0.07%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92602-2433	5,412	8	0.15%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92614-8567	4,981	10	0.20%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92620-3548	4,754	6	0.13%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92602-2464	4,195	3	0.07%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Newport Coast	92657-1516	3,755	3	0.08%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	San Clemente	92672-0000	3,728	9	0.24%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92602-2459	3,627	2	0.06%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Tustin	92780-5126	3,574	4	0.11%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92606-0829	3,532	8	0.23%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Lake Forest	92630-3746	3,182	2	0.06%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	Irvine	92618-1049	3,096	11	0.36%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Santa Ana	92701-4312	2,848	2	0.07%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92614-5429	2,621	1	0.04%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92606-0603	2,614	6	0.23%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Irvine	92604-8605	2,493	2	0.08%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92620-0243	2,467	3	0.12%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	Irvine	92614-0236	2,461	6	0.24%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	San Juan Capistrano	92675-2716	2,415	2	0.08%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Irvine	92614-5821	2,204	2	0.09%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Irvine	92604-3067	2,123	2	0.09%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Santa Ana	92701-6317	2,112	4	0.19%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	Irvine	92617-4028	1,881	2	0.11%

Apps and Domains Where Ads Were Served

Campaign	Domain	Impressions	Clicks	CTR
Total ⓘ		400,009	538	0.13%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	https://www.dailymail.co.uk	18,499	18	0.10%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	1207472156	7,624	12	0.16%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	com.pixel.art.coloring.color.number	9,949	10	0.10%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	1407852246	6,576	9	0.14%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	357218860	4,202	8	0.19%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	418987775	3,568	8	0.22%
MBI Media_Orange County Transportation Authority_Vietnamese Language_AGF_6/7-7/12/21	https://blitz.gg	1,478	7	0.47%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	366247306	4,572	6	0.13%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	591560124	17,066	6	0.04%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	642831690	1,148	5	0.44%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	1299956969	1,135	5	0.44%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	500962489	1,790	5	0.28%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	com.americasbestpics	4,785	5	0.10%
MBI Media_Orange County Transportation Authority_Korean Language_AGF_6/7-7/12/21	845422455	868	5	0.58%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	448999087	3,740	5	0.13%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	jp.ne.ibis.ibispaintx.app	1,516	4	0.26%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	com.dna.solitaireapp	2,013	4	0.20%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	puzzle.blockpuzzle.cube.relax	1,214	4	0.33%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	https://blitz.gg	10,597	4	0.04%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	com.europosit.pixelcoloring	1,032	4	0.39%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	285692706	2,139	4	0.19%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	495583717	2,153	4	0.19%
MBI Media_Orange County Transportation Authority_Mandarin Language_AGF_6/7-7/12/21	com.pixel.art.coloring.color.number	2,826	4	0.14%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	game.puzzle.woodypuzzle	602	4	0.66%
MBI Media_Orange County Transportation Authority_Spanish Language_AGF_6/7-7/12/21	com.fivemobile.thescore	3,361	4	0.12%

Preview	Size	Impressions	Clicks	CTR	Ad	
Total 		400,009	538	0.13%		
 Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070. 사우스 오렌지 카운티에서 미래의 이동성전략을 개선하는데 도움을 주십시오! octa.net/SouthOCStudy 에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오. 	160x600	3,391	2	0.06%	OCTA-SOCMTS-ENG-KOREAN-Phase2-Geofencing-ver01_160x600.jpg	
  Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070 사우스 오렌지 카운티에서 미래의 이동성전략을 개선하는데 도움을 주십시오! octa.net/SouthOCStudy 에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오.	300x250	4,269	4	0.09%	OCTA-SOCMTS-ENG-KOREAN-Phase2-Geofencing-ver01_300x250.jpg	
 Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070. 사우스 오렌지 카운티에서 미래의 이동성전략을 개선하는데 도움을 주십시오! octa.net/SouthOCStudy 에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오. 	300x50	1,089	3	0.28%	OCTA-SOCMTS-ENG-KOREAN-Phase2-Geofencing-ver01_300x50.jpg	



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Take a short survey
and learn more at
octa.net/SouthOCStudy
or call in at (833) 711-8070.

사우스 오렌지 카운티에서
미래의 이동성전략을
개선하는데 도움을 주십시오!

octa.net/SouthOCStudy에서 간단한
설문에 응하셔서 좀 더 자세히
알아보시거나
(833) 711-8070으로 전화하십시오.



Help improve future mobility strategies in South OC!
Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.

미래의 이동성전략을 개선하는데 도움을 주십시오!
octa.net/SouthOCStudy에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오.



Help improve future mobility strategies in South OC!
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사우스 오렌지 카운티에서 미래의 이동성전략을 개선하는데 도움을 주십시오!
octa.net/SouthOCStudy에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오.



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octa.net/SouthOCStudy에서 간단한 설문에 응하셔서 좀 더 자세히 알아보시거나 (833) 711-8070으로 전화하십시오.



300x600

491

2

0.41%

OCTA-SOCMTS-
ENG-KOREAN-
Phase2-Geofencing-
ver01_300x600.jpg

320x50

11,014

21

0.19%

OCTA-SOCMTS-
ENG-KOREAN-
Phase2-Geofencing-
ver01_320x50.jpg

728x90

5,993

9

0.15%

OCTA-SOCMTS-
ENG-KOREAN-
Phase2-Geofencing-
ver01_728x90.jpg







970x90

420

1

0.24%

OCTA-SOCMTS-
ENG-KOREAN-
Phase2-Geofencing-
ver01_970x90.jpg

 <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>帮助改善橙县南部的未来流动性策略！</p> <p>在 octa.net/SouthOCStudy 上或致电 (833) 711-8070 完成简短的研究调查并了解更多信息。</p> 		160x600	7,248	4	0.06%	OCTA-SOCMTS-ENG-MAND-Phase2-Geofencing-ver01_160x600.jpg
  <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>帮助改善橙县南部的未来流动性策略！</p> <p>在 octa.net/SouthOCStudy 上或致电 (833) 711-8070 完成简短的研究调查并了解更多信息。</p>		300x250	11,402	14	0.12%	OCTA-SOCMTS-ENG-MAND-Phase2-Geofencing-ver01_300x250.jpg
 <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>帮助改善橙县南部的未来流动性策略！</p> <p>在 octa.net/SouthOCStudy 上或致电 (833) 711-8070 完成简短的研究调查并了解更多信息。</p> 		300x50	2,085	4	0.19%	OCTA-SOCMTS-ENG-MAND-Phase2-Geofencing-ver01_300x50.jpg



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300x600

1,202

7

0.58%

OCTA-SOCMTS-
ENG-MAND-
Phase2-Geofencing-
ver01_300x600.jpg



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320x50

26,240

27

0.10%

OCTA-SOCMTS-
ENG-MAND-
Phase2-Geofencing-
ver01_320x50.jpg



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728x90

10,920

18

0.16%

OCTA-SOCMTS-
ENG-MAND-
Phase2-Geofencing-
ver01_728x90.jpg



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970x90

903

3

0.33%

OCTA-SOCMTS-
ENG-MAND-
Phase2-Geofencing-
ver01_970x90.jpg



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160x600









20,858

11

0.05%

OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01-08-160x600.jpg

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  <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>¡Ayude a mejorar las futuras estrategias de movilidad en el sur de OC!</p> <p>Realice una breve encuesta para el Estudio y obtenga más información en octa.net/SouthOCStudy o llame al (833) 711-8070.</p>		300x250	43,861	OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01_300x250.png
 <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>¡Ayude a mejorar las futuras estrategias de movilidad en el sur de OC!</p> <p>Realice una breve encuesta para el Estudio y obtenga más información en octa.net/SouthOCStudy o llame al (833) 711-8070.</p> 		300x50	13,586	OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01_300x50.png
 <p>Help improve future mobility strategies in South OC!</p> <p>Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>¡Ayude a mejorar las futuras estrategias de movilidad en el sur de OC!</p> <p>Realice una breve encuesta para el Estudio y obtenga más información en octa.net/SouthOCStudy o llame al (833) 711-8070.</p> 		320x50	144,593	OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01_320x50.png

 <p>Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>¡Ayude a mejorar las futuras estrategias de movilidad en el sur de OC! Realice una breve encuesta para el Estudio y obtenga más información en octa.net/SouthOCStudy o llame al (833) 711-8070.</p> 	728x90	53,463	83	0.16%	OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01_728x90.png
 <p>Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>¡Ayude a mejorar las futuras estrategias de movilidad en el sur de OC! Realice una breve encuesta para el Estudio y obtenga más información en octa.net/SouthOCStudy o llame al (833) 711-8070.</p> 	970x90	4,509	2	0.04%	OCTA-SOCMTS-ENG-SPAN-Phase2-Geofencing-ver01_970x90.png
 <p>Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>Hãy giúp cải thiện các chiến lược di chuyển trong tương lai ở South OC! Tham gia một cuộc khảo sát ngắn đối với Cuộc Nghiên cứu và tìm hiểu thêm tại octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.</p> 	160x600	2,804	9	0.32%	OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_160x600.jpg
 <p>Help improve future mobility strategies in South OC! Take a short survey and learn more at octa.net/SouthOCStudy or call in at (833) 711-8070.</p> <p>Hãy giúp cải thiện các chiến lược di chuyển trong tương lai ở South OC! Tham gia một cuộc khảo sát ngắn đối với Cuộc Nghiên cứu và tìm hiểu thêm tại octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.</p> 	300x250	4,036	3	0.07%	OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_300x250.jpg



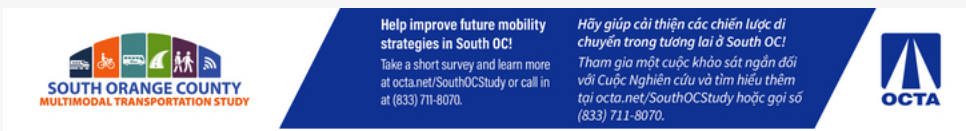
300x50 1,440 4 0.28% OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_300x50.jpg



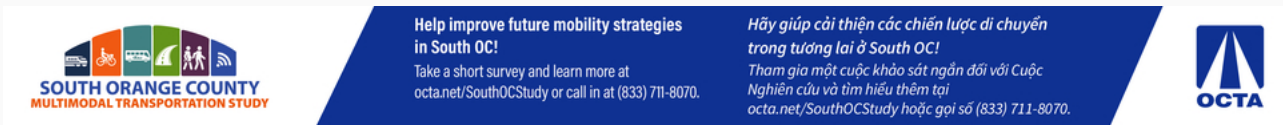
300x600 502 4 0.80% OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_300x600.jpg



320x50 12,321 18 0.15% OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_320x50.jpg



728x90 5,129 11 0.21% OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_728x90.jpg



970x90 440 2 0.45% OCTA-SOCMTS-ENG-VIET-Phase2-Geofencing-ver01_970x90.jpg

Appendix C

Appendix C.3 Telephone Townhall Raw Data

Started at 20:30:30, Duration 01:02:30

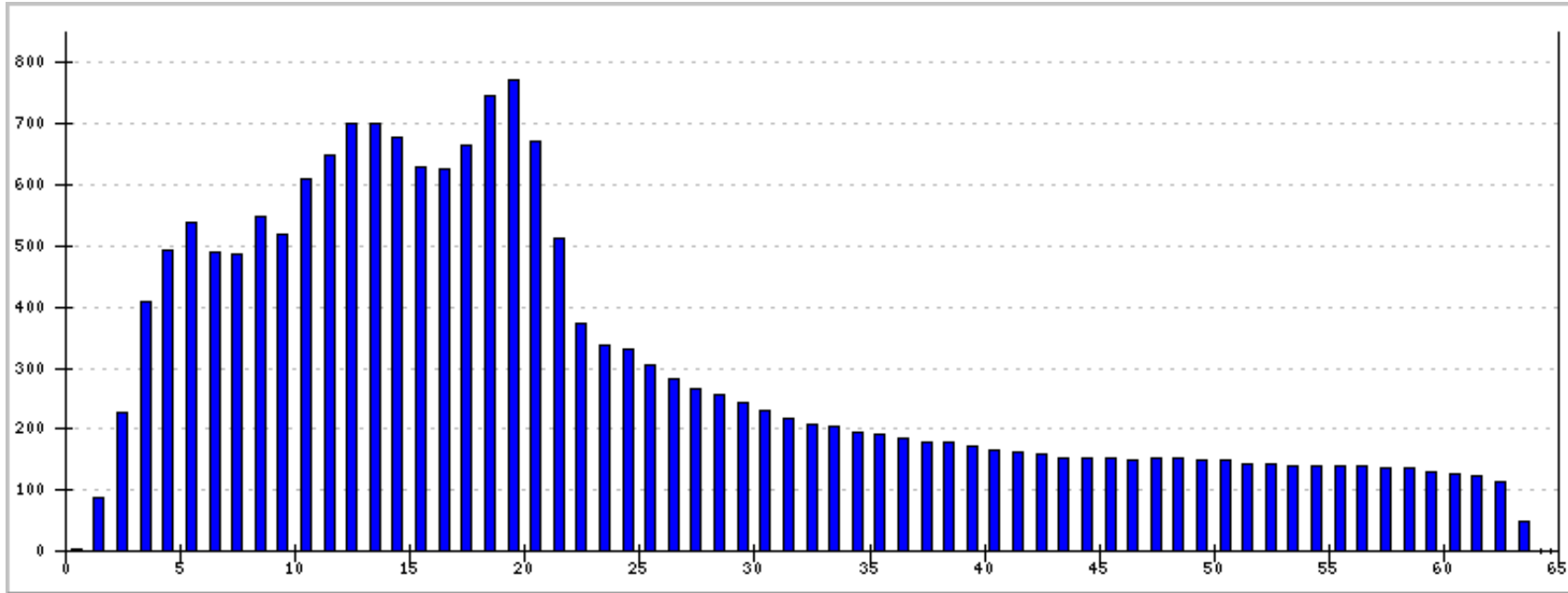
Average Acceptant Duration 3.69

MAX Number of People in Conference 797

Answered Calls

Name	Number
Selects For Event	99,723
Accepts	5,972
TF Calls	53
Toll Inbound Calls	0
Answering Machines	35,163
Declines	9,255
Total Answered Calls	50,390
Talked	17
Speaker Queue	46
Screenner Queue	13
WEB Participants	0

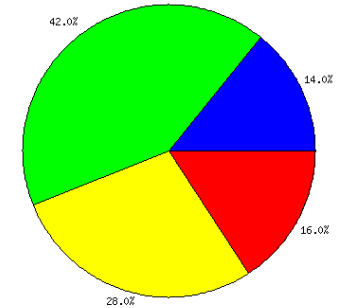
In Conference NOW / Conference Minutes



Polling Questions

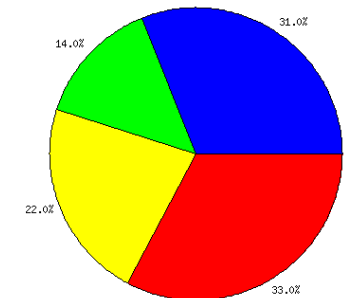
1 Which of these statements do you agree with the most?

ID	Answer	Responded	% of total
1	I'd like the ability to bike and walk more.	22	14
2	I'd like to see more bus and rail service improvements.	68	42
3	I can't imagine giving up the comfort of my car.	45	28
4	I'm supportive of teleworking and online shopping.	26	16



2 Which of the following is most important for addressing the transportation challenges in south Orange County?

ID	Answer	Responded	% of total
1	Making transit, bicycling, and walking more convenient and acces	25	31
2	Decreasing the overall number of car trips made each day	11	14
3	Protecting the environment from pollution and preserving our tra	18	22
4	Adapting to new transportation technologies and services like el	27	33



Non-Connects

Name	Number
Non Connects	21,923
Faxes	152
Busy	574
No-answer	26,684

Started at 20:30:24, Duration 01:02:40

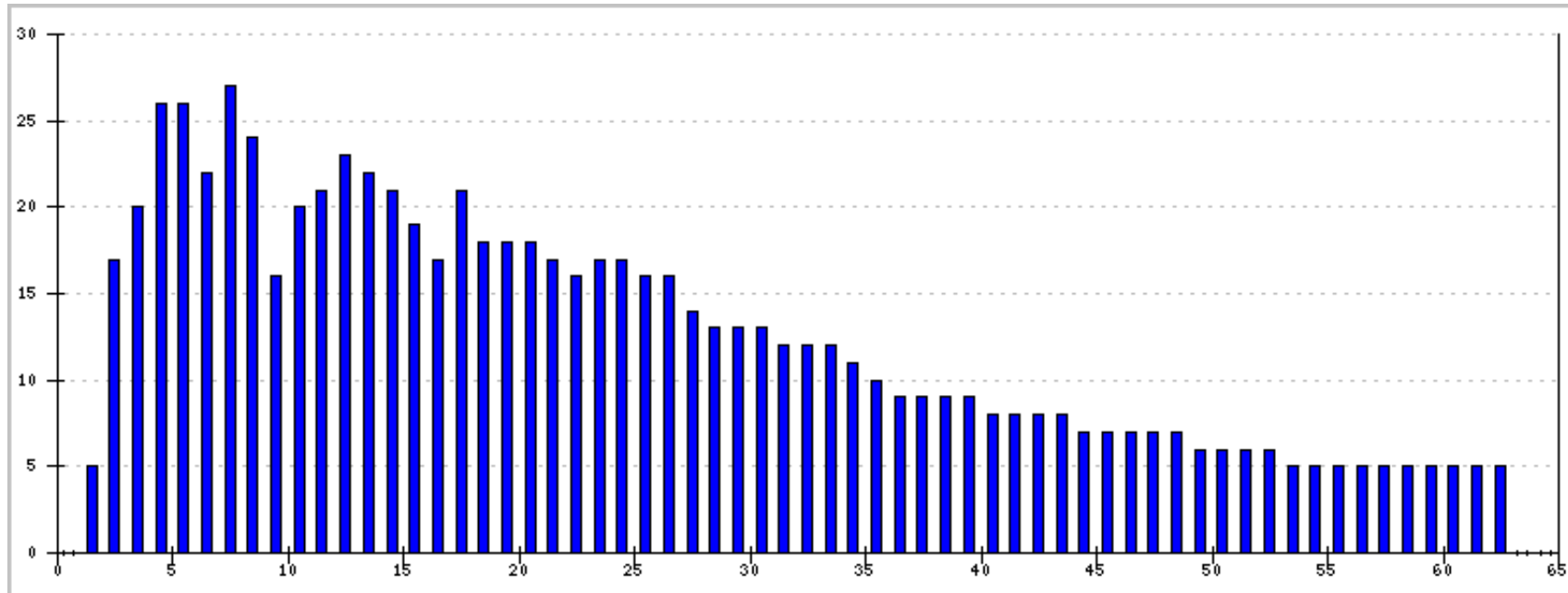
Average Acceptant Duration 6.30

MAX Number of People in Conference 37

Answered Calls

Name	Number
Selects For Event	125
Accepts	125
TF Calls	1
Toll Inbound Calls	0
Answering Machines	0
Declines	0
Total Answered Calls	125
Talked	1
Speaker Queue	4
Screenner Queue	1
WEB Participants	0

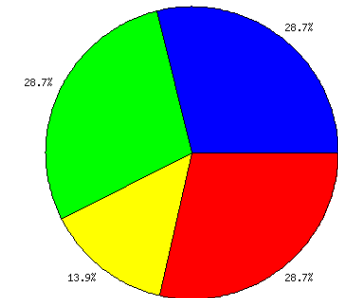
In Conference NOW / Conference Minutes



Polling Questions

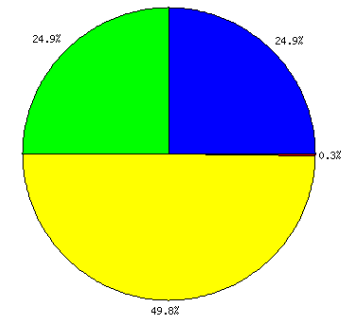
1 Which of these statements do you agree with the most?

ID	Answer	Responded	% of total
1	I'd like the ability to bike and walk more.	2	29
2	I'd like to see more bus and rail service improvements.	2	29
3	I can't imagine giving up the comfort of my car.	1	14
4	I'm supportive of teleworking and online shopping.	2	29



2 Which of the following is most important for addressing the transportation challenges in south Orange County?

ID	Answer	Responded	% of total
1	Making transit, bicycling, and walking more convenient and acces	1	25
2	Decreasing the overall number of car trips made each day	1	25
3	Protecting the environment from pollution and preserving our tra	2	50
4	Adapting to new transportation technologies and services like el	0	0



Non-Connects

Name	Number
Non Connects	0
Faxes	0
Busy	0
No-answer	0

Appendix C

Appendix C.4 Comments Collected Matrix

Organization	First Name	Last Name	Date	Time	Submission Type	Message
	Jackson	Hurst	06/07/21	4:38 PM	VMR Registration	Please keep the carpool lanes free and do not make them toll lanes as this makes the rest of the freeway more congested like the 91 freeway! It also discriminates against those of us that cant afford to pay the high price of the toll lanes! Also OCTA should be responsible for arterial roads Not TCA which needs to only pay down their existing bonds and go out of business since they are done building toll roads! Thank you
	Laura	Smith	06/07/21	10:47 PM	Online Comment Form VMR	
Capo Cares	David	Mann	06/08/21	5:28 PM	Online Comment Form VMR	In doing a survey of interest of different modes of transportation you did not separate buses and Metro trains. This provides no clear desire for bus services being separated from Metro train services and does not measure a separated desire for their services. Hence, will not get accurate information.
UCI Institute of Transportation Studies	Michael	McNally	06/09/21	11:01 AM	Online Comment Form VMR	What's presented is very good, but what's missing is very problematic. It's people, not vehicles, that demand travel. Given the essentially zero growth rate in California, issues of housing affordability, likely changes in travel and residential behavior as the pandemic recedes, and movement in Sacramento that the State would like a greater influence in local land use decisions, it would seem that proposals that either directly address growth and land use, or at least explicitly recognize their impact, should be a formal part of any long term planning effort. FYI. On my browser, it was difficult to see the full screen when three (versus two) display boards were shown. Also. the "i" info button to expand on these displays maybe should have been a bit more obvious?
	Sonia	Triana	06/10/21	1:32 PM	VMR Registration	I live in south O.C. I work in Irvine. I commute by car and by bicycle. Safety is my main concern. My immediate comments are that currently there are no dedicated lanes with barriers to protect pedestrians and cyclists from cars. Cyclists are sharing bike lanes with e-bikes. Pedestrians are sharing sidewalks with cyclists, both motorized and human powered. Dedicated walking, dedicated e-bike, dedicated non-motorized bicycle, and automobile lanes are all needed and laws must be made to support their usage. Violations must be studied, documented, and addressed to provide safe alternatives to each type of user. None is more important than the other but each must provide a safety factor to improve usage. When connecting unfinished trails please consider these improvements.
	Sharon	Calicdan	06/10/21	2:45 PM	Online Comment Form VMR	
Resident	Kate	M.	06/10/21	5:24 PM	Online Comment Form VMR	Hello, Please do not toll the carpool lanes on the freeways. This causes congestion in the other lanes and is economically unfair. We pay taxes for our roads to be maintained and free to use. Also please stop the TCA from involvement in any regional mobility studies. The TCA should pay down the bonds and go out of business as promised in the original agreement. The toll roads should be free for all residents and users. We have paid our fair share in taxes and development fees. This would alleviate traffic on the freeways and side streets as people avoid using the toll roads at such a high cost. Thank you, Kate M.
	Jason	Watts	06/12/21	9:45 AM	VMR Registration	
	Joseph	Wilmes	06/12/21	10:10 PM	VMR Registration	
	Ronald	Shepherd	06/13/21	4:49 PM	VMR Registration	
	Bruce	Becker	06/14/21	4:57 PM	VMR Registration	
OCTA	Charles	Larwood	06/17/21	10:00 AM	VMR Registration	
OCTA	Greg	Nord	06/17/21	10:00 AM	VMR Registration	
Dayle McIntosh Center	Ivan	Cortez	06/17/21	1:53 PM	VMR Registration	
County of Orange Office on Aging	Janette	Revilla	06/17/21	5:19 PM	VMR Registration	
Iteris, Inc.	Brandon	Gamboa	06/17/21	5:31 PM	VMR Registration	
Laguna Streets	Les	Miklosy	06/18/21	11:07 AM	Online Comment Form VMR	Dear SOCMTS Organizers, This is the best invitation I received in years, thank you for considering MTS solutions to SoCal mobility issues. Unfortunately I received the forum invitation during the forum and could not participate. I completed the survey and look forward to future notices on this topic. Please email me if you wish to discuss anything related to MTS for SoCal and Laguna Beach.
	PJ	Douglas	06/18/21	3:56 PM	Email	Hello Marissa, Please have OCTA Administration strongly consider putting in a South bound freeway off ramp at Stonehill. This would alleviate traffic on Camino Capistrano going to Capistrano Beach and del Obispo going to Dana Point. Follow the traffic and that where most of it ends up. Also the off ramp at Ortega to go West backs up onto the freeway. No safe at all. Thank you, PJDouglas [REDACTED] [REDACTED] [REDACTED]
Capistrano Bay Community Services District	Karen	Morris	06/22/21	9:20 PM	VMR Registration	
	Linda		06/28/21		Hotline Message	My name is Linda. My number is [REDACTED], please, call me. Thank you.
	Penelope	Mill	06/25/21		Hotline Message	Um hi my name is Penelope Mill. I'm the president of Can Do the Canyon Alliance of neighborhoods, assistance organization, and I had emailed on Friday about our participation in the South County Multimodal Transportation Round Table on the 23rd, giving you the name and email address of our representative Steve Tollef, will be participating on behalf of Can Do, but we, I did not hear back in response with, you know, the link to be able to join. So I'm hoping that you can send that to us either to see if his email address was included in the email that I sent you. So and it's [REDACTED] or email us, the organization, you can ema [REDACTED]. That's [REDACTED]. Sorry. That's .org. [REDACTED] and and I will forward the link to Steve. So anyway, I didn't have the email RSVP but I did, it should have been clear. I had of it OCTA, Stakeholder Round Table Participation. So I'm I sent that on Friday as required. So anyway, please do get back to us Penny Mill [REDACTED] or to Steve Tollef's email. So, thank you very much. Bye.
	Pauline	Chesco	06/25/21		Hotline Message	Yes, my name is Pauline Jesco. I live here at the towers and I was wondering how I could avail myself of your services. We have our local service, transportation service, but there are times when I want to go out of our area here in Laguna Woods. And I'd like to avail myself of the Orange County Transportation System. If you give me a call, I'd appreciate it. My number is [REDACTED] Thank you.
	Mark	A Torres	06/25/21		Hotline Message	Yes, my name is Mark A Torres and I was calling regarding the transportation study. I was online a couple of times trying to get through to complete the survey and that stopped at a couple of points and retried and retried. I keep getting hit in the same wall. So, My phone number is [REDACTED]. Again, that number is [REDACTED]. Thank you, goodbye.
	Heather	Gillon	06/29/21		Online Comment Form VMR	I work with many individuals who live in San Juan Capistrano. Is it possible to get a bus that goes directly to Walmart (where right now it takes a couple of hours to get there)?
	Chuck	Gildea	06/30/21		VMR Registration	
	Eileen	McCrickerd	06/17/21		TTH Comment	Is there any plan or can you foresee any extension of the transportation for access on weekends? Currently, I do not live near a fixed route bus line and so if I want to travel on Saturday or Sunday I have to get myself to a designated route stop that would be able to pick me up. Maybe extending door to door service for access members.
	Tony	Hay	06/17/21		TTH Comment	What's being done to implement smart traffic signals? Most operate on a fixed schedule. What we really need is a system that can change depending on traffic at specific times of the day. Anything like that in the works?
	Chuck	Gilday	06/17/21		TTH Comment	I occasionally take the train to San Diego. They have a flex service there that is much more extensive than the one we have here on south Orange County. I am an access passenger. I would like to see the flex schedule extended from Mission Viejo into my downtown - it would save us money here.
	Carolyn	Campbasso	06/17/21		TTH Comment	Orange County doesn't have enough transportation.
	Lea	Myers	06/17/21		TTH Comment	What kind of accommodations are there being made for the disabled community?
	Barbara	Rush	06/17/21		TTH Comment	1. I think that there is a city in Utah where they have left turn yellow blinking lights so that it doesn't slow traffic as much. This seems like a great improvement to have here. Sometimes, the red turn arrow prevents the flow of traffic when there is no oncoming traffic and that costs us all time. 2. I know there are extra funds in all of the cities - why not have them all contribute to opening up our toll roads? We could eliminate a lot of congestion on the freeways.
	Justin	Wong	06/17/21		TTH Comment	For the last few years, I noticed the bus services aren't very frequent there. They are more frequent in Anaheim. Will there be a freeway BRT in the future that goes from Laguna to Fullerton?
	Marla	Rajput	06/17/21		TTH Comment	Do we have a technology bot that counts cars passing over the signaled wire? How come we are still behind with technology? I'm disappointed with the appointment of all the Transportation committee members. They haven't done anything productive so far in the last 10 years.
	Dale	Nethery	06/17/21		TTH Comment	We only have two bus routes here in Rancho Santa Margarita. Are there any plans to expand the transportation system in this community?

Organization	First Name	Last Name	Date	Time	Submission Type	Message
	Carolyn	Boyd	06/17/21		TTH Comment	Is there anyway you can designate a lane for 18 wheelers so they don't cause a danger to other drivers?
	BriaN	Cox	06/17/21		TTH Comment	What specific steps do you invision need to be taken to incorporate bicycles into the transportation system?
	Jupi	Chen Kuo	06/17/21		TTH Comment	He is concern with people walking and no sidewalks.
	John	Garay	06/17/21		TTH Comment	I talked at last meeting about the poss. of local shuttles that utilizes the metro better in Tustin. Any developments?
	Constance	Duquette	06/17/21		TTH Comment	I hope traffic is controlled by AI because I'm a pedestrian and bicyclist and cars go through stop signs. People are not paying attention and it's too dangerous to walk and bike. I'd love to hear how you plan on making it safer for pedestrians and cyclists.
	Daniel	Wong	06/17/21		TTH Comment	Her husband had eye surgery, and the bus that picked her husband up after surgery had no shock absorbers.
	Lora	Williams	06/17/21		TTH Comment	I just lost my license at 85 years old. Is there a way to get my scooter on and off the city buses?
	Alfred	John Zucker	06/17/21		TTH Comment	No question
	Thomas	Zolan	06/17/21		TTH Comment	The bus system used to offer senior discounts on Fri, Sat, and Sun. to the fair. The buses don't offer this discount anymore. Why?
	Kathleen	Buck	06/17/21		TTH Comment	I live right by the Aliso exit on the 5 and I got a notice that they would be installing 100 pylons and widening the road over the creek. We have had a LOT of wildlife in our yards - ducks, squirrels, etc - and I am concerned for the environment as well as the community. We are getting duck eggs, rats, animals in the pools...is there any compensation planned for neighbors who are put out by this? We have extra cleaning, etc, to do because of this.
	Bill	Davis	06/17/21		TTH Comment	This is all a wonderful idea, but what's being done for our black and Mexican communities? Anything in the works to make transportation better in those communities?
	Elaine	Frank	06/17/21		TTH Comment	I appreciate the bus and train services from OCTA because I do not drive. In training some of the bus drivers, they don't keep a steady speed and that can cause motion sickness.
	Luis	Hernandez	06/17/21		TTH Comment	DNC
	Evelyn	Mccuiston	06/17/21		TTH Comment	no response
	Andrew	Avina	06/17/21		TTH Comment	No answer
	Irene	Bronson	06/17/21		TTH Comment	What are they doing to protect the low and middle class on paying for HOV lanes and Fast Track that are just for the rich?
	Karen	Gorman	06/17/21		TTH Comment	No response
	James	Pieratt	06/17/21		TTH Comment	no repsonse
	Cindy	Cross	06/17/21		TTH Comment	I've heard Laguna Woods lady raising questions about equity. I have a question about equity on the other end. Does OCTA have ideas for charging stations for the Joe Biden's of the world and their electric vehicles?
	Virginia	Bayliss	06/17/21		TTH Comment	With all the recent shootings on the freeways, will OCTA put more overhead cameras on the overpasses?
	Lori	Miller	06/17/21		TTH Comment	I take the access here in Rancho Santa Margarita. Will they ever run on the weekends?
	Brian	Grode	06/17/21		TTH Comment	What is the status of the 5 freeway plan at El toro?
	Lavinia	Wohlfert	06/17/21		TTH Comment	Can there be something done about the bus stops themselves? Sometimes it is really hot, there is no shade, and that is a great discouragement to riding the bus.
	Cassandra	Haggins	06/17/21		TTH Comment	I missed a doctors appointment do to there being another pickup added. What's being done to prioritize people and their trips based on importance and urgency? Also, I use a walker. I fell on my way out of the door, and the driver said he wasn't allowed to touch me. Is there a reason the drivers can't help someone who's fallen and can't get up?
	Theresa	Salisbury	06/17/21		TTH Comment	Drivers that pick me up - 360 taxis. I don't have to pay. I'm very grateful that I don't have to drive. I've had seizures.
	Kevin	Modermott	06/17/21		TTH Comment	no comment
	Carl	Koncz	06/17/21		TTH Comment	no comment
	John	Gregg	06/17/21		TTH Comment	Why aren't bicycles getting taxed for putting in the bike lanes?
	Kyvan	Zainabadi	06/17/21		TTH Comment	What is OC-FLEX and when will this be offered?
	Dana	Cornelius	06/17/21		TTH Comment	The highway overhead signs are being unlawfully used for messages. Is the county doing anything to correct this issue?
	Stephen	Johnson	06/17/21		TTH Comment	Is there any creative research being done on transportation? Such as Trolley, Train, etc.
	Robert	Macvicar	06/17/21		TTH Comment	There are some bus benches that aren't being used at the bus stop Laguna Miguel? Will they resume a bus services at that location?
	Beverly	Bernstein	06/17/21		TTH Comment	1. Most cyclists are very law abiding. I have had a couple that go down the middle of the lane when there is no bike lane. They won't go near the cars. One of them, when we pulled up at a signal together, he told me I am supposed to stay 6 feet behind him until he can get to a bike lane. Is this true? 2. When you keep building apartments, such as on Jamboree, are you going to widen the street at all? There is a lot more traffic there now. I am concerned about how long it takes to widen a street because University has taken so long.
	Maeve	Eisenberg	06/17/21		TTH Comment	If they do this expansion with the buses, are they taking away the carpool lane? There's no room on the 5 to expand.
	June	Lange	06/17/21		TTH Comment	No comment
	Catherine	Schreiner	06/17/21		TTH Comment	Is there ever going to be transportation for seniors in my community?
	Andrew	Graner	06/17/21		TTH Comment	I've lived in OC for over 30 years and I'm in an electric wheelchair - disabled. What are the plans for improving access to other places around here? Like in LA?
	Lisa	Talmage	06/17/21		TTH Comment	no comment
	Alice	Gharibjanians	06/17/21		TTH Comment	no comment
	Catherine	Young	06/17/21		TTH Comment	The access bus doesn't come down the side that I live on. Are there any plans to expand that route for us seniors?
	Ira	Gruber	06/17/21		TTH Comment	I have lived in Irvine close to 40 years. I have watched Irvine grow from a relatively quiet suburb into the economic powerhouse it is today. I don't own a car, I have not for many years. I choose to use the local bus service instead and where I live it is in a particular area of Irvine that my transportation options is pretty good. This isn't true in much of OC. I don't think we are running busses effectively - a lot of parts of S OC particularly, we need smaller, more frequent vehicles.How does that figure in to the plans and studies so far?
	Phillip	Rosen	06/17/21		TTH Comment	Lives in a senior building, Would like more transportation in his area. He has to take the same day taxi, and waits up to 4 hours. Why doesn't OCTA have but 2 taxi's in that area?
	Lisa	Staight	06/17/21		TTH Comment	I know bus drivers evaluated on their safety and skills, but what about their customer service? If a bus driver could help me navigate the system, I could rate them higher and be more comfortable using the system!
	David	Ramseyer	06/17/21		TTH Comment	Several years ago, they were considering extending the 241 S and meet up with the 5 south of San Clemente. One of the routes that I thought was the best went east of Pico Blvd and came out near the north end of Camp Pendleton. That was turned down because they thought it might disrupt some bird flight in that area.
	Pamela	Peery	06/17/21		TTH Comment	We have a lot of homeless that camp out at the train station at San Clemente, north beach. When will they come out and enforce anti loitering laws (or whatever they are called)?
	Louis	Kramer	06/17/21		TTH Comment	Considering that 42% of the current poll voters want to increase bus and rail transportation, how can OC increase rail transit between urban areas as OC is a traditionally rural/suburban area? We have downtown urban cores - how can orange county connect its downtowns together to create an urban loop?
	Edith	Bates	06/17/21		TTH Comment	I am 78, I need transportation to see my doctor and current services are very limited and strict . This is worrysome because people like me and other senior friends can not use services for doctors visits. I live Bristol/McCarthur and I take 55 but I need transfers and waiting time is very long also drivers are very rude, sometimes they see us running and close the door in our face even though we are seniors
	Jesus	Santillan	06/17/21		TTH Comment	I don't use public trasportation
	Lucina	Rivera	06/17/21		TTH Comment	no comment
	Carmen	Rosales	06/17/21		TTH Comment	I'm 84 and there's no one that gives me help with rent. I have help with transportation when I'm sick and things like that, but I don't have the help I need with other things. Why is that the people that are here for many many years, we can't get help. The government gives money to everyone else--people in other countries-- but not to people who have been here for years and years.
	Armando	Sardon	06/17/21		TTH Comment	Do you have transportation for when I need it'
Arcturus Marketing	Shannon	Martinez	07/07/21		VMR Registration	

Appendix D

Notification Materials

Appendix D.1	Stakeholder Communications Toolkit
Appendix D.2	Study Website
Appendix D.3	List of Organizations
Appendix D.4	Eblast #1 — Telephone Townhall Meeting, Survey and Virtual Meeting Room Invite
Appendix D.5	Eblast #2 — Survey and Virtual Meeting Room Reminder
Appendix D.6	Eblast #3 — Survey and Virtual Meeting Room Last Chance
Appendix D.7	Telephone Townhall Meeting, Survey and Virtual Meeting Room Postcard (English; Spanish; Mandarin; Korean; Vietnamese)
Appendix D.8	Live Facebook Advertisement
Appendix D.9	Facebook Posts
Appendix D.10	Twitter Posts
Appendix D.11	News Release
Appendix D.12	Study Blog Article
Appendix D.13	One the Move Article

Appendix D

Appendix D.1 Stakeholder Communications Toolkit

Help us plan for SOUTH ORANGE COUNTY'S TRANSPORTATION FUTURE



Dear Stakeholder,

The Orange County Transportation Authority (OCTA) is entering Phase 2 of the South Orange County Multimodal Transportation Study (SOCMTS). The SOCMTS will identify improvements in south Orange County for all modes of transportation, including streets, transit, freeways and bikeways beyond the year 2045.

During Phase 1 of the study in fall 2020, OCTA engaged with residents and stakeholders and completed a survey in multiple languages, including English, Spanish, Vietnamese, Korean and Mandarin.

Among the survey findings, the respondents said that they would like to see:

- Reduction in **traffic congestion**
- Increased frequency and accessibility of **multimodal transportation**
- Increased safety and efficiency for **all modes of travel**, and
- Increase in **alternative transportation** frequency and accessibility.

Phase 2 will be starting this spring/summer 2021 to present the draft transportation strategies. The community and stakeholders will be asked to participate to help prioritize transportation strategies and solutions.

As a key stakeholder, we are reaching out to you to offer optional methods for sharing project and public survey details with your community. These efforts are intended to complement the other public notification methods that OCTA is using to promote this project. The survey will be available through Monday, July 12, 2021. Below are some suggested options on ways to share project and community survey details:

1. **Distribute electronically via email:** Share the community survey (SouthOCStudySurvey.com) with your e-mail contacts. You can link to the survey [HERE](#).
2. **Post to your website:** You can use [this image](#) 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 can 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) wants to hear your feedback on mobility strategies that will help identify future improvements to local streets, transit, freeways and bikeways for the Orange County Multimodal Transportation Study (SOCMTS). Through July 12th, please take a short survey online 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 (<http://metroquestsurvey.com/st7h7p>).

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 considering mobility strategies and solutions in south Orange County. Share your feedback by taking a short community survey through July 12th 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 considering mobility strategies and solutions in south Orange County. Share your feedback by taking a short community survey through July 12th at SouthOCStudysurvey.com or call in at 833-711-8070. For more information, visit octa.net/SouthOCStudy.
- C. **Instagram:** @goOCTA is considering mobility strategies and solutions in south Orange County. Share your feedback by taking a short community survey through July 12th at SouthOCStudysurvey.com or call in 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) wants to hear your feedback on mobility strategies that will help identify future improvements to local streets, transit, freeways and bikeways for the Orange County Multimodal Transportation Study (SOCMTS). Through July 12th, please take a short survey online at SouthOCStudysurvey.com or take the survey on our information line at 833-711-8070. For more information, visit octa.net/SouthOCStudy.

Appendix D

Appendix D.2 Study Website

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.

You're Invited

SURVEY

Please take a short survey online or by phone to share your feedback on mobility strategies that will help improve transportation in south Orange County in the future.

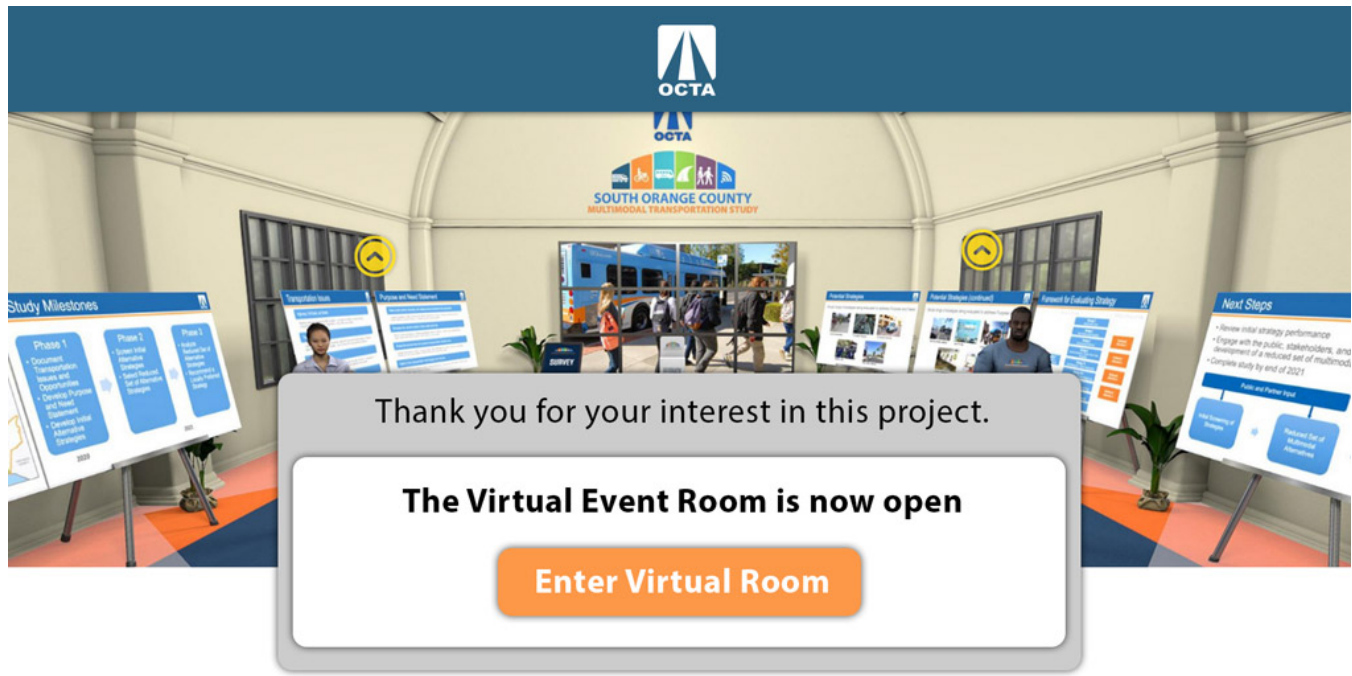
Survey Link: [SouthOCStudysurvey.com\(https://live.metroquestsurvey.com/?u=st7h7p#!/?p=web\)](https://live.metroquestsurvey.com/?u=st7h7p#!/?p=web)

Survey Phone: (833) 711-8070

Telephone Town Hall

On June 17th, 2021, OCTA conducted a Telephone Town Hall to gain community input on the study. Recordings of the call can be found below:

- English Recording (/uploadedfiles/SOCMTS-TTHM-Recording-06-17-21-English.mp3)
- Spanish Recording (/uploadedfiles/SOCMTS-TTHM-Recording-06-17-21-Spanish.mp3)



For additional information, please contact Marissa Espino at mespino@octa.net or at [714-560-5607](tel:714-560-5607) or visit octa.net/SouthOCStudy

(<https://www.virtualeventroom.com/octa/socmts/>)

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:

Phase 1

- Identify issues and opportunities
- Establish goals
- Develop strategy options



Phase 2

- Analyze strategy options
- Eliminate lower performing options



Phase 3

- Further analyze remaining options
- Recommend a Locally Preferred Strategy

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.

SIGN-UP FOR UPDATES AND ALERTS

GET CONNECTED

(/GETCONNECTED)

STAY CONNECTED

f([HTTP://WWW.FACEBOOK.COM/GOOCTA](http://www.facebook.com/GOOCTA))



([HTTP://TWITTER.COM/GOOCTA](http://twitter.com/GOOCTA))



([HTTP://WWW.YOUTUBE.COM/GOOCTA](http://www.youtube.com/GOOCTA))



([HTTP://WWW.INSTAGRAM.COM/GOOCTA](http://www.instagram.com/GOOCTA))



Orange County Transportation Authority

BUS INFORMATION

(714) 636-7433(tel:714-636-7433)

Appendix D

Appendix D.3 List of Organizations

Organization	Organization	Organization
3000 The Plaza Irvine Homeowners Association	Harvest Community Church of Irvine	Orange County Health Care Agency
5th Marine Regiment Support Group	Headrick Medical Center	Orange County Hispanic Chamber of Commerce
AAA - Automobile Club of Southern California	Heartstone Housing Foundation	Orange County Small Business Development Center
Acres of Love	Heritage Committee	Orange County United Way
Aegean Heights Homeowners Association	Heritage Hill Historic Park	Orange County Visitors Association
Affordable Housing Access Inc	Hilton Orange County/Costa Mesa	Orange County Women in Networking
Aliso Creek Church	Hoag Health Center	Orange County Youth Chamber of Commerce
Aliso Viejo Chamber of Commerce	Hoag Memorial Hospital Presbyterian	Our Father's Table
Aliso Viejo Community Association	Hotel Joaquin/ Laguna Beach Chamber of Commerce	Our Lady of Pillar Catholic Church
Aliso Viejo Country Club	I.C.A.R.E Dog Rescue	Outlets at San Clemente
Aliso Viejo Ranch	i-5 Freedom Network	Pacific Marine Mammal Center
Alliance for a Healthy Orange County	ICU Medical	PADI
Ambridge Maintenance Association (Accell Property Management)	Immaculate Heart of Mary Catholic Church	Palm Tree Communities
American Institute of Architects Orange County	Irvine Business Complex	Palma Master Association
American Lung Association in California	Irvine Community Church	Panasonic Avionics Corporation
American Planning Association- Orange County Chapter	Irvine Company	Pedego Electric Bikes
Amtrak	Irvine First Chinese Baptist	Pet Project Foundation
Applied Medical	Irvine Kiwanis Club	Pinot's Palette
Aquatic Technologies	Irvine Ranch Water District	Pintar Investment Company
Arroyo Vista Elementary YMCA	Irvine Rotary Club	Plaza Tower
Arthritis Center of Southern Orange County	Irvine Spectrum Center	Promenade Villas Homeowners Association
Ashford Place Maintenance Association (Keystone Pacific)	Irvine Unified School District	Quest Software
Asian Business Association Orange County	Irvine Valley College	R.D. Olson Development
Assistance League of Laguna Beach	Jax Bicycle Center	Race 4 the Environment
ASU University	John Wayne Airport	Rancho Cielo Home Owners Association (Seabreeze Management Company)
Auburn Homeowners Association (Action Property Management)	Journey Christian Church	Rancho Mission Viejo
Avanir Pharmaceuticals Inc	Jubilee Presbyterian Church in Irvine	Rancho Mission Viejo, LLC
Aventura Sailing	Julie Loughton Design Build/ Laguna Beach Chamber of Commerce	Rancho San Clemente Community Association (Curtis Management Co.)
AYSO	Kaiser Permanente Orange County	
Bay Laurel Homeowners Association	Irvine Medical Center	Rancho Santa Margarita Chamber of Commerce
BAYSIDE VILLAGE HOA	Kawamura College Advisement	Rancho Santa Margarita Landscape and Recreation Corporation
BAYVIEW TERRACE HOA	Kawasaki Motors Corp., U.S.A.	Rancho Santa Margarita Library
Bayview/Baycrest Court HOA	Kiwanis Club of Laguna Woods Village	Redan Medical Inc.
BEACON BAY COMMUNITY ASSOC.	Kiwanis Club of Mission Viejo	Relay for Life
Bell Fleur Homeowners Association	Kiwanis Club of San Clemente	Rock Harbor Church
Bellwether Financial Group	Knights of Columbus	Rotary Club of Irvine
Best Best and Krieger LLP	Korean Community Services	Rotary Club of Laguna Niguel
Bicycle Club of Irvine	Korean Resource Center (KRC) - Orange County Office	Rotary Club of Mission Viejo
Blue Lagoon HOA (Action Property Management)	Korean Resource Center (KRC), Orange County Office	Saddleback Adult Education SIC Campus
Blue Lantern Inn	La Mirage at Aliso Viejo HOA (Total Property Management)	Saddleback Church (Irvine South Campus)
BLUFFS H. O. COMMUNITY ASSOC.	La Vista HOA (Powerstone Property Management)	Saddleback Church Dana Point
Boys & Girls Club of Capistrano Valley	Laguna Aesthetics and Vein Center	Saddleback College
Boys & Girls Club of the South Coast Area	Laguna Beach Canyon Alliance Neighborhood Defense Organization	Saddleback Family & Urgent Care
Boys and Girls Club Newport Beach	Laguna Beach Chamber of Commerce	Saddleback Valley Unified School District
Braille Institute - Laguna Hills	Laguna Beach Community Clinic	Saint Thomas More Church
Brio Tuscany Grille	Laguna Beach Company/ Laguna Beach Chamber of Commerce	Salvation Army Church
Buchalter/ Laguna Beach Chamber of Commerce	Laguna Beach Historical Society	SAMLARC (Rancho Santa Margarita Landscape and Recreation Corporation)
Building Industry Association	Laguna Beach Interfaith Council	San Clemente Arts Association
Burnham Ward Properties	Laguna Beach Library	San Clemente Chamber of Commerce
C. J. Segerstrom & Sons	Laguna Beach Net Works Christian Church	San Clemente Community Center
Cabrillo Playhouse	Laguna Beach Riviera Lions Club	San Clemente Downtown Business Association
Cal State Fullerton	Laguna Beach Rotary Club	San Clemente Exchange Club
California Avocado Society Inc.	Laguna Beach Saddleback	San Clemente Green
California Bank & Trust/ Le Tip of Irvine Spectrum	Laguna Beach Seniors	San Clemente Junior Woman's Club
Caltrans, District 12	Laguna Beach Unified School District	San Clemente Library
Calvary Chapel Costa Mesa	Laguna Beach United Methodist Church	San Clemente Medical Group
Camden Park HOA (Optimum Professional Property Management)	Laguna Beach Visitors Center	San Clemente Sunrise Rotary Club
Camino Health Center	Laguna Board of Realtors	San Clemente Times & Dana Point Times
Canyon Estates Community Association	Laguna Canyon Foundation	San Diego Gas and Electric
Capistrano Beach Care Center	Laguna Coast Wilderness Park	San Juan Capistrano Fiesta Association
Capistrano Unified School District	Laguna Crest Estates Community Association (Accell Property Management)	San Juan Capistrano Historical Society
Capo Beach Church	Laguna Dana Urgent Care	San Juan Capistrano Library
Captain's Hill HOA (Dana Pacific Management Services)	Laguna Health & Wellness Center	San Juan Capistrano Rotary Club
Car Sound Exhaust System, Inc.	Laguna Hills Anticoagulation Clinic	San Juan Chamber of Commerce
Cardinal Property Management	Laguna Hills Chamber of Commerce	San Onofre Parks Foundation
Casa Romantica Cultural Center & Gardens	Laguna Hills Technology	Santa Ana Active Streets
Casa Romantica Cultural Center and Gardens	Laguna Niguel Chamber of Commerce	Santa Ana Business Council, Inc.
Casino San Clemente	Laguna Niguel Library	Santa Ana Chamber of Commerce
Casta Del Sol HOA	Laguna Niguel Lions Club	Santa Ana College (SAC)
Catalina Express	Laguna Niguel Republican Women Federated	Santa Ana Main Public Library
Center for Spiritual Living Capistrano Valley & Executive Suites at Talega	Laguna Niguel Woman's Club	Santa Ana Unified Adult Transition
Chamber of Commerce Mission Viejo	Laguna Playhouse/ Laguna Beach Chamber of Commerce	Santa Ana Unified School District (SAUSD)
Chapman University	Laguna Presbyterian Church	Santa Margarita Water District
Chief Strategy Officer	Laguna Sur HOA (Seabreeze Management)	Sawdust Art Festival
Child Guidance Center, Inc.	Laguna Woods Democratic Club	SCKE - Odyssey Medical Group
Chinese Baptist Church of Central Orange County	Laguna Woods History Center	Sea & Sage Audubon Society
Church By the Sea	Laguna Woods Library	Sea & Sage Audubon Society - Orange County Chapter
Church in Irvine	Laguna Woods Village - Community Civic Association	Seniors in Transit
Church of Scientology of Orange County	Lake Forest Chamber of Commerce	Serrano Creek Community Park
City Harvest Church Orange County	Lake Forest Community Association	Shorecliffs Golf Course
City of Aliso Viejo	Lake Forest Community Association	Sierra Club - Orange County Conservation Committee
City of Costa Mesa	Lake Forest Golf and Practice Center	Sikh Center of Orange County
City of Dana Point	Lake Forest II - Ranchwood	SoCal Gas Company
City of Irvine	Lake Forest II Master Homeowners Association	Soka Performing Arts Center
City of Laguna Beach	Lake Forest Keys HOA	Soka University
City of Laguna Hills	Lake Forest Shores	South Coast Global Medical Center
City of Laguna Niguel	Lake Forest Village Shopping Center	South Coast Medical Group
City of Laguna Woods	Las Flores Elementary/ Middle School YMCA	South Coast Metro Alliance
City of Mission Viejo	Latino Health Access	South Coast Plaza
City of Newport Beach	Laurelwood Homeowners Association	South Coast Roadrunners
City of Newport Beach	League of United Latin American Citizens (LULAC)	South Coast Water District
City of Rancho Santa Margarita	Liberty Park	South County Chamber of Commerce
City of San Clemente	LIDO SANDS COMMUNITY ASSOCIATION	South County Outreach
City of San Juan Capistrano	Lions Club	South Laguna Civic Association
City of Santa Ana	Lion's Heart - Aliso Viejo	South Orange County Community College District
City of Tustin	Little Balboa Property Owners Association	South Orange County Economic Coalition
Coalition for Clean Air	Little League	South Shores Church
Community Health Centers	Little Saigon Foundation	Special Camp
Coast Hills Church	Lowe's	Spectrum Church Irvine
Coastland University Rancho Santa Margarita	Main Place Mall	Spectrumotion
Coastline Community College-Newport Beach	MAKO Educational Foundation	St Edward the Confessor Parish School
Colinas De Capistrano Community Association	Marblehead Community Association (FirstService Residential)	St Francis By The Sea Catholic Church
College-Environmental Tech	Marconi Automotive Museum	St. Joseph Health
Columbus Grove HOA - Ainsley Park	Mares Foundation	St. Mary's Episcopal Church Laguna Beach
Columbus Grove HOA - Clarendon	Marina Hills Planned Community Association (Keystone Pacific)	Stanbridge University, Orange County
Community Action Partnership of Orange County	Marine Adoption Committee	Summer Place Homeowners Association
Community Management Corporation	Mariners Church	Sunhollow HOA (Accell Property Management)
Community Outreach Alliance	Marinita Homeowners Association	Sunset Place of Laguna Hills Homeowners Association
Compass Bible Church	Marque Urgent Care	Surf Rider Orange County Chapter
	McDowell School	Surfing Heritage and Culture Center

Organization	Organization	Organization
Concentra Urgent Care	Medical Concierge Mental Health Center	Surfrider Foundation
Concord USA/ Le Tip of Irvine Spectrum	Melissa Data	SVUSD
Concordia University Irvine	Memorial Care Health System	Talega Maintenance Corporation
Cornerstone HOA	Metro Town Square	Temple Hills Community Association
CORONA HIGHLANDS POA	MicroVenture Inc	Terrace View Homeowners Association
Corpus Christi Church	Milano HOA (Action Property Management)	The ALS Guardian Angels Foundation
Costa Brava at Rancho Niguel	Mission Hospital	The Capistrano Dispatch
Costa Mesa Chamber of Commerce	Mission Hospital - Laguna Beach	The Chamber Newport Beach
Costa Mesa Marriott	Mission Viejo Activities Committee	The Chronically Awesome Foundation
Coto de Caza News	Mission Viejo Chamber of Commerce	The District at Tustin Legacy
County of Orange	Mission Viejo Community Foundation	The Doyle Foundation
Crown Valley Highlands Community Association	Mission Viejo Rotary Club	The Ecology Center
Crystal Cay HOA	Mission Viejo Senior Activities Committee	The Hydration Room IV and Injection Therapy
Crystal Cove Conservancy	Mobility 21	The Kennedy Commission
Cyprus Shore Homeowners Association	Modjeska Playhouse	The LAB Holding Company
Dana Point 5th Marine Regiment Support Group	MOMS Resource Center	The Laguna Beach Community Foundation
Dana Point Chamber of Commerce	Monarch Bay Plaza	The Laguna Playhouse
Dana Point Coastal Arts	Monarch Beach Master HOA (Keystone Pacific)	The Marina at Dana Point
Dana Point Community Center	Monarch Beach Promenade	The OC Marathon
Dana Point Fine Arts Association	Monarch Beach Resort	The Orchard
Dana Point Harbor Partners	Monarch Beach Sunrise Rotary Club	The Outlets at Orange
Dana Point Historical Society	Monarch Summit I HOA	The Redwoods Homeowners Association
Dana Point Lantern District Alliance	Moulton Niguel Water District	The Reserve at Rancho Mission Viejo
Dana Point Library	Moulton Ranch III (Action Property Management)	The Shops at Mission Viejo
Dana Point Marina Inn	Multi-Ethnic Collaborative of Community Agencies (MECCA)	The Village at Laguna Hills
Dana Point Physical Therapy	Music Preserves Foundation	The Westin South Coast Plaza
Dana Point Women's Community House	Nadadores - Dive	Tijeras Creek Elementary YMCA
Dana Point Yacht Club	Nadadores - Swim	Tijeras Creek Golf Club
Dana Wharf Sportfishing & Whale Watching	Neck & Back Medical Center	Toastmasters of Laguna Beach
Dennis and Leslie Power Library, Laguna College of Art and Design	Neighborhood Congregational Church	Trabuco Highlands Community Association (Keystone Pacific)
Destination Irvine	Nellie Gail Ranch Owners Association	Trabuco Mesa Park
Discovered Money	New Life Irvine	Traditional Fine Arts Organization
Doheny State Beach Interpretive Association	New University Newspaper, University of California, Irvine	Trails 4 All
Doheny State Park	Newport Beach Chamber of Commerce	Transit Advocates of Orange County
Dove Canyon Country Club	Newport Beach Foundation	Transportation Corridor Agencies
Downtown, Inc.	Newport Center Toastmasters	Turtle Rock Glen Community Association (Keystone Pacific)
EASTBLUFF HOMEOWNERS COMMUNITY ASSOC.	Newport Church	Tustin Chamber of Commerce
Edwards Lifesciences Corporation	Newport/Irvine Rotary Club	Tustin Community Foundation
Efficient Power Conversion Corporation	Newport-Mesa-Irvine Interfaith Council	Tustin Host Lions Club
El Toro Water District	Niguel Botanical Preserve	Tustin Meadows - West
Elks of Mission Viejo	Niguel Shores Community Association	Tustin Ranch Golf Club
Evolution Haiti	Norman P. Murray Community and Senior Center	Tustin Unified School District
Exodus3	OC Fair	Tustin/Santa Ana Rotary Club
Expressions HOA (Accell Property Management)	OC Health Care Agency	Unidos South OC Inc
Festival of Arts and Pageant of the Masters	OC Register	Unitarian Universalist Church
Firebrand Media/ Laguna Beach Chamber of Commerce	Ocean View Plaza	University of California, Irvine
FivePoint	O'Connell Landscape®	University of Phoenix
Fluidmaster Inc	Octane OC	University of Southern California
Foothill Communities Association, Inc.	O'Neill Regional Park	Villa Pacifica Homeowners Association (c/o South Coast Property Management)
Fredric H. Rubel Fine Jeweler/ Laguna Beach Chamber of Commerce	Orange Coast College	Village Church of Irvine
Friends of Harbors, Beaches, and Parks	Orange County	Villagio 1 Community Association (Curtis Management Co.)
Friends of the Dana Point Headlands	Orange County Asian Pacific Islander Community Alliance (OCAPICA)	Vista La Cuesta Homeowners Association
Frisby Cellars Winery	Orange County Association of Realtors	Voyagers Bible Church
Future Leaders of Our Community	Orange County Bicycle Coalition	Vybed Out Radio
Gloria Dei Lutheran Church	Orange County Black Chamber of Commerce	Walmart Neighborhood Market
Good Shepard Lutheran Church	Orange County Business Council	We Rock The Spectrum Laguna Hills Kid's Gym
Grace City Church	Orange County Business Council (OCBC)	WIN-TEAM Racing
Great Opportunities	Orange County Coastkeeper	Women's Club of Laguna Beach
Greater Irvine Chamber of Commerce	for Responsible Development (OCCORD)	Woodbridge Community Church
Greater Light Family Church	Orange County Community Foundation	Wyland Foundation
Greater Orange County Lions Club	Orange County Council of Governments	Yesenia's Humanitarian Foundation
Harbor Christian Church	Orange County Department of Education	YMCA
HARBOR VIEW KNOLL COMMUNITY ASSN.	Orange County Fire Authority	Your Story Matters

Appendix D

Appendix D.4 Eblast #1 — Telephone Townhall Meeting, Survey and Virtual Meeting Room Invite

Kristyn Bogda

From: Marissa Espino <mespino@octa.net>
Sent: Monday, June 7, 2021 11:02 AM
To: Kristyn Bogda
Subject: Join our Telephone Townhall to Plan for South Orange County's Transportation Future

Follow Up Flag: Follow up
Flag Status: Flagged

[View this email in your browser](#)



The Orange County Transportation Authority (OCTA) wants to hear your feedback on the mobility strategies that will help identify future improvements to local streets, transit, freeways and bikeways for the **South Orange County Multimodal Transportation Study (SOCMTS)**.

We Want To Hear From You!

Please take this short survey below or by phone to share your feedback on mobility strategies that will help improve transportation in south Orange County in the future.



Join us for a Telephone Townhall to learn about study findings, provide input and ask questions.

Simulcast in Spanish.

Date: Thursday, June 17, 2021

Time: 5:30-6:30 p.m.

Registration

URL: octa.net/TTHsignup

A recording of the presentation will be available on the project website following the meeting.



A Virtual Meeting Room will also be open from Monday, June 7 through

Survey

link: SouthOCStudysurvey.com

Survey Phone Number:

(833) 711-8070

Monday, July 12, 2021 to learn more about the study, make comments and ask questions. Please visit octa.net/SouthOCStudy to access the Virtual Meeting Room.

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 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, *Principal Community Relations Specialist*

Email: mespino@octa.net

Phone: (833) 711-8070

Project Site: octa.net/SouthOCStudy



La Autoridad de Transporte del Condado de Orange (OCTA) quiere escuchar sus comentarios sobre las estrategias de movilidad que ayudarán a identificar futuras mejoras a las calles, tránsito, autopistas y ciclovías a nivel local para **el Estudio de Transporte Multimodal del sur del Condado de Orange (SOCMTS)**.

¡Queremos Saber Su Opinión!

Realice una breve encuesta en línea o por teléfono para compartir su opinión sobre las estrategias de movilidad que



Únase a nosotros para una reunión telefónica del ayuntamiento para aprender acerca de los hallazgos del estudio, proporcionar información y preguntar preguntas

Simulcast en español.

Fecha: Jueves, 17 de junio de 2021

Horario: 5:30-6:30 p.m.

Regístrese en: octa.net/TTHsignup

Una grabación de la presentación estará disponible en el sitio web del proyecto después de la reunión.

ayudarán a mejorar el transporte en el sur del Condado de Orange en el futuro.

Enlace a la

Encuesta: SouthOCStudySurvey.com

Número de Teléfono de la

Encuesta:

(833) 711-8070



También se abrirá una Sala de Reuniones Virtual desde lunes, 7 de junio al lunes, 12 de julio de 2021 para aprender más sobre el estudio, hacer comentarios y hacer preguntas. Visite octa.net/SouthOCStudy para acceder a la Sala de Reuniones Virtual.

Marissa Espino, *Principal Community Relations Specialist*

Email: mespino@octa.net

Phone: (833) 711-8070

Project Site: octa.net/SouthOCStudy

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Orange County Transportation Authority · 550 S. Main Street · Orange, CA 92868 · USA

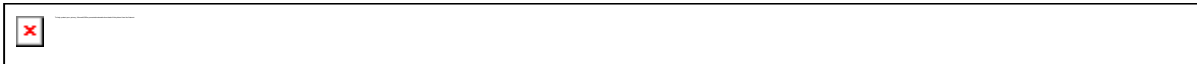
Appendix D

Appendix D.5 Eblast #2 — Survey and Virtual Meeting Room Reminder

Kristyn Bogda

From: Marissa Espino <mespino@octa.net>
Sent: Wednesday, June 16, 2021 1:46 PM
To: Kristyn Bogda
Subject: REMINDER: Join our Telephone Townhall to Plan for South Orange County's Transportation Future

[View this email in your browser](#)



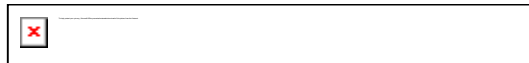
The Orange County Transportation Authority (OCTA) wants to hear your feedback on the mobility strategies that will help identify future improvements to local streets, transit, freeways and bikeways for the **South Orange County Multimodal Transportation Study (SOCMTS)**.

We Want To Hear From You!

Please take this short survey below or by phone to share your feedback on mobility strategies that will help improve transportation in south Orange County in the future.

Survey

link: SouthOCStudysurvey.com



Join us for a Telephone Townhall to learn about study findings, provide input and ask questions.

Simulcast in Spanish.

Date: Thursday, June 17, 2021

Time: 5:30-6:30 p.m.

Registration

URL: octa.net/TTHsignup

A recording of the presentation will be available on the project website following the meeting.



A Virtual Meeting Room will also be open from Monday, June 7 through Monday, July 12, 2021 to learn more about the study, make comments

Survey Phone Number:
(833) 711-8070

and ask questions. Please visit octa.net/SouthOCStudy to access the Virtual Meeting Room.

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 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, *Principal Community Relations Specialist*

Email: mespino@octa.net

Phone: (833) 711-8070

Project Site: octa.net/SouthOCStudy




La Autoridad de Transporte del Condado de Orange (OCTA) quiere escuchar sus comentarios sobre las estrategias de movilidad que ayudarán a identificar futuras mejoras a las calles, tránsito, autopistas y ciclovías a nivel local para **el Estudio de Transporte Multimodal del sur del Condado de Orange (SOCMTS)**.

¡Queremos Saber Su Opinión!

Realice una breve encuesta en línea o por teléfono para compartir su opinión sobre las estrategias de movilidad que ayudarán a mejorar el transporte en el sur del Condado de Orange en el futuro.

Enlace a la

Encuesta: SouthOCStudysurvey.com



Únase a nosotros para una reunión telefónica del ayuntamiento para aprender acerca de los hallazgos del estudio, proporcionar información y preguntar preguntas

Simulcast en español.

Fecha: Jueves, 17 de junio de 2021

Horario: 5:30-6:30 p.m.

Regístrese en: octa.net/TTHsignup

Una grabación de la presentación estará disponible en el sitio web del proyecto después de la reunión.



**Número de Teléfono de la
Encuesta:**
(833) 711-8070

También se abrirá una Sala de Reuniones Virtual desde lunes, 7 de junio al lunes, 12 de julio de 2021 para aprender más sobre el estudio, hacer comentarios y hacer preguntas. Visite octa.net/SouthOCStudy para acceder a la Sala de Reuniones Virtual.

Marissa Espino, *Principal Community Relations Specialist*

Email: mespino@octa.net

Phone: (833) 711-8070

Project Site: octa.net/SouthOCStudy

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Appendix D

Appendix D.6 Eblast #3 — Survey and Virtual Meeting Room Last Chance

Kristyn Bogda

From: Marissa Espino <mespino@octa.net>
Sent: Wednesday, July 7, 2021 11:00 AM
To: Kristyn Bogda
Subject: Last Chance to Take Our Survey for South Orange County's Transportation Future

[View this email in your browser](#)

Help us plan for
SOUTH ORANGE COUNTY'S
TRANSPORTATION FUTURE



Share your feedback on the transportation study by Monday, July 12.

Take our survey and check out our Virtual Meeting Room for the **South Orange County Multimodal Transportation Study!** Your input is valuable in helping OCTA develop strategies that will help identify future mobility improvements to south Orange County. The survey and Virtual Meeting Room will close this Monday, July 12th.



Survey

Please take this short survey below or by phone. The survey is available in English, Spanish, Korean, Mandarin and Vietnamese.

Survey

link: SouthOCStudySurvey.com

Survey phone number:



Virtual Meeting Room

You can also fill out an online comment form through our [Virtual Meeting Room](#) to share your thoughts.

(833) 711-8070

Share the survey and Virtual Meeting Room with family, friends,
neighbors, or colleagues who live, work, or visit south Orange County.

We look forward to hearing from you!

Marissa Espino, *Principal Community Relations Specialist*

Email: mespino@octa.net

Phone: 833.711.8070

Project Site: octa.net/SouthOCStudy

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Appendix D

Appendix D.7 Telephone Townhall Meeting, Survey and Virtual Meeting Room Postcard (English; Spanish; Mandarin; Korean; Vietnamese)

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) wants to hear your feedback on mobility strategies that will help identify future improvements to local streets, transit, freeways and bikeways for the **South Orange County Multimodal Transportation Study (SOCMTS)**.

La Autoridad de Transporte del Condado de Orange (OCTA) quiere escuchar sus comentarios sobre las estrategias de movilidad que ayudarán a identificar futuras mejoras a las calles, tránsito, autopistas y ciclovías a nivel local para el Estudio de Transporte Multimodal del sur del Condado de Orange (SOCMTS).

We Want To Hear From You!

¡Queremos Saber Su Opinión!

Please take a short survey online or by phone to share your feedback on mobility strategies that will help improve transportation in south Orange County in the future.

Realice una breve encuesta en línea o por teléfono para compartir su opinión sobre las estrategias de movilidad que ayudarán a mejorar el transporte en el sur del Condado de Orange en el futuro.

Survey Link / Enlace a la Encuesta:
[SouthOCStudysurvey.com](https://www.southocstudysurvey.com)

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 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.



TELEPHONE TOWNHALL REUNIÓN PÚBLICA TELEFÓNICA

Join us for a Telephone Townhall to learn about study findings, provide input and ask questions. Simulcast in Spanish.

Únase a nosotros para una reunión telefónica del ayuntamiento para aprender acerca de los hallazgos del estudio, proporcionar información y preguntar preguntas. Simulcast en español.



WHEN / CUANDO

Date / Fecha:

Thursday, June 17, 2021 / Jueves, 17 de junio de 2021

Time / Horario: 5:30-6:30 p.m.

Please register by going to octa.net/TTHsignup

Regístrese en octa.net/TTHsignup

A recording of the presentation will be available on the project website following the meeting.

Una grabación de la presentación estará disponible en el sitio web del proyecto después de la reunión.



VIRTUAL MEETING ROOM / SALA DE REUNIONES VIRTUAL

A Virtual Meeting Room will also be open from Monday, June 7 to Monday, July 12, 2021 to learn more about the study, make comments and ask questions. Please visit octa.net/SouthOCStudy to access the Virtual Meeting Room.

También se abrirá una Sala de Reuniones Virtual desde lunes, 7 de junio al lunes, 12 de julio de 2021 para aprender más sobre el estudio, hacer comentarios y hacer preguntas. Visite octa.net/SouthOCStudy para acceder a la Sala de Reuniones Virtual.

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



Marissa Espino
Principal Community Relations Specialist



mespino@octa.net



833.711.8070



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

PRSRRT STD
ECRWSS
U.S. POSTAGE
PAID
SANTA ANA, CA
PERMIT NO. 985



Appendix D

Appendix D.8 Live Facebook Advertisement



Last chance!
Take our survey at
SouthOCSurvey.com
or call 833-711-8070.



South OC Multimodal Transportation S... ✕
Share your feedback on the transportati... ..

Appendix D

Appendix D.9 Facebook Posts

6/7/21 English Advertisement

Ad Preview



OCTA

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OCTA's South Orange County Multimodal Transportation Study (SOCMTS) will help identify future improvements to local streets, transit, freeways and bikeways.

Tell us how to better connect south OC through a brief survey and learn more about the project through our Virtual Meeting Room, visit octa.net/SouthOCStudy or call in at (833) 711-8070.



Help us plan for
SOUTH ORANGE COUNTY'S
TRANSPORTATION FUTURE

OCTA.NET

Orange County

Over the next 25 years, the pop...

LEARN MORE



Like



Comment



Share

Performance

\$48.93 spent over 10 days.

Link Clicks



62

Reach ⓘ

4,507

Cost Per Link Click

ⓘ \$0.79

Activity

Post Engagement

78

Link Clicks

62

Landing Page Views

13

Post Reactions

11

Post Shares

4

Post Comments

1

See Less ^

Audience

This ad reached 4,507 people in your audience.

People

Placements

Locations

43.4% Women 56.6% Men



6/8/21 Spanish Advertisement

Ad Preview



OCTA

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OCTA quiere escuchar sus comentarios sobre las estrategias de movilidad que ayudarán a identificar futuras mejoras a las calles, tránsito, autopistas y carriles de bicicleta al nivel local para el Estudio de Transporte Multimodal del sur del Condado de Orange (SOCMTS). Realice nuestra encuesta y obtenga más información sobre el proyecto a través de nuestra Sala de Reuniones Virtual, visite octa.net/SouthOCStudy o llame al (833) 711-8070.



Ayúdenos a planificar el futuro del transporte del condado de South Orange

OCTA.NET

Orange County

Over the next 25 years, the pop...

LEARN MORE



Like



Comment



Share

Performance

\$49.65 spent over 10 days.

Link Clicks



58

Reach



4,657

Cost Per Link Click

\$0.86

Activity

Post Engagement

93

Link Clicks

58

Post Reactions

32

Post Shares

3

Landing Page Views

1

See Less ^

Audience

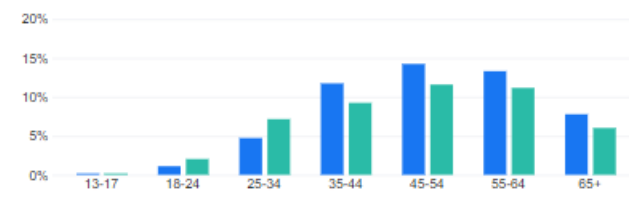
This ad reached 4,657 people in your audience.

People

Placements

Locations

52.9% Women 47.1% Men



6/8/21 Korean Advertisement

Ad Preview

**OCTA**
Sponsored · 🌐

OCTA는 사우스 오렌지 카운티 복합 교통수단 연구(SOCMTS)를 위해 지역 거리, 대중 교통수단, 프리웨이 및 자전거 도로의 향후 개선 사항을 파악하는 데 도움이 될 이동성 전략에 대한 여러분의 의견을 듣고자 합니다.
설문 조사에 응하여 저희 가상 회의실을 통해 프로젝트에 대해 자세히 알아보십시오.
octa.net/SouthOCStudy을 방문하시거나 (833) 711-8070으로 전화하십시오.



남부 오렌지 카운티의 교통 미래를 계획할 수 있도록 저희들을 도와주세요.

OCTA.NET
Orange County
Over the next 25 years, the pop...

[LEARN MORE](#)

 Like  Comment  Share

Performance

\$24.97 spent over 5 days.

Link Clicks

20

Reach

1,987

Cost Per Link Click

\$1.25

Activity

Link Clicks

20

Post Engagement

20

Landing Page Views

1

Audience

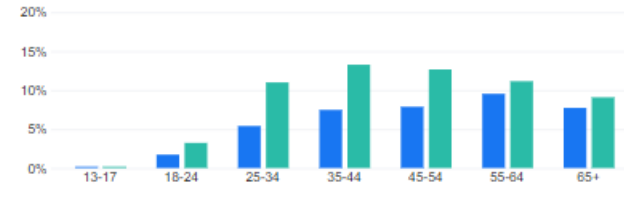
This ad reached 1,987 people in your audience.

People


Placements

Locations

39.7% Women 60.3% Men





6/8/21 Vietnamese Advertisement

**OCTA**
Sponsored · 🌐

OCTA muốn nghe phản hồi của quý vị về các chiến lược di chuyển mà sẽ giúp xác định những cải tiến trong tương lai đối với các đường phố địa phương, phương tiện di chuyển công cộng, xe lộ và đường dành cho xe đạp thông qua Cuộc Nghiên cứu Giao thông Đa phương thức vùng phía Nam Orange County (SOCMTS).




Hãy tham gia cuộc khảo sát của chúng tôi và tìm hiểu thêm về dự án này thông qua Virtual Meeting Room (Phòng Họp Ảo) của chúng tôi, truy cập octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.



Xin Giúp chúng tôi lập kế hoạch cho Tương lai Giao thông Vận chuyển của khu phía Nam Quận Orange

OCTA.NET
Orange County
Over the next 25 years, the pop...

[LEARN MORE](#)

 Like  Comment  Share

Performance
\$24.97 spent over 5 days.

Link Clicks ⓘ
24

Reach ⓘ
2,201

Cost Per Link Click ⓘ
\$1.04

Activity

Post Engagement
33

Link Clicks
24

Post Reactions
8

Landing Page Views
2

Post Comments
1

[See Less ^](#)

Audience
This ad reached 2,201 people in your audience.

People Placements Locations

41.9% Women 58.1% Men



Age Group	Blue Series (%)	Green Series (%)
13-17	0.5	0.5
18-24	1.5	2.5
25-34	3.5	7.5
35-44	4.5	7.5
45-54	7.5	11.5
55-64	12.5	15.5
65+	14.5	16.5

6/8/21 Mandarin Advertisement



OCTA

Sponsored · 

OCTA 希望听到您对流动性策略的反馈意见，这些策略将帮助通过橙县南部多式交通研究 (SOCMTS) 确定未来对当地街道、公交、高速公路和自行车道的改进内容。

参加我们的调查并且通过我们的虚拟会议室了解该项目的更多信息，请访问 octa.net/SouthOCStudy 或者致电 (833) 711-8070。



SOUTH ORANGE COUNTY

MULTIMODAL TRANSPORTATION STUDY



帮助我们为橙县南部的交通未来做好计划

OCTA.NET

Orange County

Over the next 25 years, the pop...

LEARN MORE

 Like

 Comment

 Share

Performance

\$24.99 spent over 5 days.

Link Clicks

20

Reach

1,845

Cost Per Link Click

\$1.25

Activity

Post Engagement

31

Link Clicks

20

Post Reactions

11

Landing Page Views

3

Audience

This ad reached 1,845 people in your audience.

People

Placements

Locations

48.6% Women

51.4% Men

0%

5%

10%

15%

20%

13-17

18-24

25-34

35-44

45-54

55-64

65+

6/8/21 Regular Post



OCTA

Published by Liz Mazariegos · June 8 at 8:59 AM ·



OCTA wants to hear your feedback on mobility strategies that will help identify future improvements to local streets, transit, freeways, and bikeways through the South Orange County Multimodal Transportation Study (SOCMTS).

Take our survey and learn more abo... [See More](#)



Help us plan for
SOUTH ORANGE COUNTY'S
TRANSPORTATION FUTURE

756

People Reached

21

Engagements

↑ +2.1x Higher
Distribution Score

[Boost Post](#)



7

1 Share



Like



Comment




Share



Comment as OCTA




6/9/21 Regular Post (posted by OCTA)

**OCTA**

Published by Sprinklr Prod2 · June 9 at 10:30 AM ·

OCTA continues to address south Orange County's transportation needs with a long-term study and near-term projects.



SOUTH ORANGE COUNTY

MULTIMODAL TRANSPORTATION STUDY

BLOG.OCTA.NET


South County Transportation Improvements Move Forward


285
People Reached


10
Engagements


↑ +1.2x Average
Distribution Score


Boost Post





 5

 Like

 Comment

 Share

 Comment as OCTA



6/14/21 English Advertisement

**OCTA**
Sponsored · 

Join us for a Telephone Townhall on Thursday, June 17, at 5:30-6:30 p.m. Register at octa.net/TTHTSignup to learn more about OCTA's South Orange County Multimodal Transportation Study (SOCMTS). This study will help identify future improvements to local streets, transit, freeways and bikeways. Take our survey and learn more about the project through our Virtual Meeting Room, visit octa.net/SouthOCStudy or call in at (833) 711-8070.

**Join our Telephone Townhall**
Thursday, June 17
from 5:30-6:30pm

**OCTA.NET**
OCTA
Over the next 25 years, the pop... [LEARN MORE](#)

 Like  Comment  Share

Performance

\$24.00 spent over 2 days.

Link Clicks

9

Reach

1,839

Cost Per Link Click

\$2.67

Activity

Link Clicks



Post Engagement



Audience

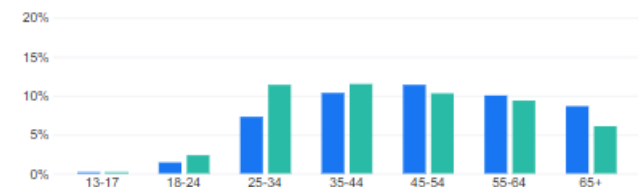
This ad reached 1,839 people in your audience.

People



Placements

Locations

49.1% Women 50.9% Men





6/14/21 Spanish Advertisement




**OCTA**
Sponsored · 

OCTA está realizando un estudio para ayudar a identificar futuras mejoras en las calles locales, el tránsito, las autopistas y los carriles de bicicleta para el Estudio de Transporte Multimodal del Sur del Condado de Orange (SOCMTS). Acompáñenos en una Reunión Pública Telefónica el jueves 17 de junio de 5:30 - 6:30 p.m. para conocer las estrategias de transporte y compartir su opinión. La presentación será transmitida en español. Regístrese en: octa.net/TTHsignup. Simulcast en español.

Realice nuestra encuesta y obtenga más información sobre el proyecto a través de nuestra Sala de Reuniones Virtual, visite octa.net/SouthOCStudy o llame al (833) 711-8070.

**Únase a nuestra Reunión Telefónica Pública**
Jueves, 17 de junio de 5:30-6:30pm

**OCTA.NET**
OCTA
Over the next 25 years, the pop... [LEARN MORE](#)

 Like  Comment  Share

Performance
\$14.00 spent over 2 days.

Link Clicks ⓘ
14

Reach ⓘ
1,169

Cost Per Link Click ⓘ
\$1.00

Activity

Post Engagement
19

Link Clicks
14

Post Reactions
3

Post Shares
2

Landing Page Views
1

[See Less ^](#)

Audience
This ad reached 1,169 people in your audience.

People

PlacementsLocations

61.9% Women 38.1% Men



Age Group	Women (%)	Men (%)
13-17	0.5	0.5
18-24	1.5	1.5
25-34	7.5	5.5
35-44	13.5	7.5
45-54	16.5	9.5
55-64	15.5	9.5
65+	10.5	5.5

6/14/21 Korean Advertisement

Ad Preview

[See All Previews](#)



OCTA

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OCTA는 오렌지 카운티 교통국(OCTA)은 사우스 오렌지 카운티 복합 교통수단 연구(SOCMTS)를 위해 지역 거리, 대중 교통수단, 프리웨이 및 자전거 도로의 향후 개선 사항을 파악하는 데 도움이 될 설문조사를 하고 있습니다. 6월 17일 목요일 오후 5시 30 분 ~ 6시 30분에 타운홀 전화하기 (Telephone Townhall)에 참여하여 교통 전략에 대해 알아보고 의견을 주시기 바랍니다. 등록: octa.net/TTHsignup.

설문 조사에 응하여 저희 가상 회의실을 통해 프로젝트에 대해 자세히 알아보십시오. octa.net/SouthOCStudy를 방문하시거나 (833) 711-8070으로 전화하십시오.



남부 오렌지 카운티의 교통 미래를 계획할 수 있도록 저희들을 도와주세요.

OCTA.NET
OCTA

Over the next 25 years, the pop...

[LEARN MORE](#)



Like



Comment



Share

Performance

\$14.00 spent over 2 days.

Link Clicks



10

Reach



1,341

Cost Per Link Click

\$1.40

Activity

Post Engagement



Link Clicks



Landing Page Views



Post Reactions



Audience

This ad reached 1,341 people in your audience.

People

Placements

Locations

42.4% Women 57.6% Men



6/14/21 Vietnamese Advertisement

Ad Preview [See All Previews](#)

**OCTA**
Sponsored · 

OCTA đang tiến hành một cuộc nghiên cứu để giúp xác định những cải tiến trong tương lai đối với các đường phố địa phương, phương tiện di chuyển công cộng, xa lộ và đường dành cho xe đạp cho Cuộc Nghiên cứu Giao thông Vận chuyển Đa phương thức Nam Orange County (SOCMTS). Tham gia với chúng tôi trong một Telephone Townhall (Cuộc Gặp gỡ qua Điện thoại) vào Thứ Năm, ngày 17 tháng 6, từ 5:30 đến 6:30 chiều để tìm hiểu về các chiến lược vận chuyển và chia sẻ phản hồi của quý vị. Đăng ký tại: octa.net/TTHsignup.

Hãy tham gia cuộc khảo sát của chúng tôi và tìm hiểu thêm về dự án này thông qua Virtual Meeting Room (Phòng Họp Ảo) của chúng tôi, truy cập octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.



Xin Giúp chúng tôi lập kế hoạch cho Tương lai Giao thông Vận chuyển của khu phía Nam Quận Orange

OCTA.NET
OCTA
Over the next 25 years, the pop...

[LEARN MORE](#)

 Like  Comment  Share

Performance
\$14.00 spent over 2 days.

Link Clicks ⓘ
12

Reach ⓘ
1,333

Cost Per Link Click ⓘ
\$1.17

Activity

Post Engagement **17**

Link Clicks **12**

Post Comments **3**

Post Reactions **2**

Landing Page Views **1**

[See Less ^](#)

Audience
This ad reached 1,333 people in your audience.

People Placements Locations

47.8% Women 52.2% Men



Age Group	Women (%)	Men (%)
13-17	0.5	0.5
18-24	2.0	2.0
25-34	4.0	8.0
35-44	5.0	7.0
45-54	9.0	8.0
55-64	14.0	13.0
65+	13.0	13.0

6/14/21 Mandarin Advertisement

Ad Preview

See All Previews



OCTA

Sponsored · 

OCTA đang tiến hành một cuộc nghiên cứu để giúp xác định những cải tiến trong tương lai đối với các đường phố địa phương, phương tiện di chuyển công cộng, xa lộ và đường dành cho xe đạp cho Cuộc Nghiên cứu Giao thông Vận chuyển Đa phương thức Nam Orange County (SOCMTS). Tham gia với chúng tôi trong một Telephone Townhall (Cuộc Gặp gỡ qua Điện thoại) vào Thứ Năm, ngày 17 tháng 6, từ 5:30 đến 6:30 chiều để tìm hiểu về các chiến lược vận chuyển và chia sẻ phản hồi của quý vị. Đăng ký tại: octa.net/TTHsignup.

Hãy tham gia cuộc khảo sát của chúng tôi và tìm hiểu thêm về dự án này thông qua Virtual Meeting Room (Phòng Họp Ảo) của chúng tôi, truy cập octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.



Xin Giúp chúng tôi lập kế hoạch cho Tương lai Giao thông Vận chuyển của khu phía Nam Quận Orange

OCTA.NET

OCTA

Over the next 25 years, the pop...

LEARN MORE

 Like

 Comment

 Share

Performance

\$14.00 spent over 2 days.

Link Clicks

12

Reach

1,333

Cost Per Link Click

\$1.17

Activity

Post Engagement

17

Link Clicks

12

Post Comments

3

Post Reactions

2

Landing Page Views

1

See Less

Audience

This ad reached 1,333 people in your audience.

People

Placements

Locations

47.8% Women

52.2% Men

13-17

18-24

25-34

35-44

45-54

55-64

65+

6/16/21 Regular Post

**OCTA**

Published by Liz Mazariegos · June 16 at 11:24 AM ·

Provide your input at our Telephone Townhall TOMORROW at 5:30-6:30 p.m. for the South Orange County Multimodal Transportation Study (SOCMTS). Learn about the study and provide input on strategies that will help identify future mobility improvements. Register... See More



SOUTH ORANGE COUNTY
MULTIMODAL TRANSPORTATION STUDY



OCTA

Join our Telephone Townhall

Thursday, June 17
from 5:30-6:30pm

1,177
People Reached

13
Engagements

↑ +3.7x Higher
Distribution Score

Boost Post

 2

2 Shares

 Like

 Comment

 Share

 Comment as OCTA



7/7/21 English Advertisement

Ad Preview

[See All Previews](#)

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Share your feedback on the transportation study by Monday. Take our survey and check out our Virtual Meeting Room for the South Orange County Multimodal Transportation Study! Learn more and share your input on strategies that will help will identify future mobility improvements to south Orange County at octa.net/SouthOCStudy or call in at (833) 711-8070.

Last chance!

Take our survey at
SouthOCStudySurvey.com
or call 833-711-8070.



OCTA.NET
**South OC Multimodal
Transportation Study -**

[LEARN MORE](#)

Like



Comment



Share

Performance

\$19.96 spent over 5 days.

Link Clicks



20

Reach ⓘ

2,263

Cost Per Link
Click

ⓘ \$1.00

Activity

Post Engagement

21

Link Clicks

20

Landing Page Views

5

Post Reactions

1

Audience

This ad reached 2,263 people in your audience.

People

Placements

Locations

34.8% Women 65.2% Men

20%

15%

10%

5%

0%

13-17

18-24

25-34

35-44

45-54

55-64

65+

7/7/21 Spanish Advertisement

Ad Preview

[See All Previews](#)**OCTA**

Sponsored ·



¡ÚLTIMA OPORTUNIDAD! ¡Este lunes será el último día para realizar nuestra encuesta y consultar nuestra Sala de Reuniones Virtual para el Estudio de Transporte Multimodal del Sur del Condado de Orange! Obtenga más información sobre el estudio y comparta su opinión sobre las estrategias de movilidad que ayudarán a identificar futuras mejoras en las calles locales, el tránsito, las autopistas y los carriles de bicicletas del sur del Condado de Orange en octa.net/SouthOCStudy o llame al (833) 711-8070.

¡La última oportunidad!

Realice nuestra encuesta en
SouthOCStudySurvey.com
o llame al 833-711-8070.



OCTA.NET
South OC Multimodal
Transportation Study -

[LEARN MORE](#)

Like



Comment



Share

Performance

\$19.98 spent over 5 days.

Link Clicks

**36**

Reach

2,083Cost Per Link
Click **\$0.56**

Activity

Post Engagement

42

Link Clicks

36

Post Reactions

6

Landing Page Views

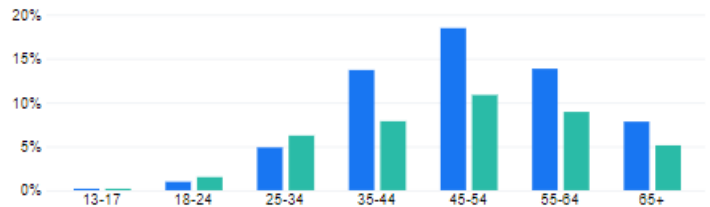
4

Audience

This ad reached 2,083 people in your audience.

[People](#)[Placements](#)[Locations](#)

59.6% Women 40.4% Men



7/7/21 Korean Advertisement

Ad Preview

[See All Previews](#)**OCTA**

Sponsored · 🌐

...

마지막 기회! 이번 월요일은 사우스 오렌지 카운티 복합 교통수단 연구 설문 조사에 응하고 가상 회의의 룬을 나갈 수 있는 마지막 날입니다! 이 연구에 대해 더 자세히 알아보고 지역 거리, 대중 교통수단, 프리웨이 및 자전거 도로의 향후 개선 사항을 파악하는 데 도움이 될 이동성 전략에 대한 여러분의 의견을 주시기 바랍니다.

octa.net/SouthOCStudy를 방문하시거나 (833) 711-8070으로 전화하십시오.

마지막 기회!

SouthOCStudySurvey.com

에서 설문 조사에 응해

주시거나 833-711-8070

으로 전화하십시오.



OCTA.NET
South OC Multimodal
Transportation Study -

[LEARN MORE](#)

Like



Comment



Share

Performance

\$14.98 spent over 5 days.

Link Clicks

i

17

Reach i

1,666Cost Per Link
Click**\$0.88**

Activity

Post Engagement

18

Link Clicks

17

Landing Page Views

4

Post Reactions

1

Audience

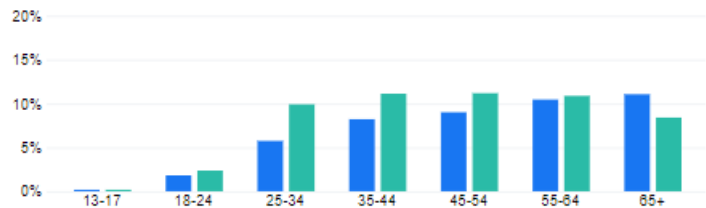
This ad reached 1,666 people in your audience.

People

Placements

Locations

46.2% Women 53.8% Men



7/7/21 Vietnamese Advertisement

Ad Preview

[See All Previews](#)



OCTA

Sponsored ·



CƠ HỘI CUỐI CÙNG! Thứ Hai tuần này sẽ là ngày cuối cùng để tham gia cuộc khảo sát của chúng tôi và kiểm tra Phòng Hạp Áo của chúng tôi đối với Cuộc Nghiên cứu Giao thông Vận chuyển Đa phương thức vùng phía Nam Orange County! Tìm hiểu thêm về cuộc nghiên cứu và chia sẻ phản hồi của quý vị về các chiến lược di chuyển mà sẽ giúp xác định những cải tiến trong tương lai đối với các đường phố địa phương, phương tiện di chuyển công cộng, xe lô và đường dành cho xe đạp ở phía nam Quận Orange tại octa.net/SouthOCStudy hoặc gọi số (833) 711-8070.

Cơ hội cuối cùng!

Hãy tham gia cuộc khảo sát của chúng tôi tại SouthOCStudySurvey.com hoặc gọi số 833-711-8070.



OCTA.NET

South OC Multimodal Transportation Study -

LEARN MORE



Like



Comment



Share

Performance

\$14.98 spent over 5 days.

Link Clicks



17

Reach



1,612

Cost Per Link Click

\$0.88

Activity

Post Engagement

21

Link Clicks

17

Landing Page Views

5

Post Reactions

3

Post Comments

1

[See Less](#)

Audience

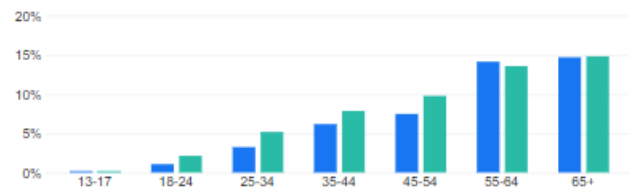
This ad reached 1,612 people in your audience.

People

Placements

Locations


46.7% Women 53.3% Men



7/7/21 Mandarin Advertisement

Ad Preview

[See All Previews](#)





OCTA
Sponsored · 🌐

...

最后的机会！这个星期一时参加我们的调查并且查看我们橙县南部多式交通研究虚拟会议室的最后一天！在 octa.net/SouthOCStudy 网站上或者致电 (833) 711-8070，了解关于这项研究的更多信息，并且分享您对将有助于确定橙县南部当地街道、公交、高速公路和自行车道的未来改进内容的流动性策略的反馈意见。

最后的机会！请上网
SouthOCStudySurvey.com
或者致电 833-711-8070
完成调查。



OCTA.NET
South OC Multimodal
Transportation Study -

LEARN MORE

Like Comment Share

Performance

\$14.99 spent over 5 days.

Link Clicks

21

Reach

1,448

Cost Per Link Click

\$0.71

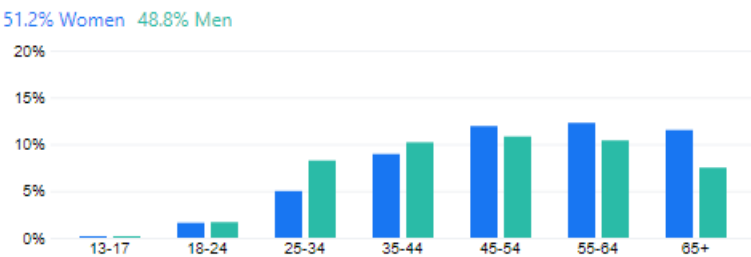
Activity



Audience

This ad reached 1,448 people in your audience.

People Placements Locations



7/7/21 Regular Post



OCTA

Published by Liz Mazariegos · July 7 at 1:41 PM ·



Share your feedback on the transportation study by Monday. Take our survey and check out our Virtual Meeting Room for the South Orange County Multimodal Transportation Study! Learn more and share your input on strategies that will help will identify future mobility improvements to south Orange County at octa.net/SouthOCStudy or call in at (833) 711-8070.

Last chance!

Take our survey at
SouthOCStudySurvey.com
or call 833-711-8070.



Reach More People With This Post



You could reach up to 781 people daily by boosting your post for \$35.

316

People Reached

18

Engagements

↓ -1.0x Average

Distribution Score

Boost Post



6

2 Shares

Like

Comment

Share

Appendix D

Appendix D.10 Twitter Posts

6/7/21 Twitter Post



OCTA @goOCTA · Jun 7

We want your feedback on mobility strategies to help identify future improvements to local streets, transit, freeways, and bikeways.

Take our survey and learn more about the project through our Virtual Meeting Room at octa.net/SouthOCStudy or call in at (833) 711-8070.



6/10/21 Twitter Post

OCTA Retweeted



OCTA Media Team @OCTAnews · Jun 10

Help [#OCTA](#) with the next phase of a south Orange County [#transportation](#) study by taking a brief survey and joining a June 17 telephone townhall. South County traffic is expected to increase with 170,000 new residents over the next 25 years. Info: bit.ly/3wix8ao



6/14/21 Twitter Post



6/16/21 Twitter Post



7/7/21 Twitter Post



OCTA @goOCTA · Jul 7

...

LAST CHANCE! 7/12 is the last day to take our survey and view our Virtual Meeting Room for the South Orange County Multimodal Transportation Study.

Learn more and share your feedback on mobility strategies for South OC at octa.net/SouthOCStudy or call in at (833) 711-8070.



1



3



Appendix D

Appendix D.11 News Release

Marissa Espino

Principal Community Relations Specialist
Orange County Transportation Authority
714-560-5607
mespino@octa.net

From: Eric Carpenter <ecarpenter@octa.net> **On Behalf Of** Public Information Office

Sent: Thursday, June 10, 2021 9:50 AM

To: All OCTA <aocta@octa.net>

Subject: OCTA Press Release -- Help Shape South County's Transportation Future, Take Survey and Join OCTA Telephone Townhall



FOR MORE INFORMATION:

Eric Carpenter (714) 560-5697
Megan Abba (714) 560-5671

FOR IMMEDIATE RELEASE:

June 10, 2021

Help Shape South County's Transportation Future, Take Survey and Join OCTA Telephone Townhall

Study to address the long-term needs of South Orange County will continue through 2021

ORANGE – The Orange County Transportation Authority is seeking more public input during the next phase of a study to address south Orange County's transportation needs as the area continues to grow with new residents and jobs and as travel patterns evolve.

The study, called the South Orange County Multimodal Transportation Study, is looking at a wide range of transportation needs and solutions 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.

For the next phase of the study, people who live, work or travel through the area are asked to participate in a brief online survey to gauge opinions on transportation priorities and how available funds should best be used.

The survey can be taken online at SouthOCStudySurvey.com or by phone at (833) 711-8070. The survey will be available through July 22.

Additionally, a telephone townhall is scheduled to discuss the study and gather additional public input from 5:30 to 6:30 p.m. on June 17. The telephone townhall will be in English and simulcast in Spanish. Participants are asked to register in advance at octa.net/TTHsignup.

During the first phase of the study conducted in fall 2020, the OCTA team engaged with residents and stakeholders and completed an initial survey. Among the initial survey findings, respondents said that they 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.

OCTA, Orange County's transportation planning agency, is responsible for providing a balanced and sustainable transportation system for the entire county. The study's 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.

The South County study is scheduled to continue through the end of 2021. Residents, business owners and other key stakeholders will be asked to participate throughout in order to develop community consensus on transportation solutions that should move forward for further development.

For more information on the study, please visit octa.net/southOCstudy.

#

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, environmental programs and active transportation.

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Appendix D

Appendix D.12 Study Blog Article

Select Language ▼



COVID-19(/Your-Safety-Is-Our-Priority/)

Getting Around ▼

Projects and Programs ▼

News

and Resources ▼

About OCTA ▼

Search OCTA



Help Shape South County's Transportation Future, Take Survey and Join OCTA Telephone Townhall

June 10, 2021

Study to address the long-term needs of South Orange County will continue through 2021

ORANGE – The Orange County Transportation Authority is seeking more public input during the next phase of a study to address south Orange County's transportation needs as the area continues to grow with new residents and jobs and as travel patterns evolve.

The study, called the South Orange County Multimodal Transportation Study, is looking at a wide range of transportation needs and solutions 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.

For the next phase of the study, people who live, work or travel through the area are asked to participate in a brief online survey to gauge opinions on transportation priorities and how available funds should best be used.

The survey can be taken online at SouthOCStudySurvey.com(<https://live.metroquestsurvey.com/?u=st7h7p#!/?p=web>) or by phone at (833) 711-8070. The survey will be available through July 22.

Additionally, a telephone townhall is scheduled to discuss the study and gather additional public input from 5:30 to 6:30 p.m. on June 17. The telephone townhall will be in English and simulcast in Spanish. Participants are asked to register in advance at octa.net/TTHsignup/.

During the first phase of the study conducted in fall 2020, the OCTA team engaged with residents and stakeholders and completed an initial survey. Among the initial survey findings, respondents said that they 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.

OCTA, Orange County's transportation planning agency, is responsible for providing a balanced and sustainable transportation system for the entire county. The study's 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.

The South County study is scheduled to continue through the end of 2021. Residents, business owners and other key stakeholders will be asked to participate throughout in order to develop community consensus on transportation solutions that should move forward for further development.

Appendix D

Appendix D.13 On the Move Article



SOUTH ORANGE COUNTY

M

Y

Help Plan South Orange County's Transportation Future

Thursday, June 3, 2021



Share



Tweet



Share

OCTA is studying mobility strategies that will help identify future improvements to local

streets, transit, freeways and bikeways for South Orange County and would like your feedback.

There are several ways to participate in the South Orange County Multimodal Transportation Study (SOCMTS). Information will be provided in English and Spanish.

Telephone Townhall

On Thursday, June 17, 2021 from 5:30 p.m. to 6:30 p.m., join OCTA for a Telephone Townhall to learn about study findings, provide input and ask questions. The Townhall will be simulcast in Spanish. Please register [here](#). A recording of the presentation will be available on the [project website](#) following the meeting.

Virtual Meeting Room

A Virtual Meeting Room will be open from Monday, June 7 to Monday, July 12, 2021 to help people learn more about the study, make comments and ask questions. Please visit [here](#) to access the Virtual Meeting Room.

Survey

Please take a short survey [online](#) or by phone (833-711-8070) to share your feedback on mobility strategies that will help improve transportation in south Orange County in the future.



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Grant Awards for the Garden Grove-Santa Ana
Rails-to-Trails Gap Closure and Bus Stop Safety and Accessibility
Study

Overview

The Orange County Transportation Authority was awarded \$3,000,000 for the Garden Grove-Santa Ana Rails-to-Trails Gap Closure through the statewide Active Transportation Program, and \$300,000 for the Bus Stop Safety and Accessibility Study through the regional Sustainable Communities Program. To utilize these grants, Board of Directors' approval is requested to accept the awards and enter into agreements with the granting agencies.

Recommendations

- A. Adopt Orange County Transportation Authority Resolution No. 2021-071 and authorize the Chief Executive Officer, or designee, to accept the Active Transportation Program \$3,000,000 grant award and execute required grant-related agreements with the California Department of Transportation and California Transportation Commission.
- B. Adopt Orange County Transportation Authority Resolution No. 2021-072 and authorize the Chief Executive Officer, or designee, to accept the Sustainable Communities Program \$300,000 grant award and execute grant-related agreements with the Southern California Association of Governments.
- C. Authorize the Chief Executive Officer, or designee, to amend the Federal Transportation Improvement Program and process all necessary amendments to facilitate the recommendations above.

Background

The state Active Transportation Program (ATP) was created to encourage increased use of active modes of transportation, such as walking and bicycling. On March 25, 2020, the California Transportation Commission (CTC) issued a statewide competitive call for projects (call), which made approximately \$450 million available in federal and state funding in fiscal year (FY) 2021-22 through FY 2024-25. In response, the Orange County Transportation Authority (OCTA) submitted the Garden Grove-Santa Ana Rails-to-Trails Gap Closure application requesting \$3,000,000. The concept for a multi-use path along the Pacific Electric corridor emerged through the 2019 OC Active plan development process that was conducted in collaboration with all Orange County local jurisdictions and supported through extensive public outreach effort. The development of the multi-use path also complements the use of this corridor for transit purposes.

The regional Sustainable Communities Program (SCP) is intended to increase rates of walking and bicycling, promote traffic safety, and expand opportunities for multimodal transportation options. On September 8, 2020, the Southern California Association of Governments (SCAG) issued a call for the SCP Active Transportation and Safety (AT&S) Program, which made approximately \$5 million available in FY 2020-21. In response, OCTA submitted the Bus Stop Safety and Accessibility Study (Study) application requesting \$300,000.

Discussion

Garden Grove-Santa Ana Rails-to-Trails Study

OCTA submitted the Garden Grove-Santa Ana Rails-to-Trails Gap Closure for consideration of funding through the statewide ATP Cycle 5 call on September 15, 2020. The grant application was developed with the support of the cities of Garden Grove, Santa Ana, and the County of Orange Flood Control District (attachments D, E, and F). The project was awarded \$3,000,000 for the project approval and environmental document phase by the CTC on June 23, 2021.

The project will complete environmental assessment and public outreach, which will support the possible future construction of an approximately four-mile trail along the OCTA-owned Pacific Electric Right-of-Way in the cities of Garden Grove and Santa Ana. The implementation phases of the project are expected to be handled by the cities of Garden Grove and Santa Ana.

The project was identified in OCTA's West/Central Orange County Regional Bikeways Strategy, both cities' master plans, and the City of Santa Ana's 2019 Active Transportation Plan. This multi-use path will result in connecting downtown Garden Grove to downtown Santa Ana, and provide a connection to the Santa Ana River Trail, and is part of the 66-mile countywide OC Loop bicycle trail. This trail will provide a connection to much of Orange County and some of Los Angeles County, with over 20 transit stops conveniently located to allow for farther connections. Currently, surrounding residents and businesses have no immediate access to a bikeway safely located away from vehicles.

Study

The Study was submitted for consideration through the SCAG SCP AT&S on December 11, 2020. On May 6, 2021, the SCAG Regional Council awarded \$300,000 to the Study for the development of recommendations for pedestrian accessibility and safety improvements in the areas surrounding the OCTA bus stops with the highest ridership in Orange County.

The Study will result in recommended improvements for at least 41 stops providing service to 12,500 daily riders in the cities of Anaheim, Costa Mesa, Garden Grove, and Santa Ana. The plan will incorporate earlier plans and will focus on details for project implementation and provide recommendations to address localized access and safety needs. The report, in turn, can help the respective local agencies implement the improvements as appropriate.

Fiscal Impact

The studies were approved by the Board in OCTA's FY 2021-22 Budget under Account No. 1531-7519-A4530-0QC and 1531-7519-A4530-0QA.

Next Steps

Following the execution of the CTC ATP and SCAG SCP AT&S grants, staff will coordinate with the California Department of Transportation and CTC to proceed with project delivery. Staff will also follow OCTA's procurement process to award professional services contracts by winter 2021.

Summary

The Orange County Transportation Authority was awarded \$3,300,000 to support the development of the Garden Grove-Santa Ana Rails-to-Trails Gap Closure (\$3,000,000) and the Bus Stop Safety and Accessibility Study (\$300,000). Board of Directors' authorization is requested to accept the awards from the California Transportation Commission and the Southern California Association of Governments, and to negotiate and execute grant-related agreements and documents with the California Department of Transportation, the California Transportation Commission, and the Southern California Association of Governments, as appropriate.

Attachments

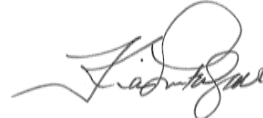
- A. Resolution No. 2020-071 of the Orange County Transportation Authority, 2020-21 Active Transportation Program Grant Authorization
- B. Resolution No. 2020-072 of the Orange County Transportation Authority, 2020-21 Sustainable Communities Grant Program Authorization
- C. Active Transportation Program Term Sheet, Project Baseline Agreement
- D. Letter from Mayor Steven R. Jones, City of Garden Grove, to Mr. Mitchell Weiss, Executive Director, California Transportation Commission, Subject: Garden Grove – Santa Ana Rails-to-Trail Gap Closure Project Active Transportation Program Cycle 5 – Large Infrastructure Application, Dated August 18, 2020
- E. Letter from Mayor Miguel A. Pulido, City of Santa Ana, to Mr. Mitchell Weiss, Executive Director, California Transportation Commission, Subject: Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project Active Transportation Program Cycle 5 – Large Infrastructure Application, Dated August 20, 2020
- F. Letter from Nardy Khan, P.E., Deputy Director, OC Public Works, to Mr. Mitch Weiss, Executive Director, California Transportation Commission, Subject: Garden Grove – Santa Ana Rails-to-Trail Gap Closure Project Active Transportation Program Cycle 5 – Large Infrastructure Application, Dated September 1, 2020

Prepared by:



Roslyn Lau
Senior Transportation Funding Analyst,
Discretionary Funding Programs
(714) 560-5341

Approved by:



Kia Mortazavi
Executive Director, Planning
(714) 560-5741

**RESOLUTION NO. 2021-071
OF THE
ORANGE COUNTY TRANSPORTATION AUTHORITY**

2020-21 ACTIVE TRANSPORTATION PROGRAM GRANT AUTHORIZATION

WHEREAS, the California Department of Transportation administers the Active Transportation Program to support its mission, which is to encourage increased use of active modes of transportation, such as bicycling and walking; and

WHEREAS, the Orange County Transportation Authority, as an eligible grantee of the California Transportation Commission Active Transportation Program, applied for and was awarded \$3,000,000 in grant funds for the Garden Grove-Santa Ana Rails-to-Trails Gap Closure; and

WHEREAS, the Southern California Association of Governments is the Metropolitan Planning Organization and administers the Active Transportation Regional Program in coordination with the County Transportation Commissions; and

WHEREAS, the California Transportation Commission reviews and approves the Active Transportation Regional Program; and

WHEREAS, the California Transportation Commission requires the grantee to certify, by resolution, the acceptance of awarded grant funds and authority to execute grant-related agreements;

THEREFORE, BE IT RESOLVED that the Orange County Transportation Authority Board of Directors accepts the awarded grant funds and authorizes the Chief Executive Officer, or designee, to file and execute grant applications and agreements, certifications and assurances, and other documents for and on behalf of Orange County Transportation Authority with the California Transportation Commission.

ADOPTED, SIGNED, AND APPROVED this _____ day of _____, 2021.

AYES:

NOES:

ABSENT:

ATTEST:

Andrea West
Interim Clerk of the Board

Andrew Do, Chairman
Orange County Transportation Authority

**RESOLUTION NO. 2021-072
OF THE
ORANGE COUNTY TRANSPORTATION AUTHORITY**

2020-21 SUSTAINABLE COMMUNITIES GRANT PROGRAM AUTHORIZATION

WHEREAS, the Southern California Association of Governments administers the Sustainable Communities Grant Program to support its mission, which is to support local jurisdictions and agencies with resources for strategies related to active transportation, transportation safety, removing barriers to housing production, smart permitting, and integrated land use, among others; and

WHEREAS, the Orange County Transportation Authority, as an eligible grantee of the Southern California Association of Governments' Sustainable Communities Grant Program, applied for and was awarded \$300,000 in grant funds for the Bus Stop Safety and Accessibility Study; and

WHEREAS, the Southern California Association of Governments requires the grantee to certify, by letter of intent or resolution, the acceptance of awarded grant funds and authority to execute grant-related agreements;

THEREFORE, BE IT RESOLVED that the Orange County Transportation Authority Board of Directors accepts the awarded grant funds and authorizes the Chief Executive Officer, or designee, to file and execute grant applications and agreements, certifications and assurances, and other documents for and on behalf of Orange County Transportation Authority with the Southern California Association of Governments.

ADOPTED, SIGNED, AND APPROVED this _____ day of _____, 2021.

AYES:

NOES:

ABSENT:

ATTEST:

Andrea West
Interim Clerk of the Board

Andrew Do, Chairman
Orange County Transportation Authority

**ACTIVE TRANSPORTATION PROGRAM TERM SHEET
PROJECT BASELINE AGREEMENT**

The baseline agreement between the Orange County Transportation Authority (OCTA), the California Transportation Commission (CTC), and the California Department of Transportation (Caltrans) for the Active Transportation Program (ATP) includes the following:

1. Project cost, project schedule, project scope, and project benefits as detailed in the project programming request for each funded project.
2. All signatories agree to adhere to the CTC ATP Guidelines.
3. All signatories agree to adhere to the CTC's SB 1 (Chapter 5, Statutes of 2017) accountability and transparency guidelines and policies, and program/project amendment processes.
4. OCTA agrees to secure funds for any additional costs of the project approvals and environmental document phase of the project.
5. OCTA agrees to report to Caltrans on a semi-annual basis the progress made toward implementation of the project, including scope, cost, schedule, outcomes, and anticipated benefits.
6. OCTA agrees to submit a timely Completion Report and Final Delivery Report as specified in the CTC's SB 1 Accountability and Transparency Guidelines.
7. OCTA agrees to maintain and make available to the CTC and/or its designated representative, all work-related documents, including without limitation engineering, financial or other data, and methodologies and assumptions used in the determination of project benefits during the course of the project, and retain these records for four years from the date of the final closeout of the project. Financial records will be maintained in accordance with generally accepted accounting principles.



CITY OF GARDEN GROVE

August 18, 2020

Mr. Mitchell Weiss
Executive Director
California Transportation Commission
1120 N Street, MS-52
P.O. Box 942873
Sacramento, CA 95814

Steven R. Jones
Mayor

John R. O'Neill
Mayor Pro Tem - District 2

George S. Brietigam
Council Member - District 1

Diedre Thu-Ha Nguyen
Council Member - District 3

Patrick Phat Bui
Council Member - District 4

Stephanie Klopfenstein
Council Member - District 5

Kim Bernice Nguyen
Council Member - District 6

Re: Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project Active
Transportation Program Cycle 5 – Large Infrastructure Application

Dear Mr. Weiss:

I am writing to support the Orange County Transportation Authority's (OCTA's) "Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project" grant application for Active Transportation Program (ATP) funding. These funds will be used for an active transportation multi-use path that links directly to the countywide 66-mile OC Loop Bikeway connecting walking and bicycling paths. OCTA is applying for the Project Approval & Environmental Document (PA&ED) phase. Once approved through the environmental process, the cities of Garden Grove and Santa Ana will advance the project through final design and construction.

When constructed, the proposed four-mile Class I multi-use path will fill an active transportation gap in the cities of Garden Grove and Santa Ana and will entail a partnership with the two cities. The new facility will allow surrounding members of disadvantaged communities to travel safely in a separated path not used by cars and trucks. The project site is located on the OCTA-owned former Pacific Electric railroad right-of-way for 3.1 miles, and 0.85 miles along the Wintersburg Channel.

A funding award would recognize OCTA's commitment to implementing active transportation along this congested corridor surrounded by disadvantaged communities, which will continue to be critical in facilitating social equity, the health and well-being of these community members, the economic vitality of the area, and the ability to access key destinations such as health care centers, open space, and transit stops.

OCTA, along with the cities of Garden Grove and Santa Ana, has been working on planning efforts with regional stakeholders to provide this benefit to our region.

Aligned with the goals of the ATP, the project will help increase the proportion of bicycling and walking trips, reduce greenhouse gas emissions, and enhance public health.

In short, the Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project is exactly the type of transportation investment that should be rewarded with ATP funds. We appreciate your consideration of this critical mobility improvement.

Sincerely,

A handwritten signature in black ink, appearing to read "Steven Jones", with a stylized, cursive script.

Steven R. Jones
Mayor

MAYOR

Miguel A. Pulido
mpulido@santa-ana.org

MAYOR PRO TEM

Juan Villegas
Ward 5
jvillegas@santa-ana.org

COUNCILMEMBERS

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Phil Bacerra
Ward 4
pbacerra@santa-ana.org

Nelida Mendoza
Ward 6
nmendoza@santa-ana.org



CITY OF SANTA ANA

August 20, 2020

Mr. Mitchell Weiss, Executive Director
California Transportation Commission
1120 N Street, MS-52
P.O. Box 942873
Sacramento, CA 95814

RE: Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project Active
Transportation Program Cycle 5 – Large Infrastructure Application

Dear Mr. Weiss:

As the mayor of the City of Santa Ana, I am writing to support the Orange County Transportation Authority's (OCTA's) "Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project" grant application for Active Transportation Program (ATP) funding. These funds will be used for an active transportation multi-use path that links directly to the countywide 66-mile OC Loop Bikeway connecting walking and bicycling paths. OCTA is applying for the Project Approval & Environmental Document (PA&ED) phase. Once approved through the environmental process, the cities of Garden Grove and Santa Ana will advance the project through final design and construction.

When constructed, the proposed four-mile Class I multi-use path will fill an active transportation gap in the cities of Garden Grove and Santa Ana and will entail a partnership with the two cities. The new facility will allow surrounding members of disadvantaged communities to travel safely in a separated path not used by cars and trucks. The project site is located on the OCTA-owned former Pacific Electric railroad right-of-way for 3.1 miles, and 0.85 miles along the Wintersburg Channel.

A funding award would recognize OCTA's commitment to implementing active transportation along this congested corridor surrounded by disadvantaged communities, which will be continue to be critical in facilitating social equity, the health and well-being of these community members, the economic vitality of the area, and the ability to access key destinations such as health care centers, open space, and transit stops.

OCTA, along with the cities of Garden Grove and Santa Ana, have been working on planning efforts with regional stakeholders to provide this benefit to our

CITY ATTORNEY
Sonia R. Carvalho

CITY MANAGER
Kristine Ridge

CLERK OF THE COUNCIL
Daisy Gomez

region. Aligned with the goals of the ATP, the project will help increase the proportion of bicycling and walking trips, reduce greenhouse gas emissions, and enhance public health.

In short, the Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project is exactly the type of transportation investment that should be rewarded with ATP funds. We appreciate your consideration of this critical mobility improvement.

Sincerely,

A handwritten signature in black ink, appearing to read "Miguel Pulido". The signature is fluid and cursive, with the first name "Miguel" and last name "Pulido" clearly distinguishable.

Miguel A. Pulido
Mayor



County Administration South
601 North Ross Street
Santa Ana, CA 92701

P.O. Box 4048
Santa Ana, CA 92702

(714) 667-8800

info@ocpw.ocgov.com

OCPublicWorks.com



Administrative
Services



OC Development
Services



OC Facilities Design
& Construction
Management



OC Facilities
Maintenance
& CUF



OC Fleet Services



OC Construction



OC Environmental
Resources



OC Operations &
Maintenance



OC Infrastructure
Programs



OC Survey

September 1, 2020

Mr. Mitch Weiss, Executive Director
California Transportation Commission
1120 N Street, MS-52
P.O. Box 942873
Sacramento, CA 95814

Subject: Garden Grove – Santa Ana Rails-to-Trails Gap Closure Project
Active Transportation Program Cycle 5 – Large Infrastructure Application

Dear Mr. Weiss:

On behalf of the Orange County Flood Control District (OCFCD) administered by the Orange County Public Works, I would like to offer this letter of support for the Active Transportation Program (ATP) application “Garden Grove – Santa Ana Rails-to-Trails Gap Closure” submitted by the Orange County Transportation Authority (OCTA).


The project will close a four-mile gap of a Class I bicycle and pedestrian active transportation trail on the OCTA-owned former Pacific Electric right-of-way and the County-owned Wintersburg Channel. OCTA will prepare the Project Approval & Environmental Document (PA&ED) to evaluate key constraints and opportunities; and the Cities of Garden Grove and Santa Ana will resume the subsequent phases of the project through construction. The project will provide a local and regional bikeway facility connecting directly to the Santa Ana River Trail which reaches all the way to the beaches in Orange County and to inland cities of San Bernardino.

We understand the project will likely require an OCFCD easement and approval and we are eager to collaborate with OCTA and the Cities on this project opportunity in the following ways:

- If required, enter into a co-operative agreement with OCTA and/or the Cities for use and maintenance of the trail as well as the issuance of an easement or license.
- Engage in review of technical studies and reports as well as design and construction documents. Issuing the appropriate encroachment permits as required.

We look forward to seeing this transformative project advance and the benefits that it will provide. Thank you in advance for your consideration of this important project. Please do not hesitate to contact me at (714) 647-3906 should you have any questions.

Sincerely,


Nardy Khan, P.E.
Deputy Director
OC Infrastructure Programs



September 2, 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 in response to changing circumstances, which may require funding revisions. Board of Directors' authorization is required to provide funding for current or planned freeway, grade separation, and transit capital projects.

Recommendations

- A. Consistent with right-of-way phase estimates for the Interstate 5 Improvement Project from Yale Avenue to State Route 55 (Segment 2), authorize the use of \$23.926 million from the following fund sources:
- Surface Transportation Block Grant (\$17.5 million),
 - Measure M2 freeway funds (\$5.575 million),
 - Repurposed earmarks (up to \$0.851 million), contingent on Federal Highway Administration approval, and
 - Additional Measure M2 freeway funds in lieu of \$0.851 million of repurposed earmarks, in the event the federal funds are not available.
- B. Consistent with updated design phase estimates for the State Route 55 Improvement Project from Interstate 5 to State Route 91, authorize the use of the funding below, increasing total funding for the phase from \$8.921 million to \$11 million, and reducing Measure M2 funds by \$3.921 million:
- Surface Transportation Block Grant (\$3.359 million), and
 - Highway Infrastructure Program (\$2.641 million).

- C. Authorize the use of \$1.720 million in Measure M2 for the State Route 55 Improvement Project from Interstate 405 to Interstate 5 to support anticipated increased costs for the design phase, changing the total project estimated cost from \$504 million to \$505.720 million.
- D. Consistent with the forecasted cost for the environmental phase for the Interstate 5 Managed Lanes Project from the Orange County/San Diego County line to Avenida Pico, authorize the use of \$0.907 million in additional Surface Transportation Block Grant funds to fund this change in the project cost estimate from \$5.5 million to \$6.407 million.
- E. Authorize the use of up to \$3.207 million in additional Measure M2 Regional Capacity Program funds for the OC Bridges Railroad Grade Separation Program in lieu of federal Congestion Mitigation and Air Quality improvement funding.
- F. Authorize the use of \$12.526 million in Congestion Mitigation and Air Quality Improvement Program funds for 173 bus engine repowers.
- G. 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 (Attachment A), and this Capital Programming update item seeks approval to fund cost increases, and upcoming projects or phases of projects. Additionally, staff will continue to seek cost savings and minimize the use of funding where applicable.

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 or different 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. Project descriptions and additional information for each of the projects discussed in this staff report are included in Attachment B. The Capital Funding Program (CFP) includes a summary of how OCTA's capital projects are currently funded along with the proposed changes in this item and is provided as 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.

The Federal Highway Administration (FHWA) allows states to use stale and unspent federal earmarks or repurpose them to other transportation projects. FHWA and the California Department of Transportation (Caltrans) have identified three stale earmarks from Orange County, with unspent funding remaining available to be repurposed to other projects. These are included in Attachment B. The original projects are now complete or did not proceed using the federal funds. The earmarks that appear to be available to OCTA for repurposing total \$0.851 million and may be repurposed to other projects. To repurpose these funds, OCTA requests approval through Caltrans and the FHWA. Staff recommendations for repurposing these funds are described below. While these earmarks are listed as available for repurposing, FHWA makes the final determination.

Discussion

The CAP lists highway, grade separation, rail, and transit projects and includes the cost estimate at completion, as well as the schedule for key milestones for each project. In coordination with project managers, programming staff refers to the CAP from the Capital Programs Division to recommend or make funding adjustments for new projects, ongoing projects, and projects that have met key milestones or other adjustments.

Freeway Program Funding Changes

The following recommendations for increased or exchanged funding for freeway projects are primarily based on estimates included in the CAP, presented to the Board on May 10, 2021. For project phases already underway, some changes are based on a forecast of actual costs. The projects are proposed to receive federal funds from the Surface Transportation Block Grant Program (STBG), Highway Infrastructure Program (HIP), repurposed earmark funds, and Measure M2 (M2) Freeway Program funds. The STBG and HIP funds are available to be used for these projects as they were previously set aside to be used for the construction phase of the State Route 55 (SR-55) Improvement Project from Interstate 405 (I-405) to Interstate 5 (I-5). However, the SR-55 project was alternatively funded with SB 1 (Chapter 5, Statutes of 2017) competitive program funds. Staff is recommending the following funding changes which are further described in Attachment B.

I-5, Yale Avenue to SR-55

The I-5 Improvement Project from Yale Avenue to SR-55 (Segment 2) entered the plans, specifications, and estimates (PS&E) phase in May 2021. This project will add one mixed-flow lane in both the northbound and southbound directions from the SR-55 on-ramp to Yale Avenue in the City of Irvine. OCTA staff is also currently developing a right-of-way (ROW) cooperative agreement with Caltrans.

Based on the status of the design phase, staff recommends funding the ROW phase, which is estimated to cost \$23.926 million with approximately:

- \$17.5 million in STBG funds,
- \$5.575 million in M2 freeway funds, and
- \$0.851 million in repurposed earmark funding.

The proposed use of \$0.851 million in repurposed earmarks contingent upon approval from the FHWA. If FHWA does not authorize any portion of the federal earmarks for this project, staff is requesting authorization to use additional M2 Freeway Program funds instead. Funding recommendations for the construction phase will be presented to the Board at a future date as project design work is completed. Staff will also report back on the success of the use of repurposed earmarks as part of a future Capital Programming Update item.

SR-55, I-5 to State Route 91 (SR-91)

The SR-55 Project from I-5 to SR-91 will add one general-purpose lane in each direction between State Route 22 (SR-22) and I-5, and includes operational improvements between SR-22 and SR-91. The Board approved the use of \$8.921 million in M2 funding for the PS&E phase on January 13, 2020. Based on a review of the scope and actual cost for several similar projects, OCTA staff has determined that the project will require an additional \$2.079 million for the design phase, for a total estimated cost of \$11 million. Staff is proposing to use \$2.641 million in federal HIP funds and \$3.359 million in STBG for the PS&E phase. Using additional federal funds allows OCTA to preserve \$3.921 million in local M2 freeway funds for future M2 freeway projects. The total estimated the PS&E cost after these proposals stands at \$11 million. The funding changes for PS&E phase are noted in the table below and are further described in Attachment B.

Existing Funding (in 000s)	STBG	M2	HIP	Total
PS&E		\$ 8,921		\$ 8,921

Proposed Funding (in 000s)	STBG	M2	HIP	Total
PS&E	\$ 3,359	\$ 5,000	\$ 2,641	\$ 11,000
CHANGE	\$ 3,359	(\$3,921)	\$ 2,641	\$ 2,079

HIP - Highway Infrastructure Program

SR-55, I-405 to I-5

The SR-55 Improvement Project between the I-405 and I-5 will add a general-purpose, high-occupancy vehicle (HOV), and auxiliary lanes in both directions between I-405 and I-5. This project is nearing completion of the PS&E

phase and is expected to be advertised for construction in the December 2021 timeframe. Additional funding is needed to complete the PS&E phase. Staff estimates that an additional \$1.720 million is needed to address additional roadway design, survey, utility and ROW coordination, engineering reports modifications, environmental services, and OCTA labor costs. A complementary staff report to amend the existing design services contract will be presented at the same Board meeting and provide more detail on the need for the additional funding. This adjustment changes the total project cost estimate from \$504 million to \$505.720 million, and is proposed to be funded with M2 Freeway Program funds. Attachment B also provides additional detail on this requested action.

I-5, Orange County/San Diego County Line to Avenida Pico

On May 11, 2020, the Board approved \$5.5 million in STBG funds for the project approval and environmental document phase for the I-5 Project from the Orange County/San Diego County line to Avenida Pico. The project entered the environmental phase in March 2021. While drafting the cooperative agreement with Caltrans, additional project risks and OCTA costs related to outreach were identified, necessitating an increase in the project budget. This increase adjusts the cost estimate for the environmental phase from \$5.5 million to \$6.407 million. Staff is proposing up to \$0.907 million in additional STBG funding for the project. This project complements Project C in the M2 Freeway Program, which extended the HOV lane from San Juan Creek Road to Avenida Pico. It is also a key project that has been identified to address congestion in south Orange County.

OC Bridges Railroad Grade Separations

OCTA initiated the OC Bridges Railroad Grade Separation Program (OC Bridges Program) in 2007, in coordination with the cities of Anaheim, Fullerton, and Placentia. Undercrossings at Placentia Avenue and Kraemer Boulevard and overcrossings at Orangethorpe Avenue, Tustin Avenue/Rose Drive, and Lakeview Avenue were implemented by OCTA. The City of Fullerton has implemented undercrossings at State College Boulevard and Raymond Avenue. All seven grade separations were constructed and opened to traffic by the end of 2017.

In July 2020, the Board approved funding changes to the OC Bridges Program, which were anticipated to be the final funding changes necessary to closeout these projects. However, staff is returning to the Board to seek approval to use additional M2 Regional Capacity Program (RCP) in lieu of CMAQ funds to close out the OC Bridges Program. The changes are primarily related to the State College Boulevard grade separation, Lakeview Avenue, and Raymond Avenue grade separations and are reflected in Attachment B.

CMAQ funds may be used to support grade separation projects, but are intended to support projects that improve air quality and cannot be used for roadway widening.

FHWA would not approve the use of a portion of the federal funds assigned to the grade separation projects, given roadway widening components were included in the projects. All other funding sources have been exhausted, including the use of proceeds from the surplus property. Based on these recommendations, the current M2 RCP amount used for the OC Bridges Program totals \$152.625 million, which is below the July 2010 Board-approved M2 RCP amount of \$169.397 million for the program.

Bus Upgrades

Staff is recommending use up to \$12.526 million in CMAQ funds to purchase 173 Cummins L9N, 8.9-liter, compressed natural gas-powered engines. The new engines will replace the older 8.9L Cummins ISL-G engines, which will reach the manufacturer-recommended engine replacement mileage by early 2022. The timing of this engine repower is consistent with maintaining the useful life of the fleet as stated in the 20-Year Fleet Outlook and the Transit Asset Management Plan. Of the 173 engines, 16 will be installed in 60-foot buses and the remaining 157 will be for 40-foot buses. The proposed engines have been certified by the California Air Resources Board as a near-zero-emission engine, which will further decrease the emissions profile of the entire bus fleet. A portion of the proposed CMAQ funds are being redirected from the OC Bridges program. The additional CMAQ was previously set aside to be used for the construction of High Occupancy Vehicle lanes for the State Route 55 Improvement Project from I-405 to I-5. However, the SR-55 project was alternatively funded with SB 1 (Chapter 5, Statutes of 2017) competitive program funds. The use of CMAQ for bus repowers is consistent with the Capital Programming Policies regarding bus transit capital projects. Additionally, this project was anticipated in the OCTA Comprehensive Business Plan, and this action identifies the funding source that will support the project.

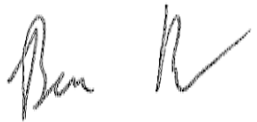
Summary

To ensure 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, staff is seeking Board approval to use and redistribute federal and local funds for several freeway, grade separation, and transit projects.

Attachments

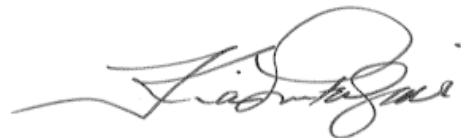
- A. Existing Capital Programming Policies by Fund Source, February 2019
- B. Capital Programming Update Project Descriptions
- C. Capital Funding Program Report
- D. List of Board of Directors Reports with Programming Actions, January 2021 – June 2021

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**Existing Capital Programming Policies by Fund Source
February 2019**

Funding Source	Measure 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 Measure M2 (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. 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 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, 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 the 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 the CTFP Guidelines. Program funds to projects through a call.

Existing Capital Programming Policies by Fund Source

February 2019

Funding Source	Measure M2 Programming Policies
Project X (Environmental Cleanup)	<p>Use Project X M2 funding consistent with the M2 Transportation Investment Plan and the 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>First priority of all funding sources is to fulfill commitments to the latest Next 10 Plan, specifically M2 projects and to maintain existing Orange County Transportation Authority's (OCTA) assets in a state of good repair (SGR). 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	Bicycle and pedestrian projects up to a ten percent set-aside and contingent on ready-to-go projects as submitted through competitive calls.
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	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.

**Existing Capital Programming Policies by Fund Source
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 clean-up, and based on the timing for the request for project nominations.
SB 1 - 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 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
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 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 (STBG) 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 Programming Update Project Descriptions

Interstate 5 (I-5) Improvement Project from Yale Avenue to State Route 55 (SR-55) (Segment 2)

This project will add one mixed-flow lane in both the northbound and southbound directions from the SR-55 on-ramp to Yale Avenue in the City of Irvine. The additional lanes will reduce corridor traffic congestion, reduce hours of travel, improve traffic operations and improve access to high-occupancy vehicle lanes. This is Segment 2 of Project B in the Measure M2 (M2) Ordinance.

This project is currently funded through the design phase with \$17.425 million of STBG and M2 funds. Staff is recommending funding the ROW phase with \$17.500 million in STBG funds, \$0.851 million in repurposed earmarks (detailed below) and \$5.575 million in M2 freeway funds, resulting in a total of \$41.351 million of programmed funding for the design and ROW phases. Utilizing federal funds for portions of the project will allow the Orange County Transportation Authority (OCTA) to benefit from the lower indirect cost-rate proposal for oversight work carried out by the California Department of Transportation (Caltrans). Staff will return to the Board of Directors (Board) for recommendations for the construction phase at a future date.

The Federal Highways Administration (FHWA) and Caltrans have identified the following three state earmarks from Orange County with unspent funding remaining available to be repurposed to other projects:

- State Route 91 (SR-91) Congestion Relief Project - \$0.237 million (no obligation activity),
- Image-based toll collection system project - \$0.188 million (original project completed), and
- State College/ BNSF Railway Company (BNSF) grade separation - \$0.426 million (original project completed).

Total amount available for repurposing is \$0.851 million. Use of these funds is contingent on approval by FHWA and Caltrans.

These proposed funding actions are summarized in the table below:

Existing Funding (in 000s)	STBG	M2	Total
PA&ED	\$ 3,527		\$ 3,527
PS&E	\$ 11,500	\$ 2,398	\$ 13,898
ROW	TBD	TBD	TBD
CON	TBD	TBD	TBD
TOTAL	\$ 15,027	\$ 2,398	\$ 17,425

PA&ED - Project approval and environmental document
 PS&E - Plans, specifications, and estimates
 STGB - Surface Transportation Block Grant

ROW – Right-of-way
 CON – Construction

Capital Programming Update Project Descriptions

Proposed Funding (in 000s)	STBG	Federal Demo	M2	Total
PA&ED	\$ 3,527			\$ 3,527
PS&E	\$ 11,500		\$ 2,398	\$ 13,898
ROW	\$ 17,500	\$851	\$ 5,575	\$ 23,926
CON	TBD	TBD	TBD	TBD
TOTAL	\$ 32,527	\$851	\$ 7,973	\$ 41,351
CHANGE	\$ 17,500	\$851	\$ 5,575	\$ 23,926

Federal Demo - Federal Demonstration

SR-55 Improvement Project from I-5 to SR-91

This project will add one general purpose lane in each direction between State Route 22 (SR-22) and I-5 and provide operational improvement between SR-22 and SR-91 (Project F). The objective of the proposed project is to reduce traffic congestion, improve mobility, and improve traffic operations in the study area.

The environmental phase of the project is fully funded with \$5 million of STBG funds. The design phase is currently funded with \$8.921 million of M2 funds, and OCTA staff is proposing \$2.641 million in available federal HIP funds and an additional \$3.359 million in STBG for the PS&E phase. These federal funds have become available for use on projects due to recent adjustments to the obligation authority plan and will replace \$3.921 million in local M2 funds. The total project funding increases by \$2.079 million to \$16 million, and changes are summarized below. Staff will return to the Board with recommendations for the ROW and construction phases at a future date.

Existing Funding (in 000s)	STBG	M2	HIP	Total
PA&ED	\$ 5,000			\$ 5,000
PS&E		\$ 8,921		\$ 8,921
ROW	TBD	TBD	TBD	TBD
CON	TBD	TBD	TBD	TBD
TOTAL	\$ 5,000	\$ 8,921		\$ 13,921

Proposed Funding (in 000s)	STBG	M2	HIP	Total
PA&ED	\$ 5,000			\$ 5,000
PS&E	\$ 3,359	\$ 5,000	\$ 2,641	\$ 11,000
ROW	TBD	TBD	TBD	TBD
CON	TBD	TBD	TBD	TBD
TOTAL	\$ 8,359	\$ 5,000	\$ 2,641	\$ 16,000
CHANGE	\$ 3,359	(\$3,921)	\$ 2,641	\$ 2,079

HIP - Highway Infrastructure Program

SR-55 Improvement from I-405 to I-5

The SR-55 Improvement Project from I-405 to I-5 is a critical M2 freeway project which will add a general purpose, high-occupancy vehicle, and auxiliary lanes in both directions between I-405 and I-5 (Project F). The SR-55 Project is expected to significantly improve mobility and increase access to jobs, healthcare facilities, John Wayne Airport, and the various educational facilities in and around Orange County.

This project is nearing completion of PS&E and is expected to be advertised for construction in the December 2021 timeframe. Additional funding is needed to complete PS&E phase. Staff estimates that an additional \$1.72 million is needed to address

Capital Programming Update Project Descriptions

additional roadway design, survey, utility and ROW coordination, engineering reports modifications, environmental services, and OCTA labor costs. A complementary staff report to amend the existing design services contract will be presented at the same Board meeting and provide more detail on the need for the additional funding. This adjustment changes the total project cost estimate from \$504 million to \$505.720 million and is proposed to be funded with M2 Freeway Program funds.

Existing Funding (in 000s)	CMAQ	STIP	STBG	SHOPP	M2	TCEP	LPP-C	TOTAL
PA&ED				\$200	\$6,308			\$6,508
PS&E			\$18,500	\$3,500	\$4,700			\$26,700
ROW	\$41,500		\$97,100	\$25,400	\$20,200			\$184,200
CON	\$3,400	\$80,000		\$12,800	\$50,392	\$115,000	\$25,000	\$286,592
TOTAL	\$44,900	\$80,000	\$115,600	\$41,900	\$81,600	\$115,000	\$25,000	\$504,000

Proposed Funding (in 000s)	CMAQ	STIP	STBG	SHOPP	M2	TCEP	LPP-C	TOTAL
PA&ED				\$200	\$6,308			\$6,508
PS&E			\$18,500	\$3,500	\$6,420			\$28,420
ROW	\$41,500		\$97,100	\$25,400	\$20,200			\$184,200
CON	\$3,400	\$80,000		\$12,800	\$50,392	\$115,000	\$25,000	\$286,592
TOTAL	\$44,900	\$80,000	\$115,600	\$41,900	\$83,320	\$115,000	\$25,000	\$505,720
CHANGE					\$1,720			\$1,720

CMAQ - Congestion Mitigation and Air Quality Improvement
 SHOPP - State Highway Operation and Protection Program
 LPP-C - Local Partnership Program-Competitive

STIP - State Transportation Improvement Program
 TCEP - Trade Corridor Enhancement Program

I-5 Improvement Project from Avenida Pico to San Diego County Line

The I-5 Improvement Project from the San Diego/Orange County line to Avenida Pico project proposes to add a high-occupancy vehicle lane in each direction on the I-5, reestablish existing auxiliary lanes, widen existing undercrossings, and replace existing overcrossings.

The PSR was funded with \$0.450 million in CMAQ funds and \$0.121 million in STBG funds that were provided to Caltrans. The Board approved \$5.5 million in STBG funds for the project approval and environmental document phase for the project which entered the environmental phase in March 2021. While drafting the cooperative agreement with Caltrans, additional project risks and OCTA costs related to outreach were identified, necessitating an increase in the project budget. This increase adjusts the cost estimate for the environmental phase from \$5.5 million to \$6.407 million. The PA&ED phase is Staff is recommending an increase in the STBG funds for this phase by \$0.907 million, resulting in a total project cost of \$6.978 million. Staff will return to the Board with recommendations for the ROW and construction phases at a future date.

Capital Programming Update Project Descriptions

Existing Funding (in 000s)	CMAQ	STBG	Total
PSR	\$ 450	\$ 121	\$ 571
PA&ED		\$ 5,500	\$ 5,500
ROW	TBD	TBD	TBD
CON	TBD	TBD	TBD
TOTAL	\$ 450	\$ 5,621	\$ 6,071

PSR – Project Study Report

Proposed Funding (in 000s)	CMAQ	STBG	Total
PSR	\$ 450	\$ 121	\$ 571
PA&ED		\$ 6,407	\$ 6,407
ROW	TBD	TBD	TBD
CON	TBD	TBD	TBD
TOTAL	\$ 450	\$ 6,528	\$ 6,978
CHANGE		\$ 907	\$ 907

OC Bridges

OCTA in coordination with the cities of Anaheim, Fullerton, and Placentia, initiated the OC Bridges Railroad Grade Separation Program (OC Bridges Program) in 2007. The OC Bridges Program included undercrossings at Placentia Avenue and Kraemer Boulevard as well as overcrossings at Orangethorpe Avenue, Tustin Avenue/ Rose Drive, and Lakeview Avenue completed by OCTA. The City of Fullerton implemented undercrossings at State College Boulevard and Raymond Avenue.

These seven grade separations have been completed and the approved overall funding plan is reflected in the table is provided below, and individual project changes discussed below that.

Existing Funding (in 000s)	M2	Surplus Property & Utilities	Other Local	TCRP/ OCCUT	PTMISEA	TCIF	TSSSDRA	Federal	Total
TOTAL	\$149,418	\$20,374	\$21,495	\$ 8,960	\$ 95,346	\$148,639	\$ 9,388	\$214,080	\$ 667,700

OCCUT - Orange County Unified Transportation Trust

PTMISEA - Public Transportation Modernization, Improvement, and Service Enhancement

TCIF - Trade Corridor Improvement Funds

TSSSDRA - Transit System Safety, Security, and Disaster Response Account

Proposed Funding (in 000s)	M2	Surplus Property & Utilities	Other Local	TCRP/ OCCUT	PTMISEA	TCIF	TSSSDRA	Federal	Total
TOTAL	\$152,625	\$20,374	\$21,564	\$ 8,960	\$ 95,477	\$148,463	\$ 9,388	\$209,700	\$ 666,551
Change	\$3,207		\$69		\$131	(\$176)		(\$4,380)	(\$1,149)

Raymond Avenue Grade Separation

The project was completed May 14, 2018, and includes construction of a vehicular underpass on Raymond Avenue at the BNSF railroad crossing, between Walnut Avenue and Ash Avenue in the City of Fullerton. The project lowered Raymond Avenue under Valencia Drive. Two bridge structures were constructed, one for the railroad and one for vehicular traffic. The project includes connector roads on the west side of Raymond Avenue to provide access to Valencia Drive and Truslow Avenue.

Capital Programming Update Project Descriptions

The total project cost is reduced from \$126.317 million to \$125.419 million and was supported through State Proposition 1B TCIF, PTMISEA, and TSSSDRA funds, M2, a portion of surplus property and rental income, BNSF, and MWD funds. The \$0.898 million in savings for this project are credited to M2 which reduces the need for additional M2 to support the ineligible CMAQ in the overall program and helped offset the loss of \$0.176 million in TCIF funds in the Lakeview Avenue Grade Separation project as noted below.

Existing Funding (in 000s)	M2	Surplus Property	BNSF	MWD	Prop 1B PTMISEA	TCIF	Prop 1B TSSSDRA	Total
Design	\$ 5,229							\$ 5,229
ROW	\$ 7,611				\$ 25,172			\$ 32,783
CON	\$ 10,562	\$ 5,216	\$ 700	\$ 1,648	\$ 52,376	\$ 10,400	\$ 7,403	\$ 88,305
TOTAL	\$ 23,402	\$ 5,216	\$ 700	\$ 1,648	\$ 77,548	\$ 10,400	\$ 7,403	\$ 126,317

MWD – Metropolitan Water District

Prop 1B – Proposition 1B

Proposed Funding (in 000s)	M2	Surplus Property	BNSF	MWD	Prop 1B PTMISEA	TCIF	Prop 1B TSSSDRA	Total
Design	\$ 5,407							\$ 5,407
ROW	\$ 7,008				\$ 25,172			\$ 32,180
CON	\$ 9,958	\$ 5,216	\$ 700	\$ 1,648	\$ 52,507	\$ 10,400	\$ 7,403	\$ 87,832
TOTAL	\$ 22,373	\$ 5,216	\$ 700	\$ 1,648	\$ 77,679	\$ 10,400	\$ 7,403	\$ 125,419
Change*	(\$ 1,029)				\$ 131			(\$ 898)

*Increases in funding under \$250,000 or reductions in funding do not require Board of Directors' approval

State College Boulevard Grade Separation

The project was completed March 8, 2018 and constructed a grade separation on State College Boulevard at the BNSF railroad tracks from Santa Fe Avenue at the northerly terminus and approximately 700 feet south of Valencia Drive at the southerly terminus in the City of Fullerton. The grade separation provides an underpass for vehicular traffic on State College Boulevard and lowered State College Boulevard below the BNSF mainline rail lines. A rail bridge was constructed for the two existing mainline tracks with space for a third track.

The total project cost is reduced from \$99.631 million to \$99.380 million and was supported through M2 Regional Capacity Program, BNSF, city funds, OCSD, TCIF, TSSSDRA, STBG, CMAQ, and Federal Demo funds. The \$0.251 million in savings for this project are credited to the reduction in CMAQ which reduces the need for additional M2 to support the ineligible CMAQ in the overall program

Existing Funding (in 000s)	M2	BNSF	City of Fullerton	OCSD	TCIF	TSSSDRA	STBG/CMAQ	Federal Demo	Total
Design	\$ 3,080		\$ 1,925	\$ 170					\$ 5,175
ROW			\$ 4,412				\$ 19,032	\$ 10,823	\$ 34,267
CON	\$ 8,320	\$ 1,100	\$ 121	\$ 3,290	\$ 32,800	\$ 1,985	\$ 12,509	\$ 64	\$ 60,189
TOTAL	\$ 11,400	\$ 1,100	\$ 6,458	\$ 3,460	\$ 32,800	\$ 1,985	\$ 31,541	\$ 10,887	\$ 99,631

OCSD - Orange County Sanitation District

Capital Programming Update Project Descriptions

Proposed Funding (in 000s)	M2	BNSF	City of Fullerton	OCSD	TCIF	TSSSDRA	STBG/CMAQ	Federal Demo	Total
Design	\$ 3,568		\$ 1,925	\$ 170					\$ 5,663
ROW	\$ 4,437		\$ 4,412				\$ 14,715	\$ 10,823	\$ 34,387
CON	\$ 7,455	\$1,147	\$ 121	\$3,312	\$ 32,800	\$ 1,985	\$ 12,446	\$ 64	\$ 59,330
TOTAL	\$15,460	\$1,147	\$ 6,458	\$3,482	\$ 32,800	\$ 1,985	\$ 27,161	\$ 10,887	\$ 99,380
Change*	\$4,060	\$ 47		\$ 22			(\$4,380)		(\$251)

*Increases in funding under \$250,000 or reductions in funding do not require Board of Directors' approval

Lakeview Avenue Grade Separation

The project was completed June 5, 2017 and raised Lakeview Avenue 24 feet above the BNSF mainline tracks between Orchard Drive to the north and Eisenhower Circle to the south in the cities of Anaheim and Placentia. A bridge was constructed that spans over Orangethorpe Avenue, the BNSF, and Orange County Flood Control ROW. A modified loop type connector road was also constructed to move vehicles from Lakeview Avenue back to Orangethorpe Avenue. Improvements to adjoining streets and commercial driveways were also part of the project.

The total project cost remains at \$110.702 million and was supported through M2 Regional Capacity Program, BNSF, city funds, OCSD, TCIF, TSSSDRA, STBG, CMAQ, and Federal Demo funds. There was \$0.176 million in TCIF funds that were unable to be reimbursed through the State. M2 savings from the Raymond Avenue Grade Separation were used in place of the TCIF funds for this project.

Existing Funding (in 000s)	M2	Federalized Portion of Surplus Property	Utility Relocation Reimbursement	BNSF	TCIF	STBG/CMAQ	Federal Demo	Total
Design	\$6,832					\$631		\$ 7,463
ROW	\$1,289	\$10,164	\$1,047	\$1,619		\$34,317		\$ 48,436
CON	\$13,495	\$1,925			\$27,520	\$2,154	\$9,709	\$ 54,803
TOTAL	\$21,616	\$12,089	\$1,047	\$1,619	\$27,520	\$37,102	\$9,709	\$110,702

Proposed Funding (in 000s)	M2	Federalized Portion of Surplus Property	Utility Relocation Reimbursement	BNSF	TCIF	STBG	Federal Demo	Total
Design	\$6,832					\$631		\$ 7,463
ROW	\$1,289	\$10,164	\$1,047	\$1,619		\$34,317		\$ 48,436
CON	\$13,671	\$1,925			\$27,344	\$2,154	\$9,709	\$ 54,803
TOTAL	\$21,792	\$12,089	\$1,047	\$1,619	\$27,344	\$37,102	\$9,709	\$110,702
Change*	\$ 176				(\$176)			

*Increases in funding under \$250,000 or reductions in funding do not require Board of Directors' approval

173 Bus Repowers

OCTA operates a fleet of 173 New Flyer Xcelsior compressed natural gas-powered buses, model year 2016, that are due for midlife overhaul maintenance, which includes engine replacement. The proposed replacement Cummins Engines have been certified

Capital Programming Update Project Descriptions

by the California Air Resources Board as a near-zero-emission engine, which will further decrease the emissions profile of the entire bus fleet. Of the 173 engines, 16 will be for 60-foot buses and 157 will be for 40-foot buses.

This project is proposed to be fully funded with \$12.526 million of CMAQ funding.



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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	\$33,395			\$49,392	
I-5 widening, Yale Avenue to SR-55 (Segment 2) ²	B	\$41,351	\$32,527		\$851					\$7,973	
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) ³	F	\$16,000	\$8,359		\$2,641					\$5,000	
SR-55 widening between I-405 and I-5 ⁴	F	\$505,720	\$160,500		\$41,900	\$80,000	\$140,000			\$83,320	
SR-57 Orangewood Avenue to Katella Avenue	G	\$9,327	\$2,500		\$3,240					\$3,587	
SR-57 truck climbing lane phase II: Lambert Road to LA County Line ⁶	G	\$6,500				\$6,500					
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 Managed Lane Project from Avenida Pico to San Diego County Line ⁵		\$6,978	\$6,978								
SR-74 Ortega Highway Multimodal Improvements, Calle Entradero to Reata Road ⁷		\$53,513			\$250	\$43,913				\$7,200	\$2,150
SR-74 widening, City/County line to Antonio Parkway		\$40,905	\$5,285			\$10,000					\$25,620
State Highway Project Totals		\$4,116,708	\$508,278		\$78,612	\$382,835	\$182,783	\$140,392		\$1,871,866	\$951,942
Federal Funding Total		\$586,890									
State Funding Total		\$706,010									
Local Funding Total		\$2,823,808									
Total Funding (000's)		\$4,116,708									

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	



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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 improvements	D	\$80,300				\$48,683		\$24,109	\$2,500		\$5,008
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									



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 2021

Board Action:

1. 2022 State Transportation Improvement Program - Authorize the use of up to \$11.396 million in Measure M2 funds for the Interstate 5 Improvement Project from Interstate 405 to Yale Avenue (Segment 1).

2. Capital Programming Update - Consistent with right-of-way phase estimates, authorize the use of \$23.926 million in the following fund sources for the Interstate 5 Improvement Project from Yale Avenue to State Route 55 (Segment 2):

- Surface Transportation Block Grant (\$17.5 million),
- Measure M2 Freeway Funds (\$5.575 million), and
- Repurposed Earmarks (up to \$0.851 million), contingent on Federal Highway Administration approval
- Authorize the use of additional Measure M2 Freeway funds in lieu of \$0.851 million of Repurposed Earmarks, in the event the federal funds are not available.

3. Capital Programming Update - Consistent with updated design phase estimates, authorize the use of the funding below which supports an overall phase increase of \$2.079 million from \$8.921 million to \$11 million, and the reduction of Measure M2 funds by \$3.921 million for the State Route 55 Improvement Project from Interstate 5:

- Surface Transportation Block Grant (\$3.359 million), and
- Highway Infrastructure Program (\$2.641 million).

4. Capital Programming Update - Authorize the use of \$1.720 million in Measure M2 for the State Route 55 Improvement Project from Interstate 405 to Interstate 5 to support anticipated costs for the design phase, changing the total project estimated cost from \$504 million to \$505.702 million

5. Capital Programming Update - Consistent with the forecasted cost for the environmental phase, authorize the use of \$0.907 million in additional Surface Transportation Block Grant funds for the Interstate 5 Managed Lanes Project from the Orange County/San Diego County line to Avenida Pico to fund a change in project cost estimate from \$5.5 million to \$6.407 million.

6. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27. (\$6.5 million)

7. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27. (\$37.6 million)

Acronyms:

Aux - Auxiliary

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 OCTA Board of Directors (Board) Approval - September 13th, 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 Engine Repowers (173) ¹		\$12,526	\$12,526								
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 FY2018-19 to FY2024-25 (ACCESS and contracted fixed-route contracts)		\$349,243		\$185,623							\$163,620
Digital Bus Stop Sign 13" Along High Quality Transit Corridors (143 sign) ²		\$2,500				\$2,500					
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 2018-19 to FY 2024-25		\$420,500		\$84,101							\$336,399
OC Mobility Hubs Strategy		\$300	\$266			\$34					
Preventive maintenance - including salaries and benefits (includes ATN & Laguna Beach)		\$167,572		\$167,572							
Purchase (201) 40-foot alternative fuel replacement buses (OCTA)		\$229,384	\$134,670	\$47,696							\$47,018
Purchase 117 replacement paratransit vehicles		\$14,995		\$14,995							
Rehabilitation and Renovation at OCTA Bus Facilities		\$1,509		\$1,207							\$302
Rideshare/vanpool		\$11,232	\$11,232								
Standby backup generators at Anaheim and IRCC bases		\$1,374					\$1,374				
Transit Security & Operations Center ^{3,4}		\$56,436			\$3,660	\$10,382	\$32,002	\$5,603			\$4,789
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		\$14,004					\$6,466	\$7,538			



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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	
Bus Transit Project Totals		\$1,634,650	\$226,929	\$622,969	\$4,001	\$13,092	\$53,832	\$42,498	\$5,730	\$55,845	\$609,754	
Federal Funding Total		\$853,899										
State Funding Total		\$109,422										
Local Funding Total		\$671,329										
Total Funding (000's)		\$1,634,650										

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		\$405		\$313			\$92					
Zero-emission hydrogen fuel cell buses (10)		\$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 Action:

1. Capital Programming Update - Authorize the use of up to \$12.526 million in Congestion Mitigation and Air Quality Improvement Program funds for 173 bus engine repowers
2. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27 (\$2.5 million)
3. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27 (\$10.382 million)
4. 2022 State Transportation Improvement Program - Authorize the use of up to \$27.234 million for the Transit Security and Operations Center, as follows:
 - \$19.650 million in Local Partnership Program Formula funds,
 - \$3.924 million in additional State of Good Repair, and
 - \$3.660 million Coronavirus Response and Relief Supplemental Appropriations Act, 2021

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

Pending OCTA Board of Directors (Board) Approval - September 13th, 2021

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	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	P	\$117,578	\$1,774					\$11,762	\$4,546	\$99,496	
M2 Project Q Fair Share Program (FY 2016-17 through FY 2021-22)	Q	\$361,621								\$361,621	
M2 Project X Environmental Clean Up	X	\$55,258								\$55,258	
Active Transportation Program - regional call		\$83,504	\$6,359		\$63,361	\$92		\$199			\$13,493
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)		\$63,128	\$43,755								\$19,373
Bristol Street widening		\$44,750									\$44,750
Local Agency American Reinvestment and Recovery Act of 2009 rehabilitation projects		\$32,369			\$32,369						
Local Agency led SCCP projects		\$3,357					\$3,357				
Local Agency Road Rehabilitation and Maintenance Program (CRRSAA)		\$14,591			\$14,591						
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		\$1,411,904	\$77,836		\$138,388	\$86,797	\$3,357	\$61,160	\$40,326	\$858,235	\$145,805
Federal Funding Total		\$216,224									
State Funding Total		\$151,314									
Local Funding Total		\$1,044,366									
Total Funding (000's)		\$1,411,904									

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 ²	O	\$110,702	\$37,102		\$9,709			\$27,344		\$21,792	\$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 ³	O	\$125,419						\$95,482		\$22,373	\$7,564
State College Boulevard grade separation ^{1,4}	O	\$99,380	\$27,161		\$10,887			\$34,785		\$15,460	\$11,087



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 2021

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
Tustin Avenue/Rose Drive grade separation	O	\$96,638	\$45,957					\$22,534		\$26,384	\$1,763
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		\$739,983	\$197,570		\$39,196			\$268,544	\$5,992	\$156,141	\$72,540
Federal Funding Total		\$236,766									
State Funding Total		\$268,544									
Local Funding Total		\$234,673									
Total Funding (000's)		\$739,983									

Board Action:

1. Authorize the use of up to \$3.207 million in additional Measure M2 Regional Capacity Program funds for the OC Bridges Railroad Grade Separation Program in lieu of federal Congestion Mitigation and Air Quality improvement funding

Project Notes:

2. Measure M2 increased by \$0.176 million and TCIF decreased by \$0.176 million. Total project cost remains the same
 3. Measure M2 decreased by \$1.029 million and PTMISEA increased by \$0.131 million. Total project cost decreases by \$0.898.
 4. Measure M2 increased by \$4.060 million, Burlington Northern Santa Fe Railroad increased by \$0.047 million, Orange County Sanitation District increased by \$0.022 million, and STBG/CMAQ decreased by \$4.380 million. Total project cost decreased by \$0.251 million.

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

Approved by OCTA Board of Directors (Board) - June 14th, 2021

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	\$423,438	\$62,412	\$162,554				\$25,586		\$172,886	
OC Streetcar (non-New Starts)	M1/S	\$8,601		\$341					\$6,904	\$1,213	\$143
Anaheim Canyon Station	R	\$34,200	\$30,432							\$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 2016-17 to FY 2024-25	R	\$102,257		\$102,257							
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 24-25	R	\$51,000		\$51,000							
San Juan Creek Bridge replacement	R	\$43,092	\$908	\$39,833	\$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	
OC Maintenance Facility		\$198		\$198							
Slope and Culvert Improvements		\$300		\$300							
Tactile Tile Project		\$1,304		\$1,273						\$31	
Rail Project Totals		\$886,819	\$118,858	\$371,801	\$913	\$32,750		\$89,870	\$16,622	\$219,860	\$36,145
Federal Funding Total		\$491,572									
State Funding Total		\$122,620									
Local Funding Total		\$272,627									
Total Funding (000's)		\$886,819									

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



Capital Funding Program Report

Approved by OCTA Board of Directors (Board) - June 14th, 2021

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
Sand Canyon Avenue grade separation	M1/R	\$62,050	\$10,536					\$28,192	\$3,116	\$5,352	\$14,854
M2 Project S Fixed-Guideway Anaheim Rapid Connection	M1/S	\$9,924		\$1,516					\$6,000	\$1,286	\$1,122
Anaheim Regional Intermodal Transportation Center (ARTIC) construction	M1/T	\$184,164	\$33,250	\$37,253	\$3,501	\$29,219			\$43,900	\$35,291	\$1,750
Fullerton Transportation Station expansion planning, environmental PSR	M1/T	\$0	\$0						\$0		
Santa Ana grade separation planning and environmental PSR	M1/T	\$1,333	\$1,180						\$153		
Santa Ana Transportation Station planning and environmental PSR	M1/T	\$1,003	\$888						\$115		
17th Street grade separation environmental	R	\$2,476								\$2,476	
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

ATTACHMENT D

**List of Board of Directors Reports with Programming Actions
January 2021 – June 2021**

Date	Report Title	Fund Source(s) Affected
1/11/21	State Route 55 Improvement Project from Interstate 405 to Interstate 5 Funding Plan Update and SB 1 (Chapter 5, Statutes of 2017) Grant Acceptance	SB 1 TCEP, SB 1 LPP-C, STBG, CMAQ
1/25/21	M2 Community-Based Transit Circulars Program Project V Ridership Report and Proposed Program Revisions	M2 Project V
2/8/21	Capital Programming Update	M2, HIP, STBG, CMAQ
3/22/21	Agreement for Construction of the Anaheim Canyon Metrolink Station Improvement Project	CMAQ
3/22/21	OC Streetcar Project Supplemental Contingency	M2, CMAQ
5/10/21	Comprehensive Transportation Funding Programs – 2021 Call for Projects Programming Recommendations	M2 Project O, M2 Project P
5/24/21	LCTOP Recommendations for Fiscal Year 2020-21 and Prior Year Funds	LCTOP
6/14/21	Programming Recommendations for CRRSAA and Mid-Cycle State Transportation Improvement Program	CRRSAA
6/14/21	Federal Transit Administration Program of Projects for Federal Fiscal Year 2020-21, Federal CRRSAA and ARPA Transit Funding	FTA 5307, FTA 5310, FTA 5337, FTA 5339, CRRSAA, ARPA

Acronyms:

ARPA – American Rescue Plan Act of 2021

CMAQ – Congestion Mitigation and Air Quality Improvement Program

CRRSAA – Coronavirus, Response and Relief Supplemental Appropriations Act of 2021

FTA 5307 – Federal Transit Administration Section 5307 Urbanized Area Formula

FTA 5310 – Federal Transit Administration Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities

FTA 5337 – Federal Transit Administration Section 5337 State of Good Repair

FTA 5339 – Federal Transit Administration Section 5339 Bus and Bus Facilities

HIP – Highway Infrastructure Program

LCTOP – Low Carbon Transit Operations Program

LPP-C – Local Partnership Program – Competitive

M2 – Measure M2

STBG – Surface Transportation Block Grant

TCEP – Trade Corridors Enhancement Program



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendments to On-Call Traffic Engineering and Intelligent Transportation Systems Services Agreements

Overview

On January 13, 2020, the Orange County Transportation Authority Board of Directors approved agreements with four traffic engineering firms to provide consultant services for on-call traffic engineering and intelligent transportation systems services for the Measure M2 Regional Traffic Signal Synchronization Program for five years with two, one-year option terms. Amendments to the existing agreements are necessary for additional on-call services to implement recommendations approved as part of the 2021 Comprehensive Transportation Funding Program competitive call for projects.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute amendments between the Orange County Transportation Authority and the following consultants for on-call traffic engineering and intelligent transportation systems services agreements: Agreement No. C-9-1513 with DKS Associates, Agreement No. C-9-1810 with AGA Engineers, Inc., Agreement No. C-9-1811 with KOA Corporation, and Agreement No. C-9-1812 with Iteris, Inc., in a shared amount of \$10,547,425. This will increase the maximum obligation for all the on-call firms for a total combined aggregate contract value of \$15,875,425.

Discussion

Competitive funding applications for the Measure M2 (M2) Regional Traffic Signal Synchronization Program (RTSSP) are submitted annually by local agencies. Local agencies may request that the Orange County Transportation Authority (OCTA) implement projects, subject to OCTA's concurrence. On January 13, 2020, OCTA Board of Directors (Board) authorized a bench of four consultants to provide on-call traffic engineering support to OCTA.

The consultants' scope of services includes support efforts in the implementation of multi-jurisdictional signal synchronization projects as part of the M2 RTSSP. These services will provide support for three competitive calls for projects (call) in fiscal years (FY) 2018-19, 2020-21, and 2021-22. A summary of projects from the FY 2018-19 and 2020-21 calls is included in Attachment A. There were no OCTA-led projects in FY 2019-20. All RTSSP projects are designed to span over a minimum of three years. Approximately one year is allowed for data collection, design, analysis, and the implementation of new optimized coordination/synchronization timing. This is coupled with the installation of required control and communications infrastructure defined as primary implementation (PI) phase. Immediately following is a mandated two-year period for maintenance of the communications and detection systems and monitoring of the new signal timing installed in the PI phase.

The Board approved the FY 2020-21 call on May 10, 2021. The FY 2020-21 call funded three regionally significant projects with a total project cost of \$10,547,425. The respective applicant agencies requested that OCTA administer and implement all three projects, and the Board approved the negotiation and execution of cooperative agreements for these projects on August 9, 2021. These three corridors target 136 signalized intersections spanning a total of 33.5 miles. These three projects are intended to improve traffic flow by optimizing signal timing on these high-volume corridors. Table 1 shows the three corridors and their respective details.

Table 1

Project Corridors – FY 2020-21 Calls – OCTA-Administered			
Arterials	Project Intersections	Project Miles	Participating Agencies
First Street / Bolsa Avenue	55	13.1	5
Alton Parkway	50	12.8	2
Portola Parkway / Santa Margarita Parkway	31	7.6	3

Procurement Approach

The original procurement was handled in accordance with OCTA's Board-approved procedures for architectural and engineering services that conform to both federal and state laws. On January 13, 2020, the Board approved the agreements with DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc. for an initial term of five years, with two, one-year option terms. The total maximum cumulative payment obligation of the initial term was \$5,328,000.

The proposed amendments will add funding in the amount of \$10,547,425 for the implementation of the Project P 2021 call for the OCTA-administered projects. With the approval of these respective amendments to each of the four consultant contracts, the total combined aggregate contract value will be \$15,875,425.

Fiscal Impact

Funding for this project is included in OCTA's Planning Division FY 2021-22 Budget, Account No. 0017-7519-SP001-P57, and is funded through M2. These funds will be utilized to fund 80 percent of the cost for these projects. The participating agencies on each respective project are responsible for the required 20 percent of matching funds.

Summary

Staff requests the Board of Directors authorize the Chief Executive Officer to negotiate and execute amendments between the Orange County Transportation Authority and consultant agreements for on-call traffic engineering and intelligent transportation systems services: Agreement No. C-9-1513 with DKS Associates; Agreement No. C-9-1810 with AGA Engineers, Inc.; Agreement No. C-9-1811 with KOA Corporation; and Agreement No. C-9-1812 with Iteris, Inc., in the total amount of \$10,547,425, for a total combined aggregate contract value of \$15,875,425 to implement projects in support of the Measure M2 Regional Transportation Signal Synchronization Program.

Attachments

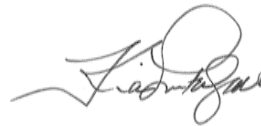
- A. Orange County Transportation Authority, Regional Traffic Signal Synchronization Program Project Summary, Call for Projects 2019 – 2021
- B. DKS Associates, Agreement No. C-9-1513 Fact Sheet
- C. AGA Engineers, Inc., Formerly Performed by Albert Grover and Associates, Inc., Agreement No. C-9-1810 Fact Sheet
- D. KOA Corporation, Agreement No. C-9-1811 Fact Sheet
- E. Iteris, Inc., Agreement No. C-9-1812 Fact Sheet

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**Orange County Transportation Authority
Regional Traffic Signal Synchronization Program Project Summary
Call for Projects 2019 – 2021**

The 2019 call for projects (call) for Project P was approved by the Board of Directors (Board) on June 11, 2019. Three of five projects approved for funding are being administered and implemented by the Orange County Transportation Authority (OCTA). These three projects target 77 signals and total 18 miles. A contract task order (CTO) for each respective project, as part of the initial term of the on-call traffic engineering services contracts, was issued to three of the four respective consultants as shown in Table 1. All three projects are currently in the primary implementation (PI) phase.

Table 1

OCTA-Administered Project Corridors – 2019 Call				
Arterials	Project Intersections	Project Miles	Participating Agencies	CTO Consultant
Aliso Creek Road	23	4.98	2	KOA Corporation
Lake Forest Drive	27	7.45	3	Albert Grover & Associates
Red Hill Avenue	28	6.65	3	DKS Associates

There were no OCTA-led projects for the 2020 call.

The 2021 call was approved by the Board on May 10, 2021, funding three regionally significant projects. Applicant agencies requested that OCTA lead all three of these projects. These three corridors target 136 signalized intersections spanning a total of 33.5 miles. The projects will improve traffic flow by optimizing travel times on these high-volume corridors. The CTOs will be issued, pending the approval of the amendment to increase the maximum obligation of the on-call traffic engineering services contracts. Table 2 shows the three corridors and the respective details.

Table 2

OCTA-Administered Project Corridors – 2021 Call			
Arterials	Project Intersections	Project Miles	Participating Agencies
First Street / Bolsa Avenue	55	13.1	5
Alton Parkway	50	12.8	2
Portola Parkway / Santa Margarita Parkway	31	7.6	3

**DKS Associates
Agreement No. C-9-1513 Fact Sheet**

1. January 13, 2020, Agreement No. C-9-1513, aggregate amount of \$5,328,000 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) approved by the Board of Directors (Board).
 - To provide on-call traffic engineering and intelligent transportation systems services, effective May 24, 2020 through March 31, 2025, with two, one-year option terms.
2. December 22, 2020, Amendment No. 1 to Agreement No. C-9-1513, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - Add other direct costs for travel with no increase to the maximum cumulative obligation.
3. August 10, 2021, Amendment No. 2 to Agreement No. C-9-1513, \$0, approved by the CAMM Department.
 - Modify key personnel and other labor charges with no increase to the maximum cumulative obligation.
4. September 27, 2021, Amendment No. 3 to Agreement No. C-9-1513, \$10,547,425 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) pending Board approval.
 - Provide additional on-call traffic engineering and transportation systems service and to increase the maximum obligation for all of the on-call firms.

Total combined maximum obligation of \$15,875,425 shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.

**AGA Engineers, Inc.
Formerly Performed by Albert Grover and Associates, Inc.
Agreement No. C-9-1810 Fact Sheet**

1. January 13, 2020, Agreement No. C-9-1810, aggregate amount of \$5,328,000 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) approved by the Board of Directors (Board).
 - To provide on-call traffic engineering and intelligent transportation systems services effective June 19, 2020, through April 14, 2025, with two, one-year option terms.
2. September 14, 2020, Amendment No. 1 to Agreement No. C-9-1810, \$0, approved by the Contracts Administration and Materials Management Department.
 - To assign agreement to AGA Engineers, Inc., and reflect consultant's new name.
3. September 27, 2021, Amendment No. 2 to Agreement No. C-9-1810, \$10,547,425 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) pending Board approval.
 - To provide additional on-call traffic engineering and transportation systems service and to increase the maximum obligation for all of the on-call firms.

Total combined maximum obligation of \$15,875,425 shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.

**KOA Corporation
Agreement No. C-9-1811 Fact Sheet**

1. January 13, 2020, Agreement No. C-9-1811, aggregate amount of \$5,328,000 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) approved by the Board of Directors (Board).
 - To provide on-call traffic engineering and intelligent transportation systems services effective August 28, 2020, through August 31, 2025, with two, one-year option terms.
2. April 1, 2021, Amendment No. 1 to Agreement No. C-9-1811, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - Staff and other direct costs modifications for prime and subconsultant.
3. September 27, 2021, Amendment No 2 to Agreement No. C-9-1811, \$10,547,425 (shared among DKS Associates, AGA Engineers, Inc, KOA Corporation, and Iteris, Inc.) pending Board approval.
 - To provide additional on-call traffic engineering and transportation systems service and to increase the maximum obligation for all of the on-call firms.

Total combined maximum obligation of \$15,875,425 shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.

**Iteris, Inc.
Agreement No. C-9-1812 Fact Sheet**

1. January 13, 2020, Agreement No. C-9-1812, aggregate amount of \$5,328,000 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) approved by the Board of Directors (Board).
 - To provide on-call traffic engineering and intelligent transportation systems services effective March 9, 2021, through December 14, 2025, with two, one-year option terms.
2. September 27, 2021, Amendment No. 1 to Agreement No. C-9-1812, \$10,547,425 (shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.) pending Board approval.
 - To provide additional on-call traffic engineering and transportation systems service and to increase the maximum obligation for all of the on-call firms.

Total combined maximum obligation of \$15,875,425 shared among DKS Associates, AGA Engineers, Inc., KOA Corporation, and Iteris, Inc.



September 2, 2021

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Draft 2021 Orange County Congestion Management Program Report Release for Public Review

Overview

The Orange County Transportation Authority is responsible for monitoring and reporting on the Orange County Congestion Management Program every two years. In accordance with state requirements, a draft 2021 Orange County Congestion Management Program Report has been prepared for public review and will be circulated to local agencies upon direction by the Board of Directors.

Recommendation

Direct staff to release the draft 2021 Orange County Congestion Management Program Report for public review and set November 22, 2021, as a public hearing date for adoption of the final 2021 Orange County Congestion Management Program Report.

Background

In June 1990, the passage of Proposition 111 required urbanized areas to designate a Congestion Management Agency (CMA) and adopt a Congestion Management Program (CMP) to continue receiving state gasoline tax funds. As Orange County's designated CMA, the Orange County Transportation Authority (OCTA) is responsible for developing, monitoring, and biennially updating Orange County's CMP Report. Specific CMP elements are also linked to the Measure M2 (M2) eligibility process that qualifies cities and the County of Orange for M2 funds. The overall purpose of the CMP is to provide a mechanism for coordinating land use and transportation decisions, and to assess how traffic congestion is being managed by monitoring the transportation system.

The draft 2021 Orange County CMP Report (Attachment A) is a composite of data submittals, such as traffic counts and capital improvement programs. It was developed through cooperative efforts between OCTA, local jurisdictions, and the California Department of Transportation (Caltrans) over the past year, in accordance with state legislation.

Discussion

It is important to emphasize that the CMP Report is updated every two years to reflect current conditions. Therefore, the data included in the draft 2021 Orange County CMP Report reflects travel conditions during the coronavirus pandemic, as noted throughout the document. As a result, the draft 2021 Orange County CMP Report should be viewed more as a record specific to the pandemic travel conditions in Orange County, rather than part of the typical cycle of CMP reports prepared in the past. While the data is unique to the pandemic period, the data collection and reporting methods have stayed consistent as outlined below.

To assist Orange County cities, OCTA funds and administers the collection of traffic count data at over 100 intersections within the Orange County CMP highway system. The count data was used to calculate intersection capacity utilization (ICU) ratings, which represent the percent of capacity used at each intersection when demand is highest, during morning and evening peak hours. Based on ICU ratings, level of service (LOS) grades are assigned to each intersection. Local jurisdictions have reviewed and approved all intersection performance data.

LOS Grade	ICU Rating
A	< .60
B	.60 - .70
C	.70 - .80
D	.80 - .90
E	.90 - 1.00
F	> 1.00

The general performance standard that must be maintained at CMP intersections is a LOS grade of E or better. In most cases, if an intersection receives a LOS grade of F, it is considered deficient and operating over capacity. As such, a deficiency plan must be developed by the responsible jurisdiction controlling the intersection.

A deficiency plan identifies the cause of congestion, the improvements needed to solve the problem, and the cost and timing of the proposed improvements. The 2021 Orange County CMP Report found that no deficiency plans are required from any Orange County local agencies.

In the baseline year data (1991 in most cases), the Orange County CMP Report identified 14 intersections that operated at LOS F in the morning and evening peak hours. Since that time, congestion conditions have improved at these intersections to a LOS grade of C or better. Compared to the baseline year, the 2021 average morning ICU rating showed a 35.82 percent improvement, and the 2021 average evening ICU rating showed a 27.77 percent improvement. While past CMP reports have demonstrated that OC Go and other locally funded projects have provided significant improvements over the baseline year, the high levels of improvement reported here reflect the lower volumes experienced during the pandemic period.

Local jurisdictions also submitted data pertaining to capital improvement programs, coordination of land use and transportation, and other legislatively required CMP elements. Based on the submittals and performance measure data, OCTA's preliminary finding is that all jurisdictions comply with the CMP requirements. The Orange County CMP Report must also include data on freeway LOS. This information was prepared by Caltrans and is included as Appendix A of the report.

Next Steps

Upon direction from the OCTA Board of Directors (Board), the draft 2021 Orange County CMP Report will be released for a three-week public review period. The draft 2021 Orange County CMP Report will be circulated to local agencies for review, hardcopies will be available in-house for review by the public, and an electronic version will be available on the OCTA website. Comments received will be reviewed and incorporated as appropriate into the final 2021 Orange County CMP Report.

The final 2021 Orange County CMP Report will be brought to the Board for adoption at a noticed public hearing on November 22, 2021, as required by state law. Upon adoption by the Board, the final 2021 Orange County CMP Report will be submitted to the Southern California Association of Governments to ensure consistency with regional transportation plans.

Summary

A draft 2021 CMP Report has been prepared in accordance with state legislation and developed through cooperative efforts involving local jurisdictions and public agencies. With Board direction, staff will circulate the draft 2021 Orange County CMP Report for a three-week public review period and return with a final report for adoption at a public hearing.

Attachment

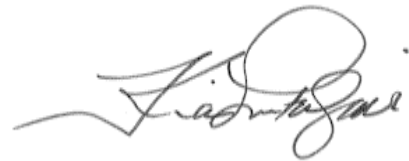
- A. 2021 Orange County Congestion Management Program,
Orange County Transportation Authority, August 2021

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2021 Orange County Congestion Management Program

**Orange County Transportation Authority
August 2021**

www.octa.net



Table of Contents

2021 UPDATE	4
CHAPTER 1: INTRODUCTION	5
Purpose and Need	5
<i>Congestion Management Program Goals</i>	<i>6</i>
State Legislation.....	6
<i>Required Elements</i>	<i>6</i>
<i>Congestion Management Agency Requirements</i>	<i>8</i>
<i>Other Relevant Legislation.....</i>	<i>9</i>
CHAPTER 2: TRAFFIC LEVEL OF SERVICE STANDARDS.....	10
CHAPTER 3: SYSTEM PERFORMANCE	13
Highway and Roadway System Performance Measures	13
<i>Overview of Intersection Capacity Utilization Methodology.....</i>	<i>13</i>
Deficiency Plans	20
Transit System Performance Measures.....	22
<i>Fixed-Route Bus Service</i>	<i>22</i>
<i>Bus Restructuring Study.....</i>	<i>24</i>
<i>Performance Measures.....</i>	<i>24</i>
Commuter Rail Service	27
Future Transit Improvements.....	28
<i>Commuter Rail Service Improvements.....</i>	<i>29</i>
CHAPTER 4: TRANSPORTATION DEMAND MANAGEMENT	30
Transportation Demand Management Ordinances	30
Countywide Transportation Demand Management Strategies	31
<i>Transit/Shuttle Services</i>	<i>31</i>
<i>OCTA Vanpool Program</i>	<i>32</i>
<i>Transportation Management Associations</i>	<i>32</i>
<i>Park-and-Ride Lots.....</i>	<i>32</i>
<i>Parking Cash-Out Programs.....</i>	<i>33</i>

2021 Congestion Management Program

<i>Guaranteed Ride Home Program</i>	33
<i>Complete Streets</i>	33
<i>Active Transportation</i>	34
<i>Motorist Aid and Traffic Information System (511)</i>	35
<i>Freeway Construction Mitigation</i>	35
CHAPTER 5: LAND-USE IMPACT ANALYSIS	36
CHAPTER 6: CAPITAL IMPROVEMENT PROGRAM	37
CHAPTER 7: CONGESTION MANAGEMENT PROGRAM CONFORMANCE	39
<i>Regional Consistency</i>	40

List of Figures

FIGURE 1: LOS Grade Chart	10
FIGURE 2: 2021 CMP Highway System	11
FIGURE 3: 2021 CMP Intersection Level of Service	16
FIGURE 4: 2021 CMP Level of Service Chart	17
FIGURE 5: Summary of Compliance	41

Appendix

Appendix A: Freeway Level of Service	
Appendix B-1: Meeting CMP Traffic Impact Analysis Requirements	
Appendix B-2: Traffic Impact Analysis Exempt Projects	
Appendix C-1: CMP Deficiency Plan Flow Chart	
Appendix C-2: Deficiency Plan Decision Flow Chart	
Appendix D: CMP Monitoring Checklists	
Appendix E: Capital Improvement Programs	
Appendix F: Measure M2 Program of Projects	
Appendix G: Orange County Subarea Modeling Guidelines	

2021 Update

The 2021 Congestion Management Program (CMP) report offers a snapshot of some of the many evolving circumstances and challenges both Orange County and Orange County Transportation Authority (OCTA) have been facing in recent years. Although many of these challenges are not unique to the region or the agency, OCTA continues to adapt its systems and programs as it navigates through new societal, technological, and political dynamics. Following is a summary of key changes made in the 2021 update of the Orange County CMP:

1. **Coronavirus (COVID-19) Impacts on the Transportation System** – A significant new challenge OCTA has encountered in the delivery of its projects and services is the ongoing impacts from the COVID-19 pandemic. Since 2020, this has resulted in a number of significant changes to travel patterns in Orange County, including a reduction in ridership on OCTA's bus system, Metrolink's rail system, and reduced traffic on Orange County's streets and roads. Some of these impacts may be temporary and others may be more long-term. The 2021 CMP update discusses and reflects these trends throughout the document, most particularly in the data sets it includes.
2. **Discussion of SB 743 (Chapter 5, Statutes of 2017) implementation in relationship to the CMP** – SB 743 was first referenced as part of the 2019 CMP update as a means of providing some initial guidance and clarity on evaluating transportation impacts under California Environmental Quality Act (CEQA). This information was included at the end of Chapter 1: Introduction as a new subsection on SB 743 legislation. The 2021 update has now added new language under Chapter 5: Land-Use Impact Analysis, as well that builds on the information first introduced in 2019. These changes clarify that all jurisdictions in Orange County are expected to comply with the CMP Land-Use Coordination analysis by following a process consistent with the CMP Traffic Impact Analysis (TIA) Guidelines for the purpose of monitoring Orange County's highway system performance.

Chapter 1: Introduction

Purpose and Need

In June 1990, the passage of the Proposition 111 gas tax increase required California's urbanized areas – areas with populations of 50,000 or more – to adopt a CMP. The following year, Orange County's local governments designated the OCTA as the Congestion Management Agency (CMA) for the County. As a result, OCTA is responsible for the development, monitoring, and biennial updating of Orange County's CMP.

The passage of AB 2419 (Chapter 293, Statutes of 1996), in July 1996, provided local agencies the option to elect out of the CMP process without the risk of losing state transportation funding. However, local jurisdictions in Orange County expressed a desire to continue the existing CMP process, because the requirements were similar to those of the Orange County Measure M Growth Management Program (GMP), and because it contributes to fulfilling federal requirements for the Congestion Management Process (23 Code of Federal Regulations 450.320), which is prepared by the Southern California Association of Governments (SCAG). The OCTA Board of Directors affirmed the decision to continue with the existing CMP process on January 13, 1997. Although the GMP ended with the sunset of Measure M, the CMP remains necessary as an eligibility requirement under Measure M2 (M2).



As mentioned above, the CMP contributes to federal Congestion Management Process requirements, which is a systematic and regionally-accepted approach for managing congestion. The federal Congestion Management Process provides accurate, up-to-date information on transportation system performance and assesses alternative strategies for congestion management that meet state and local needs.

The Congestion Management Process is also intended to serve as a systematic process that provides for consistent and effective integrated monitoring and management of the multimodal transportation system.

The process includes:

- Development of congestion management objectives;
- Establishment of measures of multimodal transportation system performance;
- Collection of data and system performance monitoring to define the extent and duration of congestion and determine the causes of congestion;
- Identification of congestion management strategies;
- Implementation activities, including identification of an implementation schedule and possible funding sources for each strategy; and
- Evaluation of the effectiveness of implemented strategies.

A federal Congestion Management Process is required in metropolitan areas with population exceeding 200,000, known as Transportation Management Areas (TMAs). Federal requirements also state that in all TMAs, the CMP shall be developed and implemented as an integrated part of the metropolitan transportation planning process.

CMP Goals

The goals of Orange County's CMP are to support regional mobility objectives by reducing traffic congestion, to provide a mechanism for coordinating land-use and development decisions that support the regional economy, and to support gas tax funding eligibility.

To meet these goals, the CMP contains a number of policies designed to monitor and address system performance issues. OCTA developed the policies that makeup Orange County's CMP in coordination with local jurisdictions, the California Department of Transportation (Caltrans), and the South Coast Air Quality Management District (SCAQMD).

State Legislation

Required Elements

California Government Code Section 65089(b) requires the CMP to include specific elements, as summarized below. The full text of the Government Code can be viewed at <https://leginfo.legislature.ca.gov/faces/codes.xhtml>, sections 65088-65089.10.

Traffic Level of Service Standards – §65089(b)(1)(A) & (B)

Traffic level of service (LOS) standards shall be established for a system of highways and roadways. The highways and roadway system shall be designated by OCTA and shall include, at minimum, all state highways and principal arterials. None of the designated facilities may be removed, and new state highways and principal arterials must be added, except if they are within an infill opportunity zone. The LOS must be measured using a method that is consistent with the Highway Capacity Manual. The LOS standards must not be below level of service "E", unless the levels of service from the baseline CMP dataset were lower. If a Congestion Management Program Highway System (CMPHS)

segment or intersection does not meet the minimum LOS standard outside an infill opportunity zone, a deficiency plan must be adopted (subject to exclusions).

Chapter 2 specifically addresses this element.

Performance Measures – §65089(b)(2)

Performance measures shall be established to evaluate the current and future performance of the transportation system. At a minimum, measures must be established for the highway and roadway system, frequency and routing of public transit, and for the coordination of transit service by separate operators. These measures will be used to support improvements to mobility, air quality, land-use, and economic objectives and

shall be incorporated into the Capital Improvement Program, the Land-Use Analysis Program, and any required deficiency plans.

Chapter 3 specifically addresses this element.

Travel Demand – §65089(b)(3)

A travel demand element shall be established to promote alternative transportation methods,

improve the balance between jobs and housing, and other trip reduction strategies. These methods and strategies may include, but are not limited to, carpools, vanpools, transit, bicycles, park-and-ride lots, flexible work hours, telecommuting, parking management programs, and parking cash-out programs.

Chapter 4 specifically addresses this element.

Land-Use Analysis Program – §65089(b)(4)

A program shall be established to analyze the impacts of land-use decisions on the transportation system, using the previously described performance measures. The analysis must also include cost estimates associated with mitigating those impacts. To avoid duplication, this program may require implementation through the requirements and analysis of the CEQA.

Chapter 5 specifically addresses this element.



Capital Improvement Program – §65089(b)(5)

The CMP shall use the performance measures described above to determine effective projects that mitigate impacts identified in the Land-Use Analysis Program, through an adopted seven-year capital improvement program. This seven-year program will conform to transportation-related air quality mitigation measures and will include any projects that increase the capacity of the transportation system. Furthermore, consideration will be given to maintaining or improving bicycle access and safety within the project areas. Projects necessary for preserving investments in existing facilities may also be included.

Chapter 6 specifically addresses this element.

CMA Requirements

As Orange County's CMA, OCTA is responsible for the administration of the CMP, as well as providing data and models that are consistent with those used by the SCAG. OCTA is also responsible for developing the deficiency plan processes. These requirements are described in the legislation, and are summarized below.

Modeling and Data Consistency – §65089(c)

In consultation with SCAG and local jurisdictions, OCTA developed a uniform database on traffic impacts for use in a countywide transportation computer model. This database is consistent with the database maintained by SCAG, the regional agency. The Orange County Transportation Analysis Model (OCTAM) is developed and maintained by OCTA. OCTAM uses standardized assumptions and conventions and is consistent with the methodologies adopted by SCAG. OCTA encourages local jurisdictions to use OCTAM to determine the quantitative impacts of development on the circulation system. This approach to modeling and data consistency reflects a consensus approach developed through discussions between OCTA and local jurisdictions.

Appendix G discusses this requirement in more detail.

Deficiency Plan Procedures – §65089.4

OCTA is responsible for preparing and adopting procedures for local deficiency plan development and implementation. OCTA's deficiency plan procedures incorporate a methodology for determining if deficiency impacts are caused by more than one local jurisdiction within Orange County. If required, a multi-jurisdictional deficiency plan must be adopted by all participating local jurisdictions. The procedures also provide for a conflict resolution process for addressing conflicts or disputes between local jurisdictions in meeting the multi-jurisdictional deficiency plan responsibilities.

Chapter 3 and Appendix C discuss this requirement in more detail.

Other Relevant Legislation

SB 743

Approved in 2013, SB 743 amended the CEQA Guidelines to provide an alternative to LOS for evaluating transportation impacts. Since its passing, the Governor's Office of Planning and Research has proposed changes to the CEQA Guidelines that identify vehicle miles traveled (VMT) as the most appropriate metric to evaluate a project's transportation impacts. Since adoption by the California Natural Resources Agency in 2018, automobile delay, as measured by LOS and other similar metrics, generally no longer constitutes a significant environmental effect under CEQA.

The intent of this legislation is to balance the need for traffic LOS standards with the need to build infill housing and mixed-use commercial developments within walking distance of mass transit facilities, downtowns, and town centers. In doing so, this legislation aims to provide greater flexibility to local governments to balance these sometimes competing needs.

Lead agencies, including OCTA, are required to comply with SB 743 requirements in the CEQA Guidelines, and OCTA even evaluates VMT in plans such as the Long-Range Transportation Plan (LRTP). However, a jurisdiction may still adopt LOS as a performance standard for analyzing traffic conditions and maintaining throughput on its highway system. Therefore as Orange County's Congestion Management Agency, OCTA still requires LOS analysis for certain projects as defined in the CMP TIA Guidelines.

Chapter 2: Traffic Level of Service Standards

In 1991, the OCTA implemented an Intersection Capacity Utilization (ICU) monitoring method, developed with technical staff members from local and State agencies, for measuring the LOS at CMPHS intersections. The CMP LOS grade chart is illustrated in Figure 1.

FIGURE 1: LOS Grade Chart

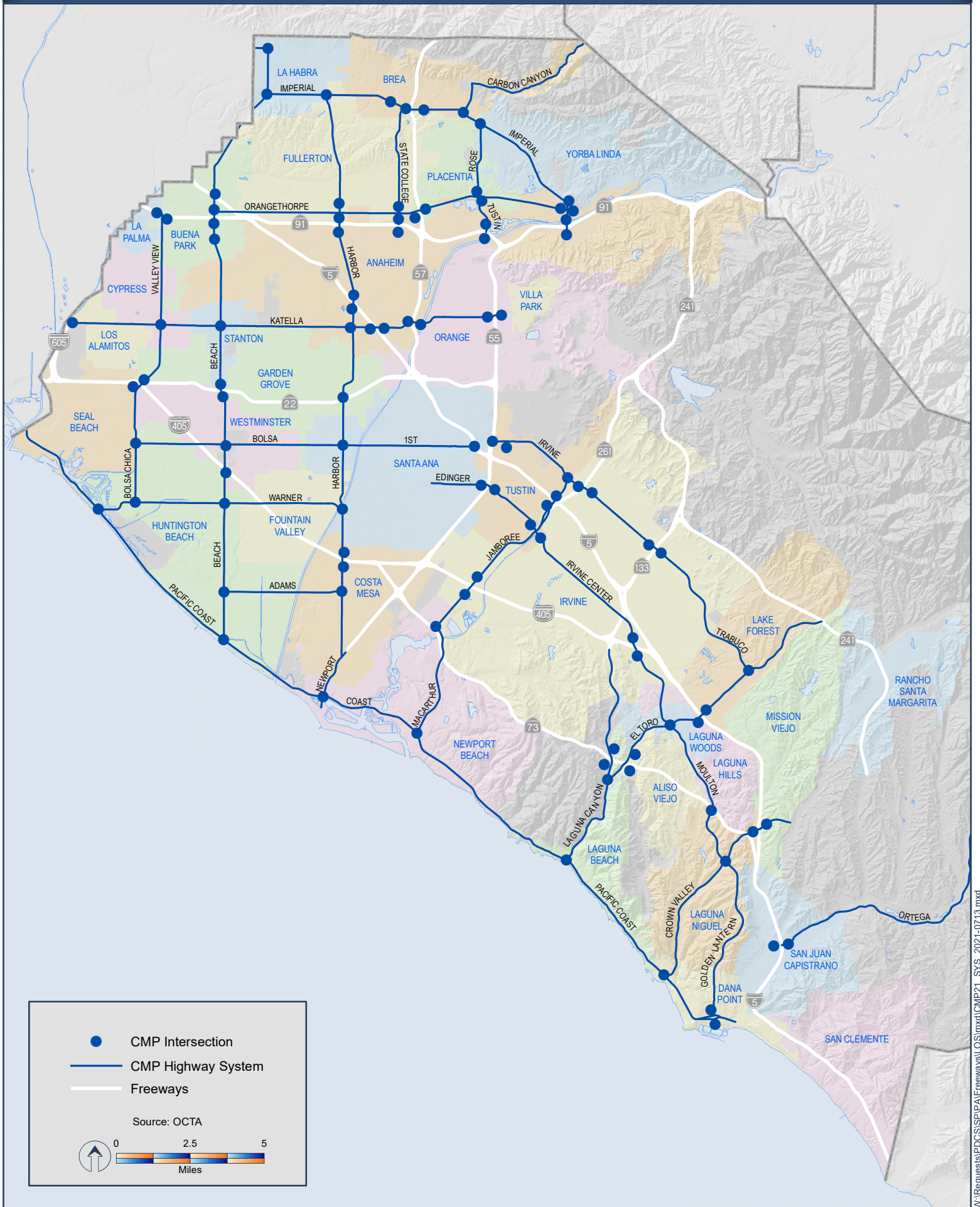
Level of Service	ICU Rating
A	0.00 – 0.60
B	0.60 – 0.70
C	0.70 – 0.80
D	0.80 – 0.90
E	0.90 – 1.00
F	> 1.00

The first CMP LOS measurement recorded, which was in 1992 for most CMP intersections, established the baseline for comparing future measurements. During subsequent LOS monitoring, CMP statute requires that CMPHS intersections maintain a LOS grade of ‘E’ or better, unless the baseline is lower than ‘E’; in which case, the ICU rating cannot increase by more than 0.10. Chapter 3 discusses the ICU method in more detail.

OCTA has an established CMPHS, consisting of Orange County’s state highways and the arterials included in OCTA’s Smart Street network (Figure 2). If, during any monitoring period, a CMPHS intersection is determined to be performing below the LOS standards, the responsible agency must identify improvements necessary to meet the LOS standards. This is accomplished either through existing plans or capital improvement programs, or through the development of a deficiency plan. This is described in more detail in Chapter 3.



Figure 2: 2021 Congestion Management Program Highway System



Freeway monitoring results, provided by Caltrans District 12, are located in Appendix A. Caltrans is responsible for monitoring freeway performance and addressing any deficiencies on State-operated facilities. Caltrans' responsibilities include, but are not limited to:

- A. Evaluating current conditions and identifying deficiencies.
- B. Developing plans and strategies to address deficiencies.
- C. Evaluating development projects of local and regional significance to determine whether they will impact the State transportation system and, if so, working with lead agencies to develop potential mitigation measures.

For the State transportation system, Caltrans does not use CMP thresholds and analysis methodologies to determine if significant impacts occur under CEQA. Their specific focus is on maintaining the safety of State highways. As such, their performance measures tend to focus upon freeway segment/ramps, ramp metering operations, queue lengths, and signal operations (timing, phasing, and system/series progression) metrics.

Local agencies are encouraged to coordinate with the Caltrans Local Development/Intergovernmental Review Branch early in the development process to determine what



methodologies and thresholds of significance should be used to identify impacts to the State transportation system. During the development of the Orange County CMP, OCTA works with Caltrans to obtain necessary freeway and state-controlled intersection data, as well as notifying Caltrans of any deficiencies on State facilities.

Chapter 3: System Performance

Highway and Roadway System Performance Measures

This section discusses the process for determining ICU ratings, as well as how ICU ratings determine the LOS at CMPHS intersections. This method is generally consistent with the Highway Capacity Manual.

Overview of ICU Methodology

Traffic counts are manually collected at CMPHS intersections to initiate the ICU calculation process. The counts monitor the traffic flow, including the approach (northbound, eastbound, southbound, or westbound) and movement (left turn, through, or right turn) for each vehicle.

Each intersection has counts conducted in 15-minute increments, during peak periods in the AM (6:00-9:00) and PM (3:00-7:00) on three separate mid-week days (Tuesday, Wednesday, and Thursday). Counts are not taken during periods when irregular conditions exist (inclement weather, holidays, construction, etc.).

The highest count total during any four consecutive 15-minute count intervals within a peak period represents the peak-hour count set. For each intersection, a peak-hour count set is determined for each day's AM and PM peak period, resulting in a group of three AM peak-hour count sets and a group of three PM peak-hour count sets (one for each mid-week count day).

The group of AM peak-hour count sets is averaged, as is the group of PM peak-hour count sets. The results are the volumes used to determine AM and PM volume-to-capacity (V/C) ratios for each movement through the intersection. A number of assumptions determine the capacities for each movement.

An example of an assumption used to determine capacity is the saturation flow-rate, which represents the theoretical maximum number of vehicles that are able to move through an intersection in a single lane during a green light phase. In 1991, OCTA and the technical staff members from local and state agencies agreed upon a saturation flow-rate of 1,700 vehicles per lane per hour. However, other factors can adjust this assumption.

Such factors include right turn lanes, which can increase the saturation flow-rate by 15 percent in specific circumstances. Right turn overlaps (signalized right turn lanes that are



green during the cross traffic's left turn movements) and free right turns (lanes in which vehicles are allowed to turn right without stopping, even when the through signal is red) are some of the circumstances that will increase the saturation flow-rate. If right turns on red are permitted, a *de facto* right turn lane (approaches that do not have designated right turn lanes, but which are at least 19-feet wide and prohibit on-street parking during peak hours) may also increase the saturation flow rate.

Roadway capacity can also be reduced under certain conditions. For example, if a lane is shared for through and turn movements, the saturation flow-rate of 1,700 could be reduced. This occurs only when the turn movement volumes reach a certain threshold that is calculated for each intersection with shared lanes. The reduction represents the slower turning movements interfering with through movements.

Finally, bicycle and pedestrian counts are conducted simultaneously with vehicle counts. Saturation flow-rate calculations may be requested to factor in bicycle and pedestrian activity for effected lanes. These calculations shall use standard reductions in accordance with the most recent Highway Capacity Manual. Reductions are only considered when field observations indicate the presence of more than 100 pedestrians per hour on one leg of an intersection.

Once the V/C ratios are determined for each movement, critical V/C ratios are calculated. Conflicting movements determine which V/C ratios are included in the calculation of the critical V/C ratios. Conflicting movements represent a situation where a movement from one approach prevents a movement from the opposite approach. For example, if through movements are being made from the southbound approach, left turn movements cannot simultaneously be made from the northbound approach. For each set of opposing approaches (north/south and east/west), the two conflicting movements with the greatest summed V/C ratios are identified. These summed V/C ratios then become known as the critical V/C ratios.

OCTA and technical staff members from local and state agencies also agreed upon a lost time factor of 0.05 in 1991. The lost time factor represents the assumed amount of time it takes for a vehicle to travel through an intersection. For each intersection, the critical V/C ratios are summed (north/south + east/west), and the lost time factor is added to the sum, producing the ICU rating for the intersection.

Based on a set of ICU rating ranges, which were agreed upon by OCTA and technical staff members from local and state agencies, grades are assigned to each intersection. The grades indicate the LOS for intersections, and are used to determine whether the intersections meet the performance standards described at the beginning of the chapter.

The 2021 LOS ratings for the CMP intersections have been mapped in Figure 3. A spreadsheet of the baseline and 2021 LOS ratings for the CMP intersections, and corresponding ICU measurements, is located in Figure 4.

Note that in Figure 4, Orange County's average ICU rating has improved over the baseline. Between 1991 and 2021, the average AM ICU improved from 0.67 to 0.43 (an improvement of 35.82 percent), and the PM ICU improved from 0.72 to 0.52 (an improvement of 27.77 percent). The ICU improvements indicate that Orange County agencies are effectively operating, maintaining, and improving the CMP Highway System. However, data collected for the 2021 CMP occurred during the COVID-19 pandemic and might reflect an anomaly for intersection LOS ratings.

Figure 3: 2021 CMP Intersection Level of Service

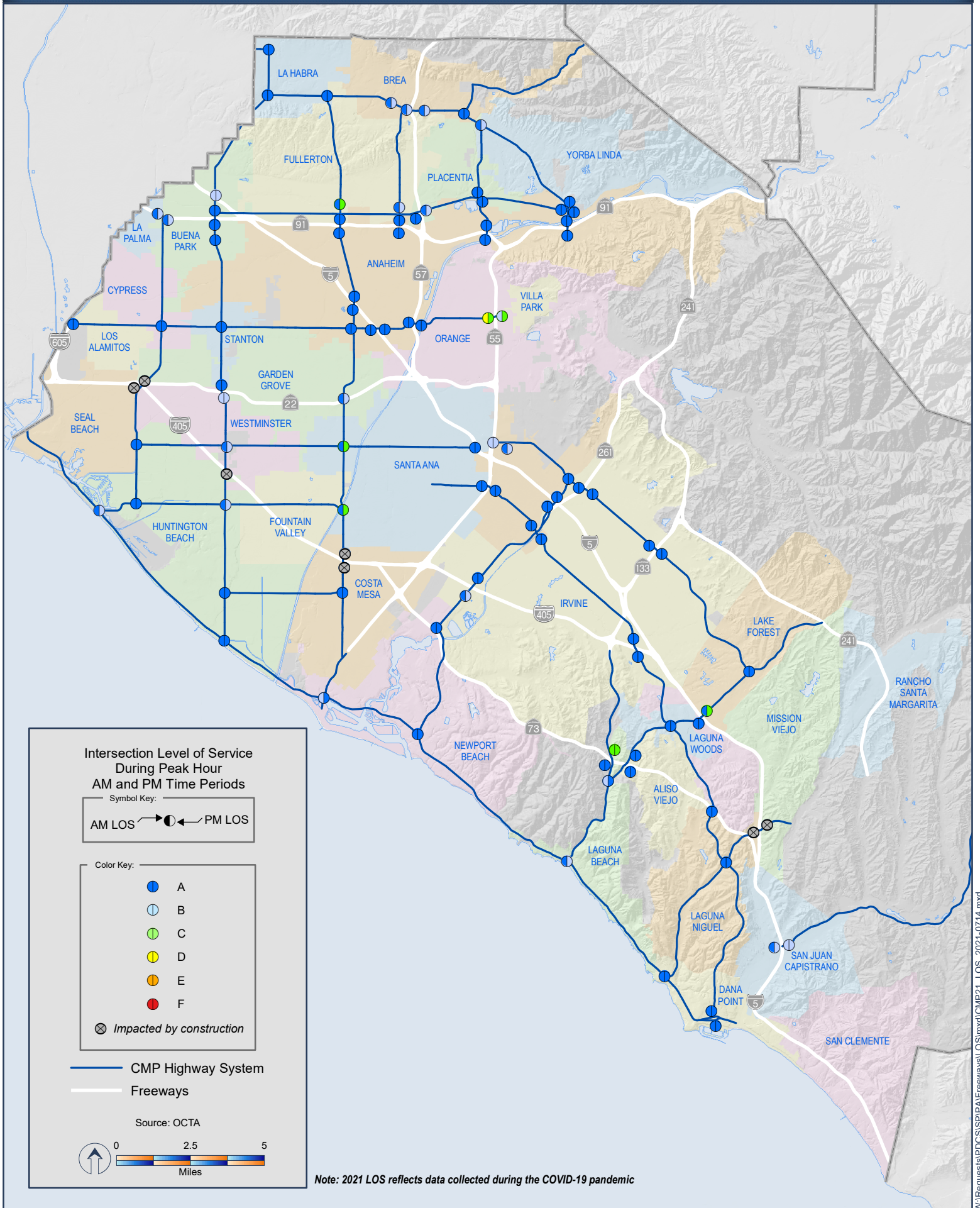


FIGURE 4: 2021 CMP Level of Service Chart

Jurisdiction	Intersection/Interchange	Baseline AM LOS	Baseline AM ICU	2021 AM LOS	2021 AM ICU	Baseline PM LOS	Baseline PM ICU	2021 PM LOS	2021 PM ICU
Anaheim	Anaheim Boulevard-I-5 NB Ramp/Katella Avenue	A	0.49	A	0.32	D	0.82	A	0.41
Anaheim	Harbor Boulevard/Katella Avenue	A	0.53	A	0.3	B	0.67	A	0.42
Anaheim	Harbor Boulevard/I-5 SB Ramps	A	0.29	A	0.19	A	0.31	A	0.24
Anaheim	Harbor Boulevard/SR-91 EB Ramps	A	0.46	A	0.35	A	0.52	A	0.5
Anaheim	I-5 NB Ramp/Harbor Boulevard	A	0.52	A	0.31	A	0.54	A	0.41
Anaheim	I-5 SB Ramps/Katella Avenue	A	0.48	A	0.43	A	0.41	A	0.5
Anaheim	SR-57 NB Ramps/Katella Avenue	A	0.51	A	0.27	A	0.41	A	0.31
Anaheim	SR-57 SB Ramps/Katella Avenue	A	0.52	A	0.31	A	0.51	A	0.34
Anaheim	SR-91 EB Ramp/Imperial Highway	C	0.73	A	0.45	C	0.79	A	0.59
Anaheim	SR-91 EB Ramps/State College Boulevard	B	0.69	A	0.37	D	0.82	A	0.39
Anaheim	SR-91 EB Ramps/Tustin Avenue	B	0.66	A	0.43	D	0.84	A	0.37
Anaheim	SR-91 WB Ramp/Harbor Boulevard	B	0.61	A	0.42	C	0.77	A	0.54
Anaheim	SR-91 WB Ramp/Imperial Highway	C	0.71	A	0.42	B	0.63	A	0.49
Anaheim	SR-91 WB Ramp/State College Boulevard	A	0.55	A	0.37	B	0.63	A	0.51
Anaheim	SR-91 WB Ramps/Tustin Avenue	B	0.64	A	0.54	A	0.6	A	0.54
Anaheim	Imperial Highway Off/SB On/Orangethorpe Avenue	A	0.32	A	0.33	A	0.39	A	0.4
Anaheim	Imperial Highway NB On/Orangethorpe Avenue	A	0.26	A	0.18	A	0.3	A	0.26
Anaheim	Imperial Highway/Orangethorpe Avenue Ramps	A	0.41	A	0.32	A	0.42	A	0.36
Brea	SR-57 SB Ramps/Imperial Highway	B	0.68	A	0.5	B	0.7	B	0.61
Brea	State College Boulevard/Imperial Highway	C	0.73	A	0.55	E	0.93	B	0.68
Brea	Valencia Avenue/Imperial Highway	A	0.56	A	0.35	A	0.59	A	0.36
Brea	SR-57 NB Ramp/Imperial Highway	C	0.78	A	0.49	E	0.91	B	0.64
Buena Park	Beach Boulevard/Orangethorpe Avenue	C	0.76	A	0.41	D	0.87	A	0.49
Buena Park	I-5 SB Ramps/Beach Boulevard	C	0.72	B	0.62	C	0.78	B	0.69
Buena Park	SR-91 EB Ramp/Beach Boulevard	C	0.74	A	0.39	D	0.84	A	0.54
Buena Park	SR-91 EB Ramp/Valley View Street	A	0.58	A	0.43	D	0.86	B	0.62
Buena Park	SR-91 WB Ramp/Beach Boulevard	A	0.58	A	0.33	A	0.59	A	0.42
Buena Park	SR-91 WB Ramp/Valley View Street	C	0.8	A	0.49	E	0.94	B	0.69
Costa Mesa	Harbor Boulevard/Adams Avenue	E	0.99	A	0.4	F	1.09	A	0.57
Costa Mesa	I-405 SB Ramps/Harbor Boulevard	A	0.53	Impacted by Construction		B	0.63	Impacted by Construction	
Costa Mesa	I-405 NB Ramps/Harbor Boulevard	E	0.95	Impacted by Construction		F	1.07	Impacted by Construction	
Cypress	Valley View Street/Katella Avenue	B	0.63	A	0.45	D	0.87	A	0.56
Dana Point	Crown Valley Parkway/Bay Drive/PCH	F	1.41	A	0.44	F	1.62	A	0.58
Dana Point	Street of the Golden Lantern/Del Prado Avenue	A	0.32	A	0.2	A	0.53	A	0.36
Dana Point	Street of the Golden Lantern/PCH	A	0.42	A	0.49	A	0.55	A	0.6
Fullerton	Harbor Boulevard/Orangethorpe Avenue	A	0.6	A	0.45	E	0.94	C	0.71
Fullerton	State College Boulevard/Orangethorpe Avenue	C	0.8	A	0.48	D	0.86	B	0.62
Garden Grove	SR-22 WB/Beach Boulevard	C	0.73	B	0.63	C	0.73	B	0.62
Garden Grove	SR-22 WB Ramp/Valley View Street	C	0.76	Impacted by Construction		D	0.87	Impacted by Construction	
Garden Grove	SR-22 WB Ramps/Harbor Boulevard	F	1.1	A	0.58	F	1.16	B	0.67
Huntington Beach	Beach Boulevard/405 SB Ramp/Edinger Avenue	B	0.63	Impacted by Construction		E	1.03	Impacted by Construction	
Huntington Beach	Beach Boulevard/Adams Avenue	A	0.55	A	0.42	C	0.67	A	0.58
Huntington Beach	Beach Boulevard/PCH	A	0.45	A	0.37	A	0.47	A	0.5
Huntington Beach	Beach Boulevard/Warner Avenue	C	0.78	A	0.56	E	0.93	B	0.66
Huntington Beach	Bolsa Chica Street/Bolsa Avenue	B	0.66	A	0.36	A	0.53	A	0.43
Huntington Beach	Bolsa Chica Street/Warner Avenue	A	0.57	A	0.47	D	0.81	A	0.58

FIGURE 4: 2021 CMP Level of Service Chart

Jurisdiction	Intersection/Interchange	Baseline AM LOS	Baseline AM ICU	2021 AM LOS	2021 AM ICU	Baseline PM LOS	Baseline PM ICU	2021 PM LOS	2021 PM ICU
Huntington Beach	PCH/Warner Avenue	D	0.81	A	0.46	B	0.72	B	0.61
Irvine	SR-133 NB Ramps/Irvine Boulevard	A	0.37	A	0.36	A	0.33	A	0.44
Irvine	SR-133 SB Ramps/Irvine Boulevard	A	0.37	A	0.34	A	0.29	A	0.36
Irvine	SR-261 NB Ramps/Irvine Boulevard	A	0.38	A	0.21	A	0.53	A	0.32
Irvine	SR-261 SB Ramps/Irvine Boulevard	A	0.42	A	0.23	A	0.4	A	0.29
Irvine	I-405 NB Ramps/Enterprise/Irvine Center Drive	E	0.95	A	0.3	A	0.39	A	0.46
Irvine	I-405 NB Ramps/Jamboree Road	F	1.03	A	0.48	C	0.78	A	0.59
Irvine	I-405 SB Ramps/Irvine Center Drive	E	1	A	0.31	A	0.57	A	0.4
Irvine	I-405 SB Ramps/Jamboree Road	E	0.92	A	0.55	B	0.66	B	0.69
Irvine	I-5 NB Ramps/Jamboree Road	A	0.54	A	0.43	C	0.75	A	0.57
Irvine	I-5 SB Ramps/Jamboree Road	A	0.4	A	0.48	A	0.35	A	0.52
Irvine	MacArthur Boulevard/Jamboree Road	B	0.61	A	0.31	B	0.69	A	0.36
La Habra	Harbor Boulevard/Imperial Highway	D	0.81	A	0.43	D	0.86	A	0.57
La Habra	Beach Boulevard/Imperial Highway	D	0.85	A	0.36	D	0.87	A	0.58
La Habra	Beach Boulevard/Whittier Boulevard	A	0.33	A	0.33	A	0.29	A	0.46
Laguna Beach	El Toro Road/SR-73 NB Ramps	E	0.91	A	0.39	A	0.59	A	0.49
Laguna Beach	El Toro Road/SR-73 SB Ramps	A	0.41	A	0.36	B	0.67	A	0.46
Laguna Beach	Laguna Canyon Rd/SR-73 NB Ramps	C	0.73	C	0.72	C	0.72	C	0.72
Laguna Beach	Laguna Canyon Rd/SR-73 SB Ramps	A	0.32	A	0.32	A	0.33	A	0.3
Laguna Beach	Laguna Canyon Road/El Toro Road	F	1.54	B	0.63	F	1.16	A	0.57
Laguna Beach	Laguna Canyon Road/PCH	D	0.84	A	0.59	C	0.74	B	0.65
Laguna Hills	I-5 SB Ramp/Avenida de la Carlotta/El Toro Road	F	1.18	A	0.41	F	1.13	A	0.42
Laguna Niguel	Moulton Parkway/SR-73 SB Ramps	A	0.45	A	0.27	A	0.38	A	0.3
Laguna Niguel	Moulton Parkway/Crown Valley Parkway	A	0.56	A	0.43	B	0.65	A	0.49
Laguna Niguel	I-5 SB Ramps/Crown Valley Parkway	E	0.94	Impacted by Construction		F	1.26	Impacted by Construction	
Laguna Woods	Moulton Parkway/El Toro Road	A	0.56	A	0.4	D	0.81	A	0.45
Lake Forest	I-5 NB/Bridger/El Toro Road	F	1.03	A	0.55	C	0.8	C	0.74
Lake Forest	Trabuco Road/El Toro Road	B	0.69	A	0.48	B	0.65	A	0.51
Los Alamitos	I-605 NB Ramps/Katella Avenue	B	0.68	A	0.28	B	0.69	A	0.37
Mission Viejo	I-5 NB Ramps/Crown Valley Parkway	D	0.86	Impacted by Construction		F	1.01	Impacted by Construction	
Newport Beach	MacArthur Boulevard/PCH	A	0.51	A	0.46	B	0.7	A	0.56
Newport Beach	Newport Boulevard/PCH	A	0.56	B	0.6	A	0.49	A	0.54
Orange	SR-55 NB Ramps/Sacramento/Katella Avenue	C	0.75	B	0.6	D	0.85	C	0.77
Orange	SR-55 SB Ramps/Katella Avenue	C	0.73	D	0.89	E	0.95	C	0.8
Placentia	Rose Drive/Imperial Highway	E	0.95	A	0.46	E	0.99	B	0.63
Placentia	SR-57 NB Ramps/Orangethorpe Avenue	B	0.67	A	0.55	C	1.03	B	0.61
Placentia	SR-57 SB Ramps/Iowa Place/Orangethorpe Avenue	C	0.74	A	0.41	B	0.8	A	0.44
Placentia	Del Cerro Dr/Orangethorpe Ave	A	0.29	A	0.2	A	0.69	A	0.23
Placentia	Rose Dr/Del Cerro Dr	A	0.59	A	0.4	A	0.69	A	0.41
San Juan Capistrano	I-5 NB Ramps/Ortega Highway	A	0.52	B	0.66	A	0.51	B	0.69
San Juan Capistrano	I-5 SB Ramps/Ortega Highway	B	0.61	A	0.58	C	0.58	B	0.62
Santa Ana	Harbor Boulevard/1st Street	A	0.48	A	0.57	D	0.77	C	0.7
Santa Ana	Harbor Boulevard/Warner Avenue	E	0.93	A	0.56	E	0.81	C	0.71
Santa Ana	I-5 SB Ramps/1st Street	A	0.29	A	0.41	A	0.98	A	0.44
Santa Ana	SR-55 SB Ramp/Auto Mall/Edinger Avenue	D	0.9	A	0.5	F	0.46	A	0.53
Santa Ana	SR-55 SB Ramps/Irvine Boulevard	B	0.68	B	0.6	D	1.06	B	0.64

FIGURE 4: 2021 CMP Level of Service Chart

Jurisdiction	Intersection/Interchange	Baseline AM LOS	Baseline AM ICU	2021 AM LOS	2021 AM ICU	Baseline PM LOS	Baseline PM ICU	2021 PM LOS	2021 PM ICU
Stanton	Beach Boulevard/Katella Avenue	D	0.89	A	0.48	F	0.83	A	0.56
Tustin	Jamboree Road/Edinger Avenue-NB Ramp	A	0.28	A	0.31	A	0.32	A	0.41
Tustin	Jamboree Road/Edinger Avenue-SB Ramp	D	0.81	A	0.31	A	0.41	A	0.41
Tustin	Jamboree Road/Irvine Boulevard	B	0.65	A	0.43	A	0.59	A	0.51
Tustin	SR-55 NB Ramps/Edinger Avenue	C	0.72	A	0.36	B	0.65	A	0.54
Tustin	SR-55 NB Ramps/Irvine Boulevard	A	0.59	A	0.5	A	0.45	B	0.68
Westminster	SR-22 EB/Beach Boulevard	A	0.53	A	0.45	A	0.54	A	0.46
Westminster	Beach Boulevard/Bolsa Avenue	F	1.09	A	0.59	F	1.11	B	0.66
Westminster	Bolsa Chica Road/Garden Grove Boulevard	E	0.91	Impacted by Construction		E	0.97	Impacted by Construction	
	COUNTY AVERAGE		0.67		0.43		0.72		0.52

*2021 LOS reflects data collected during the COVID-19 pandemic

Deficiency Plans

If an intersection does not meet LOS standards, then a deficiency plan is required, as described under California Government Code Section 65089.4. The deficiency plan identifies the cause of congestion, the improvements needed to solve the problem, and the cost and timing for implementing proposed improvements.

A deficiency plan process was developed by the CMP Technical Advisory Committee to provide local jurisdictions with a framework for maintaining compliance with the CMP when a portion of the CMPHS fails to meet its established LOS standard (Appendix C-1). The Deficiency Plan Decision Flow Chart (Appendix C-2) illustrates the individual steps that must be taken in order for a local jurisdiction to meet CMP deficiency plan requirements.

Deficiency plans are not required if a deficient intersection is brought into compliance within 18 months of its initial detection, using improvements that have been previously planned and programmed in the CMP Capital Improvement Program. In addition, CMP legislation specifies that the following shall be excluded from deficiency determinations:



- Interregional travel (trips with origins outside the Orange County CMPHS)
- Construction, rehabilitation, or maintenance of facilities that impact the system
- Freeway ramp metering
- Traffic signal coordination by the State or multi-jurisdictional agencies
- Traffic generated by the provision of low-income and very low-income housing
- Traffic generated by high-density residential development located within one-quarter mile of a fixed-rail passenger station
- Traffic generated by any mixed-use development located within one-quarter mile of a fixed rail passenger station, but only if more than half of the land area, or floor area, of the mixed-use development is used for high-density residential housing.

Per §65089.4, the following three CMP intersections have adjustment factors applied to their traffic counts as a result of interregional travel:

- *Beach Boulevard/Whittier Boulevard (City of La Habra)*
- *Beach Boulevard/Imperial Highway (City of La Habra)*
- *Harbor Boulevard/Imperial Highway (City of La Habra)*

There are no intersections exceeding the CMP level of service standard in 2021. However, it should also be noted that data collected for the 2021 CMP occurred during the COVID-19 pandemic and might reflect an anomaly for intersection LOS ratings.

Transit System Performance Measures

As Orange County's transit provider, OCTA continually monitors the frequency and routing of its transit services. Bus and rail transit are essential components of Orange County's transportation system, and are important tools for achieving a balanced multi-modal transportation system capable of maintaining level of service standards.



The CMP performance measures provide an index of the effectiveness and efficiency of Orange County's fixed-route bus and commuter rail services. ACCESS, OCTA's complementary paratransit service, is not reported separately because it is an extension of the fixed-route service. The CMP performance measures are used to help ensure that bus and rail services meet demand.

COVID – 19 Impacts to Bus Service

OCTA implemented an emergency service change on March 23, 2020. This emergency service change reduced service levels to balance a reduction in demand for transit service resulting from the federal and state emergency declarations. This included the State's

stay-at-home order to help reduce the spread of the COVID-19 and correlating public health guidance.

Based on these factors, service levels were adjusted to provide a baseline level of service for customers needing to make essential trips. Bus service was subsequently increased slightly in June 2020 as demand increased and to help ensure social distancing for passengers and OCTA coach operators. Staff will continue to reinstate service as the economy reopens and demand increases. COVID-19 continues to have a negative impact on bus ridership.

Fixed-Route Bus Service

OCTA's fixed-route bus service includes local routes, express routes, community routes, limited-stop/Bus Rapid Transit (BRT) routes, rail feeder and shuttle routes.

- Local routes (numbered 1 to 99) operate primarily along arterial corridors serving multiple bus stops spaced about 1/4-mile apart, serving multiple destinations

such as residential areas, employment centers, educational institutions and health care facilities. They are the most heavily used bus routes and, in many cases, require additional trips during peak commute periods. OCTA also provides Xpress service which are local routes with limited-stop trips.

- Express routes (numbered 200 to 299 and 700 to 799) provide higher speed point-to-point service along freeways and high-occupancy vehicle (HOV) facilities providing peak period commuter transportation to employment centers. Relatively few stops are made and service is generally designed to match typical work-time spreads. OCTA's 200-series intracounty express routes operate within Orange County while the 700-series intercounty services connect Orange County with neighboring counties such as Los Angeles and Riverside County.
- Community routes (numbered 100 to 199) are typically shorter distance services that may act as community circulators and are less direct compared to the local routes. They often provide connections to the local and express bus network. Community routes typically operate throughout the service day.
- Limited-stop/BRT routes (numbered 500 to 599) provide trips with higher average speeds and connect with other OCTA bus networks and modes. The speed advantage is realized by making fewer stops which are spaced about a three-fourth-mile to one mile apart. Local bus riders making longer distance trips are among the transit users that are attracted to limited-stop/BRT service. Like local and community routes, these services operate throughout the service day.
- Rail feeder/Stationlink routes (numbered 400 to 499) provide first and last mile trips during peak hours to and from employment centers for commuters using Metrolink commuter rail service. Feeder trips are scheduled to match specific train trips and, like express routes, operate only during commute hours.
- Shuttle routes (numbered 600 to 699) serve special event venues or provide additional connections to community points of interest as a traffic mitigation tool. Shuttle routes may be point-to-point and seasonal in nature such as OCTA's Orange County Fair Express network or confined to a single community perhaps using a short distance circular route structure.
- Circulator Shuttle routes (numbered 800 to 899) typically provide short-distance connections to local business on a frequent timed headway. Route 862 is an example implemented to connect the Santa Ana Regional Transportation Center to the Santa Ana Downtown area while the OC Streetcar is under construction. The alignment and timed headway of Route 862 is similar to the planned OC Streetcar service and will help to acclimate riders to transition to the OC Streetcar upon its opening.

OCTA's pre-pandemic fixed-route bus service has a total of 58 routes. The network is comprised of 36 local routes, five express routes (two intra- and three inter-county routes), eight community routes, three limited-stop routes, five rail feeder routes, and one circulator shuttle, as listed above.

After the implementation of the state's stay-at-home order in March 2020, weekday OC Bus ridership dropped significantly. Weekday ridership decreased from approximately 125,000 boardings to the low 30,000s immediately after the stay-at-home order, but has been steadily recovering and is now in the mid 60,000s. In March 2020, OCTA reduced fixed-route bus service to 41 routes (approximately 40 percent of revenue vehicle hours (RVH)) by implementing Sunday service schedules on all routes, seven days a week. Starting in June 2020, an enhanced Saturday service schedule was implemented on weekdays and a regular schedule on Saturdays and Sundays. This increase to 50 routes equates to about 75 percent of RVH for pre-COVID-19 service levels. OCTA anticipates adding incremental amounts of service as ridership increases.

Bus Restructuring Study

OCTA last completed a bus restructuring study nearly a decade ago, in 2012. The "Transit System Study" was the basis for OC Bus 360 changes that were implemented between 2016 and 2018. In general, these changes reallocated service from lower productivity routes and areas to the core service area where these resources could yield additional ridership. COVID-19 has affected transit ridership significantly in Orange County and throughout the nation, although it is not yet clear which impacts may be temporary and which might have more long-term effects. With these considerations, OCTA is looking to restructure the OC Bus system based on changing demand, travel patterns, and funding.

Performance Measures

The section that follows describes OCTA's transit performance measures for vehicle load, vehicle headway, on-time performance, and service accessibility. These performance measures are used to evaluate the effectiveness of transit service provided by OCTA.

Performance Measure 1: Vehicle Load

Vehicle load refers to the maximum number of passengers allowed on a service vehicle, expressed as the ratio of passengers to the number of seats on the vehicle and varied by mode and by time of day. OCTA monitors vehicle load to help ensure the safety and comfort of customers. All pre-pandemic routes have less than 100 percent average peak loads based on an analysis of 2018 Automatic Passenger Counter data.

During COVID-19, OCTA started with a 15-passenger capacity. This was a limit many transit agencies began with, and was less than half of the seated load (36 on a 40' bus) to maintain social distance. These precautions were accompanied with encouragement or

requirement of face coverings, use of hand sanitizers installed on all buses, rear door boarding, and signage along with a marketing campaign preceding these precautions. These precautions considered local, state and federal guidelines, discussions with American Public Transportation Association subcommittees, and the availability of resources to use trippers to mitigate capacity limitation impacts (pass-bys due to overcrowding).

After the installation of plexi-glass shields for coach operators, OCTA switched back to all door boarding and an increase to a 20-passenger capacity. Staff's approach was to leave an empty seat between each passenger (50 percent of the seated capacity equaling 18 passengers). To account for groups that may ride together, staff assumed two to three such groups. Therefore, allowing two additional customers, bringing the total to 20. As of June 15th, 2021, state and local distancing measures were lifted and OCTA has reinstated regular passenger load standards.

Performance Measure 2: Vehicle Headway

Vehicle headway is the time interval between vehicles on a route that allows passengers to gauge how long they will have to wait for the next vehicle. Vehicle headway varies by mode and time of day and is primarily determined by bus ridership. However, it is also limited by the availability of resources to operate the system. To keep up with changing conditions and to make improvements to service, OCTA continually monitors ridership along routes and their respective headways. This process generally results in an identification of improvement priorities pending funding availability.

Due to the impact of COVID-19, OCTA responded with the reduction of frequency to account for the drop in demand for transit service. However, where passenger loads exceeded OCTA's COVID-19 capacity considerations (described above), trippers were used to ensure social distancing measures were met with approximately 130 extra trippers per day.

Peak Weekday Vehicle Headways

Service	≤15 Min.	16 – 30 min.	>30 min.
Local Routes	6	12	19
BRT / Limited	0	1	0
Community Routes	0	0	7
Express Routes	0	0	0
Rail Feeder Routes	0	0	0

Performance Measure 3: On-Time Performance (OTP)

OCTA defines OTP as not more than five minutes late. OTP is measured at the time point. A trip is on-time if it does not leave the time point ahead of the scheduled departure time

and no more than five minutes later than the scheduled departure time. System-wide OTP for fiscal year (FY) 2020-21 was 83 percent.

Performance Measure 4: Service Accessibility

Service accessibility is the percentage of population and employment in proximity to bus service. A review of service accessibility conducted in 2018 shows that 86 percent of all population and employment, and 95 percent of population and employment within minority communities (census tracts with a minority population of 53.75 percent or greater), are within a half-mile of OCTA bus services.



During COVID-19, travel and commute patterns changed dramatically. Demand for transit service dropped further and this drop required a reduction in frequency, span of service, and area coverage affecting service accessibility. Moving forward, OCTA will look to the Bus Restructuring Study to establish future coverage.

The impacts of COVID-19 on the OC Flex service have also made it challenging to evaluate the performance of this pilot

program. Prior to March 2020, ridership in south Orange County had been steadily increasing, and key metrics such as subsidy per boarding continued to improve. Due to its success, the pilot program in south Orange County will be extended through December 2021 for further evaluation. The service portions in the Cities of Huntington Beach and Westminster have been suspended indefinitely because of low ridership. The OCTA Bus Restructuring effort may also lead to further expansion of the program in other zones in the future.

Meeting Transit Service Challenges

The lack of ongoing operating revenues, competing resources (e.g., increasing resources dedicated to paratransit costs), decreases in ridership, and impacts from COVID-19 in recent years have all contributed to an increasing set of challenges. The priorities for improvements include addressing vehicle loads, headways, on-time performances, and service accessibility. OCTA's current Bus Restructuring Study will be considering these priorities and identifying system improvements where appropriate.

Coordination of Transit Service with Other Carriers

OCTA coordinates the delivery of transit services with several transit agencies. They include the City of Laguna Beach, the City of Irvine, Riverside Transit Agency, Norwalk Transit System, Los Angeles County Metropolitan Transportation Authority, Long Beach Transit, Foothill Transit, North County Transit District, Omnitrans, Anaheim Transportation Network, various specialized charter bus services, and commuter rail services. OCTA also coordinates with cities during the planning and implementation of Project V community circulators. Additionally, internet-based services, such as Google transit, can often provide service schedules and identify available transfers between the various systems.

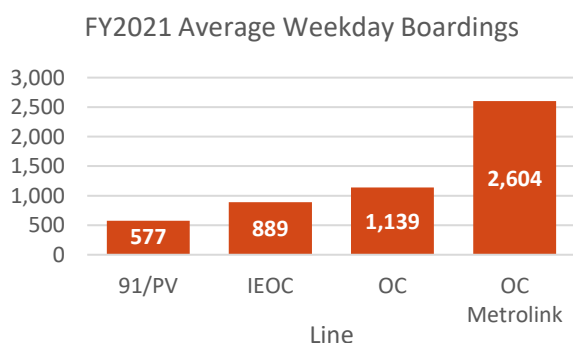
Commuter Rail Service

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Metrolink is operated by the Southern California Regional Rail Authority (SCRRA), a joint powers authority of five member agencies representing the counties of Los Angeles, Orange, Riverside, San Bernardino, and Ventura.



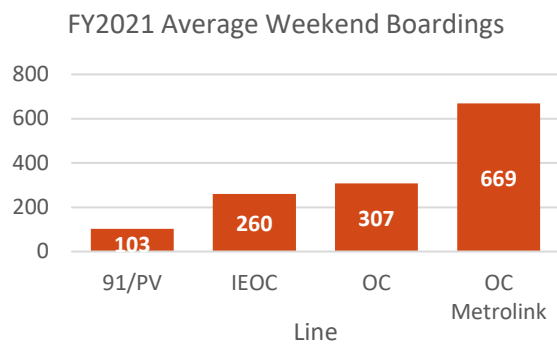
In 2021, Metrolink provides service on seven routes, covering 538 miles through six counties in Southern California. On an average weekday, there are 108 trains serving nearly 7,000 passenger trips at 61 stations. Orange County plays an important and growing role within this system.

As one of the five SCRRA member agencies, OCTA administers and funds Orange County's portion of the Metrolink commuter rail system. Orange County's share of Metrolink



service covers 68 route miles and sees approximately 2,604 average weekday boardings, comprising more than 35 percent of Metrolink's total system-wide boardings. There are 11 stations in Orange County that serve a total of 41 one-way trips each weekday on three lines:

- **Orange County (OC) Line:** Daily service from Los Angeles Union Station to Oceanside;
- **Inland Empire-Orange County (IEOC) Line:** Daily service from San Bernardino and Riverside through Orange to Oceanside; and
- **91 / Perris Valley (91/PV) Line:** Daily service from South Perris through Riverside and Fullerton to Los Angeles Union Station.



In 2006, Metrolink Weekend service was introduced on the OC and IEOC lines, with increased service during the summer travel season. In July 2014, weekend service was added on the 91/PV Line, providing four trains between Riverside and Los Angeles Union Station. Weekend ridership varies considerably dependent upon the

season and local events, but generally the OC, IEOC and 91/PV Lines combined carry a total of approximately 669 riders per weekend day.

OCTA and other local agencies provide free transfers to local bus service to deliver Metrolink passengers to their final destinations. OCTA has five dedicated StationLink bus routes that connect with Orange County Metrolink stations in Orange, Santa Ana, Tustin, and Irvine. The iShuttle in the City of Irvine has six routes that provide peak hour connections to and from the Tustin and Irvine stations. Anaheim Resort Transportation provides transfers at the Anaheim Regional Transportation Intermodal Center to various destinations. These local transit connections offer Metrolink ticket holders free, easy connections between stations and major employment and activity centers, with schedules designed to meet Metrolink weekday train arrivals and departures.

In addition to Metrolink, Amtrak's Pacific Surfliner provides daily service with 18 trains between Los Angeles Union Station and downtown San Diego as an alternative for commuters. Within Orange County, Amtrak station stops include Fullerton, Anaheim, Santa Ana, Irvine, San Juan Capistrano, and San Clemente Pier.

Future Transit Improvements

Completed in 2018, the OC Transit Vision (Vision) is a 20-year plan for enhancing and expanding public transit service in Orange County. The Vision identifies near-term and long-term projects and programs that can make transit a more compelling travel option for Orange County residents and visitors. The Vision recognizes that transit is important for Orange County, both today and in the future. Transit can provide a sustainable, accessible, and affordable mobility option that serves different markets and travel needs



in a variety of ways. The recommendations from the OC Transit Vision were included in OCTA's 2018 LRTP.

The OC Transit Vision continues the process of modernizing transit by moving away from a "one-size-fits-all" approach. As described in the OC Transit Vision, some corridors with high demand may benefit from a high-capacity transit service such as streetcar or rapid bus. For example,

serving the high concentration of employment in the Irvine Business Complex might be better accomplished using Freeway Bus Rapid Transit rather than standard buses on arterial roadways. Areas with a low density of transit demand might be addressed through flexible "microtransit" such as the pilot OC Flex service. These modernized transit services benefit from technological advances as they strive to serve existing and potential Orange County transit customers while controlling costs.

Commuter Rail Service Improvements

Following the completion of the Metrolink Service Expansion Program (MSEP) improvements in 2012, OCTA deployed a total of ten new Metrolink intra-county trains operating between the Cities of Fullerton and Laguna Niguel/Mission Viejo, primarily during midday and evening hours. Efforts to increase ridership through a redeployment of the trains without significantly impacting operating costs have been underway since 2014. In April 2015, a schedule change added a connection between the 91/PV Line and the intra-county service at Fullerton to allow a later southbound peak evening departure from Los Angeles to Orange County. Additional service increases will vary based on funding availability; however, the OCTA Comprehensive Business Plan does not include new service at this time. Funding for the MSEP is being provided through M2, Orange County's half-cent sales tax for transportation improvements.

Chapter 4: Transportation Demand Management

Transportation Demand Management (TDM) strategies are geared toward increasing vehicle occupancy, promoting the use of alternative modes, reducing the number of automobile trips, decreasing overall trip lengths, and improving air quality. The adoption of a TDM ordinance was required from every local jurisdiction for Orange County's 1991 CMP. The adoption of these ordinances is no longer a statutory requirement; however, OCTA continues to encourage local jurisdictions to maintain these ordinances as a means of reducing greenhouse gas emissions.

TDM Ordinances

The model TDM ordinance, prepared by OCTA, promotes carpools, vanpools, alternate work hours, park and ride facilities, telecommuting, and other traffic reduction strategies. OCTA

updated the model ordinance in 2001 to reflect the adoption of Rule 2202 by the SCAQMD, which requires employers with 250 or more employees at a worksite to develop an emission reduction program to help meet an emission reduction target set by the SCAQMD.

Principal provisions of the TDM model ordinance are as follows:

- Applies to non-residential public and private development proposals expected to generate more than 250 employees;
- Contains a methodology for determining projected employment for specified land-use proposals;
- Includes mandatory facility-based development standards (conditions of approval) that apply to proposals that exceed the established employment threshold;
- Presents optional provisions for implementing operational TDM programs and strategies that target the property owner or employer, and requires annual reporting on the effectiveness of programs and strategies proposed for facilities;



- Contains implementation and monitoring provisions; and
- Includes enforcement and penalty provisions.

Several jurisdictions have adopted ordinances that go beyond those contained in the model TDM ordinance. Such strategies include:

- Encouraging employers to establish and help subsidize telecommuting, provide monetary incentives for ridesharing, and implementing alternative work hour programs;
- Proposing that new development projects establish and/or participate in Transportation Management Associations (TMAs);
- Implementing bus loading facilities at worksites;
- Implementing pedestrian facilities such as sidewalks, paved pathways, and pedestrian grade separations over arterial streets to connect worksites to shopping, eating, recreation, parking, or transit facilities; and
- Participating in the development of remote parking facilities and the HOV (i.e., shuttles, etc.) to serve them.

Countywide TDM Strategies

TDM efforts in Orange County are not just limited to the implementation of the local TDM ordinance provisions. Countywide services and programs, as described below, also help to manage demand on the multimodal system.

Transit/Shuttle Services

Local fixed-route bus service comprises the largest portion of OCTA's transit services. In addition, OCTA provides feeder bus service to commuter rail (Metrolink) stations. Express bus service provides patrons with longer routes that utilize freeways to connect residential areas to Orange County's main employment centers. OCTA also provides community routes for connecting to the local and express bus networks, as well as limited-stop routes for higher speed connections to other OCTA modes and networks. OC ACCESS is OCTA's shared-ride service for people who are unable to use the regular, fixed-route bus service because of functional limitations caused by a disability. These passengers must be certified by OCTA to use the ACCESS system by meeting the Americans with Disabilities Act (ADA) eligibility criteria.

OCTA Vanpool Program

The OCTA Vanpool Program assists commuters working in Orange County. OCTA coordinates with commuters, employers, and private vanpool operators to organize and sustain vanpools, and provides a monthly subsidy for each vanpool to offset vehicle lease



and maintenance costs. In addition to Caltrans-maintained park-and-ride lots, OCTA maintains park-and-ride lots throughout the County and supports the Guaranteed Ride Home Program. OCTA provides trip planning tools on their website and on the phone through the 5-1-1 service. OCTA has also provided the necessary data to Google Transit® to integrate trip planning with other Southern California transit operators. These efforts are designed to reduce single-occupancy commuting.

Transportation Management Associations

TMA's are comprised of groups of employers who work together to solve mutual transportation problems by implementing programs to increase average vehicle ridership. Presently, Orange County has TMA's located in the following areas:

- Irvine (Spectrumotion)
- Anaheim (Anaheim Transportation Network)

Park-and-Ride Lots

Currently there are 29 park-and-ride lots in Orange County providing 10,383 parking spaces. Of the 29 lots, 11 are located at Metrolink stations, accounting for 7,604 of the parking spaces. Also, six of the lots are located at OCTA transit centers, which account for 1,492 parking spaces. The remaining 1,287 spaces are at Caltrans-managed lots.

Park-and-ride lots serve as transfer points for commuters to change from one mode of travel (usually single-occupancy automobile) to another, higher capacity mode (bus, train, carpool, or vanpool). Providing a convenient system of park-and-ride transfer points throughout Orange County encourages ridesharing and the use of higher capacity transit systems, which improves the efficiency of the transportation system. Park-and-ride lots

are also a natural companion to Orange County's network of HOV lanes and transitways on the freeways.

Parking Cash-Out Programs

Parking cash-out programs are employer-funded programs that provide cash incentives to employees who do not drive to work. The most effective programs provide an incentive equal to the full cost of employee parking. State law requires certain employers who provide subsidized parking for their employees to offer a cash allowance in lieu of a parking space. This law is called the parking cash-out program. The intent of the law is to reduce vehicle commute trips and emissions by offering employees the option of "cashing out" their subsidized parking space and taking transit, biking, walking or carpooling to work.

Guaranteed Ride Home Program

Employers throughout Orange County have the option to participate in OCTA's Guaranteed Ride Home Program. This program provides reliability for those who rideshare but are faced with an unexpected illness, at-home emergency, or unexpected overtime.

Complete Streets

On September 30, 2008, Governor Arnold Schwarzenegger signed AB 1358 (Chapter 657, Statutes of 2008), the California Complete Streets Act. The Act states: "In order to fulfill the commitment to reduce greenhouse gas emissions, make the most efficient use of urban land and transportation infrastructure, and improve public health by encouraging physical activity, transportation planners must find innovative ways to reduce VMT and to shift from short trips in the automobile to biking, walking and use of public transit."

The legislation impacts local general plans by adding the following language to Government Code Section 65302(b)(2)(A) and (B):

(A) Commencing January 1, 2011, upon any substantial revision of the circulation element, the legislative body shall modify the circulation element to plan for a balanced, multimodal transportation network that meets the needs of all users of the streets, roads, and highways for safe and convenient travel in a manner that is suitable to the rural, suburban, or urban context of the general plan.

(B) For the purposes of this paragraph, "users of streets, roads, and highways" means bicyclists, children, persons with disabilities, motorists, movers of commercial goods, pedestrians, users of public transportation, and seniors.

As identified in OCTA's Pedestrian Action Plan, OCTA staff has developed a Complete Streets Checklist to consider bicycle and pedestrian accommodation in projects planned and designed by OCTA. This provides a method to illustrate decision-making and

transparency in ultimate design outcomes and avoid conflict when a project is ready for construction. Furthermore, the Orange County Council of Governments Complete Streets Initiative Design Handbook serves as another resource for both OCTA staff and Orange County's local agency staff that identifies best practices for complete street design specific to the Orange County context.

Active Transportation

In 2021, the League of American Bicyclists renewed their designation of Orange County as a bronze-level bike friendly community. This was in recognition of the collective county-level and local efforts to improve conditions for bicycling in Orange County. This includes countywide regional bikeway planning, recent bicycle and pedestrian safety marketing campaigns, and encouraging first/last mile linkages to transit for both bicyclists and pedestrians. In support of these efforts, OCTA allocates funding to local agencies through the Bicycle Corridor Improvement Program call for projects.

The broad serving active transportation program addresses topics serving people bicycling and walking. Completed in 2019, OC Active is the countywide active transportation plan. OC Active includes the first effort to analyze pedestrian needs throughout Orange County. OC Active provides maps of high need pedestrian areas and maps future bikeways for each jurisdiction. The plan guides active transportation investments and enables local agencies to secure funding for infrastructure and non-infrastructure improvements countywide. Further efforts by OCTA have been centered around Safe Routes to School (SRTS) programming in the form of OCTA's SRTS Action Plan and Safe Travels Education Program campaign. Work focused on provided SRTS activities and programming directly to schools that serve disadvantaged communities as well as developing a strategic plan for implementing a countywide SRTS Program.

Forthcoming work includes continued encouragement activities at local schools, a study to mirror the OC Loop concept in central and south Orange County with a cross county connector providing a connection from northeast to southwest. OCTA will also be



undertaking a bus stop safety and accessibility study as well as the project approval and environmental documentation phase of a bike trail connecting Downtown Santa Ana and Garden Grove along the Pacific Electric Right-of-Way.

Motorist Aid and Traffic Information System (511)

Orange County's 511 service is a one-stop source for up-to-the-minute travel information, advisories and trip planning information. Traffic and transit updates are provided via the free Go511 application, calling 511, or visiting Go511.com.

The 511 Motorist Aid and Travelers' Information System helps commuters outsmart traffic with the following services:

- Real-time traffic speed, congestion & incident information
- Live freeway cameras & roadwork advisories
- Bus & rail trip planner
- Scheduled departures for 70+ transit agencies in SoCal
- Carpool & ride matching information
- Park & Ride lot locations (website/phone)
- Airport information (website only)
- Bike maps, tips & resources (website only)
- Local weather conditions (website only)

The 511 system can be accessed around the clock throughout Orange County by calling 511. Accessing the Go511 system from other surrounding counties is also available by calling 877.22.go511.

Freeway Construction Mitigation

OCTA and Caltrans developed a comprehensive public outreach program for commuters impacted by construction projects and improvements on Orange County freeways. The outreach program alleviates traffic congestion during freeway construction by providing up-to-date ramp, lane, and bridge closure information; as well as suggestions for alternate routes and travel modes.

Outreach efforts include public workshops, open houses, fast fax construction alerts, flyers and newsletters, as well as other materials and presentation events. Also, OCTA's website (www.octa.net), and the Orange County Freeway Construction Helpline (1-800 724-0353), make detour and closure information available. In addition, most jurisdictions implement traffic management plans to alleviate roadway congestion during construction.

Chapter 5: Land-Use Impact Analysis

The CMP TIA measures impacts of proposed development projects on the CMPHS. In the past, Orange County's jurisdictions were allowed to select either the process outlined in the CMP TIA guidelines (Appendix B-1), or their previously existing traffic-environmental



analysis process, so long as consistency was maintained with the CMP TIA Guidelines.

Today, the traffic-environmental analysis process under CEQA no longer considers traffic delay and, instead, recommends a VMT analysis as the measure for identifying transportation impacts (as discussed under State Legislation, pg. 8).

Nevertheless, all jurisdictions in

Orange County are expected to comply with the CMP Land-Use Coordination analysis by following a process consistent with the CMP TIA guidelines for the purpose of monitoring Orange County's highway system performance. The selected TIA process must be consistently applied to all development projects meeting the adopted trip generation thresholds. Traffic impact analyses focus on:

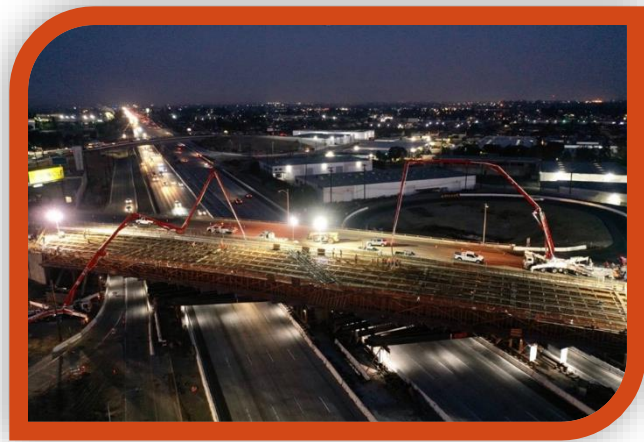
- Identifying locations where, and the extent to which, trips generated by the proposed project caused CMPHS intersections to exceed their LOS standards;
- Assessing feasible mitigation strategies capable of reducing the identified impact, thereby maintaining the LOS standard; and,
- Utilizing existing environmental processes and inter jurisdictional forums to conduct cooperative, interjurisdictional discussion when proposed CMP mitigation strategies included modifications to roadway networks beyond the jurisdiction's boundaries; and/or, when a proposed development will increase traffic at CMPHS locations outside the jurisdiction's boundaries.

OCTA does allow exemptions from this requirement for selected categories of development projects, consistent with state legislation (Appendix B-2 for a listing of exempt projects).

Chapter 6: Capital Improvement Program

The Capital Improvement Program (CIP) is a seven-year program of projects and programs that is adopted by each Orange County jurisdiction and integrated into a countywide CIP by OCTA. It includes projects that will help to maintain or improve traffic conditions on the CMPHS and adjacent facilities. In addition to traditional capital projects, which preserve investments in existing facilities, the CIP can include projects that increase the capacity of the multimodal system and provide air quality benefits, such as transit projects. Consistency with statewide standards is emphasized in order for projects in the CIP to compete for state funding.

The CIP projects, prepared by local jurisdictions for inclusion in the Orange County CMP, mitigate transportation impacts identified in the Land-Use Impact Analysis component of the CMP, and preserve and maintain CMPHS infrastructure. Many types of CIP projects have been submitted by local jurisdictions in the past, including freeway ramp widenings, transportation systems



management projects such as bus turnouts, intersection improvements, roadway widenings, signal coordination projects, and roadway resurfacing projects.

Each Orange County jurisdiction's CIP is included in Appendix E, which is published separately and provided on OCTA's website at www.octa.net/Plans-and-Programs/Congestion-Management-Program/Overview/. All projects in the CIP that are state or federally funded, or locally funded but of regional significance, are included in the Orange County portion of the Federal Transportation Improvement Program (FTIP), and are consistent with the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS), both of which are approved by SCAG.

Projects that significantly increase single occupant vehicle (SOV) capacity in the region are monitored and regulated by the federal government, and should be developed consistent with the federal Congestion Management Process. In carrying out this process, SCAG identifies SOV capacity increasing projects in the FTIP that are at least one-mile in length. These projects, if at least partially funded by federal sources, require the lead agency to document and demonstrate the consideration of alternative Transportation Systems

Management/TDM strategies during the alternatives analysis. Those that are considered safety, operational, or bottleneck improvements are exempt from this process.

Lastly, based upon a resolution by the California Transportation Commission (G-17-22), the M2 program of projects is being included in the 2021 CMP (by reference) in order to satisfy the CMP requirement of this resolution. For a listing of the M2 program of projects please see Appendix F.

Chapter 7: CMP Conformance

As Orange County's CMA, OCTA is legislatively required to monitor the implementation of all elements of the CMP, and biennially determine conformance. In so doing, OCTA consults with local jurisdictions.

OCTA determines if the local jurisdictions are in conformance with the CMP by monitoring the following:

- Consistency with LOS standards;
- Adoption of CIPs;
- Adoption and implementation of a program to analyze the impacts of land-use decisions, including an estimate of the costs associated with mitigating those impacts; and
- Adoption and implementation of deficiency plans when highway and roadway level of service standards are not maintained.

OCTA gathers local traffic data to determine the LOS at intersections throughout the CMPHS, as discussed in Chapter 2. In addition, the local jurisdictions complete a set of checklists, developed by OCTA, that guide them through the CMP conformity process



(Appendix D). The checklists address the legislative requirements of the CMP, including Land-Use Coordination, the Capital Improvement Program, and transportation demand management strategies.

Based on the LOS data and CMP checklists completed by the local jurisdictions, as summarized in Figure 7, the

following was determined for the 2021 CMP update:

LOS

The LOS data, collected by OCTA, was provided to local jurisdictions for verification. A few discrepancies in LOS reporting occurred as a result of slight variations in the data collection methodology used by the cities and OCTA, or due to erroneously reported intersection geometry. Any discrepancies in the LOS reporting were resolved through an

interactive, cooperative process between the cities and OCTA. The data shows that all local jurisdictions are in compliance with the established LOS standards.

Capital Improvement Program

All local jurisdictions submitted adopted seven-year capital improvement programs. The CIPs included projects to maintain or improve the traffic LOS on the CMPHS, or adjacent facilities which benefit the CMPHS.

Land-Use Coordination

All local jurisdictions have adopted CMP TIA processes for analyzing the impacts of land-use decisions on the CMPHS. All local jurisdictions have applied their TIA processes to development projects that met the CMP minimum threshold of 2,400 or more daily trips (1,600 or more trips per day for development projects that will directly access the CMPHS).

Deficiency Plans

Based on the data exhibited in Figure 7, all non-exempt intersections on the CMP highway system were found in compliance with LOS requirements. Therefore, no deficiency plans were required for the 2021 CMP.

Regional Consistency

To ensure consistency between CMPs within the SCAG region, OCTA submits each biennial update of the Orange County CMP to SCAG. As the regional agency, SCAG evaluates consistency with the RTP/SCS and with the CMPs of adjoining counties, and incorporates the program into the FTIP, once consistency is determined.

FIGURE 5: Summary of Conformance

Jurisdiction	Capital Improvement Program	Deficiency Plan	Land-use	Level of Service	2021 Compliance
Aliso Viejo *	Yes	N/A	Yes	N/A	Yes
Anaheim	Yes	N/A	Yes	Yes	Yes
Brea	Yes	N/A	Yes	Yes	Yes
Buena Park	Yes	N/A	Yes	Yes	Yes
Costa Mesa	Yes	N/A	Yes	Yes	Yes
Cypress	Yes	N/A	Yes	Yes	Yes
Dana Point	Yes	N/A	Yes	Yes	Yes
Fountain Valley *	Yes	N/A	Yes	N/A	Yes
Fullerton	Yes	N/A	Yes	Yes	Yes
Garden Grove	Yes	N/A	Yes	Yes	Yes
Huntington Beach	Yes	N/A	Yes	Yes	Yes
Irvine	Yes	N/A	Yes	Yes	Yes
La Habra	Yes	N/A	Yes	Yes	Yes
La Palma*	Yes	N/A	Yes	N/A	Yes
Laguna Beach	Yes	N/A	Yes	Yes	Yes
Laguna Hills	Yes	N/A	Yes	Yes	Yes
Laguna Niguel	Yes	N/A	Yes	Yes	Yes
Laguna Woods	Yes	N/A	Yes	Yes	Yes
Lake Forest	Yes	N/A	Yes	Yes	Yes
Los Alamitos	Yes	N/A	Yes	Yes	Yes
Mission Viejo	Yes	N/A	Yes	Yes	Yes
Newport Beach	Yes	N/A	Yes	Yes	Yes
Orange	Yes	N/A	Yes	Yes	Yes
Placentia	Yes	N/A	Yes	Yes	Yes
Rancho Santa Margarita *	Yes	N/A	Yes	N/A	Yes
San Clemente *	Yes	N/A	Yes	N/A	Yes
San Juan Capistrano	Yes	N/A	Yes	Yes	Yes
Santa Ana	Yes	N/A	Yes	Yes	Yes
Seal Beach *	Yes	N/A	Yes	N/A	Yes
Stanton	Yes	N/A	Yes	Yes	Yes
Tustin	Yes	N/A	Yes	Yes	Yes
Villa Park *	Yes	N/A	Yes	N/A	Yes
Westminster	Yes	N/A	Yes	Yes	Yes
Yorba Linda *	Yes	N/A	Yes	N/A	Yes
County *	Yes	N/A	Yes	N/A	Yes

*No CMP intersections within jurisdiction

Appendix A: Freeway Level of Service

To be included with Final

Appendix B-1: Meeting CMP Traffic Impact Analysis Requirements

Meeting CMP Traffic Impact Analysis Requirements

AN OPTIONAL GUIDANCE FOR LOCAL JURISDICTIONS

Prepared for:

**Orange County Environmental Management Agency
Orange County Transportation Commission
Orange County Transit District
League of Cities, Orange County Division
Transportation Corridor Agencies**

Prepared by:

**Kimley-Horn and Associates, Inc.
and
The Planning Center**

June 11, 1991

CMP-TIA REQUIREMENTS

Requirements of CMP legislation

- Analyze impacts of land-use decisions on CMP Highway System.
- Estimate costs associated with mitigation of impacts on CMP Highway System.
- Exclude costs associated with mitigating the impacts of interregional travel.
- Allow credits against mitigation costs for local public and private contributions to improvements to the CMP Highway System.
 - For toll road facilities, allow credits only for local public and private contributions which will not be reimbursed from toll revenues or other state or federal sources.
- Report annually on actions taken to adopt and implement a program to analyze the impacts of land-use decisions on the CMP Highway System and to estimate the costs of mitigating those impacts.

Year One Goal

- Identify the impacts of development anticipated to occur over the next 7 years on the CMP Highway System and the projected costs of mitigating those impacts.

Actions Required of Local Jurisdictions

- A TIA will be required for CMP purposes for all proposed developments generating 2,400 or more daily trips. For developments which will directly access the CMP Highway System, the threshold for requiring a TIA should be reduced to 1,600 or more trips per day.
- Document procedures used to identify and analyze traffic impacts of new development on CMP Highway System. This documentation should include the following:
 - Identification of type of development proposals which are subject to a traffic impact analyses (TIA);
 - Description of required or acceptable TIA methodology; and
 - Description of inter-jurisdictional coordination process used when impacts cross local agency boundaries.
- Document procedures/standards used to determine the costs of mitigation requirements for impacts of new development on CMP Highway System.
- Document methodology and procedures for determining applicable credits against mitigation costs including allowable credits associated with contributions to toll road facilities.

SECTION 1 – INTRODUCTION

Purpose

State legislation creating the Congestion Management Program (CMP) requires that the program contain a process to analyze the impacts of land-use decisions by local governments on the regional transportation system. Once impacts of a land-use decision are identified, the CMP also requires that the costs to mitigate the impacts be determined.

For CMP purposes, the regional transportation system is defined by the legislation as all state highways and principal arterials at a minimum. This system is referred to as the CMP Highway System. The identification and analysis of impacts along with estimated mitigation costs are determined with respect to this CMP Highway System.

The objectives of this report are to:

- Provide guidance to local agencies in conducting traffic impact analyses.
- Assist local agencies in maintaining eligibility for funds through documentation of CMP compliance.
- Make available minimum standards for jurisdictions wishing to use them for identifying and analyzing impacts on CMP Highway System.
- Establish CMP documentation requirements for those jurisdictions which elect to use their own TIA methodology.
- Establish a baseline from which TIA standardization may evolve as experience is gained in the CMP process.
- Cause the analysis of impacts on the CMP Highway System to be integrated into the local agency development review process.
- Provide a method for determining the costs associated with mitigating development impacts.
- Provide a framework for facilitating coordination between agencies when appropriate.

Background

Through a coordinated effort among local jurisdictions, public agencies, business and community groups, Orange County has developed a Congestion Management Program framework in response to the requirements of Assembly Bill 1791. This framework is contained in the Congestion Management Program Preparation Manual which was issued in January 1991 as a joint publication of the following agencies:

- County of Orange
- Orange County Division, League of California Cities
- Orange County Transportation Commission
- Orange County Transit District

- Transportation Corridor Agencies

The CMP Manual describes the CMP Program requirements for each component prescribed by the CMP provision of AB 1791. The components include one entitled Land-Use Coordination, which sets forth the basic requirements for the assessment, mitigation, and monitoring of traffic impacts to the CMP Highway System which are attributable to development projects.

Consolidation of Remaining Issues

This report is intended to present a useful reference in addressing the remaining issues associated with the identification and treatment of development impacts on the CMP Highway System. It is desirable that a standardized approach be utilized for determining which projects require analysis and in carrying out the resulting traffic impact analysis (TIA). It is also desirable that a reasonably uniform approach be utilized in determining appropriate mitigation strategies and estimating the associated costs.

TIA Survey History

In 1989, Kimley-Horn and Associates, Inc. conducted a survey of TIA procedures being used at the time by local jurisdictions within Orange County. The survey revealed that although there were some commonalities, there was considerable variation in approach, scope, evaluation methodology, and project disposition.

As part of the CMP process, it was determined that the identification of TIA elements which can or should be standardized should be accomplished. Additional documentation of cost estimating practices and the development of standardized costs and estimating procedures will be valuable in achieving desired consistency among jurisdictions.

In order to accomplish these objectives, Kimley-Horn's previous TIA survey was updated and additional information was solicited from each local agency within Orange County. The information was obtained through telephone interviews with City Engineers and Planners after they had an opportunity to examine the survey questionnaire which was mailed to them in advance of the interview. The information obtained was used in preparing the methodology recommendations contained in this report. A summary of the update survey results is provided in the Appendix.

Relationships with Other Components

In addition to being an integral part of the Land-Use Coordination component of the CMP, the traffic impact analysis requirements also relate to all other CMP components to a greater or lesser degree. These components include the following:

- Modeling
- Level of Service
- Transit Standards
- Traffic Demand Management
- Deficiency Plans
- Capital Improvement Program

The Land-Use Coordination section in Chapter 3 of the CMP Preparation Manual dated January, 1991 contains a detailed description of each of the component linkages listed above.

SECTION 2- REQUIREMENTS OF CMP LEGISLATION

The complete text of CMP legislation is contained in Appendix A to the Preparation Manual for the Congestion Management Program for Orange County dated January, 1991. For ease of reference, the requirements of this legislation related to analysis of the impacts of land-use decisions made by local jurisdictions are summarized as follows:

- Analyze impacts of land-use decisions on CMP Highway System.
- Estimate costs associated with mitigation of impacts on CMP Highway System.
- Exclude costs associated with mitigating the impacts of interregional travel.
- Allow credits against mitigation costs for local public and private contributions to improvements to the CMP Highway System.
 - For toll road facilities, allow credits only for local public and private contributions which will not be reimbursed from toll revenues or other state or federal sources.
- Report annually on actions taken to adopt and implement a program to analyze the impacts of land-use decisions on the CMP Highway System and to estimate the costs of mitigating those impacts.

SECTION 3 - ACTIONS REQUIRED OF LOCAL AGENCIES

The provisions of CMP legislation, as summarized in the preceding section, impose a requirement on local jurisdictions to carry out certain actions in order to demonstrate their compliance with the CMP program. This compliance will maintain eligibility to receive state gas tax funds made available by the voter approved Proposition 111. The actions and documentation requirements related to the identification and analysis of traffic impacts include the following:

- A TIA will be required for CMP purposes for all proposed developments generating 2,400 or more daily trips. For developments which will directly access the CMP Highway System, the threshold for requiring a TIA should be reduced to 1,600 or more trips per day.
- Document procedures used to identify and analyze traffic impacts of new development on CMP Highway System. This documentation should include the following:
 - Identification of type of development proposals which are subject to a traffic impact analyses (TIA);
 - Description of required or acceptable TIA methodology; and
 - Description of inter-jurisdictional coordination process used when impacts

cross local agency boundaries.

- Document procedures/standards used to determine the costs of mitigation requirements for impacts of new development on CMP Highway System.
- Document methodology and procedures for determining applicable credits against mitigation costs including allowable credits associated with contributions to toll road facilities.
- Establish annual monitoring and reporting process to summarize activities performed in analyzing the impacts of land-use decisions on the CMP Highway System and in estimating the associated mitigation costs. Procedures for incorporating mitigation measures into the Capital Improvement Program should also-be established.
- For the first year, local jurisdictions may assume that all interregional travel occurs on the freeway system or they may develop an analysis methodology to determine the amount of interregional travel occurring on arterials which are part of the CMP Highway System. During the first year, TIAs need to analyze only the impacts to arterial portions of the CMP Highway System.

SECTION 4 - CMP TRAFFIC IMPACT ANALYSIS METHODOLOGY

In order to assure that the CMP Program meets its objectives of linking land-use decisions with the adequate evaluation of impacts related to those decisions, traffic impact analyses must often be undertaken. There are a number of essential elements which should be included in traffic impact analyses (TIA) used to support the program. Many local jurisdictions already employ development review processes which will be adequate for addressing CMP requirements. For those jurisdictions wishing technical guidance in carrying out the analysis of traffic impacts on the CMP Highway System, this section offers an appropriate TIA methodology.

PROJECTS REQUIRING TIA ANALYSIS

All development in Orange County will use the CMP Network to a greater or lesser extent from time-to-time. The seven-year capital improvement program, together with deficiency plans to respond to deficiencies which cannot be resolved in the 7-year timeframe, are developed in response to anticipated growth in travel within a jurisdiction. Thus, a certain level of travel growth is addressed in the normal planning process and it is not necessary to evaluate relatively small projects with a TIA or to rely on TIA's as the primary means of identifying needed CMP Highway System improvements. Furthermore, County voters have approved a sales tax increase which will fund major improvements to the transit and highway systems serving the County.

Many jurisdictions will require an EIR for a proposed development project. When required, the EIR should include steps necessary to incorporate the required CMP analysis. Most or all of the TIA elements described in this section would normally be

incorporated into the typical EIR traffic analysis.

Certain development projects not requiring an EIR should still be evaluated through a TIA process due to their land-use type, intensity, proximity to the CMP network, and/or duration of development timeframe. In other words, developments which will significantly alter the anticipated demand on a CMP roadway should be evaluated through a TIA approach.

At the present time, there is a wide-ranging approach to determining which projects will require a TIA. In some jurisdictions, there are formal guidelines, while in others it depends primarily on the judgment of a member of staff relative to the probable significance of the project's impact on the surrounding road system.

The OCTC TIA guidelines recommended defining three percent of the level of service standard as significant impact. This seems reasonable for application for CMP purposes. Thus, project impacts of three percent or less can be mitigated by impact fees or other revenues. Projects with a potential to create an impact of more than three percent of Level of Service E capacity will require TIA's. On this basis, it is recommended that all development projects which generate more than 2,400 daily trips be subject to a TIA for CMP evaluation. For projects which will directly access or be in close proximity to a CMP Highway System link a reduced threshold of 1,600 trips/day would be appropriate. Appendix B provides background information of the derivation of these threshold values.

TIA PROCESS

There are a number of essential elements in the TIA process itself. It is desirable that all of these elements be evaluated within an acceptable range of criteria in order to assure the objectives of the CMP process and to maintain a reasonable degree of equity from jurisdiction to jurisdiction. It is recognized, however, that for certain of the elements, some variations relating to professional judgment and local criteria and characteristics are necessary and appropriate to the process. These factors have been fully considered in developing the descriptions of the following elements:

- Evaluation of existing conditions
- Trip generation
- Internal capture and passer-by traffic
- Trip distribution and assignment
- Radius of development influence
- Background traffic
- Capacity analysis methodology
- Impact costs/mitigation

Evaluation of Existing Conditions

In order to evaluate the relative impacts of a proposed development, determine CMP Highway System status and define appropriate mitigation for new impacts, it is necessary to understand the existing conditions on the affected roadway network. Evaluation of

existing conditions is common to nearly all jurisdictions in Orange County. Given that most jurisdictions use link and intersection capacity analysis techniques compatible with the techniques identified in the level-of-service component, no changes in existing local jurisdiction procedures should be necessary in connection with the CMP Program.

Trip Generation

At the foundation of traffic impact analyses is the quantification of trip generation. Use of the ITE Trip Generation Manual is common throughout Orange County. In addition, other widely accepted practices are being used when appropriate to supplement the lit data. These practices include use of acceptable rates published by local agencies and surveys conducted at similar sites, subject to approval of the reviewing agency. Given the uniformity of practice in Orange County to date, no major adjustments in this procedure should be required. It would be desirable however to establish a central library for reporting the results of special trip generation studies and making these results available to all other jurisdictions who wish them.

Internal Capture and Passer-by Traffic

Techniques for identifying the internal relationship of travel within mixed-use developments and the degree to which development captures passer-by trips as opposed to creating new trips are being applied by approximately 2/3 of the local jurisdictions within Orange County. The use of guidelines in the ITE Trip Generation Manual and appropriate professional judgment are the predominant techniques employed. To supplement the guidance available through ITE documentation, local jurisdictions are encouraged to undertake additional studies to document rates applicable within their jurisdiction. The determination of applicable rates should be undertaken by experienced transportation engineering professionals with thorough documentation of the methodology, data, and assumptions used. It is recommended that those jurisdictions which do not currently allow these adjustments establish revised TIA procedures incorporating this element. As with trip generation data, a central library would be desirable for reporting of data and analyses performed locally related to determination of appropriate factors.

Trip Distribution and Assignment

Several appropriate distribution and assignment techniques are used in Orange County, depending on the size of the development and the duration of buildout. Manual and computer modeling approaches are used as appropriate. Manual methods based on the best socio-economic information available to the agency and applicant should be acceptable except when a development's size makes a modeling approach more appropriate. Sources of this information include demographic surveys, market analyses, and previous studies.

Radius of Development Influence

There are numerous ways to identify the study area to be evaluated in a TIA. These include both qualitative and quantitative approaches. One of the most effective ways is through the determination of the quantity of project traffic on CMP roadway links compared to a selected level of impact. The goal of a quantitative approach is to be sure that all elements

of the CMP network are addressed in a comparable manner from jurisdiction to jurisdiction. This is important due to the potential for overlapping impacts among jurisdictions. It is also important to maintain flexibility within a quantitative process to allow transportation professionals at local jurisdictions to add areas to the study which are of specific concern. It is not intended that CMP practices should restrict this aspect of each agency's existing TIA process.

It is recommended that the study area for CMP Highway System links be defined by a measure of significant impact on the roadway links. As a starting point, it is proposed that the measure be three percent of existing roadway capacity. Thus, when a traffic impact analysis is being done it would require the inclusion of CMP roadway links that are impacted by 3 percent or more of their LOS E capacity. If a TIA is required only for CMP purposes, the study area would end when traffic falls below three percent of capacity on individual roadway links. If the TIA is also required for other purposes, additional analysis can be required by the local jurisdiction based on engineering judgment or local regulation as applicable.

Background Traffic

In order for a reasonable assessment of the level of service on the CMP network, it is necessary to not only identify the proposed development impact, but also the other traffic which can be expected to occur during the development of the project. There are numerous methods of evaluating background traffic. The implications of these alternative methods are that certain methodologies may result in deficiencies, while other methodologies may find an acceptable operating conditions.

The cost to mitigate impacts of a land-use decision is unrelated to background traffic. Rather, it is related to the cost of replacing the capacity which is consumed by the proposed development. However, it is necessary to understand background traffic in order to evaluate level-of-service. Background traffic is composed of existing traffic demands and growth from new development which will occur over a specific period of time. Both the existing and the growth elements of background traffic contain sub-elements. These include traffic which is generated within Orange County, that which begins and/or ends within the County, and interregional traffic which has neither end in Orange County. CMP legislation stipulates that interregional traffic will not be considered in CMP evaluations with respect to LOS compliance or determining costs of mitigation.

Given that the CMP process is new, there is no existing practice of separating interregional traffic from locally generated traffic. Until a procedure for identifying interregional traffic is developed, local jurisdictions may assume that all interregional traffic occurs on the freeway system. Initially TIA's required for CMP purposes need only analyze the impacts to arterial portions of the CMP Highway System.

Local governments in Orange County are generally consistent in their approach to background traffic. There are three major approaches used. The first is to use historical growth factors which are applied to existing traffic volumes to project future demands. The second is to aggregate the impacts of specific individual projects which have been approved or planned but not built to identify the total approved background traffic on the study area roadway system. A third method is to use computer modeling to identify

total traffic demands which represent both background traffic and project impact traffic. For the present CMP program, it is recommended that the discretion for the appropriate process lie within the local jurisdiction, however, the method to be used in the jurisdiction should be clearly defined in the agency's TIA rules and procedures. In addition, it is recommended that all jurisdictions create a listing of approved development projects and a map showing their locations which would be updated frequently and be available to other jurisdictions on request. The listing should include information related to type and size of land-use and phasing for each project.

It is appropriate to periodically update long range forecasts based on development approvals and anticipated development growth in the region and plan a transportation system which will provide the necessary level-of-service for this amount of development. When a development proposal will significantly alter this long-term plan, it will be necessary to address the aggregate of all approved development to assure that there is a long-term solution. However, from a TIA perspective, it is reasonable and practical to consider only that development traffic which can be expected to exist at the time of buildout of a new development proposal. That is to say, for CMP purposes background traffic should be limited to that traffic which is generated by development which will exist at the time of buildout of a proposed development. CEQA requirements may dictate that other background traffic scenarios be analyzed as well.

Capacity Analysis Methodology

Once the projected traffic demands are known, it is necessary to evaluate these demands relative to available and planned roadway capacity. The methodology used in capacity determination in Orange County is relatively uniform. Additionally, the level of service (LOS) component of the CMP Program has identified specific criteria which are to be used in determining level-of-service on the CMP Highway System.

Impact Costs/Mitigation

This element is at the heart of the CMP process; that is to identify the costs of mitigating a land development decision on the CMP System.

The current practice throughout Orange County is to require mitigation only when the level-of-service standard is exceeded. However, some jurisdictions require regular impact mitigation fees and phasing road improvements with development. The growth management requirement of the sales tax Measure M mandates a traffic phasing program. Often, mitigation is equated to construction of roadway improvements to maintain an acceptable level-of-service and/or to maintain the existing level-of-service. In some instances, a pay and go mitigation approach is allowed. This means that new development may pay its fair share and go forward and the provision of improvements remain the responsibility for the local jurisdiction.

In order to assess responsibility for impacts, there are a variety of approaches. One approach is to consider impact traffic as a percent of total traffic. Impact traffic may also be taken as a percentage of existing capacity. Another common approach is to use the net impact of development as a percent of total future traffic demand.

Since CMP legislation requires the identification of costs of land-use decisions and impacts

across jurisdictional lines, it is desirable that the CMP program have a consistent method for identifying the costs of development impacts. On the other hand, a wide variety of mitigations can occur from jurisdiction to jurisdiction.

It is recommended that the impact costs be calculated as the total of new development traffic on a roadway link requiring improvement divided by the capacity of the improvement times the cost of the improvement. This can be expressed in a formula as follows:

$$\text{Impact Cost} = \frac{\text{Development Traffic}}{\text{Capacity of Improvement}} \times \text{Improvement Cost}$$

Improvements to be included in the cost analysis should be those identified in the jurisdiction's adopted Circulation Element and any additional improvements identified in the development TIA. The total impact cost for a development would be the sum of costs for all significantly impacted links. Funds collected from these assessments could be aggregated and applied to specific projects on an annual basis in accordance with locally established priorities. If project impacts extend across jurisdictional boundaries the impact costs calculated for significantly impacted links in an adjacent jurisdiction should be allocated to that jurisdiction for use in its program of prioritized improvements.

Through this process, progress can be achieved in implementing system improvements without having to wait for 100% of the funds being collected for each individual improvement. In theory, all required improvements will be accomplished over time as new developments are approved which will generate traffic to utilize available and planned system capacity. The costs should be based on recent Unit cost experience in Orange County and may include planning, permitting, preliminary engineering, design, right-of-way, construction, landscaping, construction inspection, and, if applicable, financing costs.

There are two approaches to mitigation. One is traffic reduction and the other is to build improvements to accommodate the new traffic. Traffic reduction through transportation demand ordinances or other regulations which will reduce impacts can be calculated in the same way a development impact would be calculated. But in this case, it would be taken as a credit or a reduction in impact. Mitigation techniques such as TDM or phasing or reduction in project intensity merely reduce for a new development the amount of impact which must be mitigated and are changes which should occur prior to the calculation of project impact costs. A monitoring program should be established to confirm that anticipated reductions are realized.

To comply with the CMP process, a local jurisdiction should accomplish two things. First, it should demonstrate that it is analyzing and mitigating the impact of new development on the CMP Highway System. Second, it should maintain the level-of-service standards or adopt a deficiency plan Consistent with CMP legislation. In order to demonstrate the mitigation which has been undertaken, the local jurisdiction should maintain a record of the cumulative impact cost of all development approvals and the cumulative mitigation value of improvements provided by the local jurisdiction. These could be construction programs or credits from a TDM ordinance or other traffic reduction measures. It is then

only necessary to show on an annual basis that the total improvement costs plus traffic reduction credits are equal to or greater than the total impact cost of new development approvals to prove mitigation compliance.

The maintenance of level-of-service would come through implementation of improvements contained in the 7-year capital improvements element, Measure M and state-funded improvements, additional improvements which may be made in conjunction with development approvals, and from deficiency plans which may be required from time to time. From a TIA perspective, it would be necessary to document the following:

- a. the level-of-service on the CMP network at buildout of the proposed development will be: 1) level—of-service “E or better, or 2) will not result in a cumulative increase of more than 0.10 in v/c ratio if the established LOS standard is worse than LOS E.
- b. a deficiency plan exists to address the links for which level-of-service is not provided, and
- c. a deficiency plan will be developed for a new link when a deficiency will occur.

DOCUMENTATION OF RULES AND PROCEDURES

To assure a clear understanding of the TIA procedures which are necessary to support a viable CMP program, it is recommended that a set of rules and procedures be established by each local jurisdiction. Ideally, these rules and procedures would cover the requirements for the full TIA analysis and would include minimum requirements for the CMP process. Local jurisdictions which prefer not to adopt separate CMP TIA standards could implement standards for CMP requirements within a TIA and maintain their existing approach for all other aspects of their existing TIA process. The following is a summary of the elements which should be included in CMP procedures documentation and the methodologies applicable to each element:

1. **Thresholds for Requiring a TIA for CMP** - Projects with the potential to create an impact of more than 3% of LOS “E” capacity on CMP Highway system links should require a TIA. All projects generating 2,400 or more daily trips should require a TM for CMP evaluation. If a project will have direct access to a CMP link this threshold should be reduced to 1,600 or more daily trips. A TIA should not be required again if one has already been performed for the project as part of an earlier development approval which takes the impact on the CMP Highway System into account.
2. **Existing Conditions Evaluation** - Identify current level-of-service on CMP roadways and intersections where the proposed development traffic will contribute to 3 percent of the existing capacity. Use procedures defined in the level-of-service component for evaluation of level—of-service.
3. **Trip Generation** - ITE trip generation rates or studies from other agencies and locally approved studies for specific land-uses.
4. **Internal Capture and Passerby Traffic** - Justification for internal capture should be

included in the discussion. Passerby traffic should be calculated based upon ITE data or approved special studies.

5. **Distribution and Assignment** - Basis for trip distribution should be discussed and should be linked to demographic or market data in the area. Quantitative and/or qualitative information can be used depending on the size of the proposed development. As the size of the project increases, there should be a tendency to use a detailed quantitative approach for trip distribution. Trip assignment should be based on existing and projected travel patterns and the future roadway network and its travel time characteristics.
6. **Radius of Impact/Project Influence** - The analysis should identify the traffic assignment on all CMP roadway links until the impact becomes less than 3 percent of level of service E capacity.
7. **Background Traffic** - Total traffic which is expected to occur at buildout of the proposed development should be identified.
8. **Impact Assessment Period** - This should be the buildout timeframe of the proposed development.
9. **Capacity Analysis Methodology** - The methodology should be consistent with that specified in the level-of—service component of the CMP Program.
10. **Improvement Costs** - The cost of roadway improvements should include all costs of implementation including studies, design, right-of-way, construction, construction inspection, and financing costs, if applicable.
11. **Impact Costs and Mitigation** - The project impact divided by the capacity of a roadway improvement times the cost of the improvement should be identified for each significantly impacted CMP link and summed for the study area.
12. **Projected Level-of-Service** - The TIA should document that the projected level-of-service on all CMP links in the study area will be at Level-of-Service “E” or the existing level-of-service whichever is less, or that a deficiency plan exists or will be developed to address specific links or intersections.

SECTION 5 – APPENDICES

Appendix A – Summary of TIA Update Survey Results (Available Upon Request)

Appendix B – Deviation of Thresholds for Projects Requiring TIA Analysis

APPENDIX B

DERIVATION OF THRESHOLDS FOR PROJECTS REQUIRING TRAFFIC IMPACT ANALYSIS

The TIA process recommendation is to require a TIA for any project generating 2,400 or more daily trips. This number is based on the desire to analyze any impacts which will be 3% or more of the existing capacity. Since most CMP Highway System will be four lanes or more, the capacity used to derive the threshold is a generalized capacity of 40,000 vehicles/day. The calculations are as follows:

$$40,000 \text{ veh./day} \times 3\% = 1,200 \text{ veh./day}$$

Assuming 50/50 distribution of project traffic on a CMP link

$$1,200 \times 2 = 2,400 \text{ veh./day total generation}$$

As can be seen, a project which will generate 2,400 trips/day will have an expected maximum link impact on the CMP system of 1,200 trips/day based on a reasonably balanced distribution of project traffic. On a peak-hour basis, the 3% level of impact would be 120 peak-hour trips. For intersections, a 3% level of impact applied to the sum of critical volume (1,700 veh./hr.) would be 51 vehicles per hour.

A level of impact below 3% is not recommended because it sets thresholds which are generally too sensitive for the planning and analytical tools available. Minor changes in project assumptions can significantly alter the results of the analysis and the end result can be additional unnecessary cost to the developer and additional review time by staff with little benefit. Additionally, a lower threshold of significance will expand the study area, which also increases effort and costs, and increases the probability that the analysis would extend beyond jurisdictional boundaries.

The following illustration shows that the 2,400 trip/day threshold would be expected to produce a 3% impact on the CMP System only when the project has relatively direct access to a CMP link. As a project location moves further off the CMP System the expected impacts is reduced. With a more directional distribution of project traffic a development with direct CMP System access could produce a 3% impact with somewhat lower daily trip generation.

The table included on the following page illustrates the daily trip generation thresholds which would produce various levels of impact on the CMP System for project locations with and without direct access to the system. Based on a 3% impact the trip generation thresholds for requiring a TIA are 1,600 veh./day with direct CMP System access and 2,400 veh./day if a project does not have direct CMP System access.

CMP Highway System Impacts for Development Generating 2,400 trips/day
Based on proximity to CMP System

	50		50		250	
	80	80		280	80	
100	100	100		300	100	300
200	600	800	2400	800	600	100
300	100	300		200	100	200

MAXIMUM IMPACT < 1%

400						200
200	600	700		600	800	300
	200	300	1200 1200	300	200	
			2400			200

MAXIMUM = 1.8%

	400			100		200
200	800	1000	1200 1200	900	700	300
	200		2400	100		200

MAXIMUM = 3%
COULD BE 4.5% WITH 75/25 SPLIT

Alternative Criteria

Assume 75/25 distribution

For direct access to CMP System:
 $1,200 / .75 = 1,600 \text{ veh./day}$

For no direct CMP System Access:
 Approximately 1/3 less impact
 on CMP System
 $1,600 \times 3/2 = 2,400 \text{ veh./day}$

Daily Trip Generation

<u>Significant Impact</u>	<u>Direct Access</u>	<u>No Direct Access</u>
1%	500	800
2%	1,100	1,600
3%	1,600	2,400

Appendix B-2: Traffic Impact Analysis Exempt Projects

Appendix B-2: Traffic Impact Analysis Exempt Projects

Projects exempt from the requirements of a mandatory, CMP Traffic Impact Analysis are listed below. This list is not meant to be all-inclusive. Any inquiries regarding additional exemptions shall be transmitted in writing to the Orange County Transportation Authority, attention CMP Program Manager.

Project Not Requiring a CMP TIA Analysis:

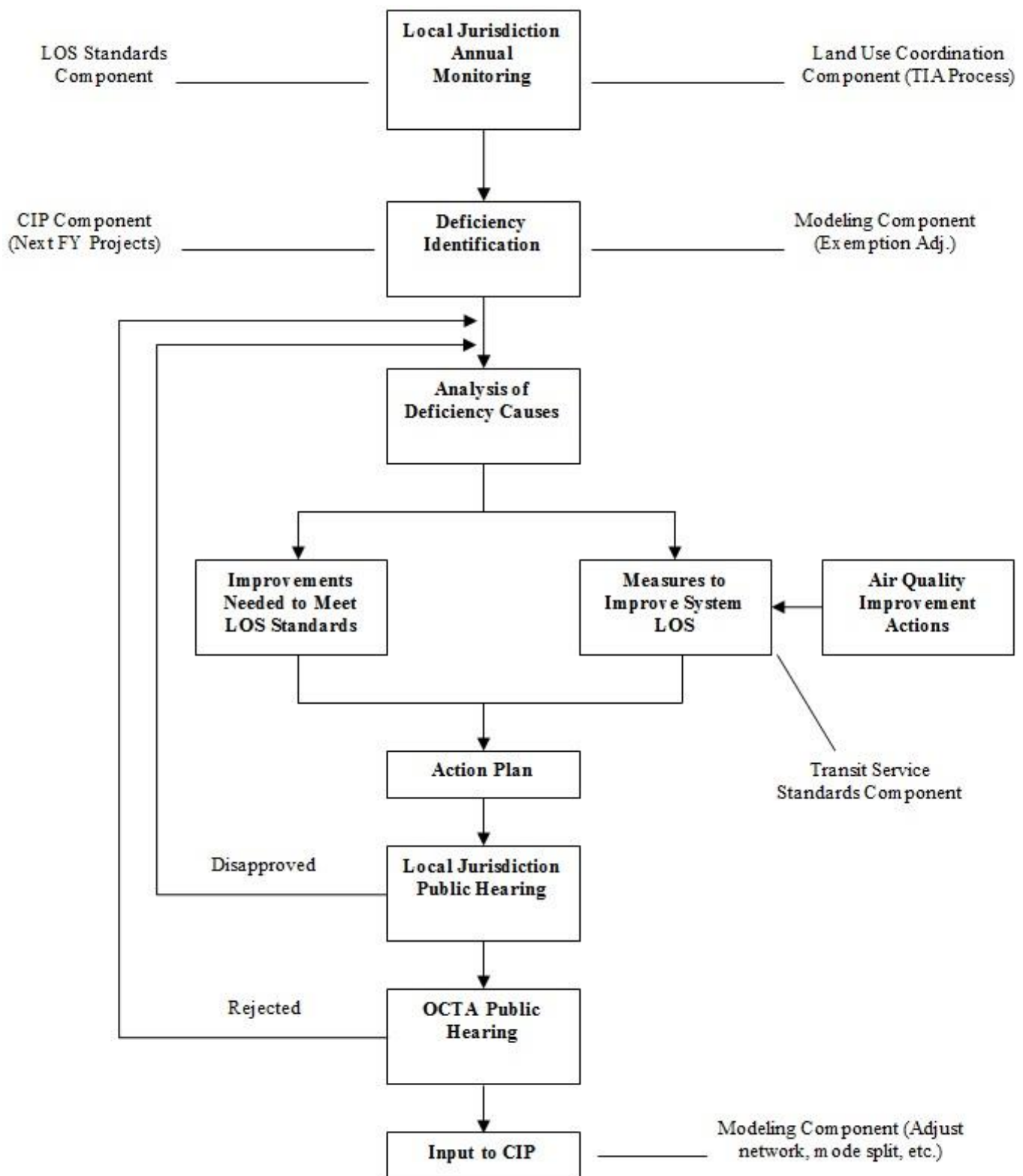
1. Applicants for subsequent development permits (i.e., conditional use permits, subdivision maps, site plans, etc.) for entitlement specified in and granted in a development agreement entered into prior to July 10, 1989.¹
2. Any development application generating vehicular trips below the Average Daily Trip (ADT) threshold for CMP Traffic Impact Analysis, specifically, any project generating less than 2,400 ADT total, or any project generating less than 1,600 ADT directly onto the CMPHS.^{1, 2}
3. Final tract and parcel maps.^{1, 2, 3}
4. Issuance of building permits.^{1, 2, 3}
5. Issuance of certificates of use and occupancy.^{1, 2, 3}
6. Minor modifications to approved developments where the location and intensity of project uses have been approved through previous and separate local government actions prior to January 1, 1992.^{1, 2, 3}

¹ Vehicular trips generated by CMP TIA-exempt development applications shall not be factored out in any traffic analyses or levels of service calculations for the CMPHS.

² Exemption from conduction a CMP TIA shall not be considered an exemption from such projects' participation in approved, transportation fee programs established by the local jurisdiction.

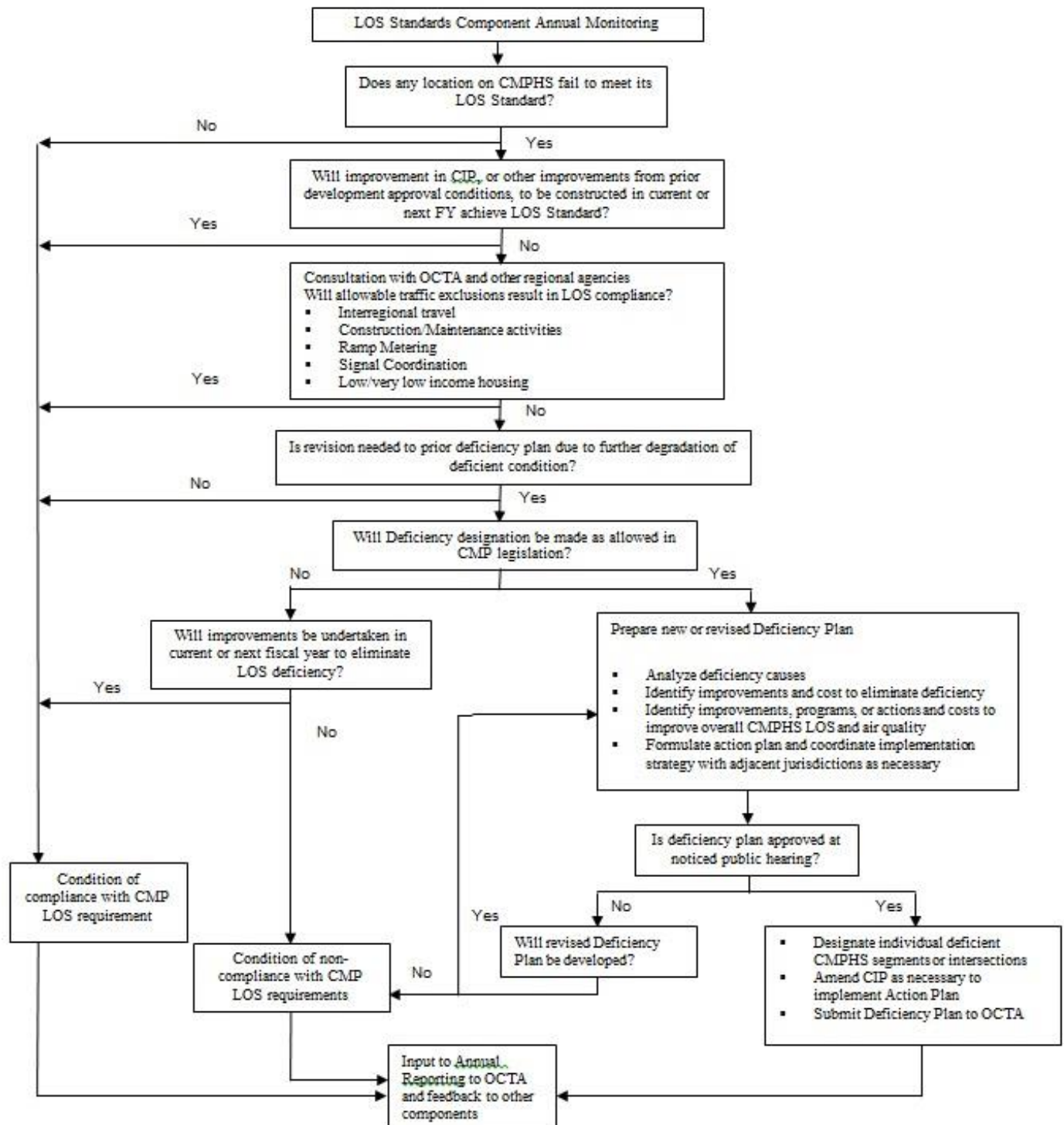
³ A CMP TIA is not required for these projects only in those instances where development approvals granting entitlement for the project sites were granted prior to the effective date of CMP TIA requirements (i.e., January 1992).

Appendix C-1: CMP Deficiency Plan Flow Chart

APPENDIX C-1: CMP Deficiency Plan Flow Chart

Appendix C-2: Deficiency Plan Decision Flow Chart

APPENDIX C-2: Deficiency Plan Decision Flow Chart



Appendix D: CMP Monitoring Checklists

¹The following activities are statutorily-exempt from deficiency determinations: interregional travel, traffic generated by the provision of low and very low income housing, construction rehabilitation or maintenance of facilities that impact the system, freeway ramp metering, traffic signal coordination by the state or multi-jurisdictional agencies, traffic generated by high-density residential development within 1/4 mile of a fixed-rail passenger station, traffic generated by mixed-use residential development within 1/4 mile of a fixed-rail passenger station.



APPENDIX C

Congestion Management Program (CMP)

CMP Monitoring Checklist: Deficiency Plans				
CMP Checklist		YES	NO	N/A
1.	Check "Yes" if either of the following apply: <ul style="list-style-type: none"> There are no CMP intersections in your jurisdiction. Factoring out statutorily-exempt activities², all CMP Highway System (CMPHS) intersections within your jurisdiction are operating at LOS E (or the baseline level, if worse than E) or better. 	<input type="checkbox"/>	<input type="checkbox"/>	
NOTE: ONLY THOSE AGENCIES THAT CHECKED "NO" FOR QUESTION 1 NEED TO ANSWER THE REMAINING QUESTIONS.				
2.	If any, please list those intersections found that are not operating at the CMP LOS standards. <ul style="list-style-type: none"> _____ _____ _____ 			<input type="checkbox"/>
3.	Are there improvements to bring these intersections to the CMP LOS standard scheduled for completion during the next 18 months or programmed in the first year of the CIP?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTE: ONLY THOSE AGENCIES THAT CHECKED "NO" FOR QUESTION 3 NEED TO ANSWER THE REMAINING QUESTIONS.				
4.	Has a deficiency plan or a schedule for preparing a deficiency plan been submitted to OCTA?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Does the deficiency plan fulfill the following statutory requirements? :			
	a. Include an analysis of the causes of the deficiency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b. Include a list of improvements necessary to maintain minimum LOS standards on the CMPHS and the estimated costs of the improvements?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c. Include a list of improvements, programs, or actions, and estimates of their costs, which will improve LOS on the CMPHS and improve air quality?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i. Do the improvements, programs, or actions meet the criteria established by South Coast Air Quality Management District (SCAQMD) (see the CMP Preparation Manual)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

²The following activities are statutorily-exempt from deficiency determinations: interregional travel, traffic generated by the provision of low and very low income housing, construction rehabilitation or maintenance of facilities that impact the system, freeway ramp metering, traffic signal coordination by the state or multi-jurisdictional agencies, traffic generated by high-density residential development within 1/4 mile of a fixed-rail passenger station, traffic generated by mixed-use residential development within 1/4 mile of a fixed-rail passenger station.



APPENDIX C

Congestion Management Program (CMP)

CMP Monitoring Checklist: Deficiency Plans (cont.)				
CMP Checklist		YES	NO	N/A
6.	Are the capital improvements identified in the deficiency plan programmed in your seven-year CIP?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Does the deficiency plan include a monitoring program that will ensure its implementation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	Does the deficiency plan include a process to allow some level of development to proceed pending correction of the deficiency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.	Has necessary inter-jurisdictional coordination occurred?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	Please describe any innovative programs, if any, included in the deficiency plan:			<input type="checkbox"/>
Additional Comments:				

APPENDIX C

Congestion Management Program (CMP)

CMP Monitoring Checklist: Land Use Coordination				
CMP Checklist		YES	NO	N/A
1.	Have you maintained the CMP traffic impact analysis (TIA) process you selected for the previous CMP?	<input type="checkbox"/>	<input type="checkbox"/>	
	a. If not, have you submitted the revised TIA approach and methodology to OCTA for review and approval?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Did any development projects require a CMP TIA during this CMP cycle? ³	<input type="checkbox"/>	<input type="checkbox"/>	
NOTE: ONLY THOSE AGENCIES THAT CHECKED "YES" FOR QUESTION 2 NEED TO ANSWER THE REMAINING QUESTIONS.				
3.	If so, how many?	_____		
4.	Please list any CMPHS links & intersections that were projected to not meet the CMP LOS standards (indicate whether any are outside of your jurisdiction). <ul style="list-style-type: none"> _____ _____ _____ 	<input type="checkbox"/>		
	a. Were mitigation measures and costs identified for each and included in your seven-year CIP?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b. If any impacted links & intersections were outside your jurisdiction, did your agency coordinate with other jurisdictions to develop a mitigation strategy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	If a local traffic model was/will be used, did you follow the data and modeling consistency requirements as described in the CMP Preparation Manual (available online at http://www.octa.net/pdf/cmpprepmanual.pdf)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Comments:				
<div style="border: 1px solid black; height: 150px; width: 100%;"></div>				

³Exemptions include: any development generating less than 2,400 daily trips, any development generating less than 1,600 daily trips (if it directly accesses a CMP highway), final tract and parcel maps, issuance of building permits, issuance of certificate of use and occupancy, and minor modifications to approved developments where the location and intensity of project uses have been approved through previous and separate local government actions prior to January 1, 1992.



Congestion Management Program (CMP)

CMP Monitoring Checklist: Capital Improvement Program (CIP)				
CMP Checklist		YES	NO	N/A
1.	Did you submit a seven-year CIP to OCTA by June 30?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Does the CIP include projects to maintain or improve the performance of the CMPHS (including capacity expansion, safety, maintenance, and rehabilitation)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Is it consistent with air quality mitigation measures for transportation- related vehicle emissions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Was the OC Fundtracker CIP provided by the OCTA used to prepare the CIP?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Comments:				

CMP Checklist		YES	NO	N/A
1.	Does any federally funded project in the CIP result in a significant increase in single occupant vehicle (SOV) capacity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTE: ONLY THOSE AGENCIES THAT CHECKED "YES" FOR QUESTION 1 NEED TO ANSWER THE REMAINING QUESTION.				
2.	If so, was the project developed as part of the federal Congestion Management Process, in other words, was there an appropriate analysis of reasonable travel demand reduction and operational strategies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Comments:				
I certify that the information contained in this checklist is true.				
_____ Name (Print)		_____ Title		_____ Signature
				_____ Date

Appendix E: Capital Improvement Programs

Available online at:

<http://www.octa.net/Plans-and-Programs/Congestion-Management-Program/Overview/>

Appendix F: Measure M2 Program of Projects



FREEWAY IMPROVEMENT PROGRAM

Interstate 5 (I-5) Projects

- A** I-5, SR-55 to SR-57
- B** I-5, El Toro "Y" Area to SR-55
- C** I-5, SR-73 to El Toro Road
- C** I-5, Avenida Pico to San Juan Creek Road
- D** I-5 Highway Interchanges

State Route 22 (SR-22) Projects

- E** SR-22 Access Improvements

State Route 55 (SR-55) Projects

- F** SR-55, I-405 to I-5
- F** SR-55, I-5 to SR-91

State Route 57 (SR-57) Projects

- G** SR-57 NB, Orangewood Avenue to Katella Avenue
- G** SR-57 NB, Katella Avenue to Lincoln Avenue
- G** SR-57 NB, Orangethorpe Avenue to Lambert Road
- G** SR-57 NB, Lambert Road to Tonner Canyon Road

State Route 91 (SR-91) Projects

- H** SR-91 WB, I-5 to SR-57
- I** SR-91, SR-57 to SR-55
- J** SR-91, SR-55 to Riverside County Line

Interstate 405 (I-405) Projects

- K** I-405, I-605 to SR-73
- L** I-405, SR-55 to El Toro "Y" Area

Interstate 605 (I-605) Projects

- M** I-605 Katella Interchange Improvements

Freeway Mitigation Restoration Projects
Part of Projects A-M

Freeway Mitigation Acquisition Projects
Part of Projects A-M

STREETS & ROADS

- O** Grade Separation Program (shown)
- P** Signal Synchronization Project Corridors

TRANSIT PROJECTS

- R** Grade Separation and Station Improvement Projects
- S** Transit Extensions to Metrolink
- T** Metrolink Station Conversion to accept Future High-Speed Rail Systems

OC GO PROJECTS NOT SHOWN

Project N: Freeway Service Patrol

Project O: Streets & Roads - Regional Capacity Program

Project Q: Local Fair Share Program

Project R: Grade crossing and Trail Safety Enhancements
Metrolink Service Expansion Program

Project U: Senior Mobility Program (SMP), Senior Non-emergency Medical Transportation Program (SNEMT), and Fare Stabilization Programs

Project V: Community Based Transit/Circulators

Project W: Safe Transit Stops

Project X: Environmental Cleanup Program

Appendix G: Orange County Subarea Modeling Guidelines

Note: *The primary purpose of these guidelines are to promote consistency in transportation modeling within Orange County.*

Available online at:

<http://www.octa.net/Plans-and-Programs/Congestion-Management-Program/Overview/>



September 2, 2021

To: Regional Planning and Highways Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: 2022 State Transportation Improvement Program

Overview

Every two years, the Orange County Transportation Authority develops a program of projects for funding through the State Transportation Improvement Program. Project recommendations are presented for Board of Directors' consideration and approval. These recommendations are consistent with the Board of Directors' programming policies.

Recommendations

- A. Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27.
- B. Authorize the use of \$11.396 million in Measure M2 funds for the Interstate 5 Improvement Project from Interstate 405 to Yale Avenue (Segment 1).
- C. Consistent with construction phase estimates for the Transit Security and Operations Center, authorize the use of \$27.234 million from the following fund sources:
 - \$19.650 million in Local Partnership Program Formula funds,
 - \$3.924 million in additional State of Good Repair, and
 - \$3.660 million Coronavirus Response and Relief Supplemental Appropriations Act, 2021.
- D. Authorize staff to make all necessary amendments to the State Transportation Improvement Program and the Federal Transportation Improvement Program and execute any necessary agreements to facilitate the recommendations above.

Background

The State Transportation Improvement Program (STIP) is a major source of funding for transportation improvements throughout California. Every two years, state and federal transportation revenues are forecasted and programmed for the subsequent five-year period.

A fund estimate (FE) is developed each STIP cycle to determine funding shares for each county. For the 2022 STIP, Orange County's new capacity would be \$34.977 million, including \$10.382 million of 2021 mid-cycle STIP funding derived from federal Coronavirus Response and Relief Supplemental Appropriations Act funds. A report on funding was presented to the Board of Directors on June 14, 2021. On August 23, 2021, the Board received the 2022 STIP overview as an information item that provided more detail regarding the funding share for Orange County.

The Orange County Transportation Authority (OCTA) is responsible for developing and programming of the STIP for Orange County, which is submitted to the California Transportation Commission (CTC) for approval and adoption. Consistent with the Board adoption of the Capital Programming Policies on February 11, 2019, OCTA dedicates STIP funds for Measure M2 (M2) freeway, commuter rail, fixed-guideway projects, planning/programming and complementary activities, and seek an equitable balance between freeways and transit capital and are consistent with state goals.

Discussion

The overall strategy for programming the 2022 STIP is to maintain funding for existing projects and implement a multimodal STIP. For the 2022 STIP, several projects were considered, including active transportation projects, transit station improvements, and additional M2 freeway projects. The recommended projects are a high priority for OCTA, fit within the guidelines of the STIP, and serve as a balanced and multimodal approach to meet the transportation needs of Orange County. A map of the 2022 STIP projects is provided as Attachment A.

The OCTA 2022 STIP proposal totals \$164.647 million. Of this amount, the 2022 STIP will make approximately \$153.774 million available over the five-year period that ends in fiscal year (FY) 2026-27. Per the STIP FE and Guidelines, the CTC may approve and program STIP funding above the targets up to the STIP maximum. OCTA is proposing to request \$10.873 million over the STIP target, which results in the total STIP request of \$164.647 million. If approved, the \$10.873 million will be advanced from the 2024 STIP cycle, reducing new capacity funding that might otherwise be available in the 2024 FE.

A significant portion of this funding is committed to existing projects. The difference between what is committed and what is available is considered the

“new capacity”. This new capacity combined with the deferred 2021 mid-cycle STIP funding provides OCTA with approximately \$34.977 million available to program to new projects. There are also two projects within the committed STIP projects that have been alternatively funded. The environmental phase for the Interstate 5 (I-5) Managed Lane from Avenida Pico to San Diego County Line (\$5.5 million) and the plans, specifications, and estimates (PS&E) phase for State Route 74 (SR-74) Ortega Highway Multimodal Improvements – Calle Entradero to city/county line (\$8.54 million), were advanced using other funds, which provide approximately \$14.04 million in additional programming capacity. The \$8.54 million for the SR-74 Ortega Highway Multimodal Project is proposed in the 2022 STIP to be redirected to the right-of-way (ROW) phase.

OCTA staff is recommending the 2022 STIP as presented in the table and discussed in further detail below:

STIP Projects (\$000)	2020 STIP	2022 STIP
Carry Over Projects		
I-5 Improvements from I-405 to Yale Avenue (Segment 1) (CON)	\$95,338	\$95,338
I-5 Improvements from SR-73 to El Toro Road (replacement planting/landscaping)	\$6,000	\$6,000
Planning, Programming, and Monitoring	\$3,419	\$6,327
SR-74 Ortega Highway Multimodal Improvements – Calle Entradero to City/County Line	\$8,540	\$37,600
Funded with M2 and Other Federal Funding		
I-5 Managed Lane from Avenida Pico to San Diego County Line (ENV)*	\$5,500	\$0
Proposed New Projects		
Transit Security and Operations Center (TSOC) (CON)	\$0	\$10,382
SR-57 Truck Climbing Lane Phase II – Lambert Road to County Line (ENV)	\$0	\$6,500
Digital Bus Stop Signs	\$0	\$2,500
Total	\$118,797	\$164,647

CON – Construction

ENV - Environmental

I-405 - Interstate 405

SR-57 – State Route 57

SR-73 - State Route 73

*I-5 Managed Lanes Project from Avenida Pico to San Diego County Line was alternatively funded using Federal Surface Transportation Block Grant Program funds.

The I-5 improvements from I-405 to Yale Avenue (Segment 1), which will add one lane in each direction and the replacement planting/landscaping for I-5 improvements from SR-73 to El Toro Road are projects B and C in the Next 10 Delivery Plan, and continue to be important projects to OCTA, and staff is proposing that they remain in the STIP. Further, the STIP funds were assumed

as part of the most recent Next 10 Delivery Plan. Additionally, for the I-5 improvements from I-405 to Yale Avenue (Segment 1), staff is seeking approval for an additional \$11.396 million in M2 freeway funds, which will replace SB 1 (Chapter 5, Statutes of 2017) Local Partnership Program Formula (LPP-F) funds in the ROW phase. The LPP-F funding is programmed to the project and needs to be used no later than FY 2022-23, but the ROW phase is planned to start in FY 2023-24. Therefore, the LPP-F funds are proposed to be used for the TSOC project, which is scheduled to start construction in FY 2022-23. Additional information is included in Attachment B, which provides a brief description of each project and details of the proposed funding changes.

The SR-74 Ortega Highway Multimodal Improvement Project is a carryover project which is proposed to receive additional STIP funds. The PS&E phase was alternately funding utilizing a combination of Measure M2 Regional Capacity Program, local jurisdiction and mid-cycle STIP funds as approved by the Board on May 11, 2020 and June 14, 2021. The STIP funding previously programmed to PS&E is proposed to be directed into the ROW phase. Additional funding is proposed for the ROW and CON phase. This project will alleviate a chokepoint and complete a gap in the arterial system for one of the more critical transportation links in southern Orange County and is a project of interregional importance. This project will widen SR-74/Ortega Highway from two to four lanes by adding one lane and one bike lane in each direction, a new north-side sidewalk and reconstruction of the south-side sidewalk. It is considered a gap closure project with multimodal components and is one of three key projects that have been identified along with Los Patrones Extension and the I-5 Improvement Project from the San Diego/Orange County border to Avenida Pico that will relieve congestion in south Orange County.

TSOC is an important project that will replace the existing Garden Grove Annex. The Garden Grove Annex serves as OCTA's operations center for its transit and emergency security functions. This facility is at capacity and does not meet the continuous operation standard, which is required of essential facilities in California. The proposed TSOC facility will house critical OC Bus and related safety services, as well as communication and dispatch equipment. In addition to STIP funding, staff is seeking approval for \$19.650 million in LPP-F, which is partially redirected from the ROW phase from the I-5 Improvement Project from I-405 to Yale Avenue due to timely-use of fund requirements discussed above. In addition, staff is requesting Board approval for use of \$3.924 million in future FY 2022-23 State of Good Repair (SGR) and \$3.660 million Coronavirus Response and Relief Supplemental Appropriations Act of 2021. The Board previously approved the use of FY 2020-21 and FY 2021-22 SGR funds of \$8.428 million for the project. Based on current estimates, these funds will support the \$46.044 million need for the construction phase of TSOC. The overall project cost estimate is \$56.436 million including prior expenditures for environmental and ROW acquisition. Use of these funds for this project is

consistent with the Board-approved Capital Programming Policies. Additional information is included in Attachment B regarding these funds.

The SR-57 Truck Climbing Lane Phase II is part of Project G of the Next 10 Delivery Plan and will complement the SR-57 Lambert Road Interchange Project currently under construction. This project will construct a truck climbing lane on the SR-57 from the Lambert Road undercrossing to just north of the Orange County/Los Angeles County line. Funding for the environmental phase will position the project for SB 1 (Chapter 5, Statutes of 2017) Trade Corridor Enhancement Program (TCEP) for capital phases in the future. Staff will return to the Board with funding recommendations for further project development phases at a later date.

Finally, staff is proposing funding to acquire and deploy up to 143 digital bus stops to simplify use of public transit service. The project will propose to install real-time bus system information displays along major OC Bus routes 29, 43, 57, 60, 64, 66, 529, 543, and 560. The digital bus stop signs will provide real-time bus arrival information, advisory information as well as other related travel information, and lower one of the barriers to riding the bus thus making the service more accessible.

Attachment C provides a table that depicts the projects proposed for the 2022 STIP and is part of the submittal that will be provided to the CTC. Attachment D provides the updated Capital Funding Plan, which provides summarized funding information for all OCTA's capital projects.

Per STIP guidelines, CTC staff may request changes due to revised funding capacity or timing constraints related to the state and federal funding. Adjustments to the recommended program may be necessary, and staff will continue to work with the CTC, the California Department of Transportation (Caltrans), and other appropriate agencies to ensure the projects continue to move toward the 2022 STIP adoption by spring 2022. Staff will keep the Board apprised if material changes are necessary.

OCTA's submittal is for the Regional Transportation Improvement Program which is 75% of the STIP, Caltrans also submits a request for funding for the Interregional Transportation Improvement Program (ITIP) which is the remaining 25%. Caltrans primarily submits projects that are significant for interregional transportation with a focus on interregional highways and intercity rail. Caltrans is required to meet with OCTA to discuss the Caltrans submittal for District 12. OCTA staff has met with Caltrans District 12, and they have indicated they submitted a request to Caltrans Headquarters for ITIP funding for the SR-74 Ortega Highway Multimodal Improvements and the I-5 Managed Lane from Redhill Avenue to the Los Angeles County Line Project.

New 2022 STIP Requirements

The 2022 STIP Guidelines includes new requirements to inform the State about interregional and multimodal opportunities in the County. An explanation of each requirement and responses is provided below:

- OCTA is required to identify the most significant interregional highway and intercity rail needs within the region. To be consistent with Caltrans District 12's request for ITIP funding, the SR-74 Ortega Highway Multimodal Project will be identified as the most significant interregional highway need;
- OCTA is also asked for information on priority intercity rail needs. Staff is working with the Los Angeles - San Diego – San Luis Obispo Rail Corridor Agency to identify the appropriate intercity rail needs within Orange County. Initial discussions indicate that track improvements, rehabilitation and station work between the City of Irvine and San Clemente would be prioritized for Orange County; and
- The guidelines also ask for information regarding opportunities where state highways may serve as boulevards by incorporating multimodal features. Staff will review recent studies that have been carried out for Pacific Coast Highway, Beach Boulevard, Bristol Street, and Harbor Boulevard to respond to the request for information.

Next Steps

With Board approval, staff will finalize and submit the 2022 STIP to the Southern California Association of Governments, and then to the CTC by December 15, 2021. The CTC will hold public hearings on the proposed 2022 STIP on January 27, 2022, in Northern California and on February 3, 2022, in Southern California. The CTC is expected to adopt the program on March 23-24, 2022. A 2022 STIP development schedule is included as Attachment E.

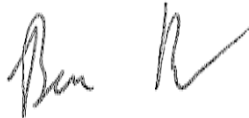
Summary

OCTA is responsible for the development and programming of the STIP for Orange County. OCTA is proposing to submit seven projects for \$164.647 million in STIP funds for FY 2022-23 through FY 2026-27. The use of STIP funds for these projects supplements the local M2 Program and will provide a range of benefits to all of Orange County.

Attachments

- A. OCTA 2022 State Transportation Improvement Program, Proposed Projects
- B. 2022 State Transportation Improvement Program, Project Descriptions
- C. Funding Plan for 2022 STIP-Proposed Projects
- D. Capital Funding Program Report
- E. 2022 STIP Development Schedule

Prepared by:

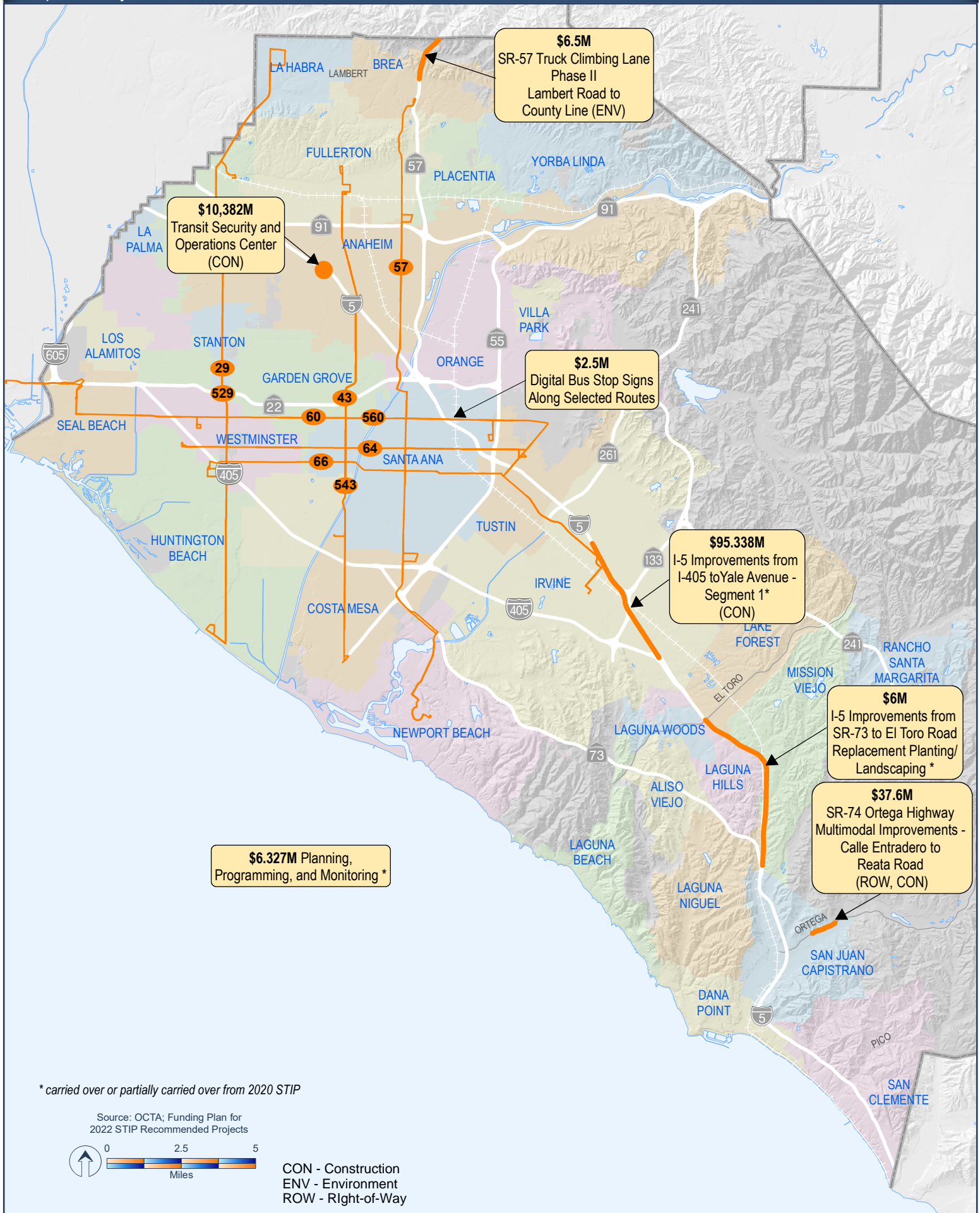


Ben Ku
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Approved by:



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Executive Director, Planning
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2022 State Transportation Improvement Program Project Descriptions

Interstate 5 (I-5) Improvements from Interstate 405 (I-405) to Yale Avenue (Segment 1) (CON)

This project will add one general purpose lane in both directions of the I-5 from the I-405 to Yale Avenue. 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 project length is approximately five 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.

Staff is seeking approval for an additional \$11.396 million in Measure M2 (M2) freeway funds, which will replace SB 1 (Chapter 5, Statutes of 2017) Local Partnership Program Formula (LPP-F) funds in the right-of-way (ROW) phase. The LPP-F funds are proposed to be redirected to the Transit Security and Operations Center (TSOC) Project (discussed below). The \$11.396 million in LPP-F funds are part of cycle 3 of the LPP-F Program and have a timely-use deadline of fiscal year (FY) 2022-23. The cycle 4 LPP-F funds have been reduced within the funding plan based on updated estimates for future LPP-F funding.

The existing and proposed funding plans are provided below.

Existing Funding (in 000s)	STBG	STIP	LPP-F	M2	Total
PA/ED	\$ 4,473				\$ 4,473
PS&E			\$ 7,395	\$ 7,396	\$ 14,791
ROW	\$ 10,595		\$ 16,864	\$ 6,729	\$ 34,188
CON	\$ 37,289	\$ 95,338	\$ 20,532	\$ 23,871	\$ 177,030
TOTAL	\$ 52,357	\$ 95,338	\$ 44,791	\$ 37,996	\$ 230,482

Proposed Funding (in 000s)	STBG	STIP	LPP-F	M2	Total
PA/ED	\$ 4,473				\$ 4,473
PS&E			\$ 7,395	\$ 7,396	\$ 14,791
ROW	\$ 10,595			\$ 23,593	\$ 34,188
CON	\$ 37,289	\$ 95,338	\$ 26,000	\$ 18,403	\$ 177,030
TOTAL	\$ 52,357	\$ 95,338	\$ 33,395	\$ 49,392	\$ 230,482
CHANGE			(\$ 11,396)	\$ 11,396	

CON - Construction

PS&E - Plans, specifications, and estimates

PA/ED - Project approval/environmental documents

STGB - Surface Transportation Block Grant

STIP - State Transportation Improvement Program

2022 State Transportation Improvement Program Project Descriptions

I-5 Improvements from State Route 73 (SR-73) to El Toro Road (Replacement Planting/Landscaping)

This is part of Project C in the Next 10 Delivery Plan and is the replacement planting/landscaping component of the three segments of the I-5 Improvement Project from SR-73 to El Toro Road. This project is included in the approved 2020 STIP, and staff is not recommending any changes to this project.

The existing funding plan is shown below.

Existing Funding (in 000s)	STIP	M2	Total
PA/ED			
PS&E		\$ 770	\$ 770
ROW		\$ 50	\$ 50
CON	\$ 6,000	\$ 5,545	\$ 11,545
TOTAL	\$ 6,000	\$ 6,365	\$ 12,365

Planning, Programming, and Monitoring (PPM)

Orange County is impacted by severe congestion on many regional and interregional facilities. Examination of the problem and potential solutions are necessary for the future construction of improvements. STIP funds will be used to support studies that are directly used in the development of the long-range transportation plan and to develop project study reports, thus creating a shelf of projects for the future. Specific examples of studies that are supported using STIP PPM include Freeway Chokepoint Study, Freeway Bus Rapid Transit Concepts Study, Bristol Street Transit Corridor Study, and OC Mobility Hub study. The California Transportation Commission (CTC) sets aside five percent of the STIP for regional agencies to carry out planning activities. Staff is requesting approval to submit for two additional years of STIP PPM funding totaling \$2.908 million. This will bring the five-year STIP PPM total to \$6.327 million

I-5 Managed Lane Project from Avenida Pico to San Diego County Line

Orange County Transportation Authority (OCTA) and California Department of Transportation (Caltrans) are currently studying the I-5 Managed Lane Project from Avenida Pico to the San Diego County line to determine how to best improve transportation through this area. It is assumed that the study will result in adding a high-occupancy vehicle lane in each direction on the I-5, which will include reestablishing existing auxiliary lanes, widening existing undercrossing, and replacement of existing overcrossings.

This project was approved for 2020 STIP funds by the CTC in March of 2020. However, in order to expedite delivery of this project, in May 2020, the OCTA Board of Directors' (Board) approved \$5.5 million in STBG funds in place of the STIP funds in order to initiate the PA/ED phase. This was subsequently increased to \$6.407 million as

2022 State Transportation Improvement Program Project Descriptions

detailed in the Capital Programming Update, which is being presented to the Board concurrently with this item. The 2020 STIP Program Update, presented to and approved by the BOD on May 11, 2020, detailed how the \$5.5 million in STIP funding would remain on the project in the STIP program and that staff would return with the 2022 STIP with recommendations for these funds. For the 2022 STIP staff is recommending the funding be removed from the project and be redirected to other 2022 STIP projects. The environmental phase is expected to take approximately three years to complete. Therefore, STIP funding for this project can be revisited as part of the 2024 STIP.

The table below demonstrates the existing programming for this project as approved on May 11, 2020 and a proposed change which is being considered through the separate Capital Programming Update item which is also being considered as part of this OCTA Board of Directors Agenda. The details for this requested change can be found in that item and are unrelated to this STIP item.

Existing Funding (in 000s)	CMAQ	STBG	Total
PSR	\$ 450	\$ 121	\$ 571
PA&ED		\$ 5,500	\$ 5,500
TOTAL	\$ 450	\$ 5,621	\$ 6,071

PSR – Project Study Report

Proposed Funding (in 000s)	CMAQ	STBG	Total
PSR	\$ 450	\$ 121	\$ 571
PA&ED		\$ 6,407	\$ 6,407
TOTAL	\$ 450	\$ 6,528	\$ 6,978
CHANGE		\$ 907	\$ 907

PSR – Project study report

CMAQ - Congestion Mitigation and Air Quality Improvement

State Route 74 (SR-74) Ortega Highway Multimodal Improvements from Calle Entradero (postmile 1.0) to Reata Road (postmile 2.1)

This project will widen SR-74/Ortega Highway from two to four lanes by adding one lane, bike lanes, and reconstruction of sidewalk in each direction in the City of San Juan Capistrano from Calle Entradero (postmile 1.0) to Reata Road (postmile 2.1). The project preliminary plans include installing a traffic signal at Via Cordova and Hunt Club Drive, providing a 12-foot-wide striped median, a five- to eight-foot shoulder on each side to accommodate a Class II bicycle lane, and reconstructing the existing sidewalk. The project also requires seven retaining walls. The PS&E phase is anticipated to take 12-18 months to complete.

The SR-74/Ortega Highway Widening Project is an important project for the region and one of the most heavily utilized local roads in the area. Currently, the existing traffic demand exceeds capacity and the roadway operates at a level of service (LOS) E and is anticipated to operate at a LOS F in the year 2025. LOS is used to measure traffic flow with LOS A being free flow, and F being stop and go or heavily congested. The project

2022 State Transportation Improvement Program Project Descriptions

has also received funding through the M2 Project O - Regional Capacity Program. This is a project of interregional significance, and Caltrans has submitted this project for the Interregional Improvement Program portion of the STIP.

On June 14, 2021, the OCTA Board approved the 2021 mid-cycle STIP recommendations. As part of that item, \$0.800 million in mid-cycle STIP funds were approved for the SR-74 Ortega Highway Multimodal Improvement Project to advance the PS&E phase of the project. The approval of 2021 mid-cycle STIP funds allowed the total \$7.740 million in STIP funds previously programmed to the project to be redistributed to other projects in the 2022 STIP.

Existing and proposed funding levels are shown in the tables below.

Existing Funding (\$000s)	STIP	Mid Cycle STIP	M2	Local	SHOPP	Total
PA/ED	\$ 5,513	\$ -	\$ 1,950	\$ 400	\$ 250	\$ 8,113
PS&E	\$ -	\$ 800	\$ 5,250	\$ 1,750	\$ -	\$ 7,800
TBD	\$ 7,740	\$ -	\$ -	\$ -	\$ -	\$ 7,740
TOTAL	\$ 13,253	\$ 800	\$ 7,200	\$ 2,150	\$ 250	\$ 23,653

Proposed Funding (\$000s)	STIP	Mid Cycle STIP	M2	Local	SHOPP	Uncommitted	Total
PA/ED	\$ 5,513	\$ -	\$ 1,950	\$ 400	\$ 250	\$ -	\$ 8,113
PS&E	\$ -	\$ 800	\$ 5,250	\$ 1,750	\$ -	\$ -	\$ 7,800
ROW	\$13,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,000
CON	\$24,600	\$ -	\$ -	\$ -	\$ -	\$ 22,200	\$ 46,800
TOTAL	\$43,113	\$ 800	\$ 7,200	\$ 2,150	\$ 250	\$ 22,200	\$ 75,713
CHANGE	\$29,860	\$ -	\$ -	\$ -	\$ -	\$ 22,200	\$ 52,060

TBD – To be determined

SHOPP - State Highway Operation and Protection Program

Staff is seeking approval for an additional \$29.860 million in STIP for the ROW and CON phase. Based on current estimates, \$13.000 million in STIP funding for ROW will be sufficient for the phase. Additionally, the current estimate for construction is \$46.800 million. The staff proposal of \$24.600 million for construction in STIP will partially fund the phase, so an additional \$22.200 million in future funding will be necessary. Per the STIP guidelines uncommitted CTC-administered competitive funds can be used for the project, and staff will return to the Board with funding determination

TSOC

Engineering studies determined that the building that houses the OCTA's Transit Police Services, Operations Support, and Central Communications cannot be expanded to accommodate OCTA's projected needs as the transportation system expands. Further, the structure does not currently meet the continuous operation standard, which is required of essential facilities in California. To ensure OCTA is able to provide for more effective management of OCTA's expanding transportation network, for continuity of operations, and for disaster response transportation that can move people, goods, emergency

2022 State Transportation Improvement Program Project Descriptions

personnel, and equipment in the aftermath of a disaster, OCTA is working to replace OCTA's control center facility, known as the Garden Grove Annex, which is currently located at 11800 Woodbury Road in the City of Garden Grove, California.

This new TSOC will be located on a 2.86-acre site at the intersection of Lincoln Avenue and Manchester Avenue in the City of Anaheim, California. The TSOC will be a secured facility for authorized personnel only and not open to the general public. The two-story building is planned to support the following user groups:

- Emergency Operations Center,
- Central Communications (Dispatch),
- Field Operations (Transit),
- Public Information Officer,
- Security and Emergency Preparedness, and
- Transit Police.

The TSOC will provide for dispatch of 60 OCTA bus routes over the OCTA service area in Orange County and parts of Los Angeles and Riverside counties. The TSOC will also provide additional parking intended for emergency events, and a proposed microwave tower would improve the level of communication and collaboration with the Loma Ridge Emergency Center, the Orange County Emergency Operations Center, and other partner agencies. It could also serve as an alternate site of Caltrans emergency operations.

Staff is seeking approval to fully fund the construction phase of the project. Staff's funding proposal consists of an additional \$3.924 million in SB 1 State of Good Repair (SGR), \$19.650 million in LPP-F, \$3.66 million in Coronavirus Response and Relief Supplemental Appropriations Act of 2021 (CRRSAA) and \$10.382 million in STIP funding for the project. The additional SGR funds of \$3.924 million will consist of FY 2022-23 SGR funds. The OCTA Board previously approved \$8.428 million for TSOC in FY 2020-21 (\$2.012 million) and FY 2021-22 (\$6.416 million) SGR funds. Additionally, staff is recommending Board approval for \$19.650 million in LPP-F funds. \$16.864 million of these LPP-F funds were previously for the I-5 Improvement Project from I-405 to Yale Avenue and \$2.786 million were unprogrammed. LPP-F funds are subject to CTC approval. Lastly, CRRSAA funding details were presented to the Board on June 14, 2021, and the item mentioned that recommendations would be presented at a later date. Staff is proposing to use \$3.660 million of the available CRRSAA funds for the TSOC project. The remaining CRRSAA funds will be brought to the Board for programming in an upcoming Board item.

The use of SGR, CRRSAA, and STIP funding for TSOC is consistent with the Board-approved Capital Programming Policies (CPP), which prioritizes SGR for use on bus transit capital projects and replacement of existing OCTA transit assets. CRRSAA funds are a one-time federal source and are consistent with the CPP by decreasing the use of local funds when possible. Lastly, STIP funds are consistent with the CPP as TSOC is a transit capital project. LPP-F CPP policy states that LPP funds are to be used for ready-to-deliver M2 projects, which are compatible with state goals and seek to balance

2022 State Transportation Improvement Program Project Descriptions

funds between freeways, streets and roads, and transit capital among other things. TSOC is not an M2 project, but staff is recommending it for LPP-F funds because it is a high-priority transit capital safety project.

Existing and proposed funding levels are shown in the tables below.

Existing Funding (\$000s)	TSSSDRA	Local transit	SB-1 SGR	LPP-F	CRRSAA	STIP	Total
PA/ED	\$ 884	\$ 201					\$ 1,085
PS&E		\$ 4,588					\$ 4,588
ROW	\$ 4,719						\$ 4,719
CON			\$ 8,428				\$ 8,428
TOTAL	\$ 5,603	\$ 4,789	\$ 8,428				\$18,820

TSSSDRA – Transit System Safety, Security & Disaster Response Account
SHOPP - State Highway Operation and Protection Program

Proposed Funding (\$000s)	TSSSDRA	Local Transit	SB-1 SGR	LPP-F	CRRSAA	STIP	Total
PA/ED	\$ 884	\$ 201					\$ 1,085
PS&E		\$ 4,588					\$ 4,588
ROW	\$ 4,719						\$ 4,719
CON			\$ 12,352	\$ 19,650	\$ 3,660	\$ 10,382	\$ 46,044
TOTAL	\$ 5,603	\$ 4,789	\$ 12,352	\$ 19,650	\$ 3,660	\$ 10,382	\$ 56,436
CHANGE			\$ 3,924	\$ 19,650	\$ 3,660	\$ 10,382	\$ 37,616

State Route 57 (SR-57) Truck Climbing Lane Phase II – Lambert Road to County Line

This project will construct a truck climbing lane on the SR-57 from the Lambert Road undercrossing to just north of the Orange County/Los Angeles County line. A climbing lane would improve truck traffic travel speeds and would increase the throughput of the northbound SR-57. This project is Project G in the Next 10 Delivery Plan. Staff is proposing \$6.5 million in STIP funds for the SR-57 Truck Climbing Lane project which is consistent with the CPP regarding the use of STIP funds because it is an M2 freeway project. STIP funding for the PA/ED phase will help align the project for future competitive funds in the SB1 Trade Corridor Enhancement Program, which provides funding for infrastructure improvements along corridors that have high volumes of freight movement.

Proposed funding is shown in the table below:

Proposed Funding (in 000s)		STIP	Total
PA/ED		\$ 6,500	\$ 6,500
TOTAL		\$ 6,500	\$ 6,500
CHANGE		\$ 6,500	\$ 6,500

2022 State Transportation Improvement Program Project Descriptions

Digital Bus Stop Signs/Electronic Message Signs 13" Along High-Quality Transit Corridors (143 Signs)

The project will result in the installation of real-time displays and signage at up to 143 bus stops along OC Bus routes 29, 43, 57, 60, 64, 66, 529, 543, and 560 in Orange County. It will provide real time information on the next bus arriving, identify Orange County's Rapid Bus Service, and provide information regarding connections to Metrolink Stations which provide service into Los Angeles, Riverside, San Bernardino, and Ventura counties, as well as service up to San Luis Obispo. Staff is proposing the use of STIP funds for the project because it will provide significant benefit to transit users and its inclusion will contribute to a more multimodal STIP submittal. The CPP policy will be revisited in the future to potentially include traffic system management projects.

Proposed funding is shown in the table below.

Proposed Funding (in 000s)	STIP	Total
CON	\$ 1,500	\$ 1,500
Five Years of Ongoing Performance Testing	\$ 1,000	\$ 1,000
TOTAL	\$ 2,500	\$ 2,500

Funding Plan for Proposed 2022 STIP Projects														
							Other Funding							
2022 STIP (In Thousands)	2022-23	2023-24	2024-25	2025-26	2026-27	Total STIP	Prior STIP	STBG/ CMAQ	STBG/CMAQ Pending Approval	M2	M2 Pending Approval	Other ¹	Other ² Pending Approval	Total Project Cost
Carry Over Projects														
I-5 Improvement Project from I-405 to Yale Avenue - Segment 1 (CON)			95,338			95,338		52,357		37,996	11,396	33,395		230,482
I-5 Improvements from SR-73 to El Toro Road (replacement planting/landscaping)			6,000			6,000				6,365				12,365
Augmented Projects														
Planning, Programming, and Monitoring	1,848	515	1,056	1,454	1,454	6,327								6,327
SR-74 Ortega Highway Multimodal Improvements - Calle Entradero to Reata Road	-	13,000	-	24,600		37,600	6,313			7,200		2,400	22,200	75,713
Deleted Project														
I-5 Managed Lane from Avenida Pico to San Diego County Line (ENV)		-				-								-
Proposed New Projects														
Transit Security and Operations Center (CON)	10,382					10,382						18,820	27,234	56,436
SR-57 Truck Climbing Lane Phase II – Lambert Road to County Line (ENV)				6,500		6,500								6,500
Digital Bus Stop Signs 13" Along High-Quality Transit Corridors (143 Sign)				2,500		2,500								2,500
2022 STIP total	12,230	13,515	102,394	35,054	1,454	164,647	6,313	52,357	-	51,561	11,396	54,615		390,323

1. Other funds include \$33.395 million in LPP formula for the I-5 Improvement Project from I-405 to Yale Avenue, \$5.603 million in TSSSDRA, \$4.789 million in TDA, and \$8.428 million in SGR for TSOC. \$2.150 million in developer fee and \$0.250 million in State Highway Operations and Protection Program funds for the SR-74 Ortega Highway Project

2. Other funds pending approval include \$3.924 million in SGR, \$19.650 million in LPP-F, and \$3.660 million in Coronavirus Response and Relief Supplemental Appropriations Act of 2021 for TSOC and \$22.200 million in uncommitted funds for the SR-74 Ortega Highway Project

Acronyms

CON - Construction

CMAQ - Congestion Mitigation and Air Quality

ENV - Environmental

I-5 - Interstate 5

I-405 - Interstate 405

LPP-F - Local Partnership Program - Formula

M2 - Measure M2

PS&E - Plans, Specifications, and Engineering

ROW- Right-of-Way

SGR - State of Good Repair

SR-57 - State Route 57

SR-73 - State Route 73

SR-74 - State Route 74

TSOC- Transit Security Operations Center

TDA - Transportation Development Act

TSSSDRA - Transit System Safety, Security and Disaster Response Account

STBG - Surface Transportation Block Grant Program

STIP - State Transportation Improvement Program



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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	\$33,395			\$49,392	
I-5 widening, Yale Avenue to SR-55 (Segment 2) ²	B	\$41,351	\$32,527		\$851					\$7,973	
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) ³	F	\$16,000	\$8,359		\$2,641					\$5,000	
SR-55 widening between I-405 and I-5 ⁴	F	\$505,720	\$160,500		\$41,900	\$80,000	\$140,000			\$83,320	
SR-57 Orangewood Avenue to Katella Avenue	G	\$9,327	\$2,500		\$3,240					\$3,587	
SR-57 truck climbing lane phase II: Lambert Road to LA County Line ⁶	G	\$6,500				\$6,500					
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 Managed Lane Project from Avenida Pico to San Diego County Line ⁵		\$6,978	\$6,978								
SR-74 Ortega Highway Multimodal Improvements, Calle Entradero to Reata Road ⁷		\$53,513			\$250	\$43,913				\$7,200	\$2,150
SR-74 widening, City/County line to Antonio Parkway		\$40,905	\$5,285			\$10,000					\$25,620
State Highway Project Totals		\$4,116,708	\$508,278		\$78,612	\$382,835	\$182,783	\$140,392		\$1,871,866	\$951,942
Federal Funding Total		\$586,890									
State Funding Total		\$706,010									
Local Funding Total		\$2,823,808									
Total Funding (000's)		\$4,116,708									

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	



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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 improvements	D	\$80,300				\$48,683		\$24,109	\$2,500		\$5,008
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									



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 2021

Board Action:

1. 2022 State Transportation Improvement Program - Authorize the use of up to \$11.396 million in Measure M2 funds for the Interstate 5 Improvement Project from Interstate 405 to Yale Avenue (Segment 1).
2. Capital Programming Update - Consistent with right-of-way phase estimates, authorize the use of \$23.926 million in the following fund sources for the Interstate 5 Improvement Project from Yale Avenue to State Route 55 (Segment 2):
 - Surface Transportation Block Grant (\$17.5 million),
 - Measure M2 Freeway Funds (\$5.575 million), and
 - Repurposed Earmarks (up to \$0.851 million), contingent on Federal Highway Administration approval
 - Authorize the use of additional Measure M2 Freeway funds in lieu of \$0.851 million of Repurposed Earmarks, in the event the federal funds are not available.
3. Capital Programming Update - Consistent with updated design phase estimates, authorize the use of the funding below which supports an overall phase increase of \$2.079 million from \$8.921 million to \$11 million, and the reduction of Measure M2 funds by \$3.921 million for the State Route 55 Improvement Project from Interstate 5:
 - Surface Transportation Block Grant (\$3.359 million), and
 - Highway Infrastructure Program (\$2.641 million).
4. Capital Programming Update - Authorize the use of \$1.720 million in Measure M2 for the State Route 55 Improvement Project from Interstate 405 to Interstate 5 to support anticipated costs for the design phase, changing the total project estimated cost from \$504 million to \$505.702 million
5. Capital Programming Update - Consistent with the forecasted cost for the environmental phase, authorize the use of \$0.907 million in additional Surface Transportation Block Grant funds for the Interstate 5 Managed Lanes Project from the Orange County/San Diego County line to Avenida Pico to fund a change in project cost estimate from \$5.5 million to \$6.407 million.
6. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27. (\$6.5 million)
7. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27. (\$37.6 million)

Acronyms:

Aux - Auxiliary
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 OCTA Board of Directors (Board) Approval - September 13th, 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 Engine Repowers (173) ¹		\$12,526	\$12,526								
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 FY2018-19 to FY2024-25 (ACCESS and contracted fixed-route contracts)		\$349,243		\$185,623							\$163,620
Digital Bus Stop Sign 13" Along High Quality Transit Corridors (143 sign) ²		\$2,500				\$2,500					
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 2018-19 to FY 2024-25		\$420,500		\$84,101							\$336,399
OC Mobility Hubs Strategy		\$300	\$266			\$34					
Preventive maintenance - including salaries and benefits (includes ATN & Laguna Beach)		\$167,572		\$167,572							
Purchase (201) 40-foot alternative fuel replacement buses (OCTA)		\$229,384	\$134,670	\$47,696							\$47,018
Purchase 117 replacement paratransit vehicles		\$14,995		\$14,995							
Rehabilitation and Renovation at OCTA Bus Facilities		\$1,509		\$1,207							\$302
Rideshare/vanpool		\$11,232	\$11,232								
Standby backup generators at Anaheim and IRCC bases		\$1,374					\$1,374				
Transit Security & Operations Center ^{3,4}		\$56,436			\$3,660	\$10,382	\$32,002	\$5,603			\$4,789
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		\$14,004					\$6,466	\$7,538			



Capital Funding Program Report

Pending OCTA Board of Directors (Board) Approval - September 13th, 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	
Bus Transit Project Totals		\$1,634,650	\$226,929	\$622,969	\$4,001	\$13,092	\$53,832	\$42,498	\$5,730	\$55,845	\$609,754	
Federal Funding Total		\$853,899										
State Funding Total		\$109,422										
Local Funding Total		\$671,329										
Total Funding (000's)		\$1,634,650										

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		\$405		\$313			\$92					
Zero-emission hydrogen fuel cell buses (10)		\$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 Action:

1. Capital Programming Update - Authorize the use of up to \$12.526 million in Congestion Mitigation and Air Quality Improvement Program funds for 173 bus engine repowers
2. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27 (\$2.5 million)
3. 2022 State Transportation Improvement Program - Approve the 2022 State Transportation Improvement Program submittal to program \$164.647 million to seven projects, from fiscal year 2022-23 through fiscal year 2026-27 (\$10.382 million)
4. 2022 State Transportation Improvement Program - Authorize the use of up to \$27.234 million for the Transit Security and Operations Center, as follows:
 - \$19.650 million in Local Partnership Program Formula funds,
 - \$3.924 million in additional State of Good Repair, and
 - \$3.660 million Coronavirus Response and Relief Supplemental Appropriations Act, 2021

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

2022 STIP Development Schedule

- August 18-19, 2021 – California Transportation Commission (CTC) adopts State Transportation Improvement Program (STIP) fund estimate
- September 13, 2021 – Present to the Orange County Transportation Authority (OCTA) Board of Directors (Board) the STIP/Regional Transportation Improvement Program (RTIP) item for approval
- September 15, 2021 – OCTA STIP/RTIP projects submitted to Southern California Association of Governments for regional modeling analysis
- By October 1, 2021 – The California Department of Transportation (Caltrans) submits final draft Interregional Transportation Improvement Program (ITIP)
- October 14, 2021 – CTC ITIP Hearing – South
- October 21, 2021 – CTC ITIP Hearing – North
- December 15, 2021 – STIP/RTIP Submittal Due to CTC
- December 15, 2021 – Caltrans ITIP submittal due to CTC
- January 27, 2022 – CTC STIP Hearing - North
- February 3, 2022 – CTC STIP Hearing - South
- February 28, 2022 – CTC publishes staff recommendations
- March 23-24, 2022 – CTC adopts STIP
- May 2, 2022 – Inform OCTA Board of Final STIP program of projects

2022 State Transportation Improvement Program

2022 STIP Overview

- Major source of transportation funding
- Funding commitment covering a five-year period
- Updated every two years and approved by the CTC

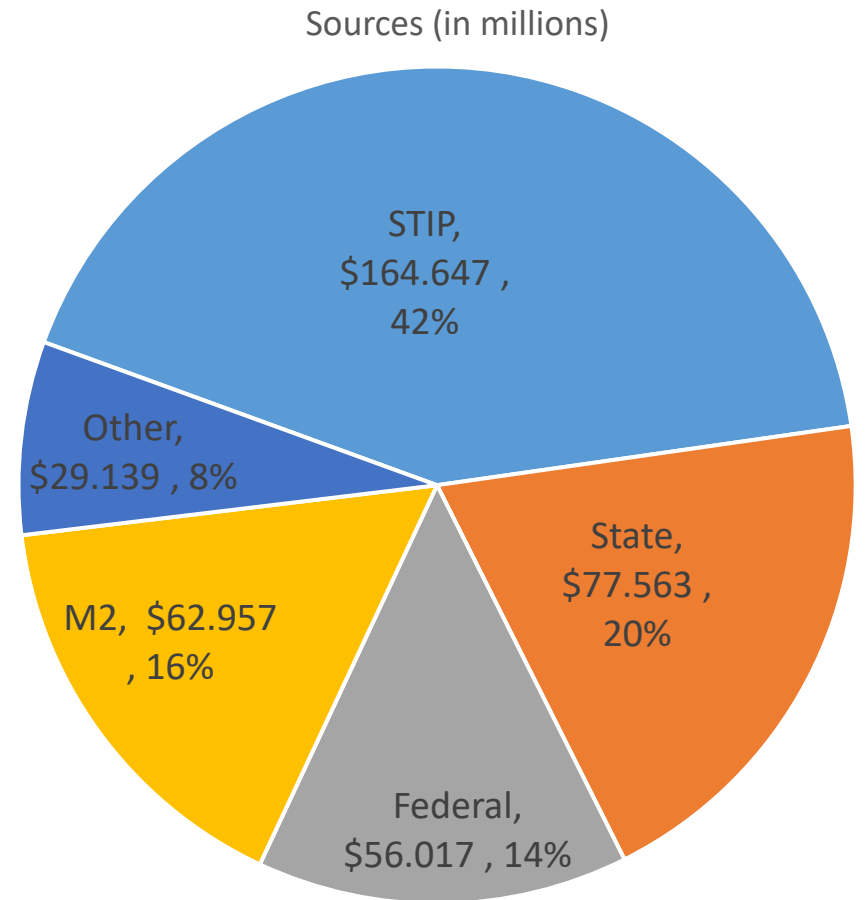


Funding Target and STIP Strategy

- Total proposed STIP funding: **\$164.6 million**
- Overall strategy
 - Maintain funding for existing projects
 - Be consistent with the CPP and STIP Guidelines
 - Take a comprehensive approach
 - Active transportation, transit station improvements, and M2 freeway projects
 - Consider project timing – need vs. timing of funding availability
 - Ensure project phases are fully funded

Recommendation A - Program of Projects

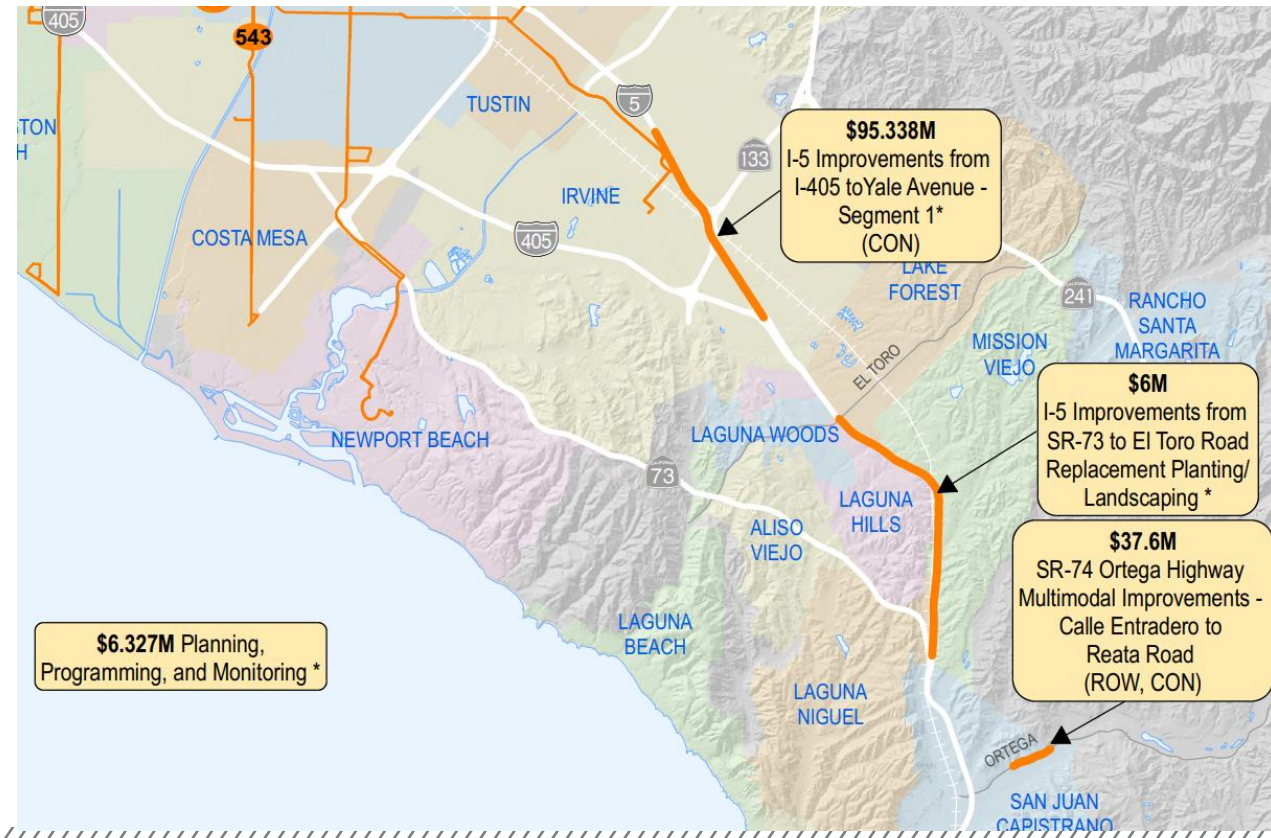
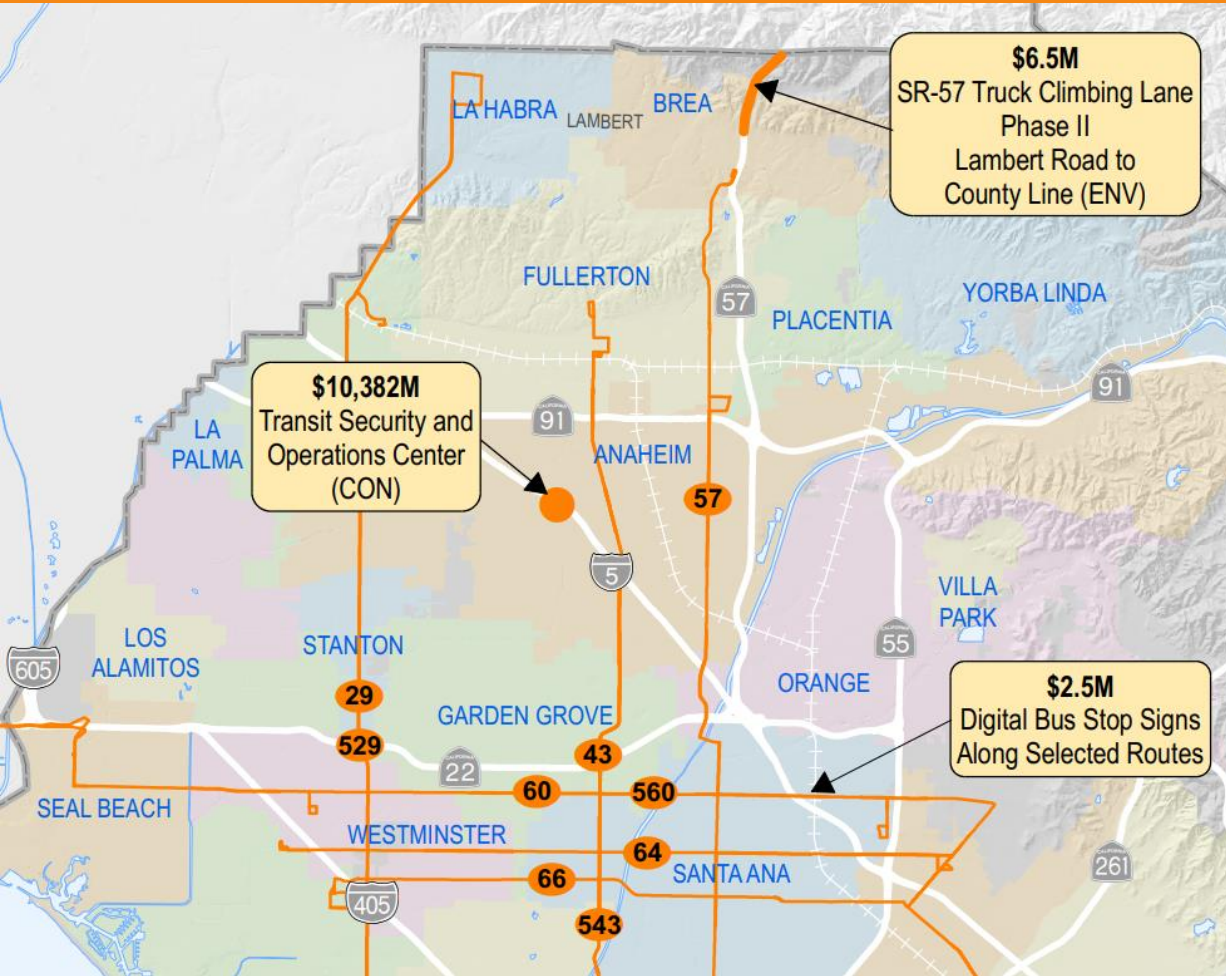
Proposed 2022 STIP (in millions)	CPP Priority	Included in Prior 2020 STIP	2020 STIP	2022 STIP
I-5 Improvements (I-405 to Yale Avenue) Segment 1	✓	✓	\$95.338	\$95.338
I-5 Improvements (SR-73 to El Toro Road) (Replacement Planting /Landscaping)	✓	✓	\$6.000	\$6.000
Planning, Programming, and Monitoring	✓	✓	\$3,419	\$6.327
SR-74 Ortega Highway Multimodal Improvements (Calle Entradero to Reata Road)	✓	✓	\$8,540	\$37.600
Transit Security and Operations Center (TSOC)	✓			\$10.382
SR-57 Truck Climbing Lane – Phase 2 (Lambert Road to County Line)	✓			\$6.500
Digital Bus Stop Signs 13” Along High-Quality Transit Corridors (143 Sign)	✓			\$2.500
Total 2022 STIP Submittal				\$164.647



Total = \$390.323 million

I-5 – Interstate 5 / I-405 – Interstate 405 / SR-57 – State Route 57 / SR-74 – State Route 74

Program of Projects



CON – Construction / ENV - Environmental / ROW – Right-of-Way / SR-73 – State Route 73

Recommendation B - Funding Source Change

- I-5 Improvements from I-405 to Yale Avenue (Segment 1)
 - Use \$11.3 million in M2 in place of LPP-F due to timely use of funds
 - Total project cost stays the same - \$230.5 million

Proposed Funding (in 000s)	STBG	STIP	LPP-F	M2	Total
PA/ED	\$4,473				\$4,473
PS&E			\$7,395	\$7,396	\$14,791
ROW	\$10,595			\$23,593	\$34,188
CON	\$37,289	\$95,338	\$26,000	\$18,403	\$177,030
TOTAL	\$52,357	\$95,338	\$33,395	\$49,392	\$230,482
CHANGE			(\$11,396)	\$11,396	



Recommendation C - Additional Programming

Transit Security and Operations Center Construction Phase - Full Funding Approval Required

Fund Source	Recommended	Previously Approved
Mid-Cycle STIP	\$10.4 million	
LPP-F	\$19.6 million	
Coronavirus Response and Relief Supplement Appropriations Act	\$3.7 million	
SB 1 (Chapter 5, Statutes of 2017) State of Good Repair	\$3.9 million	\$8.5 million
Total Construction:	\$46 million	



Conceptual Drawing of TSOC

Next Steps

Timeframe	2022 STIP Action/Activity
September 2021	Board Consideration
September 2021	Submittal to SCAG for Modeling
December 2021	CTC RTIP Submittal
January 2022	CTC Hearings
February 2022	CTC Hearings and CTC Staff Recommendations
March 2022	CTC approves the 2022 STIP
Late Spring 2022	Report back to OCTA Board

Board – Board of Directors / OCTA – Orange County Transportation Authority / SCAG – Southern California Association of Governments / RTIP – Regional Transportation Improvement Program



September 2, 2021

To: Regional Planning and Highways Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Long-Range Transportation Plan Challenges and Goals

Overview

The Long-Range Transportation Plan provides Orange County's program of projects for the Regional Transportation Plan, prepared by the Southern California Association of Governments. The plan also serves as the policy framework for future transportation investments in Orange County. Over the planning period for the Long-Range Transportation Plan (2019-2045), many challenges have been identified that may influence how transportation facilities, services, and needs evolve. To provide context and guidance for the development of the Long-Range Transportation Plan, these challenges and the proposed goals are presented for review.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA) is preparing the Long-Range Transportation Plan (LRTP) as input into the Southern California Association of Governments' 2024 Regional Transportation Plan and Sustainable Communities Strategy. The LRTP will analyze travel conditions based on a 2045 horizon year, which considers a nine percent growth in population and a 12 percent growth in employment. As a result of this growth, it is expected that travel demand will increase.

OCTA currently has commitments to deliver projects that help manage travel demand and improve system efficiencies. These are being delivered primarily through OC Go and OCTA's public transit services. However, even with these commitments, additional improvements will be needed to help offset the growth in travel demand anticipated by 2045.

Discussion

Many factors influence travel demand and system performance beyond demographic changes and growing populations and OCTA's current Measure M2 (M2) commitments. Several of these factors have been identified as challenges for discussion in the LRTP, and they have been considered in developing the proposed LRTP goals. The challenges were identified after engaging with the OCTA Citizens Advisory Committee (CAC) and OCTA Diverse Community Leaders Group. These challenges, along with the goals, are presented for discussion below.

Growing Traffic and Limited Land

Travel demand will continue to increase with the projected growth in population and employment. Beyond the improvements in Measure M2 which will mitigate some of this growth, limitations on available right-of-way and funding reduce opportunities to add capacity to meet demand. Further, the availability of resources to maintain the added facilities is also a consideration. Therefore, transportation efficiencies will need to be improved. These improvements could include gap closures and chokepoint fixes on freeways and arterials, better access to transit, providing convenient alternatives to driving alone, and better utilization of available capacity.

Evolving Travel Trends

The coronavirus pandemic has influenced travel behavior in many ways, such as increases in the number of people that work from home and use active transportation. However, it will take months or years to collect enough data to understand long-term changes in travel behavior. While this adds uncertainty to predicting future travel conditions, the recent changes to travel behavior may highlight opportunities to advance emerging technologies and services that can help reduce congestion and greenhouse gas (GHG) emissions. This includes the fast-growing popularity of electric bicycles and widespread use of cloud networking that makes remote working more productive and appealing. OCTA is continuously monitoring emerging technologies and services like these to better understand how they may impact transportation. For example, OCTA's 2021 Attitudinal and Awareness survey showed strong support for encouraging work from home strategies to reduce vehicle miles traveled and congestion.

Transit ridership dropped during the pandemic. Furthermore, market shifts that predate the pandemic resulted in nationwide transit ridership declines. This resulted in ridership on OCTA buses falling 37 percent between 2009 and 2019. OCTA initially responded with the OC Bus 360° strategy that focused on redeploying resources in more productive areas and providing services that meet the needs of the traveling public. However, additional strategies will need

to be identified through efforts like the Bus System Restructuring Plan to reverse the declining trend and grow ridership in the future.

Another trend is the increasing number of commuters that travel into or out of Orange County for employment. Between 2009 and 2018, intercounty commutes have increased 20 percent. Commutes coming into Orange County have seen the most growth at approximately 24 percent during the same period. With the projected employment growth (12 percent) outpacing projected housing growth (nine percent), the increase of Orange County employees living in surrounding areas is expected to continue. While the decline in Metrolink ridership during the pandemic on lines serving Orange County (which fell as much as 93 percent) may suggest that many of these employees are able to work remotely, it is difficult to estimate the extent to which remote work options will continue post-pandemic.

Increasing Climate-Related Risks

As documented in the OCTA Rail Defense Against Climate Change Plan, Orange County is at risk of more frequent and/or more intense extreme heat days, wildfires, droughts, coastal floods, and inland floods. These hazards threaten closures and damage Orange County's transportation infrastructure. These events can also create safety hazards for the traveling public.

Similar climate challenges have been recognized throughout California. Over the past 15 to 20 years, the State has put policies in place that have ramped up efforts to reduce GHG emissions. This has resulted in a set of ambitious goals, such as reducing statewide transportation sector GHG emissions to 80 percent below 1990 levels by 2050.

Changing Funding Outlook

Consistent with the state's GHG emissions reduction goals noted above, the California State Transportation Authority recently developed the Climate Action Plan for Transportation Infrastructure (CAPTI). The purpose of CAPTI is to better align investment of state transportation funds with the goals and policies of the State. This means that competitive funding programs managed by the State will begin favoring projects that support reductions in GHG emissions and other state priorities.

Another funding change that requires significant consideration in this LRTP is the sunset of the M2 half-cent local sales tax in 2041. This funding source alone represents nearly a quarter of the total revenues projected in the 2018 LRTP. With this iteration of the LRTP looking out to 2045, the sunset of M2 will present a significant loss of locally controlled funds in the outer years.

Diversity, Equity, and Inclusion

Historically, disadvantaged populations throughout the nation have been disproportionately burdened by transportation inequities that limit access to opportunities. During the past year, there has been a renewed call for transparency regarding diversity, equity, and inclusion, especially in public sector activities, to ensure that the voices of those most in need are heard and meaningfully addressed. While this challenge is not specific to Orange County, there are always opportunities for improvements to watch for that may also align with the 2021 OCTA Board of Directors and Chief Executive Officer Initiatives to provide balanced public transportation options and solutions, and to engage with diverse and disadvantaged communities.

Proposed Goals and Objectives

The overarching goals are consistent with the previous LRTP, while the objectives for achieving those goals respond to the challenges discussed above and are generally consistent with input received through the 2021 Attitudinal and Awareness Survey. Together, the goals and objectives are intended to help guide policy recommendations and investment priorities within the LRTP. Proposed goals and objectives are presented below.

Deliver on Commitments

- Prioritize M2 commitments consistent with the Next 10 Delivery Plan
- Provide safe and reliable transit services

Improve System Performance

- Improve the efficiency of transit, highways, and roadways
- Leverage emerging technologies and services

Expand System Choices

- Support options for single-occupant vehicle trips
- Improve equitable access to key destinations
- Enhance connectivity between travel modes

Support Sustainability

- Identify strategies to address climate-related risks
- Explore opportunities to improve financial sustainability
- Deliver a financially constrained LRTP

It is also important to keep in mind that major travel and trade corridors within Orange County are generally shared by adjacent counties. Implications of intercounty projects and studies within these corridors will be acknowledged and considered in the development of the LRTP.

Ongoing Outreach

Community input is a key factor when developing the proposed strategies and options that will help shape the LRTP. The primary goals are to inform target audiences about transportation options, key issues and challenges, and to gather input. To ensure the study receives input from a broad range of stakeholders and the general public, the engagement program will use both traditional and non-traditional outreach methods. All outreaches will be responsive to public health directives while striving to obtain the greatest level of public involvement possible.

OCTA will seek input from the general public, stakeholders, including the CAC and diversity, equity, and inclusion communities, and elected officials through various tactics that include social media, online surveys, webinars, roundtables, pop-up events, and a community helpline. The first phase of outreach will take place in September 2021 and October 2021. The survey and materials will be provided in Spanish and Vietnamese so that OCTA is inclusive of multiple communities throughout the County.

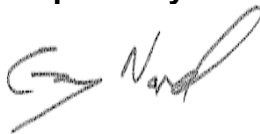
Summary

Travel demand in Orange County is expected to increase with population and employment growth. OCTA transit services, M2, and other committed investments help to address this travel demand. However, additional improvements must be explored to address issues impacting transportation. To help guide policy recommendations and investment priorities within the LRTP that address these issues, a series of goals and objectives are being proposed.

Attachment

None.

Prepared by:



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Approved by:



Kia Mortazavi
Executive Director, Planning
(714) 560-5741

Long-Range Transportation Plan Challenges and Goals



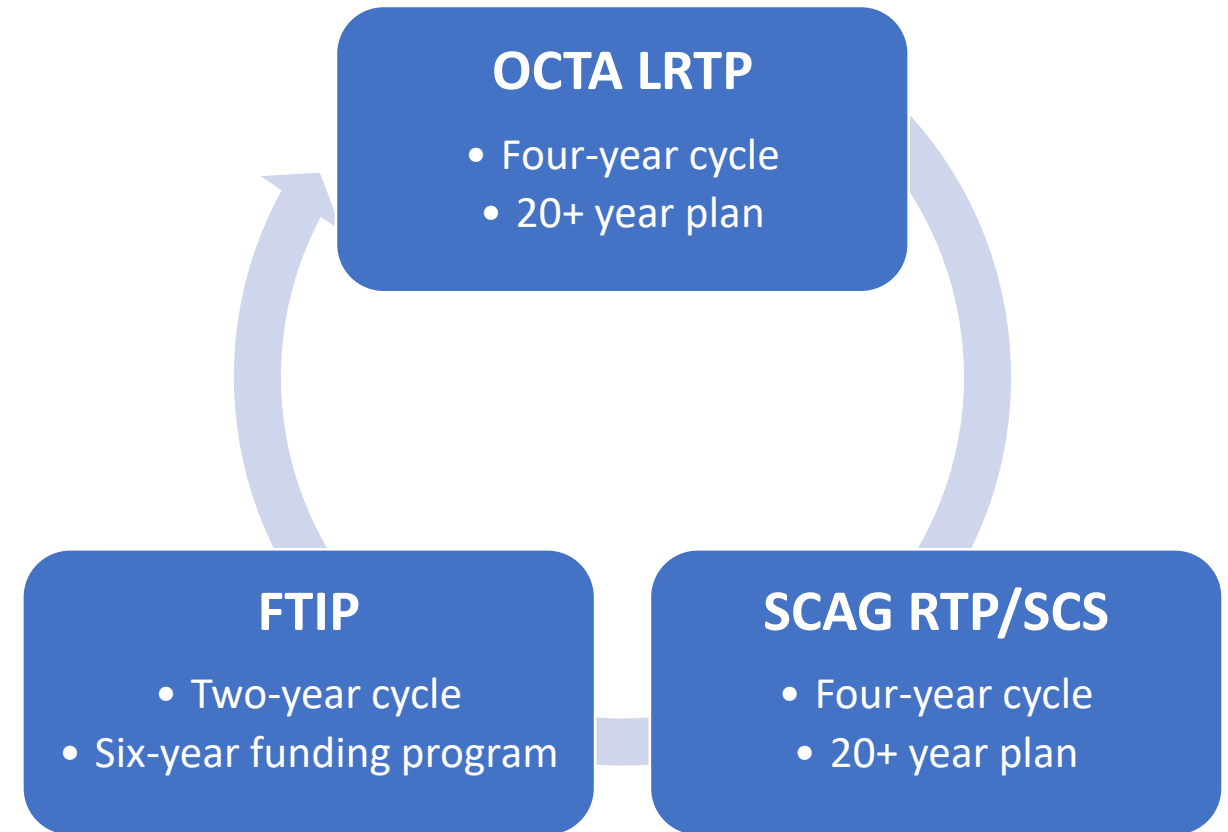
DIRECTIONS 2045

LONG RANGE TRANSPORTATION PLAN

Sustainable, equitable, and innovative transportation solutions.

Long-Range Transportation Plan

- OCTA's LRTP serves to:
 - Evaluate current plans and policies
 - Identify new initiatives and priorities
 - Define projects in the RTP
- Must consider:
 - Stakeholder input
 - Revenue forecasts
 - Current commitments
 - Population/employment forecasts
 - Key challenges



LRTP – Long Range Transportation Plan
OCTA – Orange County Transportation Authority
RTP – Regional Transportation Plan
FTIP – Federal Transportation Improvement Program
SCAG – Southern California Association of Governments
SCS – Sustainable Communities Strategy

Current Commitments

OCTA core functions:

Delivery of Measure M2 (OC Go)



- A total of 2% of the overall OC Go Program funds is allocated to the Environmental Cleanup Program.
- A total of 5% of OC Go Freeway Program funds is allocated to the Freeway Environmental Mitigation Program.

Provide Public Transit



Demographic Growth (2019-2045)

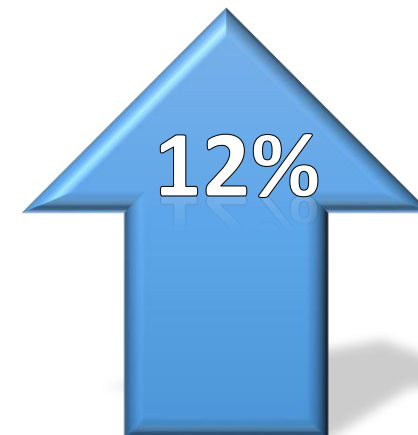
	Population	Housing	Employment
2019	3,250,357	1,057,355	1,760,986
2045	3,534,620	1,154,416	1,980,433
Total Change	+284,263	+97,061	+219,447



Population



Housing



Employment

Key Challenges



Draft Goals and Objectives

Deliver on Commitments

- Prioritize M2 commitments consistent with the Next 10 Delivery Plan
- Provide safe and reliable transit services

Improve System Performance

- Improve efficiency of transit, highways, and roadways
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Support Sustainability

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- Deliver a financially constrained LRTP

Public Engagement

Public Outreach in fall 2021

- Online survey
- Public webinar
- Digital media
- Multilingual outreach
- Pop-ups/community events



Next Steps

Fall 2021

Public outreach

Develop financial forecast

Initiate alternatives development

Winter 2022

Update to the Board of Directors