



**October 7, 2019**

**To:** Regional Planning and Highways  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** South County Traffic Relief Effort Update

### **Overview**

The Transportation Corridor Agencies are in the process of studying toll road expansion options in south Orange County through the South County Traffic Relief Effort. This process has included public meetings, a screening report, a project initiation document, and preparation for environmental analysis. The following discussion highlights the history of the process, the current approach by the Transportation Corridor Agencies, and key points that staff intend to focus on as the South County Traffic Relief Effort moves into the environmental phase.

### **Recommendation**

Receive and file as an information item.

### **Background**

The Orange County Transportation Authority (OCTA) finalized the South Orange County Major Investment Study (SOCMIS) in 2008. Since that time, most of the recommendations from the SOCMIS locally preferred strategy have been implemented or are underway, including the recently completed Interstate 5 (I-5) carpool lanes between San Juan Creek Road and Avenida Pico.

There have also been significant changes since 2008 within south Orange County including development pattern changes, bus service reductions, elimination of the proposed State Route 241 (SR-241) Green Alignment extension (assumed in the SOCMIS baseline scenario), and the opening of Los Patrones Parkway as a north-south local arterial within right-of-way previously reserved for the SR-241 extension. In response to these changes, along with a need to align projects to compete for funding programs (i.e., the Solutions for Congested Corridors Program), OCTA is initiating a two-year South Orange County Multimodal Transportation Study as an update to SOCMIS.

As noted above, one of the most significant changes since SOCMIS is the elimination of the Green Alignment. This occurred in 2016 through a settlement agreement between the Transportation Corridor Agencies (TCA), the State Attorney General, and a coalition of environmental groups. TCA has since been seeking other options to expand its toll road network. These efforts have led to the development of the South County Traffic Relief Effort Project Study Report-Project Development Support (PSR-PDS), and TCA, in cooperation with the California Department of Transportation (Caltrans) is preparing to initiate the environmental phase to conduct more detailed studies.

The efforts leading up to the environmental phase have raised concerns with OCTA, as documented in attachments A, B, C, and D. These concerns generally focus on a lack of meaningful stakeholder coordination, questionable technical analyses, and conflicts with Measure M2 and other improvements planned by OCTA. The following discussion outlines the upcoming environmental phase being led by TCA and Caltrans, District 12.

### ***Discussion***

TCA and Caltrans intend to submit a Notice of Intent/Notice of Preparation (NOI/NOP) in November 2019, which will initiate the scoping period for the environmental phase. This includes a public comment period that is currently being scheduled for approximately 45 days. The scoping period is primarily used to define the set of alternatives that will undergo detailed technical study and environmental analysis. The current set of alternatives include the concepts identified in TCA's PSR-PDS document that was approved by Caltrans, District 12 in May 2019.

Through development of the PSR-PDS, TCA screened an initial set of 20 "ideas" down to a set of seven that were analyzed in the PSR-PDS. An additional concept (idea 21) was added by the TCA Board of Directors after the initial screening, bringing the total to eight ideas that were analyzed in the PSR-PDS. A map of the eight ideas from the PSR-PDS is provided in Attachment E.

A key element of any PSR-PDS is the Purpose and Need Statement, which identifies a specific deficiency and describes desired objectives. The Purpose and Need Statement from TCA's final PSR-PDS is as follows.

### **Purpose**

*The purpose and fundamental objectives of the project are to materially improve north-south regional mobility in South Orange County and accommodate*

*regional travel demand in a manner that promotes the supporting objectives related to mobility in South Orange County:*

- *Improve regional mobility by reducing congestion on I-5 during peak commuting hours and weekends,*
- *Provide additional north-south capacity in case of traffic incidents on I-5*
- *Enhance bike and pedestrian opportunities.*

*The project would also provide additional north-south capacity that would benefit potential evacuations in case of emergencies.*

### Need

*Transportation infrastructure improvements are necessary to address the existing and future deficiencies for north-south regional mobility in South Orange County. Roadway deficiencies and mobility limitations in South Orange County are described below:*

- *Demand approaches or exceeds capacity on I-5 during peak commuting hours and weekends,*
- *The lack of redundant north-south capacity increases congestion during traffic incidents on I-5,*
- *Additional bike and pedestrian facilities are needed to connect highways with local sidewalks and bikeways, consistent with Caltrans' Sustainability Implementation Action Plan (2016).*

*In addition, lack of sufficient north-south regional mobility impairs potential evacuations in case of emergencies such as wildfires, major storms, or other disasters.*

A key concern raised by OCTA, as noted in attachments C and D, is that TCA and Caltrans developed the Purpose and Need Statement largely without involvement from the project development team (PDT). This approach is inconsistent with the Caltrans Project Development Procedures Manual (PDPM), which states, "The PDT, in conjunction with the project sponsors and key stakeholders, must develop the Purpose and Need Statement."

The reluctance to engage the PDT in the early PSR-PDS stages continues to be concerning because according to the Caltrans PDPM, "The Purpose and Need Statement shall remain consistent through the entire project development phase." Therefore, this statement will continue to play an important role as a final set of alternatives is identified for analysis in the environmental phase.

TCA and Caltrans have also identified four new concepts ahead of the scoping period that will be compared against the Purpose and Need Statement.

One is an extension of Los Patrones Parkway, consistent with the concept being explored by the County of Orange (Attachment F). At this time, it is not clear if the extension would be tolled, but the likelihood is strong given the TCA settlement agreement indicates that TCA intends to pursue an SR-241 extension project. The other three propose to add capacity on I-5 as follows (Attachment G):

- Add one carpool lane in each direction from Avenida Pico to Basilone Road,
- Add two high-occupancy toll lanes in each direction from Avenida Pico to Basilone Road,
- Add two high-occupancy toll lanes in each direction from State Route 73 to Basilone Road.

The first of the three I-5 concepts listed above is nearly identical to the I-5 carpool lane completion project that has been studied and planned for by OCTA since the development of SOCMIS. More recently, OCTA developed a PSR-PDS in coordination with Caltrans District 12, TCA, the City of San Clemente, and the San Diego Association of Governments. Caltrans ultimately declined to finalize this PSR-PDS stating that they did not want to finalize two PSR-PDS documents in the same area.

If the newly proposed concepts are included, TCA and Caltrans will begin the scoping period with a total of 12 alternatives. Several alternatives would impact recently completed or ongoing projects. These include the recently completed and Measure M-funded carpool lanes on I-5 from Pacific Coast Highway to Avenida Pico, the Measure M-funded construction currently underway on I-5 from El Toro Road to Avery Parkway, the aforementioned I-5 carpool lane completion project, as well as the recently constructed Los Patrones Parkway. These conflict concerns have been raised by OCTA throughout the South County Traffic Relief Effort process.

To engage the public in the scoping process, TCA and Caltrans are planning for two public meetings, with dates and venues forthcoming. TCA and OCTA will coordinate on outreach to clearly delineate the South County Traffic Relief Effort from OCTA activities in south Orange County. OCTA staff will also attend the

public scoping meetings and will likely submit written comments that are consistent with previous comments and encourage the following planning principles:

- Consider multimodal solutions,
- Use standard practices and methods,
- Honor Measure M commitments,
- Acknowledge future change,
- Ensure transparency,
- Respect community input.

TCA and Caltrans expect to conclude the public comment period by the end of 2019. Input received during this time will be used to further screen the alternatives through spring 2020. A final set of alternatives is then expected by mid-2020. Should any I-5 capacity enhancements be recommended for analysis beyond the scoping period, TCA agreed that they will not proceed without consensus from OCTA (Attachment H). Once the alternatives are selected, technical analysis of the alternatives will proceed, lasting approximately two years. In turn, the analysis will be followed by development of the environmental impact report/environmental impact statement, which is currently anticipated to be finalized by fall 2025.

### ***Summary***

TCA and Caltrans have finalized the South County Traffic Relief Effort PSR-PDS and are now preparing to release an NOI/NOP in November 2019 to begin the environmental phase. The NOI/NOP signals the start of the scoping period, where improvement concepts will be considered and screened to identify a final set of alternatives to be analyzed in detail. Altogether, the environmental phase is expected to take approximately six years, completing in fall 2025. OCTA staff intends to be engaged throughout the entirety of this process.

***Attachments***

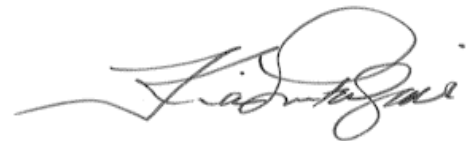
- A. Letter to Michael Kraman, Chief Executive Officer, Transportation Corridor Agencies, from Darrell Johnson, Chief Executive Officer, Orange County Transportation Authority, dated March 2, 2017
- B. Letter to Mike Chesney, Strategic Planning Officer, Transportation Corridor Agencies, from Kurt Brotcke, Director, Strategic Planning, Orange County Transportation Authority, dated February 20, 2018
- C. Letter to David Speirs, Project Director, Corridor Management Group, Transportation Corridor Agencies, from Greg Nord, Section Manager, Long-Range Planning and Corridor Studies, Orange County Transportation Authority, dated April 17, 2018
- D. Letter to David Speirs, Project Manager, Corridor Management Group, Transportation Corridor Agencies from Greg Nord, Section Manager, Long-Range Planning and Corridor Studies, Orange County Transportation Authority, South County Traffic Relief Effort Draft Project Study Report-Project Development Support, dated July 26, 2018
- E. South Orange County Traffic Relief Effort Alternatives Map
- F. Los Patrones Parkway Extension – Working Draft Map
- G. I-5 Managed Lane Options – Working Draft Map
- H. Letter to Darrell Johnson, Chief Executive Officer, Orange County Transportation Authority, from Michael A. Kraman, Chief Executive Officer, Transportation Corridor Agencies, dated November 7, 2018

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