



**May 11, 2023**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer 

**Subject:** Coordination of Transit Projects with the City of Irvine

### **Overview**

At the September 8, 2022, Transit Committee, a request was made for additional information about prior coordination between the Orange County Transportation Authority and the City of Irvine to plan, fund, and implement past transit improvements in the City of Irvine, including the planned Orange County Maintenance Facility. Staff has prepared an overview of transit projects, services, and agreements executed by both agencies over the past several decades that demonstrate the Orange County Transportation Authority's committed partnership with the City of Irvine.

### **Recommendation**

Direct staff to continue to coordinate with the City of Irvine on transit improvement projects, including the Orange County Maintenance Facility, and return to the Board of Directors for project approvals as necessary.

### **Discussion**

The Orange County Transportation Authority (OCTA) has a long-standing history of partnering with the City of Irvine (City) to plan, fund, and deliver transit services and improvements to benefit the residents, commuters, and visitors that frequent the City daily. Construction of the Orange County Maintenance Facility (OCMF) is one more project in a series of OCTA investments in the City that are intended to enhance transit services in an area that serves one of the busiest Metrolink stations in Orange County. The City has been a cooperative partner in these efforts having taken numerous council actions over the years, such as adopting projects, executing cooperative agreements, accepting fund transfers, and reserving City-owned rights-of-way. These actions have demonstrated the City's shared objective with OCTA to deliver transit improvements in the City.

The following is an overview of completed and planned projects, including OCTA and City-led actions to advance their development. A map of these projects is included in Attachment A. This overview is intended to establish not just the mutual understanding between the two agencies in implementing the respective projects, but also that these projects were intended to complement each other with the mutual goal of accommodating increased transit service in a rapidly growing area of the County. In each of the projects, OCTA made significant investments in City infrastructure based upon the understanding that the City would uphold the terms of its respective agreements.

Building on this long-standing history of delivering projects in the City, there are several projects in the planning stages that OCTA continues to coordinate with the City, including the OCMF project as previously discussed with the OCTA Board of Directors (Board). While there are ongoing discussions occurring between both agencies on projects focused in and around the Irvine Metrolink Station and Great Park development, the likelihood of success for these planning efforts is dependent upon the City continuing to uphold mutual agreements with OCTA.

### Completed Projects

#### Irvine Fixed-Guideway Project/iShuttle

In 1990, California voters approved Proposition 116, the Clean Air and Transportation Improvement Act. The City received an earmark of \$125 million of Proposition 116 funds for the planning and construction of a guideway demonstration project. This project did not move forward, and, in 2009, OCTA and the City entered into an agreement in which the City would transfer remaining Proposition 116 funds to OCTA, in the amount of \$121.3 million. OCTA used the remaining Proposition 116 funds for a series of commuter rail improvements to support the expansion of Metrolink service. OCTA credited the City the same amount against the City's local match requirements for projects submitted by the City and approved by the Board under Measure M2 transit Projects S, T, and V. The credit is equal to the amount of Proposition 116 funds made available to OCTA. This arrangement relieved the City from the Proposition 116 requirement to provide dollar-for-dollar matching funds to access the funding.

Subsequently, in 2010, the City shifted its focus toward implementation of the new iShuttle service, a rubber-tired transit system connecting Metrolink stations to business centers within the City. As part of a new agreement, OCTA agreed to exchange the \$121.3 million in match credit for actual funding that the City could use for the iShuttle system, subject to specific provisions within the agreement. Each year, OCTA determines the fund source to be provided to the

City for the iShuttle, and this amount is subject to approval through OCTA's budget process. To date, OCTA has allocated approximately \$32 million to the City, and the remaining balance is \$89.3 million.

#### Operation of the iShuttle Service

Prior to 2016, the City managed and operated the iShuttle. An analysis in 2016 showed that when comparing the City's operating cost for the service to the estimated cost, the City could realize significant and ongoing savings if OCTA operated the service. As a result, the City requested, and OCTA agreed, to operate the iShuttle service on behalf of the City. The shift of iShuttle operations to OCTA resulted in significant savings to the City that could be used to deliver more service. At the same time, OCTA was able to better integrate the service with existing bus and rail services to deliver a more seamless transit experience.

#### Purchase and Sale Agreement for the 21.3-Acre Rail Maintenance Facility Site

Located south of the Great Park adjacent to the railroad tracks is a 21.3-acre parcel of land that was identified in 2003 in the City's Great Park Environmental Impact Report as the site for a future Metrolink maintenance facility. In 2010, the OCTA Board and City Council approved a funding term sheet for the Sand Canyon Grade Separation project, that included the following provisions related to the 21.3-acre site:

- The City to reserve 21.3 acres for the rail maintenance facility with a 15-year option for OCTA to purchase the property. Within the first four years OCTA may purchase the property at the current appraised value.
- OCTA to provide the City with 1.34 acres of the maintenance-of-way (MOW) facility property needed for the project and approximately four acres for relocation of the MOW facility.
- Credit to OCTA for the appraisal value of the MOW facility property against the purchase of the rail maintenance yard.

OCTA initiated the purchase process in late 2012, and in 2015, the purchase and sale agreement was approved by the City Council for the 21.3-acre site for \$14.1 million. OCTA waived any claim that it is exempt from the City's Zoning Code requirements and agreed to abide by the City's land-use authority. Also in 2015, the City Council approved Planning Area 51, which included the 21.3-acre site, in the City's general plan and designated the site for institutional use.

#### Sand Canyon Grade Separation

Located approximately one mile from the 21.3-acre site, the Sand Canyon Avenue Railroad Grade Separation project (Project) lowered Sand Canyon Avenue

under the railroad tracks and widened the City's roadway from four to six lanes. The newly constructed bridge was designed to improve safety and mobility for the traveling public and railroad operations. Retaining walls, landscaping, and relocation of the Walnut Bike Trail were also project features.

The funding term sheet for this Project was approved by the OCTA Board in 2010 and identified roles and responsibilities for the implementation of the Project. The City was the lead for project planning and design; however, after the City encountered challenges with another grade separation project, the City requested OCTA's assistance with project funding and delivery. It was agreed that based on its successful implementation of the OC Bridges program and its relationship with partnering agencies, OCTA should assume the responsibility for construction of the Project, which commenced in 2011.

The funding agreement also cited the cooperation between OCTA, City, and County in determining a location for a future 21.3-acre Metrolink Rail Maintenance Facility within the City, adjacent to the Great Park property as discussed earlier. The City Council approved the funding term sheet and cooperative agreement in 2010 to implement the funding agreement for the Project. The funding consisted of 76 percent in regional funds provided via OCTA and 24 percent in local funds for a total of \$62.1 million. The Sand Canyon railroad grade separation opened in 2014.

#### Irvine Metrolink Station Parking Structure

Located approximately 1.3 miles from the 21.3-acre site, the Irvine Metrolink Station opened in 1990. As the station grew to become the second busiest station in Orange County, a 1,500-space parking structure was built to meet the growing parking demand and to accommodate future growth. In 2003, OCTA and the City entered into a cooperative agreement for the design and construction of the parking structure. The City was the lead on the construction of the project. OCTA secured \$26.8 million in state and federal funding for the project, and in 2008 the parking structure was opened to the public.

#### Planned Projects

##### OCMF

In 2018, Metrolink approved the Southern California Optimized Rail Expansion (SCORE) Program, a \$10 billion capital program that includes grade crossing, station, and signal improvements as well as track additions across five counties. SCORE aims to improve accessibility for Southern California's growing population, accelerate Metrolink's goal towards a zero-emissions future and prepare for the millions of tourists, workers, and residents expected to participate

in the 2028 Olympics and Paralympics. To date, Metrolink has raised approximately \$2.4 billion of the \$10 billion funding goal. Two key SCORE projects are in the City including the OCMF and Irvine Station Improvement Project.

Utilizing the 21.3-acre site purchased by OCTA in 2015, OCTA is underway with environmental clearance of the OCMF. The initial phase of the project is funded with a state grant to support expanded use of rail over automobiles as Orange County prepares for future growth. The OCMF will include train storage tracks, locomotive and car service platforms, and a service building. Service platforms will include facilities for inspection, fueling and sanding, and interior and exterior car cleaning. OCMF will allow for greater efficiency of train service with more localized light maintenance services. This is pertinent because the City's daytime population nearly doubles from those commuting to work in the City. Having reliable and frequent train service is key to managing the related transportation demand and associated environmental impacts from those daily commuters.

In 2018, OCTA filed, and the City approved, a use permit for a temporary storage facility, which allowed OCTA and Metrolink to build a storage track on the 21.3-acre site. Metrolink began construction of the storage track in 2018, and it was recently completed and commissioned into service on February 16, 2023. In 2021, the City accepted an initial conditional use permit submittal from OCTA and provided written comments to the administrative draft of the Initial Study/Mitigated Negative Declaration, which OCTA accepted prior to releasing the document for public review. In 2022, the City submitted a letter to OCTA expressing their significant concerns with the project's environmental analysis and stated that the project is not compatible with current land-use designations. Most concerning, the City also cited reservations as to whether a conditional use permit, zone change, or general plan amendment for the project would receive the necessary approval to advance the project.

#### Irvine Metrolink Station Improvement Project

Another SCORE project is a plan to construct additional tracks and additional/expanded platforms at the Irvine Metrolink Station, including replacing the pedestrian bridge and elevators with a new pedestrian underpass, respacing railroad signals, and constructing new railroad bridges and retaining walls.

In 2022 environmental clearance commenced for the Irvine Metrolink Station Improvement project, and OCTA is currently evaluating alternatives and preparing environmental studies.

### Marine Way and Ada Grade Separations

To enhance access to the Great Park development, the City initiated a plan to extend Marine Way and Ada across the railroad tracks with grade separations on both sides of the Irvine Metrolink Station. In 2021, ten percent design plans for both grade separations were submitted to OCTA for technical review. In 2022, 30 percent of design plans for the Marine Way grade separation were submitted to OCTA. The City decided to proceed only with Marine Way and to hold off further design of Ada until a future date.

### Marine Way Realignment

To facilitate development in and around the Great Park, the City has plans to realign Marine Way to connect directly with the northbound Interstate 5 on- and off-ramp at Sand Canyon Avenue. This realignment has significant impacts to OCTA's Sand Canyon Bus Base, including the need for partial acquisition by the City and it requires significant reconfiguration of base facilities and operations.

In 2015, a memorandum of understanding (MOU) between OCTA and the City was executed to identify OCTA's intent to cooperate with the City in the City's potential purchase of a portion of the base in accordance with the terms of the MOU. The MOU expired in 2018, as the City took additional time to address several other issues, including Great Park development needs, cumulative impacts of the Great Park development, the proposed development of the nearby 100-acre parcel owned by the County, and the inability to mitigate additional impacts to the OCTA bus base that emerged from the more detailed roadway design work. After several years of stalled project activities due to completing Great Park developer priorities, the City took over coordination of the project from Five Point Development in 2022. Subsequently, the City has requested that OCTA and the California Department of Transportation reengage in project coordination discussions.

### Next Steps

OCTA has a long-standing history of partnering with the City on transit projects and supporting their initiatives as evident in the overview of completed and planned projects. As the regional transportation provider, OCTA has a responsibility to meet regional transportation needs, providing the associated air-quality and other environmental benefits, and works to balance those efforts with local priorities. Staff is seeking Board approval to continue to coordinate with the City on transit improvement projects, including the OCMF project. Staff will return to the Board with project approvals needed, including an overview of planned outreach activities, to advance the OCMF project in partnership with the City.

**Summary**

An overview of projects that OCTA has partnered with the City on is presented for the Board's review. Staff are seeking Board direction to continue to coordinate with the City on transit improvement projects, including the OCMF project.

**Attachment**

- A. Map of Planned/Completed Projects in the City of Irvine

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