



# **Orange County Transportation Authority**

## **Legislative and Communications Committee Agenda**

### **Thursday, October 17, 2024 at 9:00 a.m.**

Board Room, 550 South Main Street, Orange, California

#### **Committee Members**

Donald P. Wagner, Chair  
Katrina Foley, Vice Chair  
Jon Dumitru  
Fred Jung  
Tam T. Nguyen  
Mark Tettemer

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

#### **Agenda Descriptions**

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

#### **Public Availability of Agenda Materials**

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

#### **Meeting Access and Public Comments on Agenda Items**

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

#### **In-Person Comment**

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

# LEGISLATIVE AND COMMUNICATIONS COMMITTEE MEETING AGENDA

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## Written Comment

Written public comments may also be submitted by emailing them to ClerkOffice@octa.net, and must be sent by 5:00 p.m. the day prior to the meeting. If you wish to comment on a specific agenda item, please identify the item number in your email. All public comments that are timely received will be part of the public record and distributed to the Board. Public comments will be made available to the public upon request.

## Call to Order

## Pledge of Allegiance

Director Dumitru

## Closed Session

There are no Closed Session items scheduled.

## Special Calendar

### 1. Conference Call with State Legislative Advocate Moira Topp

Moira Topp/Kristin Jacinto

#### **Overview**

An update of legislative items in Sacramento will be provided.

## Consent Calendar (Items 2 through 5)

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

### 2. Approval of Minutes

Clerk of the Board

#### **Recommendation(s)**

Approve the minutes of the September 19, 2024 Legislative and Communications Committee meeting.

#### **Attachments:**

[Minutes](#)

### 3. Performance Evaluation of Federal Legislative Advocate, Potomac Partners, DC

Kristin Jacinto

#### **Overview**

The firm Potomac Partners, DC provides federal legislative advocacy services for the Orange County Transportation Authority in Washington, D.C. A staff evaluation of the services provided this session is presented to the Board of Directors for consideration and further comment.

#### **Recommendation(s)**

Receive and file the staff evaluation of the federal advocacy services of Potomac Partners, DC as an information item and provide any additional comments.

## LEGISLATIVE AND COMMUNICATIONS COMMITTEE MEETING AGENDA

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***Attachments:***

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

**4. Performance Evaluation of State Legislative Advocate, Topp Strategies**

Kristin Jacinto

***Overview***

The firm Topp Strategies provides state legislative advocacy services for the Orange County Transportation Authority. A staff evaluation of the services provided during this legislative session is presented to the Board of Directors for consideration and further comment.

***Recommendation(s)***

Receive and file the staff evaluation of the state advocacy services of Topp Strategies as an information item and provide any additional comments.

***Attachments:***

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

**5. Agreement for 2026 Long-Range Transportation Plan Public Outreach Consultant Services**

Marissa Espino/Maggie McJilton

***Overview***

On June 20, 2024, the Orange County Transportation Authority released a request for proposals for public outreach services to support the upcoming 2026 Long-Range Transportation Plan. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.

***Recommendation(s)***

- A. Approve the selection of Arellano Associates, LLC, as the firm to provide public outreach services for the 2026 Long-Range Transportation Plan.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2295 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$350,000, for a two-year initial term with one, one-year option term, to provide public outreach services for the 2026 Long-Range Transportation Plan.

***Attachments:***

## LEGISLATIVE AND COMMUNICATIONS COMMITTEE MEETING AGENDA

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[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

### Regular Calendar

#### 6. Draft 2025-26 State and Federal Legislative Platforms

Alexis Carter/Kristin Jacinto

##### **Overview**

Every two years, staff conducts a comprehensive review of the Orange County Transportation Authority's Legislative Platforms to ensure updates are provided on relevant issues that are anticipated to be of discussion for the upcoming legislative sessions. Following extensive stakeholder outreach, initial draft revisions to the Orange County Transportation Authority's 2025-26 State and Federal Legislative Platforms have been prepared for consideration by the Orange County Transportation Authority Board of Directors. Before a final draft is considered for adoption, these drafts will be revised as a result of feedback from the Orange County Transportation Authority Board of Directors and stakeholder input.

##### **Recommendation(s)**

Direct staff to move forward with the recommended revisions to the draft 2025-26 Orange County Transportation Authority State and Federal Legislative Platforms and incorporate any feedback from the Orange County Transportation Authority Board of Directors, returning to the Board of Directors for final adoption at a later date.

##### **Attachments:**

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Attachment D](#)

#### 7. Diversity Outreach Update

Ted P. Nguyen/Maggie McJilton

##### **Overview**

The Orange County Transportation Authority continues to broaden its outreach efforts to engage Orange County's diverse populations through multilingual communications and targeted outreach. These efforts help position the agency as a trusted and responsive institution in Orange County. This report offers an annual update on the progress of outreach activities designed to serve the needs of diverse and hard-to-reach communities.

##### **Recommendation**

Receive and file as an information item.

## LEGISLATIVE AND COMMUNICATIONS COMMITTEE MEETING AGENDA

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### ***Attachments:***

[Staff Report](#)

[Presentation](#)

### **Discussion Items**

8. **Public Comments**

9. **Chief Executive Officer's Report**

10. **Committee Members' Reports**

11. **Adjournment**

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

**9:00 a.m. on Thursday, November 21, 2024**

OCTA Headquarters

Board Room

550 South Main Street

Orange, California



**Committee Members Present**

Donald P. Wagner, Chair  
Jon Dumitru  
Fred Jung  
Tam T. Nguyen

**Staff Present**

Darrell E. Johnson, Chief Executive Officer  
Jennifer L. Bergener, Deputy Chief Executive Officer  
Sahara Meisenheimer, Clerk of the Board Specialist  
Gina Ramirez, Assistant Clerk of the Board  
James Donich, General Counsel  
OCTA Staff

**Committee Members Absent**

Katrina Foley, Vice Chair  
Mark Tettemer

**Call to Order**

The September 19, 2024, regular meeting of the Legislative and Communications Committee was called to order by Committee Chair Wagner at 9:02 a.m.

**Closed Session**

There were no Closed Session items scheduled.

**Special Calendar**

**1. Conference Call with State Legislative Advocate Moira Topp**

Moira Topp, State Legislative Advocate, provided an update on this item.

No action was taken on this item.

**Consent Calendar (Items 2 and 3)**

**2. Approval of Minutes**

A motion was made by Director Jung, seconded by Director Nguyen, and declared passed by those present to approve the minutes of the July 18, 2024 Legislative and Communications Committee Meeting.

**3. Amendment to Agreement for Public Outreach Services for the OC Streetcar Project**

This item did not pass by the Members present. The vote was 2-2.

Directors Dumitru and Wagner voted in opposition.



**4. Amendment to Agreement for Website Maintenance Support Services**

A motion was made by Director Jung, seconded by Director Nguyen, and declared passed by those present to authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Agreement No. C-0-2524 between the Orange County Transportation Authority and Web Advanced to exercise the option term in the amount of \$675,000 to continue providing website maintenance support services, effective December 1, 2024, through November 30, 2027. This will increase the maximum obligation of the agreement to a total contract value of \$1,575,000.

**Regular Calendar**

**5. State Legislative Status Report**

Kristin Jacinto, Interim Executive Director of Government Relations, provided a report on this item.

No action was taken on this receive and file information item.

**6. Federal Legislative Status Report**

Alexis Carter, Government Relations Representative, provided a report on this item.

No action was taken on this receive and file information item.

**Discussion Items**

**7. Public Comments**

There were no public comments received.

**8. Chief Executive Officer's Report**

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

- Mobility 21 annual Southern California Transportation Summit will take place at the Disneyland Hotel tomorrow.
- The Orange County Transportation Authority will host the American Public Transportation Association TRANSform Conference from September 29 – October 2 in Anaheim.
- After 33 years of service, today is Alice Rogan's, Director of Marketing and Public Outreach, last day.



**9. Committee Members' Reports**

There were no Committee Members' reports.

**10. Adjournment**

The meeting adjourned at 9:30 a.m.

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

**9:00 a.m. on Thursday, October 17, 2024**

OCTA Headquarters

Board Room

550 South Main Street

Orange, California

ATTEST

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Sahara Meisenheimer  
Clerk of the Board Specialist





**October 17, 2024**

**To:** Legislative and Communications Committee

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

**Subject:** Performance Evaluation of Federal Legislative Advocate, Potomac Partners, DC

### **Overview**

The firm Potomac Partners, DC provides federal legislative advocacy services for the Orange County Transportation Authority in Washington, D.C. A staff evaluation of the services provided this session is presented to the Board of Directors for consideration and further comment.

### **Recommendation**

Receive and file the staff evaluation of the federal advocacy services of Potomac Partners, DC as an information item and provide any additional comments.

### **Background**

Since 2003, the Orange County Transportation Authority (OCTA) has contracted with Potomac Partners, DC (PPDC) for federal legislative advocacy services. On October 22, 2018, the OCTA Board of Directors (Board) approved a contract with PPDC to provide federal advocacy and consulting services for an initial term of two years through December 31, 2020, with two, two-year option terms. On June 22, 2020, the Board exercised the first two-year option term, which expired on December 31, 2022. Most recently, on July 25, 2022, the Board exercised the second two-year option which took effect on January 1, 2023, and will expire on December 31, 2024. The federal legislative advocacy and consulting services provided by PPDC are led by Richard Alcalde, Daniel Feliz, and Adam Cross.

### **Discussion**

The evaluation of federal legislative advocacy services covers major issues addressed and general services provided by PPDC, mirroring the process also used to evaluate the state legislative advocacy services. Staff's evaluation of

the services provided by PPDC is included in Attachment A. The major issues and general services provided by PPDC have been evaluated based on effort and outcome using a rating of excellent, very good, good, fair, or poor.

Staff has rated PPDC's efforts overall as "very good" based on responsiveness, advancing OCTA's positions and policies, and assisting in building cooperative bipartisan relationships with members of Congress and the Administration. Staff has rated PPDC's outcomes overall as "very good" based on the outcomes of the issues discussed.

To assist the Board in fully evaluating PPDC, the federal legislative advocate's current scope of work is included as Attachment B.

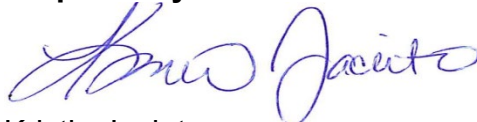
### ***Summary***

An evaluation of federal legislative advocacy services performed by Potomac Partners, DC is presented to the Board of Directors for information and further comment.

### ***Attachments***

- A.     Staff Evaluation of Services Provided by Potomac Partners, DC for 2024
- B.     Scope of Work Federal Legislative Advocates

**Prepared by:**



Kristin Jacinto  
Executive Director,  
Government Relations  
(714) 560-5754

**Staff Evaluation of Services Provided by  
Potomac Partners, DC for 2024**

The following narrative provides specific information with respect to major issues addressed by Potomac Partners, DC (PPDC) as the Orange County Transportation Authority's (OCTA) primary federal legislative advocate for 2024. Each issue has been evaluated based on effort and outcome using a rating of excellent, very good, good, fair, or poor.

**Appropriations and Grant Funding Opportunities**

*Effort: Excellent; Outcome: Good*

Both the House and Senate continued to entertain requests for earmarks this year, rebranded as “community project funding” (CPF) requests in the House and “congressionally directed spending” (CDS) requests in the Senate. Subject to added transparency requirements and limitations on overall amounts a member could request, PPDC ensured OCTA projects and programs were included. In the final fiscal year (FY) 2024 appropriations bill, OCTA received almost \$11 million in earmarks for projects including the Orange County (OC) Loop, the State Route 91 Project and the Coastal Rail Corridor Relocation Study. For FY 2025, PPDC worked equally diligently to submit several OCTA proposals, and successfully ensured these proposals were included in draft FY 2025 appropriations bills. This includes funding for the Interstate 5 Improvement Project and the Katella bridge. While an appropriations bill has yet to be passed, the fact that PPDC was able to get these projects included in the draft omnibus bill demonstrates a high potential for successful inclusion in the final FY 2025 appropriations bill.

Related to discretionary grants, PPDC again led efforts to secure support from delegation members for projects pursued by OCTA. This included projects for several programs authorized by the Infrastructure Investment and Jobs Act, including the National Infrastructure Project Assistance Program and the National Significant Multimodal Freight and Highway Projects program. The bulk of the applications submitted this year were to address immediate risks along the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor.

PPDC also worked to garner support for a joint application between OCTA and the Los Angeles Metropolitan County Transportation Authority for funding under the Environmental Protection Agency (EPA) Climate Pollution Reduction Grant. Ultimately, this request was not funded, with EPA instead selecting a \$500 million application submitted by the South Coast Air Quality Management District (SCAQMD). It is currently unclear if OCTA will be a beneficiary of those funds, with it expected that SCAQMD will distribute the funding regionally via a competitive process. OCTA will coordinate with regional partners to inform this process.

## **OCTA Policy Engagement**

*Effort: Very Good; Outcome: Very Good*

One of the most significant risks to transportation funding this year was pending action by the EPA to disapprove air quality plans for the SCAQMD area. This disapproval had the potential to lead to significant sanctions, including the withholding of transportation funding for agencies in the region. PPDC was consistently at the table during these conversations, providing key information to those leading negotiations on this topic, including Senator Alex Padilla (D-CA) and Representative Pete Aguilar (D-San Bernardino). Ultimately, agreement was reached between EPA, SCAQMD and others which prevented sanctions. However, going forward, if the conditions of this agreement are unable to be fulfilled or if a new Administration changes policies, the threat to transportation funding could again be present.

PPDC also helped inform efforts by OCTA to streamline protections for the LOSSAN Rail Corridor, including obtaining letters from both Representative Mike Levin (D-Oceanside) and Representative Katie Porter (D-Irvine) seeking an expediting permitting process by the United States Army Corps of Engineers. While this process is still being discussed, these efforts led to greater attention to this issue and heightened scrutiny to processes that could be used to expedite permits.

A variety of other issues were informed by PPDC this year including funding and regulatory reform efforts to prepare for the 2028 Olympics in Los Angeles, insight into the future of Buy America Bond subsidies, and the continuation of the Alternative Fuel Tax Credit for transit agencies. It is expected these policy issues will continue into the next session of Congress.

## **General Services**

*Effort: Very Good; Outcome: Very Good*

IN 2024, PPDC was again successful in securing necessary meetings requested by OCTA to advance policy priorities. This included meetings with Orange County delegation offices to discuss project submittals for CPF and CDS requests. These meetings allowed OCTA to discuss upcoming projects and align each delegation member's priorities with funding requests. This also helped lay the foundation for any requests that may be submitted in 2025.

Further, as work continued to advance project delivery to protect the LOSSAN Corridor, PPDC not only secured meetings with relevant delegation offices to discuss strategies for advancing funding and construction, but also assisted in securing support letters, briefed congressional leadership on project and funding status, and helped navigate regulatory challenges.

PPDC continued work to keep relevant offices and staff in DC apprised of OCTA projects and priorities, including the Interstate 405 Improvement Project, OC Streetcar and the Innovative Clean Transit Regulation. Coordinated messaging with Metrolink

was also made via PPDC to advance policies related to the In-Use Locomotive regulation and need for sustainable rail operating funds.

PPDC also worked on several other issues on behalf of OCTA including promptly responding to questions from federal delegation members and advising on new policy proposals. This included participating in meetings requested by Orange County delegation staff and in tracking policy proposals by transportation advocacy groups.

### **Overall Rating**

*Effort: Very Good; Outcome: Very Good*

PPDC's efforts overall are rated as very good based on responsiveness, time dedicated to advocating for and advancing of OCTA's positions and policies, timeliness of information, assisting in building cooperative relationships with Congress and members of the Administration, and availability. PPDC's outcomes overall are rated as very good based on the outcomes of the issues discussed.

**SCOPE OF WORK  
FEDERAL LEGISLATIVE ADVOCATES**

**I. General**

The Orange County Transportation Authority (OCTA) is seeking a federal legislative advocate team (Consultant) to address a series of issues described in and will be organized around the federal goals and objectives of the OCTA Legislative Platform. The primary issues and objectives are summarized as follows:

1. Secure a stable and reliable long-term transportation reauthorization bill, and annual appropriations bills in accordance with current Legislative Platform and Board of Directors (Board)-approved project requests.
2. Advocate at the Congressional and Executive Branch levels for federal funding for OCTA capital projects, including fixed-guideway projects.
3. Advocate on behalf of OCTA's position on Goods Movement.
4. Seek to maximize funding for all OCTA modal programs, but especially restoration of a well-funded bus discretionary program, in the next transportation reauthorization bill.
5. Seek to streamline and accelerate the delivery of federally funded projects with minimal federal requirements.
6. Advocate for funding of compliance costs for any new federally mandated requirements.
7. Advocate for federal intercity passenger rail funding in the San Luis Obispo - Los Angeles - San Diego Rail Corridor.

**II. Coalition Activities**

The Consultant shall build and sustain a strong federal coalition in support of OCTA.

**1. OCTA Legislative Platform**

- 1.1 Provide input to and implement OCTA-developed funding strategies for transportation projects described in the Information and Issues discussion and Legislative Platform, including bus, highway, intelligent transportation systems projects, and any other projects which may be appropriate to achieve OCTA legislative goals.

1.2 Recommend appropriate activities for OCTA Board Members and local elected officials at various stages of the legislative process.

1.3 Provide general political and advocacy advice to OCTA.

## 2. Legislation, Regulations, and Policy

2.1 Notify OCTA of anticipated, newly introduced, or amended federal legislation, regulations, and administrative policy actions which could impact OCTA and provide a legislative analysis on how such action(s) may affect the interest of OCTA.

2.2 Work with OCTA to develop positions and tactics which implement OCTA's strategy objectives regarding the upcoming reauthorization of the transportation program.

2.3 Provide information and advice regarding upcoming legislative hearings which may impact policies and programs of OCTA.

2.4 Attend hearings and other public sessions of interest to OCTA.

2.5 Assist in the preparation of testimony before congressional committees and represent OCTA before such committees, including, but not limited to, the House and Senate Committees on Appropriations, the House Committee on Transportation and Infrastructure, the Senate Committee on Banking and Urban Affairs, the Senate Commerce Committee, and the Senate Committee on Environment and Public Works.

2.6 Assist in drafting legislative language and other written materials deemed to be of interest to OCTA to ensure that the goals and objectives of OCTA are fulfilled.

2.7 Assist in drafting responses to Federal Register notices and other federal public comment announcements.

2.8 Assist in the preparation of appropriate written materials supporting OCTA legislative goals, including letters, talking points, bill summaries, and position papers.

## 3. Liaison and Advocacy Activities

### 3.1 Orange County Congressional Delegation

3.1.1 Maintain frequent formal and informal contact with the Orange County delegation members and staff to represent and advocate OCTA policies and positions.

3.1.2 Recommend when OCTA Board Members should be in direct contact with members of the Orange County delegation or their key legislative staff.

3.2 House and Senate

3.2.1 Maintain direct and frequent contact with key members and staff of appropriate Senate and House Committees to represent and advocate OCTA policies and positions.

3.2.2 Arrange meetings between key legislation members and OCTA personnel as appropriate in Washington, D.C. or Orange County. Provide logistical support for Washington, D.C. visits.

3.2.3 Recommend timing and nature of contacts with the Orange County delegation and other legislation members in Washington, D.C.

3.3 Executive Branch

3.3.1 Meet with and arrange meetings with appropriate White House officials and staff, as necessary, to represent and advocate OCTA policies and positions.

3.3.2 Meet with and arrange meetings with appropriate Department of Transportation officials and staff, and other federal agencies, as necessary, to represent and advocate OCTA policies and positions.

III. **Administrative Coordination**

The Consultant shall continuously coordinate with OCTA Board, Chief Executive Officer and staff.

1. Coordination

1.1 Coordinate all activities with the OCTA State and Federal Relations Manager and Executive Director, Government Relations as appropriate.

1.2 Coordinate with members of the OCTA Board, as appropriate.

1.3 Coordinate with other OCTA consultants, as appropriate.



## 2. Other Activities

- 2.1 Preparation of materials, conference calls, oral reports, written reports, and additional assignments.
- 2.2 Participate via teleconference with the Manager of Grants and Federal Relations, other OCTA staff, and other consultants as necessary.
- 2.3 Provide on-site and in-person oral reports to the Board and meet with appropriate OCTA staff at the OCTA headquarters in Orange, California, as needed. The number of on-site reports is not expected to exceed four per year.
- 2.4 Submit a written monthly activity and status report, including key advocacy activities undertaken on behalf of OCTA during each month.
- 2.5 Undertake additional assignments that have been mutually agreed upon by both parties and are necessary to accomplish OCTA's objectives in Washington, D.C.



**October 17, 2024**

**To:** Legislative and Communications Committee

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

**Subject:** Performance Evaluation of State Legislative Advocate, Topp Strategies

### **Overview**

The firm Topp Strategies provides state legislative advocacy services for the Orange County Transportation Authority. A staff evaluation of the services provided during this legislative session is presented to the Board of Directors for consideration and further comment.

### **Recommendation**

Receive and file the staff evaluation of the state advocacy services of Topp Strategies as an information item and provide any additional comments.

### **Background**

Since 2007, Moira Topp has served as the Orange County Transportation Authority's (OCTA) primary state legislative advocate through her former employment with Sloat Higgins Jensen and Associates, and then as a subcontractor on OCTA's prior contract with Platinum Advisors, LLC. On October 26, 2020, the OCTA Board of Directors (Board) awarded a new contract for state legislative advocacy services to Topp Strategies, with Platinum as a subcontractor. Under the new contract, Moira Topp continues in her role as lead state legislative advocate for OCTA. The new agreement took effect on January 1, 2021, for a two-year term, with two, two-year option terms. On July 25, 2022, the Board exercised the first two-year option term, and on June 24, 2024, exercised the final two-year option term. This most recent term will expire on December 31, 2026.

***Discussion***

Annually, OCTA staff evaluates the services provided by the state legislative advocate with respect to major issues addressed and general services provided. Staff's evaluation of the services provided by Topp Strategies is included in Attachment A. The major issues and general services provided by Topp Strategies have been evaluated based on effort and outcome using a rating of excellent, very good, good, fair, or poor.

Staff has rated Topp Strategies' efforts overall as "excellent" based on responsiveness, advancing OCTA's positions and policies, and assisting in building cooperative relationships with legislators and members of various state departments, boards, and commissions. Staff has rated Topp Strategies' outcomes overall as "excellent" based on the outcomes of the issues discussed.

Next year, the expected focus of Topp Strategies' advocacy for OCTA will include continued efforts related to protect previously committed state funding for transit capital and operations purposes, seeking methods to streamline project delivery and obtain funding for solutions on the Los Angeles-San Diego-San Luis Obispo Rail Corridor, engaging in discussions related to the future of the cap-and-trade system and informing attempts to reprioritize transportation funding. In addition, priorities for Topp Strategies will include advancement of OCTA's positions on legislation and policy goals contained in the Board-adopted 2025-26 OCTA State Legislative Platform.

To assist the Board in fully evaluating Topp Strategies, the legislative advocate's current scope of work is included as Attachment B.

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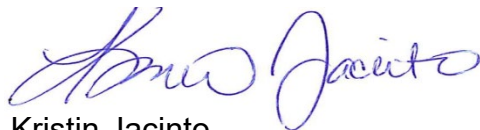
***Summary***

An evaluation of state legislative advocacy services performed by Topp Strategies is presented to the Board of Directors for information and further comment.

***Attachments***

- A. Staff Evaluation of Services Provided by Topp Strategies for 2024
- B. Sacramento Legislative Advocacy and Consulting Services Scope of Work

**Prepared by:**



Kristin Jacinto  
Executive Director,  
Government Relations  
(714) 560-5754

## **Staff Evaluation of Services Provided by Topp Strategies for 2024**

The following narrative provides specific information with respect to major issues addressed by Topp Strategies, with Moira Topp as the Orange County Transportation Authority's (OCTA) primary state legislative advocate in 2024, and general services provided. Each issue has been evaluated based on effort and outcome using a rating of excellent, very good, good, fair, or poor.

### **State Budget Provisions for Transportation Purposes**

*Effort: Excellent; Outcome: Excellent*

In previous budget cycles, when the State was operating in a budget surplus, the Legislature approved \$4 billion in formula funding for the Transit Intercity Rail Capital Program to be used for transit operating and capital purposes. With the State facing a significant funding shortfall this year, the Department of Finance froze various accounts in order to determine how to address ongoing funding needs. This included freezing transit funding that was set to be allocated to transit agencies in fiscal year (FY) 2023-24. OCTA was estimated to receive about \$183 million, which included funding for Metrolink operations and zero-emission bus purchases.

Topp Strategies, working in coordination with the California Transit Association and transit agencies across the State, developed an advocacy strategy to make the case to protect these funds and ensure quick allocation. Because transit funding represented the largest funding source that could potentially be shifted to address the budget deficit, work was necessary to showcase the importance of transit, the economic benefits from the use of these funds, and other co-benefits, including environmental. In the end, all funding for transit purposes was preserved, while adjusting some timelines for disbursement. This allowed OCTA to remain on schedule with the use of these funds and maintain promised transit service levels. Further, Topp Strategies was also successful in helping OCTA preserve funding for other transportation programs including active transportation and planning.

### **Bills of Interest**

*Effort: Very Good; Outcome: Very Good*

AB 7 (Friedman, D-Glendale): This is one of several bills OCTA opposed that Topp Strategies was successful in stopping last year AB 7 would have reprioritized various transportation funding programs in a manner inconsistent with their original intent, potentially jeopardizing OCTA's ability to deliver various transportation services and projects. Towards the end of the year, there was an attempt to again amend this bill to allow it to move forward. Even with the proposed amendments, significant concerns remained about the impacts this bill would have on transportation funding. Topp Strategies worked within the coalition they helped form last year to stop the bill from moving forward. This required coordinated advocacy with members of key committees, including the Senate Transportation Committee where the majority of members are from Orange County. Ultimately, the author pulled the bill from consideration.

## **Staff Evaluation of Services Provided by Topp Strategies for 2024**

AB 2535 (Bonta, D-Oakland): Another bill OCTA opposed this session, which sought to reprioritize transportation funding under the Trade Corridor Enhancement Program, diminishing the ability for OCTA to qualify to use the funds to benefit goods movement in the region. Again, similar to the advocacy strategy used for AB 7, Topp Strategies coordinated with a coalition of stakeholders that included labor and transportation agencies, to convey the significant impacts this bill would have on programs and projects, and the potential to undermine voter intent in protecting funding provided under SB 1 (Chapter 5, Statutes of 2017). Despite last minute attempts by the author to amend the bill to appease opposition, she ultimately pulled the bill from consideration without the necessary votes to pass out of policy committee.

SB 768 (Caballero, D-Fresno): OCTA supported this bill, which would have created a report to provide more transparency about mitigation costs for transportation projects to address vehicle miles traveled increases. With the costs of mitigation increasing exponentially, and sometimes being more expensive than the actual project, this bill would have required more analysis about different approaches that could be taken and the associated costs and benefits. Sponsored by the Building Industry Association, the bill was ultimately amended at the end of session to focus solely on mitigation associated with housing projects. Without a nexus to OCTA projects, the support position for the bill was dropped. However, in supporting the bill, Topp Strategies had started conversations with legislative staff about the need in future sessions to have a more robust conversation about this issue.

SB 1098 (Blakespear, D-Laguna Hills): While OCTA did not have a position on this bill, part of the author's intent in introducing this legislation was to seek to create more transparency and accountability for the State in ensuring the protection of the Los Angeles – San Diego – San Luis Obispo Rail Corridor through various reporting requirements. The author's office consistently worked with OCTA staff and Topp Strategies to inform amendments to mitigate any unintended consequences. While much of the bill is contingent on future appropriations, it is expected that some of the work will begin next year on developing a working group to inform the initial work required of the final bill.

### **General Services**

*Effort: Excellent; Outcome: Excellent*

Topp Strategies regularly scheduled meetings with legislators, committee consultants, Administration staff, and staff of various state departments, boards, and commissions to discuss issues of importance to OCTA. Topp Strategies has been responsive to requests by OCTA staff, provided timely information, advice and reports, and provided testimony in legislative committees that accurately reflected Board positions on legislation and policy issues. Topp Strategies also worked on a number of other issues on behalf of OCTA that were not necessarily contained in legislation.

## **Staff Evaluation of Services Provided by Topp Strategies for 2024**

Specifically, this year, Topp Strategies provided critical meetings with new and existing Orange County delegation members to discuss OCTA's top priorities including support for the rail corridor, transit operations funding, managed lanes and zero-emission buses. This included securing meetings with every Orange County delegation member at the beginning of the year. In addition, Topp Strategies secured meetings with several different administrative agencies, including the California State Transportation Agency, California Coastal Commission, California Department of Transportation, and the California Transportation Commission. Topp Strategies also strategized to start hosting OCTA Brown Bag lunches with Orange County delegation staff and staff from relevant policy committees. This provided further education about OCTA priorities.

Further work will be needed next year to advance connections with other relevant state agencies, including the California Air Resources Board, as the next stage of the Innovative Clean Transit regulation takes place.

### ***Effort: Excellent; Outcome: Excellent***

Topp Strategies efforts overall are rated as excellent based on responsiveness, time dedicated to advocating for and advancing of OCTA's positions and policies, timeliness of information, assisting in building cooperative relationships with legislators and members of various state departments, boards, and commissions, and availability. Topp Strategies outcomes overall are rated as excellent based on the outcomes of the issues discussed.

**Sacramento Legislative Advocacy and Consulting Services  
Scope of Work**

**Reporting Relationship**

The Manager of State and Federal Relations and/or his/her designee will be the key contact and will coordinate the work of the CONSULTANT. The Orange County Transportation Authority (OCTA), at its sole discretion, may enter into more than one contract with additional firms with a Reporting Relationship of:

**Role of the CONSULTANT**

Under the coordination of the Manager of State and Federal Relations and/or his/her designee, the CONSULTANT shall be responsible for implementing the objectives described below.



## **Objectives**

**Objective 1:** Maintain regular contact with the Governor's office; members of the Legislature and committee staff; and state departments, agencies, boards, commissions, committees, and staff to determine impending changes in laws, regulations, and funding priorities that relate to the OCTA.

- Meet with members of the Governor's office and Legislature to discuss policy issues affecting OCTA,
- Meet with members and staff of state agencies on issues that could impact the programming, delivery and funding of OCTA projects and services, including the California Transportation Commission; California State Transportation Agency; California Department of Transportation; California Air Resources Board,
- Track and attend meetings and actions by state agencies directly impacting transportation, including those associated with the Department of Finance; California Department of Tax and Fee Administration; Office of Planning and Research; California State Transportation Agency, Department of Transportation; California High-Speed Rail Authority; California Highway Patrol; California Department of Motor Vehicles; California Public Utilities Commission; California Environmental Protection Agency; and California Air Resources Board.

### **Objective 1 Deliverable:**

- Electronic reports of issues that could affect OCTA projects or funding.

**Objective 2:** Notify OCTA of anticipated, newly introduced or amended state legislation and proposed regulations, which could impact OCTA.

- Provide bill number and brief summary of introduced or amended state legislation via e-mail,
- Provide information relative to legislative hearings,
- Provide information on bills' sponsors, supporters, and opponents,
- Advise OCTA of proposed transportation, environmental, employment, and safety related legislation and regulations which could impact OCTA and provide copies as requested.

### **Objective 2 Deliverables:**

- Copies of legislation, committee analyses, and proposed regulations as requested,
- Electronic notification of introduced bills and amendments, with summaries,
- Notification of legislative hearings.

**Objective 3:** Advocate OCTA's legislative program and positions on legislation, proposed regulations, and funding and transportation programming priorities as adopted by the Board.

- Participate in the preparation of OCTA's legislative program by informing staff of upcoming legislative proposals, budget forecasts, and potential policy issues,
- Assist in securing authors and drafting language for sponsor bills,
- Assist in drafting amendments to legislation and regulations,
- Build coalitions to support OCTA's positions on significant legislation,
- Testify on behalf of OCTA on Board-adopted positions on legislation at committee and floor hearings, as appropriate,
- Provide copies of all written correspondence, testimony, and position papers given on behalf of OCTA,
- Schedule meetings with legislators, Governor's office, and state departments for OCTA Directors and staff to advocate legislative and funding priorities,
- Participate in transit and transportation lobbying coalitions,
- Analyze and prepare advice on the proposed state budget as it relates to transportation, including, but not limited to, identifying decreases/increases in existing programs, new funding sources, and strategies to enhance transportation funding for OCTA.

**Objective 3 Deliverables:**

- Copies of all written correspondence, testimony, and position papers given on behalf of OCTA,
- Schedule of meetings with legislators, Governor, and administration,
- Budget analyses.

**Objective 4:** Provide written and oral reports.

- While the Legislature is in session, highlight significant transportation and related issues in Sacramento of importance to OCTA as needed,
- Submit a monthly written report of advocacy activities and accomplishments,
- As needed, present an in-person report to the Board or the Legislative and Communications Committee during a regular meeting. At least one in-person meeting should occur to develop legislative strategy,
- Once per month, participate via telephone in the Legislative and Communications Committee meeting or other designated committee of the Board,
- Maintain close contact with the Manager of State and Federal Relations on issues of importance,
- Provide electronic updates via e-mail to designated recipients on meetings of the Legislature, transportation issues of importance, press releases, and other issues of importance to OCTA.

**Objective 4 Deliverables:**

- Written reports highlighting significant transportation and related developments in Sacramento, as needed,
- Monthly written report of advocacy activities and accomplishments,
- As needed, oral presentations to the Board or Legislative and Communications Committee,
- As needed, an in-person legislative strategy session with Members of the Board of Directors,
- Monthly conference calls with the Legislative and Communications Committee or other designated committee,
- Electronic updates on issues of importance.

**Objective 5: Maintain Sacramento office.**

- Maintain an office in Sacramento, convenient to the State Capitol,
- Provide briefings at office prior to meetings at the Capitol,
- Have available an office for use by Board Members and staff while performing OCTA business in Sacramento.

**Objective 5 Deliverable:**

- Office in Sacramento.

**Objective 6: Provide monthly invoices of services,**

- Provide a written summary of meetings attended on behalf of OCTA,
- Provide a list of issues advocated during the month and status.

**Objective 6 Deliverable:**

- Monthly invoice that includes a written summary of meetings attended on behalf of OCTA and a list and status of the issues advocated for OCTA during the month.



**October 17, 2024**

**To:** Legislative and Communications Committee

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

**Subject:** Agreement for 2026 Long-Range Transportation Plan Public Outreach Consultant Services

### **Overview**

On June 20, 2024, the Orange County Transportation Authority released a request for proposals for public outreach services to support the upcoming 2026 Long-Range Transportation Plan. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.

### **Recommendations**

- A. Approve the selection of Arellano Associates, LLC, as the firm to provide public outreach services for the 2026 Long-Range Transportation Plan.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2295 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$350,000, for a two-year initial term with one, one-year option term, to provide public outreach services for the 2026 Long-Range Transportation Plan.

### **Discussion**

The Orange County Transportation Authority (OCTA) works with federal, state, regional, and local officials, community groups, diverse communities, businesses, and other transportation agencies to provide the public with transportation improvements and solutions. OCTA's mission is to coordinate efforts among these various parties to identify, design, fund, and implement transportation improvements and solutions, and to improve air quality.

OCTA updates the Long-Range Transportation Plan (LRTP) every four years as local input for the Southern California Association of Governments' Regional

Transportation Plan and Sustainable Communities Strategy. The LRTP reflects OCTA's current policies and commitments, and incorporates input from local jurisdictions, business leaders, community leaders, county residents, and transportation planning professionals to address future transportation needs. The general goal of the LRTP is to define a vision for Orange County's transportation system and analyze how well that vision addresses future mobility needs. This vision must consider a 20-plus year forecast of available revenues, changing demographics, and any other significant trends.

OCTA's Public Outreach Department is responsible for public engagement and creating awareness for the LRTP. Public outreach activities include, but are not limited to, the development of handouts, fact sheets, infographics, e-newsletters, social media and web content, and execution of online surveys and mailings. The consultant will also assist with planning and implementing in-person and virtual stakeholder meetings, elected official roundtables, pop-up events, open houses, special events, and various other activities to ensure feedback is received from a broad spectrum of constituents. In an effort to reach diverse communities and encourage meaningful involvement of all people regardless of race, color, national origin, or income, disadvantaged and hard-to-reach communities will be identified, and engagement materials and surveys will be provided in multiple languages.

### ***Procurement Approach***

The procurement was handled in accordance with OCTA Board of Directors (Board)-approved procedures for professional and technical services. Various factors are considered in the award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On June 20, 2024, Request for Proposals (RFP) 4-2295 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on June 20 and June 26, 2024. A pre-proposal conference was held on June 27, 2024, with eight attendees representing five firms. Four addenda were issued to make available the pre-proposal conference registration sheet and presentation, handle administrative issues related to the RFP, as well as provide responses to written questions.

On July 22, 2024, five proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, People and Community Engagement, as well as Planning and Analysis departments, met to review all the proposals received.

The proposals were evaluated based on the following evaluation criteria and weightings:

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 25 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan                         | 20 percent |
| • Cost and Price                    | 25 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 25 percent as the firm had to demonstrate experience developing and implementing a public outreach program. Staffing and project organization was weighted the highest at 30 percent as the project team had to demonstrate extensive expertise in providing public outreach-related services. Work plan was weighted at 20 percent to ensure the firm demonstrated an understanding of OCTA's requirements based on the scope of work. Cost and price was weighted at 25 percent to ensure OCTA receives value for the services provided.

The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale with 75 points based on the evaluation of the technical proposal and the remaining 25 points based on the evaluation of the price proposal. The RFP required proposing firms to submit a separate price proposal in a sealed package. In order to focus on the technical aspects of the proposals, the evaluation committee first evaluated the written proposals on technical merit based on the weighted criteria for qualifications of the firm, staffing and project organization, and work plan. After the interviews and the technical scores of the short-listed firms were finalized, the sealed price proposals of only the short-listed firms were then opened and shared with the evaluation committee and the cost and price score was factored into the overall proposal score for a maximum of 100 points.

On August 6, 2024, the evaluation committee reviewed the five proposals received based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Arellano Associates, LLC (Arellano)  
Headquarters: Chino Hills, California  
Project Office: Chino Hills, California

Barrios & Associates, LLC, doing business as Communications LAB  
Headquarters: Orange, California  
Project Office: Orange, California

On August 20, 2024, the evaluation committee conducted interviews with the short-listed firms. The interviews consisted of a presentation by each firm to demonstrate their understanding of OCTA's requirements. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to each firm's approach to producing the key deliverables specified in the scope of work, including the roles and contributions of core team members, anticipated challenges and how they plan to address them, their experience working with community-based organizations in Orange County, as well as specific clarification questions related to each firm's proposal.

After considering responses to questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, Arellano remained the higher-ranked firm with the higher overall score.

Based on the evaluation of the written technical proposals and the information obtained from the interviews, as well as cost and price, the evaluation committee recommends Arellano for consideration of contract award. The following is a brief summary of the proposal evaluation results.

#### Qualifications of the Firm

Arellano, founded in 1994 and headquartered in Chino Hills, California, has over 70 employees. The firm has demonstrated extensive expertise in public outreach for various transportation planning initiatives, including the Los Angeles County Metropolitan Transportation Authority's (LA Metro) Long Beach-East Los Angeles Corridor Mobility Investment Plan and the Los Angeles County Bicycle Master Plan Update for the Los Angeles County Department of Public Works. Additionally, Arellano has been the lead outreach consultant for several OCTA projects, including the 2022 LRTP, Mobility Hub Study, Orange County (OC) Connect, Interstate 5 (I-5) Environmental Outreach, and the Transportation Demand Management (TDM) Plan. The firm is currently managing outreach for OCTA's on-call planning studies and oversees multilingual business outreach for the OC Streetcar project. To support their outreach efforts, Arellano has partnered with ArrowGTP, which will assist with multicultural engagement, public outreach, media relations, and translation services. The firm received positive feedback from its references.

Communications LAB, established in 2013 and based in Orange, California, has 16 full-time employees and demonstrated strong experience providing public outreach services for transportation and infrastructure projects. The firm has worked on relevant projects including the I-5 South County Improvement Project, the Interstate 405 (I-405) Design-Build Project, and outreach efforts for LA Metro. The firm has also worked with clients such as the County of Orange, Port of Long Beach, and Metrolink. Communications LAB has experience in utilizing both traditional and digital outreach strategies and proposed a subcontractor, J Wallin Opinion Research, to assist in conducting scientific surveys and public polling. Additionally, to ensure inclusive outreach, the firm proposed multilingual outreach through its collaboration with Ko & Martin, focusing on Vietnamese, Korean, and Chinese communities. Communications LAB received positive feedback from its references.

#### **Staffing and Project Organization**

Arellano proposed a highly experienced project team specializing in public outreach and transportation planning studies. The team includes individuals who are currently supporting OCTA projects such as the OC Coastal Rail Resiliency Study, OC Mobility Hubs Study, and the TDM Plan. The proposed project manager has over 14 years of experience in community relations, program management, and diversity outreach, and has worked on key regional projects like the Interstate 710 South Corridor Task Force for LA Metro and the Valley Boulevard Multi-Modal Transportation Improvements Project for the City of Los Angeles. Additionally, Arellano's subcontractor, ArrowGTP, is proposed to assist with outreach to diverse communities. The proposed community liaison has eight years of experience in targeted stakeholder outreach, engagement, event planning, coordination, and program development. During the interview, the project team clearly outlined their availability, roles, and technical approach, demonstrating a strong understanding of both OCTA's outreach requirements and broader transportation initiatives.

Communications LAB proposed a team with relevant public outreach experience across multiple transportation projects. The proposed project manager has 15 years of experience in community outreach and project management, with experience working on the I-5 South County Improvement Project and the I-405 Design-Build Project. The proposed lead community liaison has five years of experience working on public outreach initiatives, particularly in multilingual campaigns targeting diverse communities. The team also includes key staff who have worked on past OCTA projects, such as the I-5 South County Improvement Project, showcasing familiarity with OCTA's outreach methods. During the interview, the project team discussed their understanding of public outreach



challenges, including reaching disadvantaged communities and addressing transportation equity concerns.

#### **Work Plan**

Arellano presented a comprehensive work plan that covered all elements of the scope of work. The firm detailed its approach to project management, including quality assurance, schedule management, and outreach strategies. Arellano proposed various outreach methods, such as public workshops, social media campaigns, geofencing, canvassing, virtual engagement tools, and online surveys. The firm also highlighted its in-house innovations team, which focuses on implementing new technologies, such as visual design software, virtual story mapping, and online comment forums to improve stakeholder engagement. Their work plan reflected a thorough understanding of OCTA's challenges, such as managing outreach fatigue and handling multiple projects simultaneously. During the interview, Arellano provided detailed responses on addressing these challenges, including plans for close collaboration with community-based organizations to ensure effective outreach to diverse and underserved communities, particularly targeting Vietnamese and Spanish-speaking groups.

Communications LAB submitted a work plan that outlined its approach to project management, digital and social media content, and outreach tactics. The firm emphasized its experience with utilizing virtual meeting rooms and online engagement tools, which were successfully used in recent projects with the Riverside Transit Agency. Communications LAB's proposal highlighted the use of experienced subcontractors, which enhances their capacity to deliver high-quality outreach and engagement. However, concerns were raised about whether the proposed survey strategy would sufficiently meet OCTA's requirement for effectively reaching and engaging a diverse range of communities. During the interview, the firm provided general responses and did not offer additional insight beyond the information already included in their proposal.

#### **Cost and Price**

Pricing scores were based on a formula which assigned the higher score to the firm with the lower weighted average hourly rate and scored the other proposal's weighted average hourly rate based on its relation to the lower weighted average hourly rate. Arellano proposed the lower weighted average hourly rate. Therefore, Arellano's proposed hourly rates are deemed fair and reasonable.

### Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, the information obtained from the interviews, as well as cost and price, the evaluation committee recommends the selection of Arellano as the top-ranked firm to provide public outreach consulting services for the 2026 LRTP. Arellano delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

### Fiscal Impact

The project was approved in OCTA's Fiscal Year 2024-25 Budget, People and Community Engagement Division, Account No. 0017-7519-A4461-1I8, and is funded through local funds.

### ***Summary***

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2295 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$350,000, for a two-year initial term with one, one-year option term to provide public outreach consulting services for the 2026 Long-Range Transportation Plan.

***Attachments***

- A. Review of Proposals, RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services
- C. Contract History for the Past Two Years, RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services

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**Review of Proposals**  
**RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services**  
 Presented to Legislative and Communications Committee - October 17, 2024  
**5 proposals were received, 2 firms were interviewed, 1 firm is being recommended.**

| Overall Ranking | Proposal Score | Firm & Location  | Sub-Contractors                                       | Evaluation Committee Comments  | Total Weighted Average Hourly Rate |
|-----------------|----------------|--|---|--|------------------------------------|
| 1               | 87             | <b>Arellano Associates, LLC</b><br>Chino Hills, California                                       | ArrowGTP  | Managed outreach for the Orange County Transportation Authority's (OCTA) on-call studies and LA Metro's Long Beach-East LA Corridor Plan.<br>Relevant public outreach experience.<br>Highlighted experience with diverse communities, ensuring inclusive outreach efforts.<br>Demonstrated a strong understanding of community needs and engagement strategies.<br>Adequate key personnel availability.<br>Team includes individuals currently supporting OCTA projects.<br>Project manager has over 14 years in community relations and diversity outreach.<br>Public outreach strategies incorporate traditional and innovative methods.<br>Detailed approach for each scope element provided.<br>Received positive responses from references.<br>Proposed lower hourly rates. | \$137                              |
| 2               | 84             | <b>Barrios &amp; Associates, LLC, doing business as Communications LAB</b><br>Orange, California | AJ Design<br>J Wallin Opinion Research<br>Ko & Martin | Managed outreach for OCTA's Interstate 5 South Improvement Project and LA Metro's transportation initiatives.<br>Relevant public outreach experience.<br>Team has significant public outreach experience across various projects.<br>Project manager has 15 years in community outreach and project management.<br>Adequate key personnel availability confirmed.<br>Key staff has past OCTA project experience.<br>Demonstrated knowledge of public outreach requirements.<br>Provided a work plan outlining project management, digital content, and outreach tactics.<br>Concerns about whether the survey strategy will meet OCTA's preference for broader community reach.<br>Received positive responses from references.<br>Proposed higher hourly rates.                 | \$144                              |

**Evaluation Panel:**

Contracts Administration and Materials Management (1)  
 Public Outreach (2)  
 External Affairs (1)  
 Planning & Analysis (1)

**Proposal Criteria**

Qualifications of the Firm  
 Staffing and Project Organization  
 Work Plan  
 Cost and Price

**Weight Factors**

25%  
 30%  
 20%  
 25%

**PROPOSAL EVALUATION CRITERIA MATRIX (SHORT-LISTED FIRMS)**  
**RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services**

|  |             |             |             |             |             |                |                      |
|--|-------------|-------------|-------------|-------------|-------------|----------------|----------------------|
| <b>Arellano Associates, LLC</b>                              |             |             |             |             |             | <b>Weights</b> | <b>Overall Score</b> |
| <b>Evaluator Number</b>                                      | <b>1</b>    | <b>2</b>    | <b>3</b>    | <b>4</b>    | <b>5</b>    |                |                      |
| Qualifications of Firm                                       | 4.5         | 4.0         | 4.5         | 4.5         | 4.5         | 5              | 22.0                 |
| Staffing/Project Organization                                | 4.0         | 4.0         | 4.0         | 4.0         | 4.0         | 6              | 24.0                 |
| Work Plan  | 4.0         | 4.0         | 4.0         | 4.0         | 4.0         | 4              | 16.0                 |
| Cost and Price   | 5.0         | 5.0         | 5.0         | 5.0         | 5.0         | 5              | 25.0                 |
|  |             |             |             |             |             |                |                      |
| <b>Overall Score</b>   | <b>87.5</b> | <b>85.0</b> | <b>87.5</b> | <b>87.5</b> | <b>87.5</b> |                | <b>87</b>            |
|  |             |             |             |             |             |                |                      |
| <b>Barrios &amp; Associates, LLC, dba Communications LAB</b> |             |             |             |             |             | <b>Weights</b> | <b>Overall Score</b> |
| <b>Evaluator Number</b>                                      | <b>1</b>    | <b>2</b>    | <b>3</b>    | <b>4</b>    | <b>5</b>    |                |                      |
| Qualifications of Firm                                       | 4.0         | 4.0         | 4.0         | 4.5         | 4.5         | 5              | 21.0                 |
| Staffing/Project Organization                                | 4.0         | 4.0         | 4.0         | 4.0         | 4.0         | 6              | 24.0                 |
| Work Plan  | 4.0         | 3.5         | 4.0         | 4.0         | 3.5         | 4              | 15.2                 |
| Cost and Price   | 4.8         | 4.8         | 4.8         | 4.8         | 4.8         | 5              | 24.0                 |
|  |             |             |             |             |             |                |                      |
| <b>Overall Score</b>   | <b>84.0</b> | <b>82.0</b> | <b>84.0</b> | <b>86.5</b> | <b>84.5</b> |                | <b>84</b>            |
|  |             |             |             |             |             |                |                      |

Range of scores of non-short-listed firms was 31 to 54.

**CONTRACT HISTORY FOR THE PAST TWO YEARS**  
**RFP 4-2995 2026 Long-Range Transportation Plan Public Outreach Consultant Services**

| Prime and Subconsultants                                  | Contract No. | Description   | Contract Start Date | Contract End Date | Subconsultant Amount | Total Contract Amount |
|---|--------------|---|---------------------|-------------------|----------------------|-----------------------|
| <b>Arellano Associates, LLC</b>                           |              |   |                     |                   |                      |                       |
| Contract Type: Time-and-Expense                           | C-0-2622     | On-Call Planning Studies Public Outreach Consultant Services (Long-Range Transportation Plan, Express Lanes Project, Freeway Chokepoint Analysis, Orange County Mobility Hub Study)   | March 17, 2021      | February 29, 2024 |                      | \$ 316,000            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| None  |              |   |                     |                   |                      |                       |
| Contract Type: Time-and-Expense                           | C-2-3053     | On-Call Planning Studies Public Outreach Consultant Services (Countywide Transportation Demand Management Strategic Plan, Orange County Transit Vision Master Plan, Electric Vehicle Charging Stations Strategic Plan)        | June 1, 2023        | April 30, 2026    |                      | \$ 300,000            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| Arrow GTP   |              |   |                     |                   |                      |                       |
| Contract Type: Time-and-Expense                           | C-3-2817     | Public Outreach Services for South Coast Rail Infrastructure Feasibility Study  | October 27, 2023    | October 31, 2025  |                      | \$ 201,250            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| None  |              |   |                     |                   |                      |                       |
| Contract Type: Time-and-Expense                           | C-4-2076     | On-Call Planning Studies Public Outreach Consultant Services (Mobility Hubs Concept of Operations Study, Bikeways Connectivity Study, Transit Signal Priority Study, Reconnecting Communities through Complete Streets Study) | August 3, 2024      | May 31, 2027      |                      | \$ 700,000            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| Arrow GTP   |              |   |                     |                   |                      |                       |
| Contract Type: Time-and-Expense                           | C-9-1510     | Marketing Outreach Support Services   | October 16, 2019    | June 30, 2024     |                      | \$ 120,000            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| None  |              |   |                     |                   |                      |                       |
| <b>Total</b>  |              |   |                     |                   |                      | <b>\$ 1,637,250</b>   |
| <b>Barros and Associates, LLC, dba Communications LAB</b> |              |   |                     |                   |                      |                       |
| Contract Type:  | C-2-2891     | Public Outreach Consultant Services for Interstate 5 El Toro Road Interchange Project   | May 1, 2023         | April 30, 2026    |                      | \$ 349,850            |
| Subconsultants:   |              |   |                     |                   |                      |                       |
| None  |              |   |                     |                   |                      |                       |
| <b>Total</b>  |              |   |                     |                   |                      | <b>\$ 349,850</b>     |



**October 17, 2024**

**To:** Legislative and Communications Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Draft 2025-26 State and Federal Legislative Platforms

### **Overview**

Every two years, staff conducts a comprehensive review of the Orange County Transportation Authority's Legislative Platforms to ensure updates are provided on relevant issues that are anticipated to be of discussion for the upcoming legislative sessions. Following extensive stakeholder outreach, initial draft revisions to the Orange County Transportation Authority's 2025-26 State and Federal Legislative Platforms have been prepared for consideration by the Orange County Transportation Authority Board of Directors. Before a final draft is considered for adoption, these drafts will be revised as a result of feedback from the Orange County Transportation Authority Board of Directors and stakeholder input.

### **Recommendation**

Direct staff to move forward with the recommended revisions to the draft 2025-26 Orange County Transportation Authority State and Federal Legislative Platforms and incorporate any feedback from the Orange County Transportation Authority Board of Directors, returning to the Board of Directors for final adoption at a later date.

### **Background**

At the beginning of each legislative session, the Orange County Transportation Authority (OCTA) adopts State and Federal Legislative Platforms to guide the agency's advocacy activities for the upcoming legislative sessions in Sacramento and Washington, D.C., respectively. The most recent versions of the 2023-24 State and Federal Legislative Platforms were approved by the OCTA Board of Directors (Board) on November 27, 2023. Staff has prepared initial drafts of the 2025-26 State and Federal Legislative Platforms for the Board's consideration. In preparing these drafts, staff solicited feedback and suggestions from the following groups:

- OCTA advisory groups
- OCTA division directors, department managers, and staff
- Orange County legislative delegation
- Cities, chambers of commerce, and the County of Orange
- Orange County community-based organizations and associations
- Private business and industry groups

Staff will continue to consider any additional input received by all stakeholders prior to bringing final drafts back to the Board later this year.

### Draft 2025-26 State Legislative Platform

The initial draft of the 2025-26 State Legislative Platform is outlined below and further detailed in the attachments. Attachment A is a clean version of the initial draft, and Attachment B reflects staff's recommended changes as a strikethrough version, reflected in underlining and strikethrough text. In a few instances, some principles were moved and revised. Those revisions are represented in bold lettering. Language was edited, amended, or removed as necessary to ensure accuracy and grammatical and stylistic integrity.

In order to allow the State Legislative Platform to be a better organized, more readable document, many minor edits were made to move provisions in the platform to more appropriate sections and update wording to better reflect current policy. None of these changes are intended to alter OCTA's advocacy goals. Sections were also rearranged to make more sense in terms of flow of the overall platform. An overview of the recommended changes is outlined below, with all textual references to the strikethrough draft in Attachment B.

### Key Policy Issues

The Key Policy Issues section represents significant transportation issues that are expected to be discussed in the upcoming legislative session and reflect where OCTA's primary focus will be in terms of its advocacy. OCTA will continue to support transportation funding investments and policy flexibility that allow OCTA to make necessary multimodal capital improvements while providing critical transportation services, including transit, managed lanes, and motorist assistance. Another key foundation of advocacy in the coming session will continue to be related to preserving the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor in south Orange County. OCTA will be seeking support from the State in various areas to help work to prevent future service disruptions.

Several principles were moved from other sections to the Key Policy Issues section as OCTA staff notes these will become more prevalent in this next legislative cycle. Specifically, as the date for the Olympics in the City of



Los Angeles nears, staff anticipates discussions will take place on how best to support moving people throughout Southern California during the Olympics. As part of these discussions, it is crucial that Orange County be involved, given the significant impact that rising travel demand will have on its transportation infrastructure. Beyond funding, there may be opportunities related to incentives, project delivery tools, and regulatory relief that may assist in preparing for the Olympics.

Additionally, the State's cap-and-trade program expires in 2030. This program provides funding for transportation projects for which OCTA is a beneficiary. Next year, it is expected that there will be a concerted effort to extend the program to continue this funding source. OCTA staff will be engaged to monitor these efforts, ensuring that funding for regional transportation projects and programs are not impacted.

And finally, OCTA is transitioning its fleet to zero emission to comply with the Innovative Clean Transit Regulation as required by the California Air Resources Board (CARB). Recently, the costs to transition have increased significantly. OCTA will continue to work with the Legislature on ways to support efforts to mitigate costs associated with zero-emission transit buses and infrastructure, which could include alternative electricity rate structures, tax incentives, and other forms of financial assistance. It is important to note that challenges with the transition to zero-emission go beyond funding; reliability and availability of these vehicles has also been a hurdle in ensuring a smooth transition due to the lack of manufacturers in the marketplace and a constrained supply chain. OCTA is also supportive of workforce development efforts related to training for zero-emission vehicles as the technical expertise is vastly different from the traditional vehicle technology.

#### Other Legislative Suggestions

- Subsection (a) of the Section entitled, "Implementation of Environmental Policies" is recommended to be revised to better incorporate all forms of project mitigation requirements as it pertains to reducing greenhouse gas emissions. Vehicle miles traveled reduction has been used as one metric but does not necessarily equate to a reduction in greenhouse gas emissions. Therefore, it makes more sense to broaden this principle to include all types of project mitigation that could occur.
- Subsection (a) of the Section entitled, "Roads & Highways," is recommended to be removed. Several years ago, a proposed conservancy was impacting transportation planning in Orange County. This issue has since been resolved.

- Subsection (h) of the Section entitled, “Roads & Highways,” is recommended to be removed. Fines related to high-occupancy vehicles violations have been in place now for several years and staff do not anticipate legislative discussions about increasing these fines.
- Subsection (a) of the Section entitled, “Tolled & Managed Lanes,” is recommended to be revised. The intention of revising this principle is to ensure that revenues from toll facilities are only directed by the responsible governing board.
- Subsection (b) of the Section entitled, “Rail Programs,” is recommended to be removed. This principle related to consolidation of rail oversight is outdated with no current identified need to pursue this policy.
- Subsection (e) of the Section entitled, “Active Transportation,” is recommended to be removed. OCTA staff have identified that this issue related to lease agreements between project sponsors of active transportation projects has been resolved, and the California Public Utilities Commission has made improvements to simplify the process.
- Subsection (g) of the Section entitled, “Administration/General” is recommended to be added. Often times legislative bills are duplicative of existing efforts occurring outside of statute. This can create a dynamic where duplicative reporting requirements are created, which can cause an additional burden on agencies with limited resources. OCTA will continue to encourage examining what work is already being done and oppose efforts that duplicate work and unnecessarily strain agency resources.

Other suggestions that were submitted to staff for consideration as part of the solicitation for comments included: supporting funding for rail grade separation projects, assisting agencies related to cost recovery of legal claims, supporting dedicated funding for senior mobility, and general changes to environmental and goods movement principles. In reviewing these suggestions, it was determined that these suggestions were already included under existing platform principles that are retained in the Draft 2025-26 State Legislative Platform. One suggestion was included from the South Coast Air Quality Management District (SCAQMD), to revise subsection (c) of the “Implementation of Environmental Policies” Section. This revision includes collaborating with other stakeholders when working on air quality determinations and ensuring funding is not constrained. Another suggestion included substantive changes to subsection (g) of the “Goods Movement” Section was rejected by staff related to funding for a potential container fee program. Specifically, this suggestion would have changed the funding to only support zero-emission technologies for freight movement. OCTA

believes that any funding from such potential programs should be used toward projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

In the final draft of the State Legislative Platform, staff may propose additional changes that are identified as staff works with the Board, stakeholders, and internal departments. In addition, OCTA often encounters specific legislative issues requiring sponsor legislation, prompting OCTA to take the lead in developing legislative language and securing an author. Staff is currently exploring the need for potential sponsor opportunities and will provide an update to the Board for consideration on such possibilities.

#### Draft 2025-26 Federal Legislative Platform

The initial draft of the 2025-26 Federal Legislative Platform is outlined below and detailed in the attachments. Attachment C is a clean version of the initial draft, and Attachment D reflects staff's recommended changes as a strikethrough version, reflected in underlining and strikethrough text. In a few instances, some principles were moved and revised. Those revisions are represented in bold lettering. Language was edited, amended, or removed as necessary to ensure accuracy and grammatical and stylistic integrity.

Since the previous update to the Federal Legislative Platforms, OCTA has been working with its partners on implementing the Infrastructure Investments and Jobs Act (IIJA). With that well underway, next session, staff anticipates discussion will begin related to the next surface transportation reauthorization as the IIJA expires in 2026. Given that dynamic, the Federal Legislative Platform needed to be reorganized to reflect the transition to dually prioritize implementing the IIJA while looking toward the future of the next iteration of surface transportation. Therefore, to be better organized, many minor edits were made to move provisions in the platform to more appropriate sections, update wording to better reflect current policy, and to eliminate duplicative principles. Additionally, a new section was added entitled, "Transit Programs." Historically, there had not been a transit specific section because many of the transit principles overlay with other sections. However, because of the federal government's further involvement with transit, it is appropriate to add its own section.

An overview of the recommended changes is outlined below, with all textual references to the strikethrough draft in Attachment D.

### Key Policy Issues

The Key Policy Issues Section for the Federal Legislative Platform maintains consistent areas of focus as the State Platform, including an emphasis on funding for a multimodal transportation system, advocating for assistance with the LOSSAN Rail Corridor, and finding solutions to prepare the Southern California region for the Olympics in 2028. As it pertains specifically to the Federal Platform and with a new Administration and Congress being installed next year, OCTA staff have recommended emphasizing its focus on ensuring the funding OCTA receives through the IIJA and the Inflation Reduction Act is maintained and that recissions or other cuts to transportation programs are avoided. OCTA staff also recommends adding a principle to the Key Policy Issues Section related to funding for air quality standards. Specifically, it is important to ensure that Orange County is eligible for such funding included for the South Coast Air Basin. This past year, OCTA and other transportation stakeholders worked with SCAQMD on resolution of a pending decision by the Environmental Protection Agency (EPA) that would have restricted funding for certain highway projects after it determined air quality standards were not met. OCTA will continue to work to ensure that those determinations do not impact the use of transportation funding.

### Other Legislative Suggestions

- Subsection (m) of the Section entitled “Surface Transportation Reauthorization” is recommended to be added. Specifically, this principle ties into discussions related to the next surface transportation reauthorization where OCTA proposes to advocate for funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor. This funding would be targeted at preventing future service disruptions.
- Subsection (c) of the Section entitled, “Transportation & Planning,” related to expedited project delivery, is proposed to be removed. OCTA identified this principle as duplicative and was represented in subsection (e) of the “Environmental & Energy” Section.
- Subsection (g) of the Section entitled, “Transportation & Planning,” related to regional transportation plan amendments, is proposed to be removed. Staff had identified that this principle was necessary when the EPA had a backlog when OCTA was trying to process a Transportation Control Measures replacement. At this time, the issue does not impact OCTA.
- Subsection (e) of the Section entitled, “Fiscal Reforms & Issues” is recommended to be removed. This principle has to do with collection and distribution of sales tax revenue from out of state, online retailers. With

the passage of state legislation, this issue has been implemented and is largely handled at the state level at this time.

- Subsection (e) of the Section entitled, “Rail Programs” is proposed to be added. CARB has approved the In-Use Locomotive Regulation which requires locomotives operating in the State of California to transition to zero emission. In order to implement this rule, CARB must seek approval of a waiver from the EPA due to the impacts this would have on interstate commerce. There have been several hearings and legislative efforts related to this waiver. Staff proposes to monitor this process as it continues.
- Subsection (e) of the Section entitled, “Transit Programs” is proposed to be added. OCTA is required to transition its fleet to zero-emission transit vehicles by 2040. The cost of these vehicles continues to increase. There are also very limited manufacturers, which not only drives up costs further but slows down procurements. It also has an impact on the supply chain of specialized parts. With limited manufacturers, it can take months to a year to get the part necessary to fix a zero-emission transit bus, keeping that bus inoperable in the interim. This principle will support efforts to create a more competitive marketplace for zero-emission transit buses to assist in costs and supply chain constraints.
- Subsection (a) of the Section entitled, “Transportation Security & Emergency Preparedness” is proposed to be revised. These revisions modernize the existing principle and ensure that security efforts support all modes of transportation. This is especially important considering the OC Streetcar when it becomes operational.

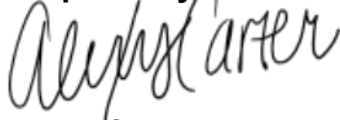
In the final draft of the Federal Legislative Platform, staff may propose additional changes that are identified as staff works with the Board, stakeholders, and internal departments. In addition, OCTA staff anticipates further discussions with the Board on further priorities for surface reauthorization legislation and will be bringing principles next year for consideration.

***Summary***

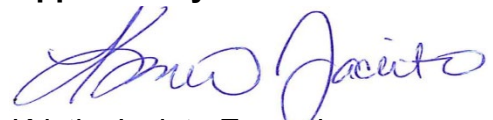
Initial drafts of the 2025-26 State and Federal Legislative Platforms are detailed for the Board's consideration. Upon approval, staff will incorporate any outstanding feedback from the Board and will return later this year for final consideration and adoption.

***Attachments***

- A. Draft Orange County Transportation Authority 2025-26 State Legislative Platform (clean copy)
- B. Draft Orange County Transportation Authority 2025-26 State Legislative Platform (strikethrough version)
- C. Draft Orange County Transportation Authority 2025-26 Federal Legislative Platform (clean copy)
- D. Draft Orange County Transportation Authority 2025-26 Federal Legislative Platform (strikethrough version)

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## **Draft Orange County Transportation Authority 2025-26 State Legislative Platform**

With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors.

The 2025-26 State Legislative Platform serves as a framework document to guide OCTA's legislative, regulatory, and administrative activities in the coming legislative session. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the upcoming legislative session. The later sections present guiding policy statements for other major issue areas that may arise during the session. Positions on individual items not directly in this document will be brought to the OCTA Board of Directors for formal action.

### **Key Policy Issues in 2025-26**

A number of significant transportation issues are expected to be discussed in the 2025-26 legislative session. OCTA will focus its advocacy efforts on the following principles.

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements and services in order to meet the mobility needs of Orange County;
- b) Seek support for adaptation and resiliency efforts related to the environment for critical transportation infrastructure;
- c) Seek funding and other administrative solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- d) Seek support, funding, and streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- e) Encourage State leadership, in conjunction with local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor;
- f) Support efforts to maximize OCTA's share of transportation and transit funding, especially through distribution formulas and more equitable competitive funding processes;

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- g) Oppose linking, reprioritizing, or aligning local and state transportation funding with policies that could significantly hinder a local agency's ability to deliver transportation programs and projects;
- h) Support efforts to maintain the promises self-help counties have made to taxpayers in the implementation of local sales tax measures and oppose mandating specific uses of future sales tax revenues;
- i) Support workforce development and training policies that allow OCTA to hire and retain personnel ready to implement the next generation of mobility, including training the workforce for zero-emission vehicles;
- j) Oppose policies that would circumvent existing transit operator funding eligibility requirements;
- k) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- l) Inform the State's Transit Transformation Task Force, created pursuant to SB 125 (Chapter 54, Statutes of 2023), in order to seek improvements to the Transportation Development Act and make recommendations related to transit funding, cost drivers, strategies for workforce retention, and ridership;
- m) Protect existing transit operations and capital funding while monitoring the implementation of the accountability provisions associated with the funding and inform clarifying legislation as needed;
- n) Oppose policies that change existing formula funding structures to redistribute funds in a way that would inhibit a local agency from delivering critical transportation projects and programs;
- o) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games are eligible for any related funding assistance, incentives, project delivery tools, and/or regulatory relief;
- p) Monitor efforts related to extending the State's cap-and-trade program while ensuring that funding for regional transportation projects and programs are maintained;
- q) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance.



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**I. IMPLEMENTATION OF ENVIRONMENTAL POLICIES**

In order to ensure that the State's environmental regulations and cap-and-trade program are implemented in an equitable manner, which will both help to reduce emissions and encourage the development of necessary infrastructure to serve California's growing population, OCTA will:

- a) Support efforts to ensure local flexibility in meeting the State's greenhouse gas emission reduction goals, including project mitigation requirements;
- b) Support streamlined environmental review and permitting processes for transportation projects and programs to avoid potentially duplicative and unnecessary analysis, while still maintaining traditional environmental protections;
- c) Work with air agencies and other stakeholders to ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- d) Monitor the State's transition to zero-emission vehicle technology to ensure that any corresponding policies adequately address the impact to long-term transportation funding stability;
- e) Oppose lengthening the California Environmental Quality Act process in a manner that would delay mobility improvements;
- f) Oppose efforts to restrict road and highway construction by superseding existing broad-based environmental review and mitigation processes;
- g) Oppose policies that would limit lead agency discretion in the management and oversight of lands set aside for environmental mitigation purposes while promoting advance mitigation planning programs;
- h) Monitor efforts to create a statewide model related to vehicle miles traveled in order to ensure that local modeling is taken into account;

**II. TRANSPORTATION FUNDING**

OCTA will monitor the status of transportation funding in California, promoting the continued stability of existing programs and efforts to address future funding deficiencies to meet transportation infrastructure needs. Given that the State is anticipated to experience a continued deficit, OCTA will work to protect funding dedicated for transportation purposes, including appropriations made in the fiscal year 2024-25 Budget Act for transit operations and capital projects.

Furthermore, executive orders continue to impact OCTA's programs and services. Staff closely monitors these efforts to ensure that transportation funds are used for their

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intended purposes. For example, Executive Order N-19-19 directed the California State Transportation Agency to review requirements for discretionary transportation investments to ensure consistency with state emission reduction goals. As a result, the State developed the Climate Action Plan for Transportation Infrastructure (CAPTI) which detailed recommendations for administering state funds related to transportation in a way that helps the State reach its goals related to climate change. It is anticipated that CAPTI recommendations will be updated in the coming year. Key actions to continue to inform the State's goals include:

- a) Oppose unfunded mandates for transportation agencies, transit providers, and local governments in providing transportation improvements and services;
- b) Oppose cost shifts or changes in responsibility for projects funded by the State to local transportation entities;
- c) Support efforts to treat the property tax of single-county transit districts the same as multi-county districts and correct other Educational Revenue Augmentation Fund inequities between like agencies;
- d) Support the constitutional protection of all transportation funding resources;
- e) Support protecting or expanding local decision-making in programming transportation funds;
- f) Oppose efforts to reduce local prerogative over regional program funds;
- g) Support efforts to involve county transportation commissions in the development and prioritization of State Highway Operation and Protection Program projects;
- h) Oppose redirecting or reclassifying transportation revenue sources, including earned interest, for anything other than their intended purposes;
- i) Support the implementation of federal transportation programs in an equitable manner that promotes traditional funding levels, programming roles, and local discretion in allocation decisions;
- j) Oppose policies that significantly increase costs, threatening OCTA's ability to deliver projects and provide transit service;
- k) Support removing the barriers for funding transportation projects, including allowing local agencies to advance projects with local funds when state funds are unavailable due to budgetary reasons, and allowing regions to pool federal, state, and local funds in order to limit lengthy amendment processes and streamline project delivery time;

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- l) Support flexibility in the application of “disadvantaged” and “low-income” communities to ensure that transportation funding flows to each region’s most impacted areas, allowing OCTA to best meet the needs of its local communities;
- m) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach.

**III. FISCAL REFORMS & ISSUES**

In recent years, the Legislature and Governor have worked collaboratively during the budget process to pass funding bills in a timely manner. Given that the State continues to report lower revenues than projected, uncertainties over future funding levels remain. Therefore, OCTA will:

- a) Monitor the study and development of alternative transportation funding proposals, including the State’s road charge pilot program and ensure that efforts are made to address concerns related to equity, privacy, and public support of such proposals;
- b) Oppose levying new and/or increase in gasoline taxes or user fees, including revenue increases on fuel consumption categorized as charges, fees, revenue enhancements, or similar classifications. Consideration of such efforts shall occur when a direct nexus is determined to exist between revenues and transportation projects, and additional revenues are to be controlled by the county transportation commission;
- c) Oppose efforts to decrease the voter threshold requirement for local tax measures for transportation purposes;
- d) Oppose increases to administrative fees charged by the California Department of Tax and Fee Administration on the collection of local sales tax measures;
- e) Support policies that ensure all users of the State’s transportation system pay their “fair share” to maintain and improve the system;
- f) Support efforts to restore equitable generation and disbursement of sales tax revenues that support the Local Transportation Fund;
- g) Support the retention of existing and future local revenue sources;
- h) Support an extension of the state sales tax exemption for the purchase of zero-emission buses.

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**IV. STATE TRANSPORTATION IMPROVEMENT PROGRAM**

The State Transportation Improvement Program (STIP), substantially amended by SB 45 (Chapter 622, Statutes of 1997), is a programming document that establishes the funding priorities and project commitments for transportation capital improvements in California. SB 45 placed decision-making authority with the regions by providing project selection for 75 percent of the funding in the Regional Transportation Improvement Program (RTIP). This funding is distributed to counties based on an allocation formula. The remaining 25 percent of the funds are programmed by the California Department of Transportation (Caltrans) in the Interregional Transportation Improvement Program (ITIP). OCTA will seek to ensure that the regional focus of the program is preserved. Key provisions to be sought by OCTA include:

- a) Support maintaining the current STIP formula, which provides 75 percent of STIP funding to the locally-nominated RTIP and 25 percent to the ITIP;
- b) Support equitable allocations of transportation funding, such as the north/south formula distribution of county shares and ITIP allocations;
- c) Support efforts to clarify that programming of current period county shares has priority over advancement of future county shares;
- d) Support a formula-based guaranteed disbursement of the ITIP;
- e) Support efforts to allow a mode-neutral STIP;
- f) Support increased flexibility for the use of STIP funds to support alternative projects, including, but not limited to, transit and goods movement improvement projects.

**V. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. While state transit funding has recently become more stable, future demand increases due to environmental regulations and increased capital and operations costs will put further strain on existing resources. OCTA will make every effort to minimize additional state obligations to transit operations which lack a sufficient and secure revenue source. To that end, OCTA will focus on the following:

- a) Advocate for a continued strong state role in providing funding for transit operations rather than shifting responsibility to local transportation entities. No additional requirements should be created for operation levels beyond existing capacity, unless agreed to by that entity or otherwise appropriately funded;

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- b) Seek additional funding for paratransit operations and transit accessibility capital improvements that support persons with disabilities and senior citizens;
- c) Support efforts to encourage and incentivize the interoperability of transit and rail systems within California;
- d) Support limiting the liability of transit districts for the location of bus stops (*Bonanno v. Central Contra Costa Transit Authority*);
- e) Support incentives for transit-oriented development projects (i.e., authorize extra credit toward housing element requirements for these developments), including incentives for development;
- f) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- g) Monitor and inform the creation of the Zero-Emission Roadmap, which will work to identify actions needed to meet California's zero-emission transit goals with minimal displacement of existing workers.
- h) Encourage policies and guidance that incentivize public transit ridership;

**VI. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. In support of these routes, OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak and managed by the LOSSAN Agency. OCTA has served as the managing agency for the LOSSAN Agency since 2013, providing administrative and management support.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. While the status and future of these programs is uncertain, OCTA will be watchful to ensure that funding for these rail systems does not impact other transportation funding sources. Key advocacy efforts will emphasize the following:

- a) Support policies that encourage commercial, commuter-based development around passenger rail corridors that includes permanent job creation;

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- b) Monitor and evaluate plans and progress of high-speed rail and its funding;
- c) Support efforts to provide resources for safety improvements on the rail network in Southern California, including for the implementation, operation, and maintenance of Positive Train Control safety technology;
- d) Support studying the policies, funding options, and need for rail/highway grade separations, including any impact on existing state highway and transit funding sources;
- e) Support policies that facilitate the development and construction of needed infrastructure projects that support modernization, connectivity, and general system-wide improvements to California's rail network;
- f) Monitor the implementation of the In-Use Locomotive Regulation to ensure the transition to zero-emission locomotives is technically feasible and provides adequate funding.

**VII. ROADS & HIGHWAYS**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors as the ownership of the 91 Express Lanes and the use of design-build authority on the State Route 22 project and Interstate 405 Improvement Project. OCTA will continue to seek new and innovative ways to deliver road and highway projects to the residents of Orange County and, to that end, OCTA will focus on the following:

- a) Support new and existing alternative project delivery methods, such as design-build, public-private partnership authority, construction manager/general contractor authority, and progressive design build, through expanding mode and funding eligibility while also allowing the appropriate balance of partnership between the State and local agencies;
- b) Support authorizing local agencies to advertise, award, and administer contracts for state highway projects;
- c) Oppose duplicative reporting mandates and efforts to impose additional requirements, beyond what is required in statute, on lead agencies awarding contracts using alternative project delivery mechanisms;
- d) Support streamlining of the Caltrans review process for projects without compromising environmental safeguards;

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- e) Support policies that improve signal synchronization programs in order to facilitate street signal coordination, prioritization, and preemption, as well as encouraging the use of intelligent transportation system measures;
- f) Support management and integration of express lanes to promote consistent and seamless user experience;
- g) Support the equitable enforcement of regulations governing transportation network companies;
- h) Support studying the development and safe operation of autonomous vehicles and related technologies;
- i) Support preserving local discretion and flexibility in the development of the congestion management program.

**VIII. TOLLED & MANAGED LANES**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors, including both the ownership of the 91 Express Lanes, a ten-mile toll facility on State Route 91, extending from State Route 55 to the Orange/Riverside County line, and the 405 Express Lanes, which operates two lanes in each direction from State Route 73 to the Interstate 605.

Because many agencies are discussing the increased use of managed lane facilities, there remains a need to advocate for local flexibility and input. To ensure the continued success of the 91 Express Lanes, the 405 Express lanes, and for toll policy moving forward, OCTA will:

- a) Oppose efforts to divert revenues from toll facilities for purposes not directed by the responsible governing board;
- b) Support policies that allow OCTA, and its partners, to efficiently operate and maintain the 91 Express Lanes and the 405 Express Lanes;
- c) Support efforts to preserve local flexibility in the administration of toll lanes and encourage the State to work with OCTA on operating policies to ensure seamless system operation;
- d) Oppose the construction or operation of toll facilities that are inconsistent with local long range transportation plans;
- e) Oppose the construction or operation of toll facilities that fail to respect existing local transportation projects and funding programs;

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- f) Support customer privacy rights while maintaining OCTA's ability to effectively communicate with customers and operate the 91 and 405 Express Lanes;
- g) Support the use of innovative means to enhance toll agency enforcement efforts, including ways to address toll violations due to protected plates;
- h) Support collaborative solutions to address the degradation of HOV lanes that respect local transportation funding sources and programs, have the support of the relevant regional transportation planning agency, do not redirect existing local transportation funding sources, and analyze the effect of single-occupant, low-emission vehicles, including associated federal requirements triggered by their access allowance;
- i) Support efforts to improve the interoperability of the different toll systems across the State in order to ensure fair and efficient toll operations while affirming user privacy protections;
- j) Inform discussions related to revising toll evasion penalties, toll exemptions, and other changes to enforcement strategies and mechanisms in order to maintain local control, opposing efforts that will hinder the ability to meet congestion management and financing requirements;
- k) Support policies that protect the process prescribed in AB 194 (Chapter 687, Statutes of 2015), which authorizes regional transportation agencies to develop and operate toll facilities, and ensure it is maintained in its application on future toll facilities.

**IX. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of the nation's busiest ports, are vital to California's economy and the surrounding region because goods are shipped to and through the surrounding counties. While the State's goods movement system is the most robust in the nation, it is continually challenged by competing goods movement systems in other states. In order to continue to compete and engage in the global marketplace, California must continue to enhance its goods movement system, while at the same time be cognizant of taking the necessary actions to mitigate any negative impacts to local communities. Key positions include:

- a) Support improvements to facilitate the movement of intrastate, interstate, and international trade beneficial to the State and Orange County's economy;
- b) Support policies that will aid in the development, approval, and construction of projects to expand goods movement capacity and reduce congestion;
- c) Ensure that control of goods movement infrastructure projects and funding is retained at the local level;



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- d) Seek mitigation for the impacts of goods movement on local communities;
- e) Pursue ongoing, stable sources of funding for goods movement infrastructure;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure any effort to establish a container fee program dedicates funding to projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

**X. ACTIVE TRANSPORTATION**

Active transportation projects and programs, which encourage greater mobility through walking and bicycling, have grown in popularity due to the environmental, health, and cost savings benefits. OCTA continues to study, plan, and fund active transportation projects and programs as part of its mission to provide Orange County with an efficient and multi-modal transportation system. Key positions include:

- a) Support policies to increase the visibility and safety of users engaged in active transportation;
- b) Support creative use of paths, roads, flood channels, and abandoned rail lines using existing established rights-of-way to promote bicycles trails and pedestrian paths, in coordination with any local agency with jurisdiction over those properties;
- c) Support funding and programs or policies that encourage the safe operation of an integrated multimodal system, which includes the interaction between roadways, rail lines, bikeways, and pedestrian ways, and the users of those facilities;
- d) Support streamlined active transportation funding programs;
- e) Seek funding and support policies and projects to increase safety requirements related to the utilization of electric bicycles.

**XI. ROLES & RESPONSIBILITIES**

In recent years, there have been many efforts to reorganize or restructure transportation programs and local agency responsibilities. OCTA will continue to monitor policies that would significantly affect the way in which it operates, with a focus on maintaining local control and continued partnerships in order to advocate for the following principles:

- a) Support preserving the role of county transportation commissions, as consistent with existing law, in the administration of transportation programs;

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- b) Oppose proposals that reduce the rights and responsibilities of county transportation commissions in planning, funding, and delivering transportation programs;
- c) Oppose policies that unnecessarily subject projects to additional reviews and project selection approvals that could adversely affect delivery timelines and processes;
- d) Support partnerships with alternative mobility providers that allow for adequate information sharing while also respecting the planning efforts of local agencies;
- e) Support efforts to increase the flexibility of funds used for motorist service programs.

**XII. EMPLOYMENT ISSUES**

As a public agency and one of the largest employers in Orange County, OCTA balances its responsibility to the community and the taxpayers to provide safe, reliable, cost-effective service with its responsibility of being a reasonable, responsive employer. Key advocacy positions include:

- a) Oppose efforts to impose state labor laws on currently exempt public agencies;
- b) Oppose policies that circumvent the collective bargaining process;
- c) Oppose policies adversely affecting OCTA's ability to efficiently and effectively deal with labor relations, employee rights, benefits, including pension benefits, the California Family Rights Act, and working conditions, including health, safety, and ergonomic standards for the workplace;
- d) Support efforts to reform and resolve inconsistencies in the workers' compensation and unemployment insurance systems, and labor law requirements that maintain protection for employees and allow businesses to operate efficiently;
- e) Support workforce development policies that facilitate a more efficient talent acquisition process;
- f) Support policies that encourage ridesharing, teleworking, vanpool, and related congestion relief programs for Orange County commuters.

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**XIII. TRANSPORTATION SECURITY & EMERGENCY PREPAREDNESS**

As natural and man-made disasters continue to threaten transportation systems around the world, significant improvements have been, and continue to be, carried out to enhance the safety, security, and resilience of transportation infrastructure in the United States. As Orange County's bus provider and a Metrolink partner, OCTA understands the importance of ensuring the safety and security of our transportation network and protecting our customers. OCTA maintains a partnership with the Orange County Sheriff's Department to provide OCTA Transit Police Services for the bus and train systems in Orange County and continues to be actively involved in a variety of state and regional preparedness exercises in support of first responders. The development of a new Transit Security and Operations Center is also underway to enhance security efforts and further the resiliency of the Orange County transit system.

Additional safety and security measures require additional financial resources. Consequently, OCTA's advocacy positions will highlight:

- a) Support state homeland security and emergency preparedness funding and grant programs to local transportation agencies to alleviate financial burden placed on local entities;
- b) Support policies that balance retention mandates of video surveillance records to reflect current reasonable technological and fiscal capabilities;
- c) Support technological advances in order to increase the safety of public transportation passengers and operators;
- d) Support policies that aim to enhance transit services and the overall safety and security of transit riders, public transit employees, and on-road vehicles while avoiding undue burden on transportation agencies to implement unfunded safety measures.

**XIV. ADMINISTRATION/GENERAL**

General administrative issues arise every session that could impact OCTA's ability to operate efficiently. Key positions include:

- a) Oppose policies adversely affecting OCTA's ability to efficiently and effectively contract for goods and services, conduct business of the agency, and limit or transfer the risk of liability;
- b) Support efforts to provide greater protection of OCTA's computer and information security systems;
- c) Support establishing reasonable liability for non-economic damages in any action for personal injury, property damage, or wrongful death brought against a public entity based on principles of comparative fault;

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- d) Support consistent campaign contribution limits as applied to both elected and appointed bodies;
- e) Monitor proposed changes related to the Ralph M. Brown Act, and other statutes governing public meetings, including the expanded use of technology;
- f) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serve all residents of Orange County;
- g) Oppose policies that create undue burden on transportation procurement practices or restrict ability to maintain local governing board award authority;
- h) Oppose efforts that create duplicative reporting requirements.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors. In addition, Orange County provides highway and rail corridors that facilitate the increasing level of international trade entering the Southern California ports.

The 2025~~3~~-26~~4~~ State Legislative Platform serves as a framework document to guide the ~~Orange County Transportation Authority's (OCTA's)~~ legislative, regulatory, and administrative activities in the coming legislative session. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the upcoming legislative session. The later sections present guiding policy statements for other major issue areas that may arise during the session. Positions on individual items not directly in this document will be brought to the OCTA Board of Directors for formal action.

### **Key Policy Issues in 2025~~3~~-26~~4~~**

A number of significant transportation issues are expected to be discussed in the 2025~~3~~-26~~4~~ legislative session. OCTA will focus its advocacy efforts on the following principles.

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements and services in order to meet the mobility needs of Orange County;
- ~~b) Encourage policies and guidance that incentivize public transit ridership; (Moved to Section V)~~
- b) Seek support for adaptation and resiliency efforts related to the environment for critical transportation infrastructure;
- c) Seek funding and other administrative solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- d) Seek support, funding, and streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- e) Encourage State leadership, in conjunction with local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail eCorridor;

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- f) Support efforts to maximize OCTA's share of transportation and transit funding, especially through distribution formulas and more equitable competitive funding processes;
- g) Oppose linking, reprioritizing, or aligning local and state transportation funding with policies that could significantly hinder a local agency's ability to deliver transportation programs and projects;
- h) Support efforts to maintain the promises self-help counties have made to taxpayers in the implementation of local sales tax measures and oppose mandating specific uses of future sales tax revenues;
- i) Support workforce development and training policies that allow OCTA to hire and retain personnel ready to implement the next generation of mobility, including training the workforce for zero-emission vehicles;
- j) Oppose policies that would circumvent existing transit operator funding eligibility requirements;
- ~~k) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach; (Moved to Section II)~~
- k) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- l) Inform the State's Transit Transformation Task Force, created pursuant to SB 125 (Chapter 54, Statutes of 2023), in order to seek improvements to the Transportation Development Act and make recommendations related to transit funding, cost drivers, strategies for workforce retention, and ridership;
- m) Protect existing transit operations and capital funding while monitoring the implementation of the accountability provisions associated with the funding and inform clarifying legislation as needed;
- n) Oppose policies that change existing formula funding structures to redistribute funds in a way that would inhibit a local agency from delivering critical transportation projects and programs;
- o) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games are eligible for any related funding assistance, incentives, and project delivery tools, and/or regulatory relief;

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- p) Monitor efforts related to extending the State's cap-and-trade program while ensuring that funding for regional transportation projects and programs are maintained;
- q) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance. (Moved from Section V).

**I. IMPLEMENTATION OF ENVIRONMENTAL POLICIES**

In order to ensure that the State's environmental regulations and cap-and-trade program are implemented in an equitable manner, which will both help to reduce emissions and encourage the development of necessary infrastructure to serve California's growing population, OCTA will:

- a) Support efforts to ensure local flexibility in meeting ~~the goals of the State's greenhouse gas~~ emission reduction goals, including project mitigation requirements and vehicle miles traveled initiatives;
- ~~b) Support formula-based cap and trade programs, including maintaining the prioritization of cap and trade funding for transportation projects; [Incorporated into subsection (p) of the Key Policy Issues Section]~~
- b) Support streamlined environmental review and permitting processes for transportation projects and programs to avoid potentially duplicative and unnecessary analysis, while still maintaining traditional environmental protections;
- c) Work with air agencies and other stakeholders to ~~E~~ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- d) Monitor the State's transition to zero-emission vehicle technology to ensure that any corresponding policies adequately address the impact to long-term transportation funding stability;
- e) Oppose lengthening the California Environmental Quality Act process in a manner that would delay mobility improvements;
- f) Oppose efforts to restrict road and highway construction by superseding existing broad-based environmental review and mitigation processes;
- g) Oppose policies that would limit lead agency discretion in the management and oversight of lands set aside for environmental mitigation purposes while promoting advance mitigation planning programs;

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- h) Monitor efforts to create a statewide model related to vehicle miles traveled in order to ensure that local modeling is taken into account.

## **II. TRANSPORTATION FUNDING**

OCTA will monitor the status of transportation funding in California, promoting the continued stability of existing programs and efforts to address future funding deficiencies to meet transportation infrastructure needs. Given that ~~future revenues remain unpredictable~~ the State is anticipated to experience a continued deficit, OCTA will also work to protect funding dedicated for transportation purposes, including appropriations made in the fiscal year 2024~~3~~-25~~4~~ Budget Act for transit operations and capital projects.

Furthermore, ~~there have been two executive orders~~ continue to that will impact OCTA's programs and services, ~~which will be Staff closely monitored~~ these efforts to ensure that transportation funds are used for their intended purposes. For example, First, Executive Order N-79-20 requires all passenger vehicles and light trucks sold in California to be zero-emission by 2035, and the same for medium and heavy-duty trucks by 2045. And secondly, Executive Order N-19-19, directed the California State Transportation Agency to review requirements for discretionary transportation investments to ensure consistency with state emission reduction goals. As a result, the State developed the Climate Action Plan for Transportation Infrastructure (CAPTI) which detailed recommendations for administering state funds related to transportation in a way that helps the State reach its goals related to climate change. It is anticipated that CAPTI recommendations will be updated in the coming year. Key actions to continue to inform the State's goals include:

- a) Oppose unfunded mandates for transportation agencies, transit providers, and local governments in providing transportation improvements and services;
- b) Oppose cost shifts or changes in responsibility for projects funded by the State to local transportation entities;
- c) Support efforts to treat the property tax of single-county transit districts the same as multi-county districts and correct other Educational Revenue Augmentation Fund inequities between like agencies;
- d) Support the constitutional protection of all transportation funding resources;
- e) Support protecting or expanding local decision-making in programming transportation funds;
- f) Oppose efforts to reduce local prerogative over regional program funds;
- g) Support efforts to involve county transportation commissions in the development and prioritization of State Highway Operation and Protection Program projects;



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- h) Oppose redirecting or reclassifying transportation revenue sources, including earned interest, for anything other than their intended purposes;
- i) Support the implementation of federal transportation programs in an equitable manner that promotes traditional funding levels, programming roles, and local discretion in allocation decisions;
- j) Oppose policies that significantly increase costs, threatening OCTA's ability to deliver projects and provide transit service;
- k) Support removing the barriers for funding transportation projects, including allowing local agencies to advance projects with local funds when state funds are unavailable due to budgetary reasons, and allowing regions to pool federal, state, and local funds in order to limit lengthy amendment processes and streamline project delivery time;
- ~~l) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding incentives and project delivery tools; (Moved to the Key Policy Issues Section and revised)~~
- l) Support flexibility in the application of "disadvantaged" and "low-income" communities to ensure that transportation funding flows to each region's most impacted areas, allowing OCTA to best meet the needs of its local communities;
- m) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach. (Moved from the Key Policy Issues Section)

### **III. FISCAL REFORMS AND~~&~~ ISSUES**

In recent years, the Legislature and Governor have worked collaboratively during the budget process to pass funding bills in a timely manner. Given that the State continues to report lower revenues than projected, uncertainties over future funding levels remain. Therefore, OCTA will:

- a) Monitor the study and development of alternative transportation funding proposals, including the State's road charge pilot program and ensure that efforts are made to address concerns related to equity, privacy, and public support of such proposals;
- b) Oppose levying new and/or increase in gasoline taxes or user fees, including revenue increases on fuel consumption categorized as charges, fees, revenue enhancements, or similar classifications. Consideration of such efforts shall occur when a direct nexus is determined to exist between revenues and transportation projects, and additional revenues are to be controlled by the county transportation commission;

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- c) Oppose efforts to decrease the voter threshold requirement for local tax measures for transportation purposes;
- d) Oppose increases to administrative fees charged by the California Department of Tax and Fee Administration on the collection of local sales tax measures;
- e) Support policies that ensure all users of the State's transportation system pay their "fair share" to maintain and improve the system;
- f) Support efforts to restore equitable ~~with regards to the~~ generation and disbursement of sales tax revenues that support the Local Transportation Fund;
- g) Support the retention of existing and future local revenue sources;
- h) Support an extension of the state sales tax exemption for the purchase of zero-emission buses.

**IV. STATE TRANSPORTATION IMPROVEMENT PROGRAM**

The State Transportation Improvement Program (STIP), substantially amended by SB 45 (Chapter 622, Statutes of 1997), is a programming document that establishes the funding priorities and project commitments for transportation capital improvements in California. SB 45 placed decision-making authority with the regions ~~closest to the problem~~ by providing project selection for 75 percent of the funding in the Regional Transportation Improvement Program (RTIP). This funding is distributed to counties based on an allocation formula. The remaining 25 percent of the funds are programmed by the California Department of Transportation (Caltrans) in the Interregional Transportation Improvement Program (ITIP). OCTA will seek to ensure that the regional focus of the program is preserved. Key provisions to be sought by OCTA include:

- a) Support maintaining the current STIP formula, which provides 75 percent of STIP funding to the locally-nominated RTIP and 25 percent to the ITIP;
- b) Support equitable allocations of transportation funding, such as the north/south formula distribution of county shares and ITIP allocations;
- c) Support efforts to clarify that programming of current period county shares has priority over advancement of future county shares;
- d) Support a formula-based guaranteed disbursement of the ITIP;
- e) Support efforts to allow a mode-neutral STIP;

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- f) Support increased flexibility for the use of STIP funds to support alternative projects, including, but not limited to, transit and goods movement improvement projects.

**V. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. While state transit funding has recently become more stable, future demand increases due to environmental regulations and increased capital and operations costs ~~fuel prices may~~ will put further strain on existing resources. OCTA will make every effort to minimize additional state obligations to transit operations which lack a sufficient and secure revenue source. To that end, OCTA will focus on the following:

- a) Advocate for a continued strong state role in providing funding for transit operations rather than shifting responsibility to local transportation entities. No additional requirements should be created for operation levels beyond existing capacity, unless agreed to by that entity or otherwise appropriately funded;
- ~~b) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance; (Moved to the Key Policy Issues Section)~~
- b) Seek additional funding for paratransit operations and transit accessibility capital improvements that support persons with disabilities and senior citizens;
- c) Support efforts to encourage and incentivize the interoperability of transit and rail systems within California;
- d) Support limiting the liability of transit districts for the location of bus stops (*Bonanno v. Central Contra Costa Transit Authority*);
- e) Support ~~the citing of~~ incentives for transit-oriented development projects (i.e., authorize extra credit towards housing element requirements for these developments), including incentives for development;
- f) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- g) Monitor and inform the creation of the Zero-Emission Roadmap, which will work to identify actions needed to meet California's zero-emission transit goals with minimal displacement of existing workers;
- ~~h) Encourage policies and guidance that incentivize public transit ridership. (Moved from the Key Policy Issues Section)~~

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**VII. ROADS AND HIGHWAYS**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors as the ownership of the 91 Express Lanes and the use of design-build authority on the State Route 22 project and Interstate 405 Improvement Project. OCTA will continue to seek new and innovative ways to deliver road and highway projects to the residents of Orange County and, to that end, OCTA will focus on the following:

- ~~a) Oppose the creation of a conservancy that would inhibit the delivery of transportation projects under study or being implemented in the region;~~
- a) Support new and existing alternative project delivery methods, such as design-build, public-private partnership authority, construction manager/general contractor authority, and progressive design build, through expanding mode and funding eligibility while also allowing the appropriate balance of partnership between the State and local agencies;
- b) Support authorizing local agencies to advertise, award, and administer contracts for state highway projects;
- c) Oppose duplicative reporting mandates and efforts to impose additional requirements, beyond what is required in statute, on lead agencies awarding contracts using alternative project delivery mechanisms;
- d) Support streamlining of the Caltrans review process for projects, ~~simplification of processes, and reduction of red tape~~, without compromising environmental safeguards;
- f) Support policies that improve signal synchronization programs in order to facilitate street signal coordination, prioritization, and preemption, as well as encouraging the use of intelligent transportation system measures;
- g) Support management and integration of express lanes to promote consistent and seamless user experience;
- ~~h) Monitor efforts to increase fines for high-occupancy vehicle (HOV) lane violations and, if implemented, ensure fines are dedicated to enforcement purposes;~~
- h) Support the equitable enforcement of regulations governing transportation network companies;
- i) Support studying the development and safe operation of autonomous vehicles and related technologies;
- j) Support preserving local discretion and flexibility in the development of the congestion management program.

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**XIVII. ROLES AND RESPONSIBILITIES**

In recent years, there have been many efforts to reorganize or restructure transportation programs and local agency responsibilities. OCTA will continue to monitor policies that would significantly affect the way in which it operates, with a focus on maintaining local control and continued partnerships in order to advocate for the following principles:

- a) Support preserving the role of county transportation commissions, as consistent with existing law, in the administration of transportation programs;
- b) Oppose proposals that reduce the rights and responsibilities of county transportation commissions in planning, funding, and delivering transportation programs;
- c) Oppose policies that unnecessarily subject projects to additional reviews and project selection approvals that could adversely affect delivery timelines and processes;
- d) Support partnerships with alternative mobility providers that allow for adequate information sharing while also respecting the planning efforts of local agencies;
- e) Support efforts to increase the flexibility of funds used for motorist service programs.

**VIII. TOLLED & MANAGED LANES**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors, including both the ownership of the 91 Express Lanes, a ten-mile toll facility on State Route 91, extending from State Route 55 to the Orange/Riverside County line, and the 405 Express Lanes, which will operate~~s~~ two lanes in each direction from State Route 73 to the Interstate 605.

~~As transportation demands continue to increase, innovative tools must be available to ensure transportation infrastructure projects continue to be built in a reliable, prompt, and efficient manner. OCTA took advantage of one such tool by securing a \$629 million federal loan to supplement state and local funds on the I-405 Improvement Project. The loan, obtained through the Transportation Infrastructure Finance and Innovation Act (TIFIA), will save taxpayers approximately \$300 million in the decades to come.~~

~~As the TIFIA loan and purchase of the 91 Express Lanes in 2003 illustrate, OCTA's leadership in improving mobility for Orange County residents through the use of innovative tools and approaches allow transportation agencies to stretch their dollars further than ever before.~~ Because many agencies are discussing the increased use of managed lane facilities, there remains a need to advocate for local flexibility and input. To ensure the continued success of the 91 Express Lanes, the 405 Express lanes, and for toll policy moving forward, OCTA will:

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- a) ~~Ensure that revenues from toll facilities remain within the corridor from which they are generated, Oppose~~ing efforts to divert revenues from toll facilities for state purposes not directed by the responsible governing board;
- b) Support policies that allow OCTA, and its partners, to efficiently operate and maintain the 91 Express Lanes and the 405 Express Lanes;
- c) Support efforts to preserve local flexibility in the administration of toll lanes and encourage the State to work with OCTA on operating policies to ensure seamless system operation;
- d) Oppose the construction or operation of toll facilities that are inconsistent with local long range transportation plans;
- e) Oppose the construction or operation of toll facilities that fail to respect existing local transportation projects and funding programs;
- f) Support customer privacy rights while maintaining OCTA's ability to effectively communicate with customers and operate the 91 and 405 Express Lanes;
- g) Support the use of innovative means to enhance toll agency enforcement efforts, including ways to address toll violations due to protected plates;
- h) Support collaborative solutions to address the degradation of HOV lanes that respect local transportation funding sources and programs, have the support of the relevant regional transportation planning agency, do not redirect existing local transportation funding sources, and analyze the effect of single-occupant, low-emission vehicles, including associated federal requirements triggered by their access allowance;
- i) Support efforts to improve the interoperability of the different toll systems across the State in order to ensure fair and efficient toll operations while affirming user privacy protections;
- j) Inform discussions related to revising toll evasion penalties, toll exemptions, and other changes to enforcement strategies and mechanisms in order to maintain local control, opposing efforts that will hinder the ability to meet congestion management and financing requirements;
- k) Support policies that protect the process prescribed in AB 194 (Chapter 687, Statutes of 2015), which authorizes regional transportation agencies to develop and operate toll facilities, and ensure it is maintained in its application on future toll facilities;
- ~~l) Oppose policies that interfere with local determination of project impacts on the functionality of the Express Lanes operated and maintained by OCTA. [Covered by subsection (e) of this Section]~~

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**VIIX. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. In support of these routes, OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak and managed by the ~~Los Angeles San Diego San Luis Obispo Rail Corridor Agency (LOSSAN Agency).~~ OCTA has served as the managing agency for the LOSSAN Agency since 2013, ~~and assumed full providing administrative and management support responsibility for the Pacific Surfliner service in June 2015 via an interagency transfer agreement with the State. OCTA continues to serve in this capacity, providing all necessary administrative support to the LOSSAN Agency.~~

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. While the status and future of these programs is uncertain, OCTA will be watchful to ensure that funding for these rail systems does not impact other transportation funding sources. Key advocacy efforts will emphasize the following:

- a) Support policies that encourage commercial, commuter-based development around passenger rail corridors that includes permanent job creation;
- ~~b) Support efforts to create additional efficiency in rail program oversight, including consideration of possible program consolidation;~~
- b) Monitor and evaluate plans and progress of high-speed rail and its funding;
- c) Support efforts to provide resources for safety improvements on the rail network in Southern California, including for the implementation, operation, and maintenance of Positive Train Control safety technology;
- d) Support studying the policies, funding options, and need for rail/highway grade separations, including any impact on existing state highway and transit funding sources;
- e) Support policies that facilitate the development and construction of needed infrastructure projects that support modernization, connectivity, and general system-wide improvements to California's rail network;

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- f) Monitor the implementation of the In-Use Locomotive Regulation to ensure the transition to zero-emission locomotives is technically feasible and provides adequate funding.

**IX. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered, ~~the nation's two of the nation's~~ busiest ports, are vital to California's economy and the surrounding region because goods are shipped to and through the surrounding counties. While the State's goods movement system is the most robust in the nation, it is continually challenged by competing goods movement systems in other states. In order to continue to compete and engage in the global marketplace, California must continue to enhance its goods movement system, while at the same time be cognizant of taking the necessary actions to mitigate any negative impacts to local communities. Key positions include:

- a) Support improvements ~~in major trade gateways in California~~ to facilitate the movement of intrastate, interstate, and international trade beneficial to the State's and Orange County's economy;
- b) Support policies that will aid in the development, approval, and construction of projects to expand goods movement capacity and reduce congestion;
- c) Ensure that control of goods movement infrastructure projects and funding is retained at the local level;
- d) Seek mitigation for the impacts of goods movement on local communities;
- e) Pursue ongoing, stable sources of funding for goods movement infrastructure;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure any effort to establish a container fee program dedicates funding to projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

**XI. ACTIVE TRANSPORTATION**

Active transportation projects and programs, which encourage greater mobility through walking and bicycling, have grown in popularity due to the environmental, health, and cost savings benefits. ~~Through local planning efforts such as Orange County's Regional Bikeways Planning Collaborative, the Pacific Coast Highway Corridor Study, and the development of OCTA's Commuter Bikeways Strategic Plan,~~ OCTA continues to study, plan, and fund active transportation projects and programs as part of its mission to provide



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Orange County with an efficient and multi-modal transportation system. Key positions include:

- a) Support policies to increase the visibility and safety of users engaged in active transportation;
- b) Support creative use of paths, roads, flood channels, and abandoned rail lines using existing established rights-of-way to promote bicycles trails and pedestrian paths, in coordination with any local agency with jurisdiction over those properties;
- c) Support funding and programs or policies that encourage the safe operation of an integrated multimodal system, which includes the interaction between roadways, rail lines, bikeways, and pedestrian ways, and the users of those facilities;
- d) Support streamlined active transportation funding programs;
- ~~e) Support efforts to streamline and simplify the review and approval by the California Public Utilities Commission of lease agreements between sponsors of active transportation projects and public utility companies;~~
- e) Seek funding and support policies and projects to increase safety requirements related to the utilization of electric bicycles.

**XIV. ADMINISTRATION/GENERAL**

General administrative issues arise every session that could impact OCTA's ability to operate efficiently. Key positions include:

- a) Oppose policies adversely affecting OCTA's ability to efficiently and effectively contract for goods and services, conduct business of the agency, and limit or transfer the risk of liability;
- b) Support efforts to provide greater protection of OCTA's computer and information security systems;
- c) Support establishing reasonable liability for non-economic damages in any action for personal injury, property damage, or wrongful death brought against a public entity based on principles of comparative fault;
- d) Support consistent campaign contribution limits as applied to both elected and appointed bodies;
- e) Monitor proposed changes related to the Ralph M. Brown Act, and other statutes governing public meetings, including the expanded use of technology;

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- f) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serve all residents of Orange County;
- g) Oppose policies that create undue burden on transportation procurement practices or restrict ability to maintain local governing board award authority;
- h) Oppose efforts that create duplicative reporting requirements.

**XIII. EMPLOYMENT ISSUES**

As a public agency and one of the largest employers in Orange County, OCTA balances its responsibility to the community and the taxpayers to provide safe, reliable, cost-effective service with its responsibility of being a reasonable, responsive employer. Key advocacy positions include:

- a) Oppose efforts to impose state labor laws on currently exempt public agencies;
- b) Oppose policies that circumvent the collective bargaining process;
- c) Oppose policies adversely affecting OCTA's ability to efficiently and effectively deal with labor relations, employee rights, benefits including pension benefits, the California Family Rights Act, and working conditions, including health, safety, and ergonomic standards for the workplace;
- d) Support efforts to reform and resolve inconsistencies in the workers' compensation and unemployment insurance systems, and labor law requirements that maintain protection for employees and allow businesses to operate efficiently;
- e) Support workforce development policies that facilitate a more efficient talent acquisition process;
- f) Support policies that encourage ridesharing, teleworking, vanpool, and related congestion relief programs for Orange County commuters.

**XIII~~IV~~. TRANSPORTATION SECURITY AND & EMERGENCY PREPAREDNESS**

As natural and man-made disasters continue to threaten transportation systems around the world, significant improvements have been, and continue to be, carried out to enhance the safety, security, and resilience of transportation infrastructure in the United States. As Orange County's bus provider and a Metrolink partner, OCTA ~~comprehends~~ understands the importance of ensuring the safety and security of our transportation network and protecting our customers. ~~Presently~~, OCTA maintains a partnership with the Orange County Sheriff's Department to provide OCTA Transit Police Services for the bus and train systems in Orange County and continues to be actively involved in a variety of state and regional preparedness exercises in support of first responders. ~~OCTA is also~~

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~~currently working with its community partners on an effort to install video surveillance systems at Metrolink stations and on its fleet of buses and throughout its bus facilities.~~ The development of a new Transit Security and Operations Center is also underway to enhance security efforts and further the resiliency of the Orange County transit system.

Additional safety and security measures require additional financial resources. ~~Heightened security awareness, an active public safety campaign, and greater surveillance efforts, all require additional financial resources.~~ Consequently, OCTA's advocacy positions will highlight:

- a) Support state homeland security and emergency preparedness funding and grant programs to local transportation agencies to alleviate financial burden placed on local entities;
- b) Support policies that balance retention mandates of video surveillance records to reflect current reasonable technological and fiscal capabilities;
- c) Support ~~the use of new technology~~ technological advances in order to increase the safety of public transportation passengers and operators;
- d) Support policies that aim to enhance transit services and the overall safety and security of transit riders, public transit employees, and on-road vehicles while avoiding undue burden on transportation agencies to implement unfunded safety measures.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors.

The 2025-26 Federal Legislative Platform serves as a framework document to guide OCTA's statutory, regulatory, and administrative goals and objectives in Washington, D.C. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the 119<sup>th</sup> Congress, and the later sections present guiding policy statements for the other major issues that may arise. Positions on individual items not directly addressed in this document will be brought to the OCTA Board of Directors for formal action.

### **Key Policy Issues in the 119<sup>th</sup> Congress**

A number of significant transportation issues will be discussed in the 119<sup>th</sup> Congress. OCTA will focus its advocacy efforts on the following principles:

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements, and services in order to meet the mobility needs of Orange County;
- b) Request annual appropriations at least consistent with authorized funding levels and advanced appropriations provided in the Infrastructure Investment and Jobs Act (IIJA) are maintained in order to meet our county's critical infrastructure needs;
- c) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs, ensuring funding OCTA receives from IIJA and the Inflation Reduction Act is maintained;
- d) Oppose rescissions or other arbitrary funding cuts to transportation programs;
- e) Advocate for full funding of transportation programs without placing new limitations or conditions on the distribution of funds that would impede the delivery of infrastructure projects;
- f) Ensure that Highway Trust Fund (HTF) revenues continue to be used for transit expenditures for capital and operations;

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- g) Ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- h) Ensure that Orange County is eligible for funding provided to meet air quality standards for the South Coast Air Basin and oppose efforts that would impact the use of transportation funding;
- i) Seek support for adaptation and resiliency efforts related to environment for critical transportation infrastructure;
- j) Seek funding and other solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- k) Seek support, funding, and project streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- l) Encourage federal leadership, in conjunction with state and local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor;
- m) Support the authority to secure direct funding for Orange County projects;
- n) Support efforts to preserve local flexibility in the administration of toll lanes and use of toll revenues;
- o) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- p) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding assistance or incentives, project delivery tools and/or regulatory relief.

**I. TRANSPORTATION FUNDING**

Current federal law does not require the appropriation of authorized HTF dollars. Therefore, the annual appropriations process will continue to play an important role in funding OCTA's programs and projects. OCTA will continue to advocate for the largest possible amount and share of appropriations funding to ensure adequate resources to meet the infrastructure needs of Orange County.

OCTA will continue to aggressively pursue discretionary funding for transportation projects within the statutory and regulatory requirements of funding programs and the

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current funding status of OCTA's capital program. Other funding priorities for OCTA include:

- a) Support sustainable transportation funding levels that allow OCTA to continue to improve mobility in and around Orange County;
- b) Support funding for the Capital Investment Grants program to allow for an expansion of bus and rail transit projects;
- c) Ensure that federal funding is available for capital purposes to the extent not needed for direct operating costs;
- d) Support funding, with increased flexibility, for safety and security grant programs in order to protect Orange County's transportation system, including highways, transit operations and facilities, rail lines, and related software systems;
- e) Support funding for commuter and intercity passenger rail corridors in Orange County;
- f) Support funding to develop training information programs to instruct on the use of new technology and address workforce needs at transit and transportation agencies;
- g) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act
- h) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services.

**II. SURFACE TRANSPORTATION REAUTHORIZATION**

The IIJA (Pub. L. No. 1147-58) authorized over \$567 billion over five years for programs. With the IIJA as law, OCTA has focused much of its advocacy efforts on implementation efforts that allow state and local government agencies to move forward with a federal partner on critical transportation projects. Now with the IIJA set to expire on September 30, 2026, OCTA will dually prioritize implementation while also advocating for its priorities related to enacting long-term reauthorization legislation. As such, OCTA will advocate for the following policies:

- a) Support the greatest possible share of funding for California and OCTA, focusing on increasing formula funds;
- b) Support increased flexibility in transportation funding programs to promote greater local decision-making in the planning process;

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- c) Ensure a long-term partnership with the federal government that helps OCTA address transit capital and operating revenue needs;
- d) Oppose unfunded federal mandates that further reduce the resources of state and local transportation agencies;
- e) Oppose policies that undermine or limit local control over land use decisions;
- f) Ensure fair suballocations of funding to account for additional costs, increased administrative responsibilities, and the potential for increased liabilities to which the agency may be subject;
- g) Oppose limitations or other arbitrary conditions on discretionary transportation grant programs that prevent an equitable distribution of transportation resources;
- h) Support policies that encourage ridesharing, teleworking, vanpool and related congestion relief programs for Orange County commuters;
- i) Oppose any effort to further reduce transportation funding for OCTA or California, advocating for a fair and equitable share;
- k) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding;
- l) Support funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor to prevent future service disruptions;

**III. TRANSPORTATION PLANNING & PROGRAMMING**

In the 119<sup>th</sup> Congress, OCTA will continue to support the implementation of the IIJA while finding ways to complement the programs and provisions authorized under federal law. During this time, OCTA will advocate for the following issues:

- a) Pursue continued eligibility of Congestion Mitigation Air Quality program funding for operating expenses associated with any fixed-guideway or eligible bus projects;
- b) Support expanded use of alternative delivery methods for federally-funded transportation projects;
- c) Support expedited review and payments to local agencies and their contractors for project development, right-of-way acquisition, and construction activities;
- d) Support efforts to authorize, fund, and streamline the delivery of bicycle and pedestrian projects in Orange County;

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- e) Advocate for policies to encourage, when possible, a “complete streets” approach to multimodal project planning in order to expedite project delivery;
- f) Support flexibility and increased local decision-making authority regarding the operation of high-occupancy vehicle (HOV) lanes in order to reduce or eliminate the unintended consequences resulting from Section 166 of the Federal Highway Act or any similar policy regulating degradation of HOV lanes;
- g) Encourage cooperation between local, state, and federal partners to mitigate or eliminate any policy that places burdensome requirements on operators related to degradation of facilities and performance;
- h) Support streamlining and greater flexibility of Federal Buy America requirements including increased clarification on market availability and technical feasibility of the Build America, Buy America Act requirements created in the IIJA to prevent any unintended disruption to projects and programs;
- i) Support efforts to clarify roles and responsibilities related to toll enforcement policies to allow for interoperability between toll facilities while affirming user privacy;
- j) Encourage policies on the planning, delivery, and operation of tolling projects that are aligned with the flexibility provided in California State law;
- k) Support equitable policies to ensure that inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County;
- l) Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as private sector partners, in the testing, development, demonstration, deployment, and operation of autonomous and connected vehicle technologies, while encouraging policies that ensure their safe implementation.

**IV. FISCAL REFORMS & ISSUES**

Transportation infrastructure projects are critical drivers in job creation and business development. Legislative and regulatory proposals can impact the ability of transportation agencies to deliver these infrastructure projects. Expediting project delivery serves as a key tool for driving economic growth and stimulating activity. Regarding these developments, OCTA will:

- a) Oppose policies that would divert revenues generated by locally-approved sales taxes to programs and projects that are not included in the sales tax ordinance;



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- b) Support removing barriers to the release of transportation funding, including allowing local agencies to advance projects with local funds in order to limit lengthy processes that delay project delivery;
- c) Support expansion, streamlining, and further development of innovative project finance methods, including the Transportation Infrastructure Finance and Innovation Act loan program;
- d) Support fiscally-sound proposals to adequately address the HTF's structural deficit, including initiatives to address the impact of low- and zero-emission vehicles on transportation funding;
- e) Support tax policies that reduce costs or provide additional flexibility in OCTA's financial and operational activities;
- f) Support a stable source of proposed future revenues that provides adequate resources for future transportation needs;
- g) Oppose subjecting public transportation providers to gas tax liability or other fees that increase operating costs;
- h) Support efforts to ensure that all users of the national transportation system pay their "fair share" to maintain and improve the system;
- i) Support additional funding and regulatory flexibility to facilitate the use of alternative mobility providers.

**V. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak. OCTA serves as the managing agency for this service, providing all necessary administrative support to the LOSSAN Agency.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. OCTA will continue to monitor the

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development of additional service to ensure that it does not adversely affect other transportation funding sources. Other rail policy priorities include the following:

- a) Support funding for rail safety programs, including funding for operation and maintenance of Positive Train Control (PTC) safety technology and other safety enhancements;
- b) Support efforts to ensure that any alternative safety technology is interoperable with, and contains the same safety benefits as, the PTC system implemented on passenger rail corridors in Southern California;
- c) Support the availability of technical resources, such as wireless spectrum, to fully implement rail safety technology;
- d) Oppose increasing the current rail passenger liability cap and work with regional partners to ensure that any changes to the cap take into account the limited resources of passenger rail providers;
- e) Monitor the ongoing waiver process in relation to implementing the California Air Resources Board's In-Use Locomotive Regulation.

**VI. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. Federal transit funding is provided on both a formula and competitive basis. Discretionary funding under the IIJA has been highly competitive for transit programs. As future demand for transit funding increases due to environmental regulations and increased capital and operations costs put further strain on existing resources, creating more opportunities for predictable transit funding will continue to be a priority for OCTA. Specifically, OCTA will focus on the following:

- a) Encourage policies and guidance that incentivize public transit ridership;
- b) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- c) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral;
- d) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels;
- e) Support efforts to create a more competitive marketplace for zero-emission transit buses to help drive down costs and create a better supply chain.

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**VII. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of the nation's busiest ports. The maintenance, improvement, and modernization of our region's goods movement infrastructure must continue to be a national priority if our region is to remain competitive with the rest of the world and responsive to the consumer needs of Southern California. Even though the IIJA continued to provide funding for goods movement projects and programs, revenue streams remain insufficient to fund the projects needed to offset the costs of moving these goods considering the many years of underinvestment. OCTA's advocacy efforts regarding goods movement will continue to emphasize the following:

- a) Pursue new, stable, dedicated, and secure sources of funding for goods movement infrastructure;
- b) Ensure that the benefits of newly-funded projects also take into account mitigation factors to impacted communities;
- c) Support a collaborative approach, including engaging with private sector partners, in developing and implementing the needed sustainable goods movement infrastructure programs and projects;
- d) Support regionally significant grade separation projects that improve the flow of goods and people throughout Southern California;
- e) Support local control of goods movement infrastructure and freight mobility projects;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure eligibility for funding and programs is available to all transportation modes that benefit regional goods movement.

**VIII. TRANSPORTATION SECURITY AND EMERGENCY PREPAREDNESS**

OCTA continues cooperative efforts with neighboring transit agencies, Urban Area Security Initiative partners, state and federal Homeland Security and Emergency Preparedness grant partners, and local jurisdictions to enhance the security and resiliency of Orange County's transportation system. OCTA will pursue the following priorities to ensure that the agency's safety, security, and emergency preparedness needs are met:

- a) Support increased funding for training, increased security, and emergency preparedness improvements with adequate flexibility to ensure that local

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agencies can effectively use the resources to also support all modes of transportation;

- b) Support a funding distribution that considers all risk threats, including natural disasters, acts of terrorism, and other man-made disasters, as estimated by the Department of Homeland Security, in cooperation with state and local officials;
- c) Support programs that facilitate cooperation with security and emergency preparedness officials to refine and improve information exchange protocols, emergency preparedness systems, and regional data coordination;
- d) Support efforts to provide funding incentives and policy flexibility to facilitate programs to provide safe working conditions for coach operators and transit personnel;
- e) Support efforts to provide sufficient funding for transit agencies to implement physical security, mandated employee screenings, and cybersecurity directives while also incorporating transit agency technical expertise in developing regulatory guidelines and procedures.

### **IX. ENVIRONMENTAL & ENERGY ISSUES**

Federal environmental policies affecting OCTA include the National Environmental Protection Act, the Clean Air Act, the Clean Water Act, and the Endangered Species Act. Therefore, policies to further develop environmental and energy-efficient goals will likely have an impact on OCTA's operations. With such proposals in mind, OCTA will:

- a) Seek funding to meet state and local environmental quality requirements, including requirements for zero-emission buses, alternative fueling stations, and future greenhouse gas reduction requirements;
- b) Support expedited review for project development, right-of-way acquisition, and construction activities without impairing substantive environmental requirements;
- c) Ensure adequate funding and flexibility in the application of resiliency, natural infrastructure, or other climate-related policies to the delivery of mobility improvements, as opposed to mandates that would constrain transportation resources.

### **IX. REGULATORY REQUIREMENTS**

OCTA must also monitor several other administrative requirements, including new and expanded regulatory definitions that may affect the agency's operations. As such, OCTA will:

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- a) Support expedited and improved federal reporting and monitoring requirements to ensure efficiency and usefulness of data while also eliminating redundant state and federal requirements;
- b) Oppose regulatory proposals that unreasonably subject OCTA to burdensome bureaucratic requirements or increased operational costs, making it harder to deliver projects and improve mobility in Orange County;
- c) Oppose policies adversely affecting the agency's ability to effectively address labor relations, employee rights, benefits, and working conditions, such as health, safety, and ergonomic standards;
- d) Oppose policies that limit state or local pension benefit reforms.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors. In addition, Orange County provides highway and rail corridors that facilitate the increasing level of international trade entering the Southern California ports.

The 20253-246 Federal Legislative Platform serves as a framework document to guide ~~the Orange County Transportation Authority's (OCTA's)~~ statutory, regulatory, and administrative goals and objectives in Washington, D.C. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the 1198<sup>th</sup> Congress, and the later sections present guiding policy statements for the other major issues that may arise. Positions on individual items not directly addressed in this document will be brought to the OCTA Board of Directors for formal action.

## **Key Policy Issues in the 1198<sup>th</sup> Congress**

A number of significant transportation issues will be discussed in the 1198<sup>th</sup> Congress. OCTA will focus its advocacy efforts on the following principles:

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements, and services in order to meet the mobility needs of Orange County;
- b) Request annual appropriations at least consistent with authorized funding levels and advanced appropriations provided in the Infrastructure Investment and Jobs Act (IIJA) are maintained in order to meet our county's critical infrastructure needs;
- c) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs, ensuring funding OCTA receives from IIJA and the Inflation Reduction Act is maintained; *(Moved from Section I and revised)*
- d) Oppose rescissions or other arbitrary funding cuts to transportation programs; *(Moved from Section II)*
- e) ~~Encourage policies and guidance that incentivize public transit ridership;~~ *(Moved to Section VI)*

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- ~~d) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County; (Moved to Section III)~~
- ~~e) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services; (Moved to Section I)~~
- e) Advocate for full funding of transportation programs without placing new limitations or conditions on the distribution of funds that would impede the delivery of infrastructure projects;
- ~~f) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act; (Moved to Section I)~~
- f) Ensure that Highway Trust Fund (HTF) revenues continue to be used for transit expenditures for capital and operations;
- g) Ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- ~~h) Ensure that Orange County is eligible for funding provided to meet air quality standards for the South Coast Air Basin and oppose efforts that would impact the use of transportation funding;~~
- i) Seek support for adaptation and resiliency efforts related to environment for critical transportation infrastructure;
- j) Seek funding and other solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- k) Seek support, funding, and project streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- l) Encourage federal leadership, in conjunction with state and local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor;
- m) Support the authority to secure direct funding for Orange County projects;
- n) Support efforts to preserve local flexibility in the administration of toll lanes and use of toll revenues;
- o) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects.;

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- p) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding assistance or incentives, and project delivery tools and/or regulatory relief.

**I. TRANSPORTATION FUNDING**

Current federal law does not require the appropriation of authorized HTF dollars. Therefore, the annual appropriations process will continue to play an important role in funding OCTA's programs and projects. OCTA will continue to advocate for the largest possible amount and share of appropriations funding to ensure adequate resources to meet the infrastructure needs of Orange County.

OCTA will continue to aggressively pursue discretionary funding for transportation projects within the statutory and regulatory requirements of funding programs and the current funding status of OCTA's capital program. Other funding priorities for OCTA include:

- a) Support sustainable transportation funding levels that allow OCTA to continue to improve mobility in and around Orange County;
- ~~b) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs; (Moved to Key Policy Issues Section)~~
- b) Support funding for the Capital Investment Grants program to allow for an expansion of bus and rail transit projects;
- c) Ensure that federal funding is available for capital purposes to the extent not needed for direct operating costs;
- d) Support funding, with increased flexibility, for safety and security grant programs in order to protect Orange County's transportation system, including highways, transit operations and facilities, rail lines, and related software systems;
- e) Support funding for ~~regional~~ commuter and intercity passenger rail corridors in Orange County California;
- f) Support funding to develop training information programs to instruct on the use of new technology and address workforce needs at transit and transportation agencies;
- ~~g) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding incentives and project delivery tools; (Moved to Key Policy Issues Section and revised)~~



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- ~~i) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding; (Moved to Section II)~~
- ~~j) Support funding and incentives to develop free or reduced fare transit programs without impacting existing programs or creating unfunded mandates. (Moved to Section VI)~~
- g) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act; (Moved from the Key Policy Issues Section)
- h) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services. (Moved from the Key Policy Issues Section)

**II. ~~IIJA~~ IMPLEMENTATION SURFACE TRANSPORTATION  
REAUTHORIZATION**

The IIJA (Pub. L. No. 1147-58) authorized over \$567 billion over five years for programs. With the IIJA as law, OCTA ~~will~~ has focused much of its advocacy efforts ~~in the 118<sup>th</sup> Congress~~ on implementation efforts that allow state and local government agencies to move forward with a federal partner on critical transportation projects. Now with the IIJA set to expire on September 30, 2026, OCTA will dually prioritize implementation while also advocating for its priorities related to enacting long-term reauthorization legislation. As such, OCTA will advocate for the following policies:

- a) Support the greatest possible share of funding for California and OCTA, focusing on increasing formula funds;
- b) Support increased flexibility in transportation funding programs to promote greater local decision-making in the planning process;
- c) Ensure a long-term partnership with the federal government that helps OCTA address transit capital and operating revenue ~~shortfalls~~ needs;
- d) Oppose unfunded federal mandates that further reduce the resources of state and local transportation agencies;
- e) Oppose policies that undermine or limit local control over land use decisions;
- f) Ensure fair suballocations of funding to account for additional costs, increased administrative responsibilities, and the potential for increased liabilities to which the agency may be subject;

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- g) Oppose limitations or other arbitrary conditions on discretionary transportation grant programs that prevent an equitable distribution of transportation resources;
- ~~h) Support policies to encourage the safe development, demonstration, deployment, and operation of connected and automated vehicle technologies; [Moved to Section III and combined with subsection (e) from Section IX]~~
- ~~i) Oppose rescissions or other arbitrary funding cuts to transportation programs; (Moved to the Key Policy Issues Section)~~
- h) Support policies that encourage ridesharing, teleworking, vanpool and related congestion relief programs for Orange County commuters;
- i) Oppose any effort to further reduce transportation funding for OCTA or California, advocating for a fair and equitable share-;
- j) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding; (Moved from Section I)
- k) Support funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor to prevent future service disruptions.

**III. TRANSPORTATION PLANNING ~~AND~~ PROGRAMMING**

In the 1198<sup>th</sup> Congress, OCTA will continue to support the implementation of the IIJA while finding ways to complement the programs and provisions authorized under federal law. During this time, OCTA will advocate for the following issues:

- a) Pursue continued eligibility of Congestion Mitigation Air Quality program funding for ~~three to five years~~ of operating expenses associated with any fixed-guideway or eligible bus projects;
- b) Support expanded use of alternative delivery methods for federally-funded transportation projects;
- ~~c) Support environmental process improvements and stewardship efforts by the relevant federal agencies to expedite project delivery and accelerate the creation of jobs;~~
- c) Support expedited review and payments to local agencies and their contractors for project development, right-of-way acquisition, and construction activities;
- d) Support efforts to authorize, fund, and streamline the delivery of bicycle and pedestrian projects in Orange County;

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- e) Advocate for policies to encourage, when possible, a “complete streets” approach to multimodal project planning in order to expedite project delivery;
- ~~g) Support shifting the approval of Regional Transportation Plan amendments involving Transportation Control Measures from the Environmental Protection Agency back to the Federal Highway Administration while allowing for an adequate consultation process;~~
- f) Support flexibility and increased local decision-making authority regarding the operation of high-occupancy vehicle (HOV) lanes in order to reduce or eliminate the unintended consequences resulting from Section 166 of the Federal Highway Act or any similar policy regulating degradation of HOV lanes;
- g) Encourage cooperation between local, state, and federal partners to mitigate or eliminate any policy that places burdensome requirements on operators related to degradation of facilities and performance;
- h) Support streamlining and greater flexibility of Federal Buy America requirements including increased clarification on market availability and technical feasibility of the Build America, Buy America Act requirements created in the IIJA to prevent any unintended disruption to projects and programs;
- i) Support efforts to clarify roles and responsibilities related to toll enforcement policies to allow for interoperability between toll facilities while affirming user privacy;
- j) Encourage policies on the planning, delivery, and operation of tolling projects that are aligned with the flexibility provided in California State law;
- ~~k) Support equitable policies to ensure that inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County; (Moved from the Key Policy Issues Section)~~
- ~~l) Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as private sector partners, in the testing, development, demonstration, deployment, and operation of autonomous and connected vehicle technologies, while encouraging policies that ensure their safe implementation. [Moved from Section IX and combined with subsection (h) in Section II]~~

**IV. FISCAL REFORMS ~~&~~ AND ISSUES**

Transportation infrastructure projects are critical drivers in job creation and business development. Several Legislative and regulatory proposals can impact the ability of transportation agencies would have economic impacts, both positive and negative, affecting the delivery of transportation to deliver these infrastructure projects that

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~~create jobs and spur further business development in Orange County. Expediting project delivery serves as a key tool for driving economic growth and stimulating activity.~~ Regarding these developments, OCTA will:

- a) Oppose policies that would divert revenues generated by locally-approved sales taxes to programs and projects that are not included in the sales tax ordinance;
- b) Support removing barriers to the release of transportation funding, including allowing local agencies to advance projects with local funds in order to limit lengthy ~~amendment~~ processes that delay project delivery;
- c) Support expansion, streamlining, and further development of innovative project finance methods, including the Transportation Infrastructure Finance and Innovation Act loan program;
- d) Support fiscally-sound proposals to adequately address the HTF's structural deficit, including initiatives to address the impact of low- and zero-emission vehicles on transportation funding;
- ~~e) Support the equitable collection and distribution of sales tax revenue from out-of-state, online retailers (*South Dakota v. Wayfair, Inc.*);~~
- e) Support tax policies that reduce costs or provide additional flexibility in OCTA's financial and operational activities;
- ~~f) Support policies that expedite the delivery of transportation improvements or the development of business opportunities in order to create jobs and economic activity in Southern California; (*Incorporated into overview paragraph of this Section*)~~
- f) Support a stable source of proposed future revenues that provides adequate resources for future transportation needs;
- g) Oppose subjecting public transportation providers to gas tax liability or other fees that increase operating costs;
- h) Support efforts to ensure that all users of the national transportation system pay their "fair share" to maintain and improve the system;
- i) Support additional funding and regulatory flexibility to facilitate the use of alternative mobility providers.

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**V. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak. ~~and managed by the Los Angeles San Diego San Luis Obispo Rail Corridor Agency (LOSSAN Agency). OCTA has served as the managing agency for the LOSSAN Agency since 2013 and assumed full administrative and management responsibility for Pacific Surfliner service in June 2015 via an interagency transfer agreement with the State of California~~ OCTA serves as the managing agency for this service, ~~continues to serve in this capacity~~, providing all necessary administrative support to the LOSSAN Agency.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. OCTA will continue to monitor the development of additional service to ensure that it does not adversely affect other transportation funding sources. Other rail policy priorities include the following:

- a) Support funding for rail safety programs, including funding for operation and maintenance of Positive Train Control (PTC) safety technology and other safety enhancements;
- b) Support efforts to ensure that any alternative safety technology is interoperable with, and contains the same safety benefits as, the PTC system implemented on passenger rail corridors in Southern California;
- c) Support the availability of technical resources, such as wireless spectrum, to fully implement rail safety technology;
- d) Oppose increasing the current rail passenger liability cap and work with regional partners to ensure that any changes to the cap take into account the limited resources of passenger rail providers;
- e) Monitor the ongoing waiver process in relation to implementing the California Air Resources Board's In-Use Locomotive Regulation.

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**VI. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. Federal transit funding is provided on both a formula and competitive basis. Discretionary funding under the IIJA has been highly competitive for transit programs. As future demand for transit funding increases due to environmental regulations and increased capital and operations costs put further strain on existing resources, creating more opportunities for predictable transit funding will continue to be a priority for OCTA. Specifically, OCTA will focus on the following:

- a) Encourage policies and guidance that incentivize public transit ridership; (Moved from the Key Policy Issues Section)
- b) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates; (Moved from the Key Policy Issues Section)
- c) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral; (Moved from Section IX)
- d) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels; (Moved from Section IX)
- e) Support efforts to create a more competitive marketplace for zero-emission transit buses to help drive down costs and create a better supply chain.

**VII. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of “America’s Gateway” and the nation’s busiest ports. The maintenance, improvement, and modernization of our region’s goods movement infrastructure must continue to be a national priority if our region is to remain competitive with the rest of the world and responsive to the consumer needs of Southern California. ~~The need for the Southern California region to remain competitive is further underscored by the expansion and modernization efforts of foreign competitors.~~ Even though the IIJA continued to provide funding for goods movement projects and programs, revenue streams remain insufficient to fund the projects needed to offset the costs of moving these goods considering the many years of underinvestment. OCTA’s advocacy efforts regarding goods movement will continue to emphasize the following:

- a) Pursue new, stable, dedicated, and secure sources of funding for goods movement infrastructure;
- b) Ensure that the benefits of newly-funded projects also take into account mitigation factors to impacted communities;

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- c) Support a collaborative approach, including engaging with private sector partners, in developing and implementing the needed sustainable goods movement infrastructure programs and projects;
- d) Support regionally-significant grade separation projects that improve the flow of goods and people throughout Southern California;
- e) Support local control of goods movement infrastructure and freight mobility projects;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure eligibility for funding and programs is available to all transportation modes that benefit regional goods movement.

**VIII. TRANSPORTATION SECURITY AND EMERGENCY PREPAREDNESS**

OCTA continues cooperative efforts with neighboring transit agencies, Urban Area Security Initiative partners, state and federal Homeland Security and Emergency Preparedness grant partners, and local jurisdictions to enhance the security and resiliency of Orange County's transportation system. OCTA will pursue the following priorities to ensure that the agency's safety, security, and emergency preparedness needs are met:

- a) Support increased funding for training, increased ~~surveillance~~ security, and emergency preparedness improvements with adequate flexibility to ensure that local agencies can effectively use the resources to ~~also ensure a more resilient transportation system~~ support all modes of transportation;
- b) Support a funding distribution that considers all risk threats, including natural disasters, acts of terrorism, and other man-made disasters, as estimated by the Department of Homeland Security, in cooperation with state and local officials;
- c) Support programs that facilitate cooperation with security and emergency preparedness officials to refine and improve information exchange protocols, emergency preparedness systems, and regional data coordination;
- d) Support efforts to provide funding incentives and policy flexibility to facilitate programs to provide safe working conditions for coach operators and transit personnel;
- e) Support efforts to provide sufficient funding for transit agencies to implement physical security, mandated employee screenings, and cybersecurity directives while also incorporating transit agency technical expertise in developing regulatory guidelines and procedures.

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**IX. ENVIRONMENTAL ~~&AND~~ ENERGY ISSUES**

Federal environmental policies affecting OCTA include the National Environmental Protection Act, the Clean Air Act, the Clean Water Act, and the Endangered Species Act. Therefore, policies to further develop environmental and energy-efficient goals will likely have an impact on OCTA's operations. With such proposals in mind, OCTA will:

- ~~a) Seek opportunities to expedite and improve the efficiency of the environmental process without impairing substantive environmental requirements; [Incorporated into subsection (e) of this section]~~
- a) Seek funding to meet state and local environmental quality requirements, including requirements for zero-emission buses, alternative fueling stations, and future greenhouse gas reduction requirements;
- ~~c) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels; (Moved to Section VI)~~
- ~~d) Monitor proposals to address the environmental impacts of greenhouse gases to ensure that any new environmental requirements are accompanied by additional funding necessary to implement those requirements; (Moved to Section VI)~~
- b) Support expedited review for project development, right-of-way acquisition, and construction activities, without impairing substantive environmental requirements;
- c) Ensure adequate funding and flexibility in the application of resiliency, natural infrastructure, or other climate-related policies to the delivery of mobility improvements, as opposed to mandates that would constrain transportation resources;
- ~~g) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral. (Moved to Section VI)~~

**IX. REGULATORY REQUIREMENTS**

OCTA must also monitor several other administrative requirements, including new and expanded regulatory definitions that may affect the agency's operations. As such, OCTA will:

- a) Support expedited and improved federal reporting and monitoring requirements to ensure efficiency and usefulness of data while also eliminating redundant state and federal requirements;



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- b) Oppose regulatory proposals that unreasonably subject OCTA to burdensome bureaucratic requirements or increased operational costs, making it harder to deliver projects and improve mobility in Orange County;
- c) Oppose policies adversely affecting the agency's ability to effectively address labor relations, employee rights, benefits, and working conditions, such as health, safety, and ergonomic standards;
- d) Oppose policies that limit state or local pension benefit reforms;
- e) ~~Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as those of private sector partners, in the testing and deployment of autonomous vehicles and related technologies. (Moved to Section III)~~



**October 17, 2024**

**To:** Legislative and Communications Committee

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

**Subject:** Diversity Outreach Update

### **Overview**

The Orange County Transportation Authority continues to broaden its outreach efforts to engage Orange County's diverse populations through multilingual communications and targeted outreach. These efforts help position the agency as a trusted and responsive institution in Orange County. This report offers an annual update on the progress of outreach activities designed to serve the needs of diverse and hard-to-reach communities.

### **Recommendation**

Receive and file as an information item.

### **Background**

The Orange County Transportation Authority (OCTA) collaborates with community members, groups, and organizations that serve Orange County's diverse population, including hard-to-reach, underrepresented, and disadvantaged communities. OCTA's diversity outreach team continues to adapt its strategies to connect and engage with diverse audiences during presentations, community meetings, cultural celebrations, business organization meetings and conferences, and other activities.

### **Discussion**

During the past fiscal year, OCTA has significantly increased the frequency of outreach activities by participating in more cultural festivals, resource fairs, and business events. OCTA has also extended outreach to senior centers, mental wellness organizations, and other groups that serve diverse communities. The focus of in-person outreach is to engage the public and increase awareness and understanding of OCTA and its programs, projects, and planning studies. The

engagement is helping enhance relationships with civic, social, business, and faith communities because they see OCTA's involvement and interest in providing transportation solutions to their respective members and constituents. Participation and support from diverse stakeholders is critical to the success of transportation programs, capital projects, and planning studies.

#### Small-Business Outreach

OCTA has expanded its engagement with diverse business organizations by building stronger partnerships and sharing procurement information and transportation initiatives, such as transit marketing programs, capital improvement projects, and planning studies.

The Diversity Outreach team has worked closely with OCTA's Contracts Administration and Materials Management (CAMP) Department to engage with disadvantaged and minority-owned businesses. During the past fiscal year, OCTA attended 63 conferences, workshops, mixers, and other events to share procurement opportunities and CAMP NET resources, reaching more than 15,000 diverse business owners.

OCTA hosted a "Meet the Primes" business event at the OCTA administrative building on February 27, 2024. Small business owners expressed appreciation for the opportunity to engage one-on-one with prime contractors during the event. OCTA also hosted the OCTA Small Business and DBE Summit in the City of Garden Grove on October 8, 2024, attended by hundreds of small business owners interested in working on transportation projects and learning about DBE certification.

#### Diversity Outreach

In fiscal year 2023-24, OCTA participated in 125 community events, cultural festivals, and other activities to inform diverse and underserved populations about OCTA and OC Bus. Major events with high engagement included multiple Tet festival celebrations, Black History Month, Día de los Muertos, Cinco de Mayo, OC Pride, and Mid-Autumn Festival, collectively reaching more than 87,000 participants — a 38 percent increase over the previous fiscal year.

An electronic newsletter with multilingual (Spanish-English and Vietnamese-English) content was distributed to more than 5,600 contacts. Additionally, a multicultural postcard campaign was initiated to engage various cultural and non-English-speaking groups, raise awareness about OCTA's services, and encourage feedback and participation in planning studies. In May and June, two bilingual (Spanish-English and Vietnamese-English) postcards were mailed to

approximately 212,000 households, including approximately 153,000 Spanish-speaking and 59,000 Vietnamese-speaking households.

#### Diversity Outreach Results: Fiscal Year Growth

| <b>Fiscal Year</b>             | <b>2021-22</b> | <b>2022-23</b> | <b>2023-24</b> |
|--------------------------------|----------------|----------------|----------------|
| Number of events attended      | 40             | 89             | 125            |
| Number of participants reached | 43,656         | 53,254         | 102,837        |
| Number of booth visitors       | 10,692         | 16,556         | 39,713         |
| Total surveys completed        | 5,546          | 5,994          | 14,490         |

#### Earned and Paid Media

The diversity outreach team leveraged strong relationships with the Vietnamese American community — including news media, cultural influencers, and community leaders — to effectively engage and disseminate information.

On December 1, 2023, 80 diverse community and business leaders attended the Interstate 405 (I-405) Improvement Project Dedication Ceremony. The diversity outreach team was able to secure media coverage from news outlets such as Telemundo, Univision, Little Saigon Television, SBN-TV, Viet Hon, Viet Bao Daily News, Nguoi Viet Daily News, and other media.

The diversity outreach team also provided media support for a mental health awareness event in the City of Santa Ana in collaboration with the Norooz Clinic Foundation, Moving Forward Together, Groundswell, Asian American Senior Citizens Service Center, and other diversity leaders. The event received coverage from Telemundo, Little Saigon Television, and NBC Channel 4, as well as an in-studio interview in the City of Garden Grove for the OC Connect Study with VNA-TV. This combination of earned and paid media not only amplifies OCTA's messages but also strengthens the organization's presence within these communities.

#### Diverse Community Leaders Group

OCTA's Diverse Community Leaders Group comprises business, cultural, and faith leaders from various communities within Orange County. This group meets quarterly to discuss OCTA's programs, services, and initiatives, providing valuable feedback and conveying concerns from their respective communities.

The group has been instrumental in generating public input for studies and projects. Members of this group, along with other community leaders, participated in multiple informal focus groups that staff facilitated for these studies, including Transit Hubs Study, OC Connect, and Transportation Demand

Management Study, as well as the OC Streetcar safety message campaign. The group also offered suggestions to enhance messaging for transit marketing programs, assisted OCTA in reaching diverse audiences with construction updates for the I-405 and other projects, supported active transportation initiatives, and provided feedback on many other programs and projects.

**Summary**

OCTA is continually creating new avenues for meaningful outreach and dialogue with historically disenfranchised diverse community members. The next steps in outreach include further developing the foundation of the trust-building campaign by pursuing more partnerships. This will include outreach to mental health organizations, faith-based communities, and other emerging groups to help reach the goal of enhancing public engagement.

**Attachment**

None.

**Prepared by:**

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**Approved by:**

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Executive Director,  
People and Community Engagement  
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# CONNECTING WITH PURPOSE COMMUNITY & BUSINESS ENGAGEMENT



**62** COMMUNITY  
EVENTS

**87,716** PEOPLE  
REACHED\*

**63** BUSINESS  
EVENTS

**15,121** PEOPLE  
REACHED\*

\*OUT OF TOTAL ATTENDEES





# SUPPORTING SMALL BUSINESS & DBEs

**MEET THE PRIMES**

Join us for this FREE opportunity to network with prime contractors and learn firsthand about contracting opportunities and available resources.

9 a.m. to 1 p.m.  
Tuesday, Feb. 27  
500 S. Main St., Orange

**REFRESHMENTS & LUNCH PROVIDED**

- Network with OCTA's leadership, including new Chair Tam T. Nguyen
- Participate in one-on-one matchmaking with prime contractors, including Auster Advisory, WSP and more than 15 others
- Gain key insights during valuable partnering opportunities
- Obtain DBE, grant business resources and other helpful info

**TAM T. NGUYEN**  
Chair, OCTA

**DIANE AUSTER**  
Senior Project Manager  
Auster Advisory  
a part of Accenture

**LUC PORRELLI**  
Senior Vice President  
WSP

**VACOC**  
Valley Area Council of Governments

To register, scan here



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2024 SMALL BUSINESS & DBE SUMMIT





VIỆT BẢO  
FOUNDATION

TELEMUNDO

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NGƯỜI VIỆT

# I-405

Spanish & Vietnamese  
News Outlets





# Spanish & Vietnamese **ADVERTISING** *for*



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## TV ADS





# DIVERSITY OUTREACH



Mother's Day events  
at Senior Centers  
Santa Ana on May 10



O.C. Heritage Council's  
Juneteenth Celebration  
Anaheim on June 15



Cinco de Mayo Fiesta  
Anaheim on May 4 & May 5



Philippines Independence Day  
Irvine on June 22



Father's Day event  
at Southwest Senior Center  
Santa Ana on June 12



SBDN Resource Conference  
Irvine on June 25



Summerfest Father's Day event  
Fountain Valley on June 16



Other in-person activities

# 2,662

## TOTAL SURVEYS COLLECTED



## EMAIL BLASTS &amp; COMMUNITY MAILERS

5,658

EMAIL SUBSCRIBERS

1,629 VIETNAMESE SPEAKERS

1,952 SPANISH SPEAKERS

2,077 MULTILINGUAL SPEAKERS

212,139  
MAILERS DISTRIBUTED59,020 VIETNAMESE-LANGUAGE  
HOUSEHOLDS153,119 SPANISH-LANGUAGE  
HOUSEHOLDS





# PUBLIC ENGAGEMENT

Over the Past 3 Fiscal Years

FISCAL YEAR  
2023 *to* 2024

**125**  
EVENTS

**87,716**  
EVENT PARTICIPANTS

**39,713**  
BOOTH VISITORS

**14,490**  
COMPLETED SURVEYS

FISCAL YEAR  
2022 *to* 2023

**89**  
EVENTS

**53,254**  
EVENT PARTICIPANTS

**16,556**  
BOOTH VISITORS

**5,994** COMPLETED SURVEYS

FISCAL YEAR  
2021 *to* 2022

**40**  
EVENTS

**43,656**  
EVENT PARTICIPANTS

**10,692**  
BOOTH VISITORS

**5,546** COMPLETED SURVEYS







# MOST RECENT & UPCOMING ACTIVITIES



**VIET FILM FEST**



## KEY EVENT

## DATE

O.C. LGBTQ Pride Festival at OC Fair & Event Center

Saturday, Oct. 5

Santa Ana Mid-Autumn Festival at Cetennial Park

Saturday, Oct. 5

OCTA's Small Business & DBE Summit at Delta Hotels in Garden Grove

Tuesday, Oct. 8

Viet Film Festival at The Frida Cinema in Santa Ana

Friday, Oct. 11 to Sunday, Oct. 13

Fiesta del Mariachi at Eddie West Stadium in Santa Ana

Sunday, Oct. 13

Quarterly Diverse Community Leaders Group meeting at OCTA

Wednesday, Oct. 16

San Bernardino County Transportation Authority Business 2 Business Expo

Wednesday, Oct. 16

Vietnamese Business Forum at Bowers Museum

Wednesday, Oct. 23

Sunkist Elementary Resource Festival in Anaheim

Wednesday, Oct. 30

Filipino American Chamber's Filipino History Month event at Duck Club

Thursday, Oct. 31

Dia de los Muertos Festival on Fourth Street in Santa Ana

Saturday, Nov. 2 & Sunday, Nov. 3

Asian Business Association of O.C.'s Gala at Disney's Grand America

Friday, Nov. 15



# QUESTIONS?

