



Orange County Transportation Authority

Regional Transportation Planning Committee Agenda

Monday, November 4, 2024 at 10:30 a.m.

Board Room, 550 South Main Street, Orange, California

Committee Members

Jamey Federico, Vice Chair
Jon Dumitru
Katrina Foley
Patrick Harper
Farrah N. Khan
John Stephens

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 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 OCTA. 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.

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

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING

AGENDA

made available to the public upon request.

Call to Order

Pledge of Allegiance

Director Khan

Closed Session

There are no Closed Session items scheduled.

Special Calendar

There are no Special Calendar matters.

Consent Calendar (Items 1 through 8)

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.

1. **Approval of Minutes**

Clerk of the Board

Recommendation(s)

Approve the minutes of the October 7, 2024, Regional Transportation Planning Committee meeting.

Attachments:

[Minutes](#)

2. **Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway**

Niall Barrett/James G. Beil

Overview

On October 22, 2018, the Orange County Transportation Authority Board of Directors approved a cooperative agreement between the Orange County Transportation Authority and the California Department of Transportation for construction capital and construction support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway as part of the Interstate 5 Improvement Project between State Route 73 and El Toro Road. An amendment to the existing cooperative agreement is needed to provide additional funding for construction capital and construction support services.

Recommendation(s)

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-8-1960 between the Orange County Transportation Authority and the California Department of Transportation, in the amount of \$3,929,113, for additional construction capital and construction support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway. This will increase the maximum cumulative obligation of the cooperative agreement

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to a total contract value of \$157,942,113.

- B. Authorize the use of up to \$3,929,113 in Measure M2 funds for the construction phase of the Interstate 5 Improvement Project between State Route 73 and Oso Parkway.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

3. Amendment to Agreement for Construction Management Support Services for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway

Niall Barrett/James G. Beil

Overview

On April 8, 2019, the Orange County Transportation Authority Board of Directors approved a contract with Arcadis U.S., Incorporated, to provide construction management support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway as part of the Interstate 5 Improvement Project between State Route 73 and El Toro Road. An amendment to the existing agreement is needed to provide additional funding for construction management support services.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-8-1969 between the Orange County Transportation Authority and Arcadis U.S., Incorporated, in the amount of \$1,355,275, for additional construction management support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$14,541,252.

Attachments:

[Staff Report](#)

[Attachment A](#)

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING

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4. **Amendment to Agreement for Construction Management Consultant Services for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605**

Dennis Mak/James G. Beil

Overview

On June 8, 2015, the Orange County Transportation Authority Board of Directors selected Jacobs Project Management Co. to provide construction management consultant services for the design-build delivery of the Interstate 405 Improvement Project between State Route 73 and Interstate 605. An amendment to the existing agreement is needed to provide additional services through the completion and closeout of the Interstate 405 Improvement Project.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 15 to Agreement No. C-4-1447 between the Orange County Transportation Authority and Jacobs Project Management Co., in the amount of \$2,600,000, for additional construction management consultant services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$52,187,573.

Attachments:

[Staff Report](#)

[Attachment A](#)

5. **Amendment to Agreement for Program Management Consultant Services for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605**

Dennis Mak/James G. Beil

Overview

On December 10, 2012, the Orange County Transportation Authority Board of Directors selected Parsons Transportation Group, Inc., to provide program management consultant services for the design-build delivery of the Interstate 405 Improvement Project between State Route 73 and Interstate 605 for a term of six and a half years. An amendment to the existing agreement is needed to provide additional services through the completion and closeout of the Interstate 405 Improvement Project.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 37 to Agreement No. C-2-1513 between the Orange County Transportation Authority and Parsons Transportation Group, Inc., in the amount of \$2,000,000, for additional program management consultant services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$140,170,682.

Attachments:

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING

AGENDA

[Staff Report](#)

[Attachment A](#)

6. Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue

Niall Barrett/James G. Beil

Overview

The Orange County Transportation Authority proposes to enter into a cooperative agreement with the California Department of Transportation for construction capital and construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Recommendation(s)

- A. Authorize the use of an additional \$47,300,000 in Measure M2 funds for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-4-2574 between the Orange County Transportation Authority and California Department of Transportation, in the amount of \$107,800,000, comprised of a construction capital share of \$90,000,000, and a construction management services share of \$17,800,000 for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above action.

Attachments:

[Staff Report](#)

[Attachment A](#)

7. Amendment to Agreement for Regional Modeling-Traffic Operations On-Call Support Staffing Agreement

Alicia Yang/Kia Mortazavi

Overview

On February 8, 2021, the Orange County Transportation Authority Board of Directors approved the selection of W.G. Zimmerman Engineering, Inc. as the firm to provide on-call support staffing services for the Regional Modeling and Traffic Operations section for a two-year initial term with two, two-year option terms. The first option term approved by the Board of Directors expires on February 28, 2025. Staff is requesting approval to exercise the second option term effective March 1, 2025 through February 28, 2027.

Recommendation(s)

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Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-0-2608 between the Orange County Transportation Authority and W.G. Zimmerman Engineering, Inc., to exercise the second option term, in the amount of \$400,000, to continue providing regional modeling-traffic operations support staffing services, effective March 1, 2025 through February 28, 2027. This will increase the maximum obligation of the agreement to a contract value of \$1,200,000.

Attachments:

[Staff Report](#)

[Attachment A](#)

8. 2025 Active Transportation Program Regional Project Prioritization Point Assignments for Orange County

Louis Zhao/Kia Mortazavi

Overview

On March 21, 2024, the California Transportation Commission adopted the 2025 Active Transportation Program guidelines and issued a two-tiered call for projects, the State of California Statewide call for projects, and the Southern California Association of Governments' regional program. The Orange County Transportation Authority can assign additional points to project applications to augment scores, which will be considered during the regional program review. The assignment of points for Orange County applications is presented for the Board of Directors' approval.

Recommendation(s)

- A. Approve the Orange County 2025 Active Transportation Program project prioritization point assignments for submittal to the Southern California Association of Governments.
- B. Authorize the Chief Executive Officer, or his designee, to provide concurrence on future project scope changes and substitutions as needed for the 2025 Active Transportation Program projects.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program to facilitate the above actions.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING

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Regular Calendar

9. Consultant Selection for On-Call Real Property Appraisals and Related Services

Joe Gallardo/James G. Beil

Overview

On June 10, 2024, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals for consultants to provide on-call real property appraisals and related services for all future Capital Programs projects. Board of Directors' approval is requested to select the firms to perform the required work.

Recommendation(s)

- A. Approve the selection of R.P. Laurain & Associates, Inc., Santolucito Doré Group, Inc., and Hennessey & Hennessey LLC as the firms to provide on-call real property appraisals and related services in the aggregate amount of \$3,000,000.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2217 between the Orange County Transportation Authority and R.P. Laurain & Associates, Inc. as the firm to provide on-call real property appraisals and related services for a five-year term.
- C. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2475 between the Orange County Transportation Authority and Hennessey & Hennessey, LLC as the firm to provide on-call real property appraisals and related services for a five-year term.
- D. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2476 between the Orange County Transportation Authority and Santolucito Doré Group, Inc. as the firm to provide on-call real property appraisals and related services for a five-year term.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING

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10. Consultant Selection for Construction Management Support Services for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue

Niall Barrett/James G. Beil

Overview

On July 8, 2024, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendation(s)

- A. Approve the selection of WSP USA Inc., as the firm to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2241 between the Orange County Transportation Authority and WSP USA Inc. to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

11. Active Transportation Program Biannual Update

Peter Sotherland/Kia Mortazavi

Overview

The Orange County Transportation Authority coordinates regional active transportation efforts with local jurisdictions, key stakeholders, and the public. An update on recent and upcoming activities is provided.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Presentation](#)

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING AGENDA

12. **OC Connect Project Update and Intent to File a California Environmental Quality Act Statutory Exemption for the OC Connect Project**

Peter Sotherland/Kia Mortazavi

Overview

The Orange County Transportation Authority is the lead agency for the OC Connect Project, a proposed shared-use path connecting the cities of Santa Ana and Garden Grove along the Pacific Electric Right-of-Way. Pursuant to Section 21080.25 of the Public Resources Code, the Orange County Transportation Authority intends to file a California Environmental Quality Act statutory exemption of this project.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Presentation](#)

13. **Regional Planning Update**

Angel Garfio/Kia Mortazavi

Overview

Regular updates on regional planning matters are provided to highlight current transportation planning issues impacting the Orange County Transportation Authority and the Southern California region.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Attachment D](#)

[Attachment E](#)

[Presentation](#)

REGIONAL TRANSPORTATION PLANNING COMMITTEE MEETING AGENDA

Discussion Items

14. Interstate 605/Katella Avenue Interchange Project Update

Josue Vaglienty/James G. Beil

Overview

Staff will provide a project update.

Attachments:

[Presentation](#)

15. Public Comments

16. Chief Executive Officer's Report

17. Committee Members' Reports

18. Adjournment

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

10:30 a.m. on Monday, December 2, 2024

OCTA Headquarters
550 South Main Street
Orange, California



Committee Members Present

Jamey Federico, Vice Chair
Jon Dumitru
Katrina Foley
Patrick Harper
Farrah N. Khan
John Stephens

Staff Present

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

Committee Members Absent

None

Call to Order

The October 7, 2024, Regional Transportation Planning Committee meeting was called to order by Committee Vice Chair Federico at 10:30 a.m.

Consent Calendar (Items 1 through 4)

1. Approval of Minutes

A motion was made by Committee Vice Chair Federico, seconded by Director Harper, and declared passed by those present to approve the minutes of the August 29, 2024, Regional Transportation Planning Committee meeting.

2. Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between Alicia Parkway and El Toro Road

A motion was made by Committee Vice Chair Federico, seconded by Director Harper, and declared passed by those present to:

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-9-1600 between the Orange County Transportation Authority and the California Department of Transportation, in the amount of \$18,980,000, for additional construction capital for the Interstate 5 Improvement Project between Alicia Parkway and El Toro Road. This will increase the maximum cumulative obligation of the cooperative agreement to a total contract value of \$181,065,000.
- B. Authorize the use of up to \$18,980,000 in Measure M2 funds for the construction phase of the Interstate 5 Improvement Project between Alicia Parkway and El Toro Road.



- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

3. Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 605/Katella Avenue Interchange Project

A motion was made by Committee Vice Chair Federico, seconded by Director Harper, and declared passed by those present to:

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 1 to Agreement No. C-3-2384 between the Orange County Transportation Authority and the California Department of Transportation, in an amount of \$3,340,000, for additional construction capital and construction management support, for the Interstate 605/Katella Avenue Interchange Project. This will increase the maximum cumulative obligation of the cooperative agreement to a total contract value of \$30,460,000.
- B. Authorize the use of an additional \$3,340,000 in Measure M2 funds for additional construction capital and construction management support for the Interstate 605/Katella Avenue Interchange Project.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

4. Comprehensive Transportation Funding Programs - Project X Tier 1 and Tier 2 2024 Calls for Projects Programming Recommendations

A motion was made by Committee Vice Chair Federico, seconded by Director HNarper, and declared passed by those present to:

- A. Approve the award of \$3,712,423 in Tier 1 Environmental Cleanup Program funding for 11 projects.
- B. Approve the award of \$6,967,250 in Tier 2 Environmental Cleanup Program funding for four projects.



Regular Calendar

5. **Santa Ana River Crossings and 19th Street Reclassification Review and Status Update**

Greg Nord, Section Manager, Long-Range Planning and Corridor Studies, provided a presentation on this item.

Committee members commented on two roadway topics covered as part of the item. There were comments on the need to expedite the resolution of these matters but also acknowledgment that some of the General Plan amendments in the affected cities related to land use that could affect traffic patterns were pending.

The Garfield-Gisler bridge is currently not assumed for transportation purposes because the neighboring cities of Costa Mesa, Fountain Valley, and Huntington Beach have agreed to implement alternative traffic measures, and a study to validate the effectiveness of these measures and ensure consensus is pending. Director Forley suggested there should be options to expedite such a consensus given the current community setting and related constraints. Director Harper suggested he could contact other Fountain Valley city council members and assess the City of Fountain Valley's current position on the need for further studies. In parallel, staff will reach out to the City of Huntington Beach to gauge their view on the need for further studies.

With respect to the 19th Street bridge, Director Foley suggested that the decision to reclassify 19th Street to existing conditions should also be fast-tracked, and Randell Preserve representatives should also be consulted in the matter. OCTA is ready to study the request as the related General Plans are updated. Director Stephens stated he would be willing to work with and meet the adjacent city mayors to seek a resolution.

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

Discussion Items

6. **Public Comments**

No public comments were received.

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

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

- Service Animal Training
- APTA Transform Conference



8. Committee Members' Reports

No reports were offered by the Committee Members.

9. Adjournment

The meeting was adjourned at 11:09 a.m.

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

10:30 a.m. on Monday, November 4, 2024

OCTA Headquarters

550 South Main Street, Orange, California



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway

Overview

On October 22, 2018, the Orange County Transportation Authority Board of Directors approved a cooperative agreement between the Orange County Transportation Authority and the California Department of Transportation for construction capital and construction support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway as part of the Interstate 5 Improvement Project between State Route 73 and El Toro Road. An amendment to the existing cooperative agreement is needed to provide additional funding for construction capital and construction support services.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-8-1960 between the Orange County Transportation Authority and the California Department of Transportation, in the amount of \$3,929,113, for additional construction capital and construction support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway. This will increase the maximum cumulative obligation of the cooperative agreement to a total contract value of \$157,942,113.
- B. Authorize the use of up to \$3,929,113 in Measure M2 funds for the construction phase of the Interstate 5 Improvement Project between State Route 73 and Oso Parkway.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway **Page 2**

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans), is implementing the Interstate 5 (I-5) Improvement Project between State Route 73 (SR-73) and El Toro Road (Project). The Project is part of projects C and D in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

The Project will add one general purpose lane in each direction on I-5 between SR-73 and El Toro Road, extend the second high-occupancy vehicle lane between Alicia Parkway and El Toro Road, re-establish auxiliary lanes, and construct new auxiliary lanes at various locations. In addition, the Project will reconstruct the Avery Parkway and La Paz Road interchanges, improve several existing on- and off-ramps, and convert existing and proposed carpool lanes to continuous access.

Construction is underway in three segments with the following project limits:

- Segment 1 extends from SR-73 to south of Oso Parkway
- Segment 2 extends from south of Oso Parkway to south of Alicia Parkway
- Segment 3 extends from south of Alicia Parkway to El Toro Road

On October 22, 2018, the Board authorized Cooperative Agreement No. C-8-1960 with Caltrans to provide the construction capital and construction support services for Segment 1, between SR-73 and Oso Parkway.

Additional capital construction funding is required due to various time delay factors that have affected the critical path within the limits of Segment 1 and extended the construction schedule. These factors include third-party impacts and the redesign and subsequent construction of Retaining Wall 748, which has added an additional 112 working days to the Project. There are also claims under negotiation and additional construction change orders that are being processed for items that include the presence of excessive ground water at freeway sign foundations, and median settlement that could increase the construction contract by up to 50 working days. Construction progress and the extent of these impacts are being monitored and managed with the intent of minimizing delays to the construction completion date.

The total construction capital funding previously approved by the Board for Segment 1 is \$128,282,000, comprised of \$15,340,000 in Local Partnership Program (LPP) funds, \$65,171,000 in State Transportation Improvement Program (STIP) funds, \$29,832,000 in Trade Corridors Improvement Fund

Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway *Page 3*

(TCIF) funds, \$6,433,000 in Federal Highway Infrastructure Program funds, and \$11,506,000 in M2 funds. The total increase in the construction capital cost is proposed to be funded by \$2,573,388 in additional M2 funding. The total construction capital funding required for Segment 1 is revised from \$128,282,000 to \$130,855,388, with an increase in M2 funds from \$11,506,000 to \$14,079,388. All other fund sources will remain the same.

The construction issues and delays that have been encountered have also led to increased construction management costs. The additional work resulting from delays due to the redesign and construction of Retaining Wall 748, claims under negotiation, and additional construction change orders that are being processed have increased construction management costs and extended the duration of the construction contract. At this time, Segment 1 construction is scheduled to be completed in early 2025. Additional construction scope of work also requires increased collection, processing, maintaining of project communications and records, managing of contractor progress payments, and processing of change orders and claims.

The total construction support funding approved by the Board for Segment 1 is \$25,731,000, comprised of \$3,984,000 in Surface Transportation Block Grant (STBG) program funds, \$8,564,000 in STIP funds, \$2,902,000 in LPP funds, and \$10,281,000 in M2 funds. The additional construction support cost is proposed to be funded by an additional \$1,355,725 in local M2 funds, which will fund the consultant support services. The proposed total construction support funding will be \$27,086,725, comprised of \$3,984,000 in STBG funds, \$8,564,000 in STIP funds, \$2,902,000 in LPP funds, and \$11,636,725 in M2 funds.

This amendment will increase the total cooperative agreement value from \$153,929,000 to \$157,942,113 (Attachment A). This is Project C in the Next 10 Delivery Plan, and the use of M2 funds for this Project is consistent with the Board-approved Capital Programming Policies. The Capital Funding Program Report (Attachment B) provides summary funding information for all the freeway projects, including the programming actions that are recommended in this report.

Fiscal Impact

Funding for the Project is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, accounts nos. 0017-9084-FC102-06W and 0017-9085-FC102-06W, and is funded with local M2 funds.

Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway *Page 4*

Summary

Board approval is requested to authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-8-1960 between OCTA and Caltrans, in the amount of \$3,929,113, for additional construction capital and construction support services for the Project. This will increase the maximum obligation of the cooperative agreement to a total contract value of \$157,942,113, comprised of a construction capital share of \$130,855,388 and a construction support share of \$27,086,725. Additionally, staff is requesting authorization for the use of up to \$3,929,113 in M2 funds for the Project.

Attachments

- A. California Department of Transportation, Cooperative Agreement No. C-8-1960 Fact Sheet
- B. Capital Funding Program Report

Prepared by:



Niall Barrett, P.E.
Program Manager
(714) 560-5879

Approved by:



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

**California Department of Transportation
Cooperative Agreement No. C-8-1960 Fact Sheet**

1. October 22, 2018, Cooperative Agreement No. C-8-1960, \$133,289,000, approved by the Board of Directors (Board).
 - To define the roles and responsibilities of the California Department of Transportation (Caltrans) and Orange County Transportation Authority for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway.
2. May 13, 2019, Amendment No. 1 to Cooperative Agreement No. C-8-1960, \$9,274,000, approved by the Board.
 - To increase construction funding, in the amount of \$9,274,000, to account for an increase in construction costs.
3. September 11, 2023, Amendment No. 2 to Cooperative Agreement No. C-8-1960, \$11,450,000, approved by the Board.
 - To add \$7,000,000 in Measure M2 (M2) funds for additional construction capital.
 - To add \$4,450,000 in M2 funds for additional construction support services.
4. November 12, 2024, Amendment No. 3 to Cooperative Agreement No. C-8-1960, \$3,929,113, pending Board approval.
 - To add \$2,573,388 in Measure M2 (M2) funds for additional construction capital.
 - To add \$1,355,725 in M2 funds for additional construction support services.

Total committed to Caltrans after approval of Amendment No. 3 to Cooperative Agreement No. C-8-1960: \$157,942,113.



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

State Highway Project												
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds			
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local	
I-5 widening, I-405 to Yale Avenue (Segment 1)	B	\$205,794	\$47,473		\$5,421	\$95,338	\$11,374			\$46,188		
I-5 widening, Yale Avenue to SR-55 (Segment 2)	B	\$41,351	\$32,527							\$8,824		
I-5 widening, Alicia Parkway to El Toro Road (Segment 3)	C	\$227,523	\$49,897		\$4,728		\$16,915			\$155,983		
I-5 widening, Oso Parkway to Alicia Parkway (Segment 2)	C	\$228,675	\$48,676		\$7,921					\$172,078		
I-5 widening, SR-73 to Oso Parkway (Segment 1) ¹	C	\$248,198	\$28,167		\$6,433	\$73,735	\$18,242	\$29,832		\$91,789		
I-5, SR-73 to El Toro Road landscaping/replacement planting	C	\$12,335	\$790			\$6,000				\$5,545		
I-5/El Toro Interchange	D	\$9,713	\$9,213							\$500		
SR-55 (I-5 to SR-91)	F	\$22,045	\$8,359		\$2,641					\$11,045		
SR-55 widening between I-405 and I-5	F	\$505,720	\$160,500		\$42,375	\$80,000	\$140,000			\$82,845		
SR-57 Orangewood Avenue to Katella Avenue ²	G	\$120,921	\$11,500		\$3,240					\$106,181		
SR-57 truck climbing lane phase II: Lambert Road to LA County Line	G	\$24,500				\$24,500						
SR-91, Acacia Avenue to La Palma Avenue (Segment 3)	I	\$164,492	\$1,770		\$3,000					\$30	\$159,692	
SR-91, La Palma Avenue to SR-55 (Segment 2)	I	\$50,314	\$3,460		\$4,000					\$40	\$42,814	
SR-91, SR-55 to Lakeview Avenue (Segment 1)	I	\$108,124	\$1,770		\$5,000		\$42,566			\$30	\$58,758	
SR-91, SR-57 to SR-55 (Segment 1,2 and 3) Outreach	I	\$2,000									\$2,000	
SR-91, SR-241 to I-15	J	\$41,800									\$41,800	
I-405 improvements, SR-73 to I-605	K	\$2,159,999	\$35,000		\$10,648			\$89,771		\$1,395,650	\$628,930	
I-405 (I-5 to SR-55)	L	\$8,000	\$8,000									
I-605/ Katella Avenue interchange	M	\$38,315	\$17,800							\$20,515		
241/91 Express Lanes (HOT) connector		\$182,298	\$50								\$182,248	
I-5 Managed Lane Project from Avenida Pico to San Diego County Line		\$24,228	\$23,478								\$750	
SR-74 - Gap closure for 0.9 mile and multimodal improvements		\$87,513	\$30,000		\$4,250	\$43,913				\$7,200	\$2,150	
SR-74 widening, City/County line to Antonio Parkway		\$40,905	\$5,285			\$10,000					\$25,620	
SR-91, Acacia Avenue to La Palma Avenue (Segment 3) Multi Asset Project		\$23,170			\$23,170							
SR-91, SR-55 to Lakeview Avenue (Segment 1) Multi Asset Project		\$8,305			\$8,305							
State Highway Project Totals		\$4,586,238	\$523,715		\$131,132	\$333,486	\$229,097	\$119,603		\$2,104,443	\$1,144,762	
Federal Funding Total		\$654,847										
State Funding Total		\$682,186										
Local Funding Total		\$3,249,205										
Total Funding (000's)		\$4,586,238										

State Highway Project Completed												
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds			
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local	
I-5 from SR-55 to SR-57, add one HOV lane each direction	A	\$41,500	\$36,191							\$5,309		
I-5 HOV lane each direction s/o PCH to San Juan Creek Road	C	\$74,300	\$11,326					\$20,789		\$42,185		



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

State Highway Project Completed											
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds		
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
I-5 HOV lanes from s/o Avenida Vista Hermosa to s/o PCH	C	\$75,300	\$12,065			\$46,779				\$16,456	
I-5 HOV lanes: s/o Avenida Pico to s/o Avenida Vista Hermosa	C	\$83,500	\$26,867		\$1,600	\$43,735				\$11,298	
I-5/SR-74 interchange improvements	D	\$80,300				\$48,683		\$24,109	\$2,500		\$5,008
I-5/SR-74 interchange landscaping/replacement planting	D	\$1,440			\$752	\$688					
SR- 57 n/b widening, Katella Avenue to Lincoln Avenue - landscaping	G	\$2,172								\$2,172	
SR- 57 n/b widening, SR-91 to Yorba Linda Boulevard - landscaping	G	\$946								\$946	
SR-57 n/b widening, Katella Avenue to Lincoln Avenue	G	\$35,827						\$24,127		\$11,700	
SR-57 n/b widening, SR-91 to Yorba Linda Boulevard	G	\$51,354						\$39,475		\$11,879	
SR-57 n/b widening, Yorba Linda to Lambert Road	G	\$52,871						\$41,250		\$11,621	
SR-57 n/b widening, Yorba Linda to Lambert Road - landscaping	G	\$1,193								\$1,193	
SR-91 w/b connect existing aux lanes, I-5 to SR-57	H	\$62,977						\$27,227		\$35,750	
SR-91 w/b connecting existing aux lanes, I-5 to SR-57 - landscaping	H	\$2,290								\$2,290	
SR-91 w/b (SR-55 - Tustin interchange) improvements	I	\$43,753				\$15,753		\$14,000		\$14,000	
SR-91 e/b widening, SR-241 to SR-71	J	\$57,773			\$45,911					\$6,942	\$4,920
SR-91 w/b routes 91/55 - e/o Weir Canyon Road replacement planting	J	\$2,898				\$2,898					
SR-91 widening, SR-55 to Gypsum Canyon (Weir Canyon Road/SR-241)	J	\$76,993				\$22,250		\$54,045		\$698	
I-405 s/b aux lane - University Drive to Sand Canyon and Sand Canyon to SR-133		\$2,328				\$2,328					
I-405/SR-22/I-605 HOV connector - landscaping		\$4,600	\$4,600								
HOV connectors from I-405 and I-605	M1	\$173,091	\$14,787					\$135,430	\$16,200		\$6,674
HOV connectors from SR-22 to I-405	M1	\$115,878	\$64,375		\$49,625				\$1,878		
State Highway Project Completed Totals		\$1,043,284	\$170,211		\$97,888	\$183,114		\$380,452	\$20,578	\$174,439	\$16,602
Federal Funding Total		\$268,099									
State Funding Total		\$563,566									
Local Funding Total		\$211,619									
Total Funding (000's)		\$1,043,284									



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway

1. Authorize the use of up to \$3,929,113 in Measure M2 funds for the construction phase of the Interstate 5 Improvement Project between State Route 73 and Oso Parkway.

Cooperative Agreement with the California Department of Transportation for the State Route 57 Improvement Project Between Orangewood Avenue and Katella Avenue

2. Authorize the use of an additional \$47,300,000 in Measure M2 funds for the State Route 57 improvement project between Orangewood Avenue and Katella Avenue.

Acronyms:

- Aux - Auxilliary
- Board - Board of Directors
- CMAQ - Congestion Mitigation Air Quality Improvement Program
- E/B - Eastbound
- E/O - East of
- FTA - Federal Transit Administration
- HOT - High-Occupancy Toll
- HOV - High-Occupancy Vehicle
- I-405 - Interstate 405
- I-5 - Interstate 5
- I-605 - Interstate 605
- LA - Los Angeles
- M Code - Project Codes in Measure M1 and M2
- M1 - Measure M1
- M2 - Measure M2
- N/B - Northbound
- OC - Orange County
- OCTA - Orange County Transportation Authority
- PCH - Pacific Coast Highway
- S/B - Southbound
- S/O - South of
- SB 1 - SB 1 (Chapter 5, Statutes of 2017)
- SR-133 - State Route 133
- SR-22 - State Route 22
- SR-241 - State Route 241
- SR-55 - State Route 55
- SR-57 - State Route 57
- SR-71 - State Route 71
- SR-73 - State Route 73
- SR-74 - State Route 74
- SR-91 - State Route 91
- STBG - Surface Transportation Block Grant
- STIP - State Transportation Improvement Program
- W/B - Westbound



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Construction Management Support Services for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway

Overview

On April 8, 2019, the Orange County Transportation Authority Board of Directors approved a contract with Arcadis U.S., Incorporated, to provide construction management support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway as part of the Interstate 5 Improvement Project between State Route 73 and El Toro Road. An amendment to the existing agreement is needed to provide additional funding for construction management support services.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-8-1969 between the Orange County Transportation Authority and Arcadis U.S., Incorporated, in the amount of \$1,355,275, for additional construction management support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$14,541,252.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans), is implementing the Interstate 5 (I-5) Improvement Project between State Route 73 (SR-73) and El Toro Road (Project). The Project is part of projects C and D in the Measure M2 (M2) freeway program and is being advanced through the 2023 Updated Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

**Amendment to Agreement for Construction Management Page 2
Support Services for the Interstate 5 Improvement Project
Between State Route 73 and Oso Parkway**

The Project adds improvements in each direction on I-5 between Avery Parkway and Alicia Parkway, extends the second high-occupancy vehicle lane from El Toro Road to Alicia Parkway, re-establishes auxiliary lanes, and constructs new auxiliary lanes at various locations. In addition, the Project will reconstruct the Avery Parkway and La Paz Road interchanges, reconstruct the Los Alisos Boulevard overcrossing, improve several existing on- and off-ramps, and convert existing and proposed carpool lanes to continuous access.

Construction is underway in three segments with the following project limits:

- Segment 1 extends from SR-73 to south of Oso Parkway
- Segment 2 extends from south of Oso Parkway to south of Alicia Parkway
- Segment 3 extends from south of Alicia Parkway to El Toro Road

On April 8, 2019, the Board authorized Agreement No. C-8-1969 with Arcadis U.S., Incorporated, (Arcadis) to provide construction management support services for Segment 1, between SR-73 and Oso Parkway.

Additional construction management (CM) support services are required due to a variety of issues that have been encountered within the limits of Segment 1, including extending the construction contract due to time impact delays. These issues include third-party impacts and delays to redesign and subsequently construct Retaining Wall 748, which has added an additional 112 working days. There are also claims under negotiation and additional construction change orders that are being processed for items such as the presence of excessive ground water at sign foundations and median settlement that could add up to 50 working days to the construction contract.

The level of CM support services needed has also risen due to the need to process the contractor's claims, resolve and negotiate these claims, and process construction change orders, when appropriate. Additional CM support services also include the associated collection, processing, maintenance of project communications and records, and management of contractor progress payments.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board-approved procedures for architectural and engineering services, which conform to both state and federal laws. The original time and expense agreement was issued on December 1, 2019, in the amount of \$10,974,923. This agreement has been previously amended as shown in Attachment A. It has

Amendment to Agreement for Construction Management Support Services for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway *Page 3*

become necessary to amend the existing agreement to add funds for additional CM support services.

OCTA staff negotiated the required level of effort with Arcadis to provide additional CM support services. Staff found Arcadis' cost proposal, in the amount of \$1,355,275, to be fair and reasonable relative to the negotiated level of effort and the independent cost estimate prepared by the OCTA project manager. Proposed Amendment No. 7 to Agreement No. C-8-1969 will increase the total contract value to \$14,541,252.

Fiscal Impact

The additional funding for the Project is local M2 funds and is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, Account No. 0017-9085-FC102-06W.

Summary

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-8-1969 between the Orange County Transportation Authority and Arcadis U.S., Incorporated, in the amount of \$1,355,275, for additional construction management support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway. This will increase the maximum obligation of the contract to \$14,541,252.

Amendment to Agreement for Construction Management Support Services for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway *Page 4*

Attachment

- A. Arcadis U.S., Incorporated, Agreement No. C-8-1969 Fact Sheet

Prepared by:



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Program Manager
(714) 560-5879



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



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

**Arcadis U.S., Incorporated
Agreement No. C-8-1969 Fact Sheet**

1. April 8, 2019, Agreement No. C-8-1969, \$10,974,923, approved by the Board of Directors (Board).
 - Agreement was executed December 1, 2019, with Arcadis U.S., Incorporated (Arcadis) to provide construction management (CM) support services for the Interstate 5 Improvement Project between State Route 73 and Oso Parkway (Project).
2. December 9, 2020, Amendment No. 1 to Agreement No. C-8-1969, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - To modify the hourly rate schedule for subconsultants Balk Biological, Inc., Dynamic Engineering Services, Inc., Ninyo and Moore, and Paleo Solutions, Inc.
 - To modify the other direct costs schedule for Ninyo and Moore.
3. August 20, 2021, Amendment No. 2 to Letter Agreement No. C-8-1969, \$0, approved by the CAMM Department.
 - To modify the hourly rate schedule for Arcadis.
4. February 25, 2022, Amendment No. 3 to Agreement No. C-8-1969, \$0, approved by the CAMM Department.
 - Modify the subconsultant name Paleo Solutions, Inc. to Stantec Consulting Services, Inc. (Stantec), due to change in ownership.
5. April 1, 2023, Amendment No. 4 to Agreement No. C-8-1969, \$0, approved by the CAMM Department.
 - To add personnel for Arcadis and subconsultant Stantec.
6. February 12, 2024, Amendment No. 5 to Agreement No. C-8-1969, \$2,211,054, approved by the Board.
 - To add additional CM support services due to various issues and increases in the construction scope of work that have impacted the construction schedule of the Project.
 - Extend the term of the agreement through December 1, 2025.

7. October 3, 2024, Amendment No. 6 to Agreement No. C-8-1969, \$0, approved by the CAMM Department.

- To add personnel for Arcadis.

8. November 12, 2024, Amendment No. 7 to Agreement No. C-8-1969, \$1,355,275, pending approval by the Board.

- To add additional CM support services due to various issues and increases in the construction scope of work that have impacted the construction schedule of the Project.

Total funds committed to Arcadis U.S., Incorporated, after approval of Amendment No. 7 to Agreement No. C-8-1969: \$14,541,252.



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Construction Management Consultant Services for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "To:" and "From:" fields of the memo.

Overview

On June 8, 2015, the Orange County Transportation Authority Board of Directors selected Jacobs Project Management Co. to provide construction management consultant services for the design-build delivery of the Interstate 405 Improvement Project between State Route 73 and Interstate 605. An amendment to the existing agreement is needed to provide additional services through the completion and closeout of the Interstate 405 Improvement Project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 15 to Agreement No. C-4-1447 between the Orange County Transportation Authority and Jacobs Project Management Co., in the amount of \$2,600,000, for additional construction management consultant services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$52,187,573.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans) and the cities of Costa Mesa, Fountain Valley, Huntington Beach, Seal Beach, and Westminster, is implementing the Interstate 405 (I-405) Improvement Project from State Route 73 (SR-73) to Interstate 605 (I-605) (Project). The Project will add one general purpose lane in each direction from Euclid Street to I-605, consistent with Measure M2 Project K, and will add an additional lane in each direction that will combine with the existing high-occupancy vehicle lane to

**Amendment to Agreement for Construction Management Page 2
Consultant Services for the Interstate 405 Improvement Project
Between State Route 73 and Interstate 605**

provide dual express lanes in each direction on I-405 between SR-73 and I-605, otherwise known as the 405 Express Lanes.

On June 29, 2016, OCTA entered into an agreement with Jacobs Project Management Co. (Jacobs) to provide construction management consultant (CMC) services. The CMC supplements the program management consultant (PMC) in the management of the construction phase of the design-build (DB) contract. The scope of services of the CMC includes administration of the construction contract, assuring compliance between the DB contractor's design and construction activities, performance of quality assurance inspections, which includes surveying, management of independent quality assurance testing, preparation of daily construction activity reports, and environmental mitigation monitoring. Other services include coordination and communications between the DB contractor and all other project participants, processing, collecting, and maintaining project communications and records, managing the recommendation of DB contractor progress payments, and processing of change orders and claims.

Additional CMC support is needed to ensure the DB contractor, OC 405 Partners (OC405), is compliant with the project's contract requirements, construction quality management plan, and various agency standards and permits, including Caltrans, the corridor cities, and environmental resource agencies. The following describes the specific efforts needed:

- Additional CMC efforts to coordinate with OC405 and various stakeholders, including all corridor cities and Caltrans, to track and ensure resolution of all punch list items and completion of routine maintenance of the Project, including the 405 Express Lanes by OC405, to achieve final acceptance of the Project.
- Additional CMC efforts to review the large volume of required construction quality closeout documentation for materials installed on the Project and as-built plans submitted by OC405.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for architectural and engineering services, which conform to both state and federal laws. On June 8, 2015, the Board approved an agreement with Jacobs for a term of six and a half years. The contract was issued with a maximum obligation of \$34,056,297. This agreement has been previously amended as shown in Attachment A.

Amendment to Agreement for Construction Management Consultant Services for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605 *Page 3*

OCTA staff and Jacobs reviewed and agreed to the level of effort for the additional CMC services. Staff found Jacobs' cost proposal, in the amount of \$2,600,000, to be fair and reasonable relative to the negotiated level of effort and the independent cost estimate prepared by the OCTA project management team. Proposed Amendment No. 15 to Agreement No. C-4-1447, in the amount of \$2,600,000, will bring the total contract value to \$52,187,573.

Fiscal Impact

Funding for this amendment is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, account nos. 0017-9085-FK101-0DY and 0037-9018-A9510-0DY, and funded with a combination of federal, state, and local funds.

Summary

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 15 to Agreement No. C-4-1447 between the Orange County Transportation Authority and Jacobs Project Management Co., in the amount of \$2,600,000, for additional construction management consultant services. This will increase the maximum obligation of the agreement to a total contract value of \$52,187,573.

Attachment

- A. Jacobs Project Management Co., Agreement No. C-4-1447 Fact Sheet

Prepared by:



Dennis Mak, P.E.
Program Manager
(714) 560-5826



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



James G. Beil, P.E.
Executive Director, Capital Programs
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**Jacobs Project Management Co.
Agreement No. C-4-1447 Fact Sheet**

1. June 8, 2015, Agreement No. C-4-1447, \$34,056,297, approved by the Board of Directors (Board).
 - Agreement was executed June 29, 2016, with Jacobs Project Management Co. (Prime) to provide construction management consulting services for the design-build Interstate 405 Improvement Project (Project).
2. August 23, 2018, Amendment No. 1 to Agreement No. C-4-1447, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - To revise key personnel for Prime and subconsultants Harris & Associates and MTGL, Inc.
3. March 25, 2019, Amendment No. 2 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To revise key personnel for Prime.
4. April 1, 2019, Amendment No. 3 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To revise Other Direct Costs schedule for subconsultant Fountainhead Corporation.
5. August 14, 2019, Amendment No. 4 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To revise key personnel for Prime.
6. October 25, 2019, Amendment No. 5 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To revise key personnel for Prime.
 - To add new personnel for subconsultants Harris & Associates and MTGL, Inc.
7. November 14, 2019, Amendment No. 6 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To add new personnel for Prime.

8. February 12, 2020, Amendment No. 7 to Agreement No. C-4-1447, \$174,000, approved by the CAMM Department.
 - To add subconsultant Kizh Nation Resources Management to monitor archaeological discoveries on the Project.
9. April 2, 2020, Amendment No. 8 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To add new personnel for Prime.
10. May 28, 2020, Amendment No. 9 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To add new personnel to subconsultant Harris & Associates.
11. September 9, 2020, Amendment No. 10 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To revise key personnel for Prime.
12. March 7, 2022, Amendment No. 11 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To add personnel for Prime and subconsultants Fountainhead Corporation, MTGL, Inc., and R&B Wagner, Inc.
13. May 9, 2022, Amendment No. 12 to Agreement No. C-4-1447, \$13,584,200, approved by the Board.
 - To provide additional construction management consulting services through completion and closeout of the Project.
 - To extend the term of the agreement by 17 months through May 31, 2024.
14. July 21, 2023, Amendment No. 13 to Agreement No. C-4-1447, \$0, approved by the CAMM Department.
 - To add new personnel for Prime.

15. April 22, 2024, Amendment No. 14 to Agreement No. C-4-1447, \$1,773,118, approved by the Board.
 - To provide additional construction management consulting services through completion and closeout of the Project.
 - To extend the term of the agreement by 13 months through June 30, 2025.
16. November 12, 2024, Amendment No. 15 to Agreement No. C-4-1447, \$2,600,000, pending approval by the Board.
 - To provide additional construction management consulting services through completion and closeout of the Project.

Total funds committed to Jacobs Project Management Co., after approval of Amendment No. 15 to Agreement No.C-4-1447: \$52,187,573.



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Program Management Consultant Services for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "To:" and "From:" fields of the memo.

Overview

On December 10, 2012, the Orange County Transportation Authority Board of Directors selected Parsons Transportation Group, Inc., to provide program management consultant services for the design-build delivery of the Interstate 405 Improvement Project between State Route 73 and Interstate 605 for a term of six and a half years. An amendment to the existing agreement is needed to provide additional services through the completion and closeout of the Interstate 405 Improvement Project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 37 to Agreement No. C-2-1513 between the Orange County Transportation Authority and Parsons Transportation Group, Inc., in the amount of \$2,000,000, for additional program management consultant services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$140,170,682.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans) and the cities of Costa Mesa, Fountain Valley, Huntington Beach, Seal Beach, and Westminster, is implementing the Interstate 405 (I-405) Improvement Project between State Route 73 (SR-73) and Interstate 605 (I-605) (Project). The Project will add one general purpose lane in each direction from Euclid Street to I-605, consistent with Measure M2 Project K, and will add an additional lane in each direction that will combine with the existing high-occupancy vehicle lane to

**Amendment to Agreement for Program Management Page 2
Consultant Services for the Interstate 405 Improvement Project
Between State Route 73 and Interstate 605**

provide dual express lanes in each direction on I-405 between SR-73 and I-605, otherwise known as the 405 Express Lanes.

To support the project and following Board approval, on March 4, 2013, OCTA entered into an agreement with Parsons Transportation Group, Inc., (Parsons) to provide program management consultant (PMC) services to support OCTA in the implementation of the Project. These services include project management and administration, design services and preliminary project development, right-of-way (ROW) support services, a design-build (DB) procurement, contracts and third-party agreements, oversight of tolling elements for the Project, and oversight of DB construction. The services involve extensive ongoing coordination and communications between all Project stakeholders while meeting the Project schedule, cost, and administrative requirements. In addition, it was identified during the development of the project express lane system and services, which includes the planning, procurement, implementation, and oversight of the toll systems, that efficiencies and cost savings could be achieved in combining the project toll system and services with the 91 Express Lanes (91 EL) system and services. As a result, in 2017, the Parsons contract for the Project was amended to provide support for the 91 EL toll systems, operations procurement management, RFP development, implementation oversight, and post-implementation work. This Parsons' amendment will extend these services until June 2025.

Additional PMC support is needed to ensure the DB contractor, OC 405 Partners, is compliant with the Project's contract requirements, construction quality management plan, and various agency standards and permits, including Caltrans, the corridor cities, and environmental resource agencies. The following describes the specific efforts needed:

- Additional project management and administration of DB contract. Efforts include coordination with the construction management consultant, various stakeholders, including all corridor cities and Caltrans, to track and ensure resolution of all punch list items to achieve final acceptance of the Project.
- Additional ROW and surveying services for the development of relevant ROW closeout documentation to comply with Caltrans' requirements.
- Additional staff efforts to assist OCTA in support of the operations phase of the 405 Express Lanes. This will extend current staff support to continue to troubleshoot and resolve any issues that may be found in the collection, billing, and customer service system for the new express lanes.
- Parsons also provides support for the 91 Express Lanes under this agreement. This amendment includes additional staff efforts for ongoing operations and maintenance technical support for this facility.

**Amendment to Agreement for Program Management Page 3
Consultant Services for the Interstate 405 Improvement Project
Between State Route 73 and Interstate 605**

Procurement Approach

The original procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for architectural and engineering services, which conform to both state and federal laws. On December 12, 2012, the Board approved an agreement with Parsons for a term of six and a half years to provide PMC services. The contract was issued with a maximum obligation of \$57,059,657. This agreement has been previously amended as shown in Attachment A.

OCTA staff and Parsons reviewed and agreed to the level of effort for the additional PMC services. Staff found Parsons' cost proposal, in the amount of \$2,000,000, to be fair and reasonable relative to the negotiated level of effort and the independent cost estimate prepared by the OCTA project management team. Proposed Amendment No. 37 to Agreement No. C-2-1513, in the amount of \$2,000,000, will bring the total contract value to \$140,170,682.

Fiscal Impact

Funding for this amendment is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, account nos. 0017-9085-FK101-TZF and 0037-9018-A9510-TZF, and is funded with a combination of federal, state, and local funds.

Summary

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 37 to Agreement No. C-2-1513 between the Orange County Transportation Authority and Parsons Transportation Group, Inc., in the amount of \$2,000,000, for additional program management consultant services. This will increase the maximum obligation of the agreement to a total contract value of \$140,170,682.

**Amendment to Agreement for Program Management Page 4
Consultant Services for the Interstate 405 Improvement Project
Between State Route 73 and Interstate 605**

Attachment

- A. Parsons Transportation Group, Inc., Agreement No. C-2-1513 Fact Sheet

Prepared by:



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Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
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**Parsons Transportation Group, Inc.
Agreement No. C-2-1513 Fact Sheet**

1. December 10, 2012, Agreement No. C-2-1513, \$57,059,657, approved by the Board of Directors (Board).
 - Agreement was executed March 4, 2013, to provide program management consultant (PMC) services for the design-build delivery of the Interstate 405 Improvement Project (Project).
2. May 7, 2014, Amendment No. 1 to Agreement No. C-2-1513, \$0, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - To revise key personnel and update hourly rate.
3. July 23, 2014, Amendment No. 2 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
 - To revise hourly rates for the prime consultant and subconsultants to list field and office hourly billing rates where applicable and additional classifications.
 - To clarify agreement terms and conditions relative to preparation and payment of invoices.
4. October 1, 2014, Amendment No. 3 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
 - To revise hourly rates for prime and subconsultants.
5. October 2, 2014, Amendment No. 4 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
 - To add Delcan Corporation (Delcan) as a subconsultant to assist with intelligent transportation systems work requirements of the Project.
6. February 9, 2015, Amendment No. 5 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
 - To revise hourly rate schedules to add personnel for subconsultants.
7. July 13, 2015, Amendment No. 6 to Agreement No. C-2-1513, \$29,981,056, approved by the Board.
 - To provide additional PMC services to support the Project preferred alternative.

- To extend the term of the agreement to July 31, 2022, to allow for completion of the expanded scope of work.
8. July 7, 2016, Amendment No. 7 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise hourly rate schedule to add and replace key personnel for the prime consultant.
9. January 17, 2017, Amendment No. 8 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise hourly rate schedules for a subconsultant.
 - To incorporate Delcan under prime consultant due to the acquisition of Delcan by prime consultant as of January 2015.
10. February 9, 2017, Amendment No. 9 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To add a subconsultant to provide scheduling services for the Project.
11. May 30, 2017, Amendment No. 10 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To modify key personnel for the prime and subconsultant HNTB Corporation.
 - To add disadvantaged business enterprise subconsultant The Alliance Group.
12. July 17, 2017, Amendment No. 11 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To update the indemnification language in the agreement regarding Parsons' support of the Transportation Innovation Finance and Innovation Act (TIFIA) loan requirements.
13. June 12, 2017, Amendment No. 12 to Agreement No. C-2-1513, \$6,000,000, approved by the Board.
- To provide additional PMC services to reduce project risks and costs associated with the right-of-way (ROW) impacts and utility relocations.
 - To provide the financial and document control systems required to support the TIFIA loan.

- To provide procurement management oversight, using a combined toll systems and operations approach for the 91 Express Lanes and 405 Express Lanes.
 - To add new subconsultant Ares Prism to provide cost management system.
 - To add new subconsultant Rosendin Electric, Inc. to provide fiber testing support for the 91 Express Lanes.
14. October 12, 2017, Amendment No. 13 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To modify key personnel and add other personnel for prime consultant and subconsultant.
15. November 16, 2017, Amendment No. 14 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To modify key personnel for prime consultant.
16. June 7, 2018, Amendment No. 15 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
17. July 30, 2018, Amendment No. 16 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To add new subconsultant Progressive Transport Solutions, LLC, for maintenance of traffic and public outreach services.
18. August 14, 2018, Amendment No. 17 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
19. October 8, 2018, Amendment No. 18 to Agreement No. C-2-1513, \$39,762,000, approved by the Board.
- To provide design-build contract compliance services.
 - To provide additional support to ensure project environmental compliance.
 - To provide additional construction management services.
 - To provide project controls and document controls services.
 - To provide value engineering studies.
 - To provide engineering support and Project stakeholder support.

- To provide toll-related engineering services for the design of the 405 Express Lanes Traffic Operations Center (TOC) and server room and tenant improvements, and 91 Express Lanes westbound toll read site.
20. January 10, 2019, Amendment No. 19 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise agreement's Exhibit D – Milestones for Release of Retention.
21. February 20, 2019, Amendment No. 20 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for subconsultants.
22. April 17, 2019, Amendment No. 21 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise schedules for personnel and other direct costs for a subconsultant.
23. June 20, 2019, Amendment No. 22 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedule for a subconsultant.
24. July 2, 2019, Amendment No. 23 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
25. September 24, 2019, Amendment No. 24 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for subconsultants.
26. November 26, 2019, Amendment No. 25 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant.
27. September 9, 2020, Amendment No. 26 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.

- To revise schedules for personnel and other direct costs for prime consultant and subconsultants.
28. November 24, 2020, Amendment No. 27 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
29. November 4, 2021, Amendment No. 28 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant.
30. May 25, 2021, Amendment No. 29 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise other direct costs schedules for subconsultants.
31. August 4, 2021, Amendment No. 30 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
32. October 6, 2021, Amendment No. 31 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
33. June 16, 2022, Amendment No. 32 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant and subconsultants.
34. August 5, 2022, Amendment No. 33 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To revise personnel schedules for prime consultant.
35. October 10, 2022, Amendment No. 34 to Agreement No. C-2-1513, \$5,367,969, approved by the Board.

- To provide additional PMC services to support the revised construction substantial completion date of October 31, 2023, and assist with Project closeout activities.
 - To assist with the implementation of the 405 Express Lanes back-office system and customer service center operations.
 - To provide additional design, plans, permits, and construction management services for necessary improvements to the former Sit n' Sleep property.
 - To provide additional design and coordination support related to the 405 Express Lanes TOC.
 - To provide additional ROW and surveying services needed for Project closeout documentation.
36. February 13, 2023, Amendment No. 35 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To modify key personnel and add other personnel for prime consultant and subconsultant.
37. February 14, 2024, Amendment No. 36 to Agreement No. C-2-1513, \$0, approved by the CAMM Department.
- To modify key personnel for prime consultant.
 - To extend the term of the agreement by 12 months, to June 30, 2025.
38. November 12, 2024, Amendment No. 37 to Agreement No. C-2-1513, \$2,000,000, pending approval of the Board.
- To provide additional PMC services to support the final contract acceptance and assist with project closeout activities.
 - To provide additional ROW and surveying services needed for project closeout documentation.

Total funds committed to Parsons Transportation Group, Inc. after approval of Amendment No. 37 to Agreement No. C-2-1513: \$140,170,682.



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue

Overview

The Orange County Transportation Authority proposes to enter into a cooperative agreement with the California Department of Transportation for construction capital and construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Recommendations

- A. Authorize the use of an additional \$47,300,000 in Measure M2 funds for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-4-2574 between the Orange County Transportation Authority and California Department of Transportation, in the amount of \$107,800,000, comprised of a construction capital share of \$90,000,000, and a construction management services share of \$17,800,000 for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above action.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the State Route 57 (SR-57) Northbound (NB) Improvement Project between

Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue **Page 2**

Orangewood Avenue and Katella Avenue (Project). The Project is part of Project G in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

The Project will construct a missing section of the fifth NB general purpose lane from the Orangewood Avenue off-ramp to the Katella Avenue off-ramp, extend the existing NB auxiliary lane and merging length from the Orangewood Avenue off-ramp to the Katella Avenue off-ramp, and add a second lane to the NB Katella Avenue off-ramp to provide additional storage capacity and improved operations at the Katella Avenue intersection. The project requires widening the NB Orangewood Avenue undercrossing bridge, the Santa Ana River bridge, and the stadium overhead bridge that spans Douglas Road and the Anaheim Regional Transportation Intermodal Center.

On March 8, 2021, the Board authorized Cooperative Agreement No. C-1-3300 with Caltrans to provide oversight of the plans, specifications, and estimates, and to advertise and award the construction contract for the Project. On June 12, 2023, the Board authorized Cooperative Agreement No. C-3-2577 with Caltrans to complete the Project's right-of-way acquisition.

OCTA and Caltrans are proposing to enter into a cooperative agreement to define the specific roles and funding responsibilities for each agency to provide the construction capital and construction management support services for the Project.

Bid documents for the Project are being prepared for the construction contract and are expected to be advertised by mid-2025. The total construction capital funding required for the project is \$90,000,000 in M2 funds, of which \$52,000,000 was previously approved by the Board on December 12, 2022. Funding for the Project in the previous Board item was determined at the 35 percent design completion and staff noted that final costs may differ when the project reached 100 percent design completion.

Staff is recommending that the Board approve the use of \$47,300,000 in M2 funds for the Project, \$38,000,000 for construction capital and \$9,300,000 for construction support. This is Project G in the Next 10 Delivery Plan, and the use of M2 funds for this Project is consistent with the Board-approved Capital Programming Policies. Attachment A provides the updated Capital Funding Plan which includes funding information for OCTA's freeway programs and the recommended funding changes for the Project.

Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue **Page 3**

As the implementing agency for construction of the Project, Caltrans will be responsible for the advertisement, award, approval, and administration of the construction contract. Under the proposed cooperative agreement, Caltrans and OCTA have agreed to share in the construction management support services for the Project.

Caltrans, as the construction phase implementing agency, will provide the senior resident engineer (RE), structures representative, and other field personnel, along with construction administrative support, environmental and paleontology monitoring for the Project at an estimated cost of \$8,500,000 which will be funded with federal Surface Transportation Block Grant (STBG) funds. Caltrans will draw down these federal funds directly.

OCTA will retain a consultant firm to augment Caltrans field staff with roadway and structural inspection, office engineering, materials testing, scheduling, and claims support services. OCTA's consultant will also provide a field office to house construction staff on the Project. The total estimated cost of the OCTA construction support contract is \$10,020,000. This is funded by M2 funds with the exception of \$720,000 for the consultant to provide the RE office, which is funded through the construction capital funds, as a state furnished item. Through separate contracts, OCTA will lead the public outreach and freeway service patrol efforts.

The total construction support funding for the Project is \$17,800,000, comprised of \$8,500,000 in STBG funds and \$9,300,000 in M2 funds.

Fiscal Impact

The Project will be included in OCTA's Fiscal Year (FY) 2025-26 Budget and subsequent FYs budget, Capital Programs Division, account nos. 0017-9084-FG104-02K and 0017-9085-FG104-02K, and will be funded with a combination of federal and local funds.

Summary

Staff requests Board authorization to use \$47,300,000 in M2 funds, and approval for the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-4-2574 between OCTA and Caltrans, in the amount of \$107,800,000, comprised of a construction capital share of \$90,000,000 and a construction management services share of \$17,800,000, for the Project.

Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue *Page 4*

Attachment

A. Capital Funding Program Report

Prepared by:



Niall Barrett, P.E.
Program Manager
(714) 560-5879

Approved by:



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



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

State Highway Project												
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds			
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local	
I-5 widening, I-405 to Yale Avenue (Segment 1)	B	\$205,794	\$47,473		\$5,421	\$95,338	\$11,374			\$46,188		
I-5 widening, Yale Avenue to SR-55 (Segment 2)	B	\$41,351	\$32,527							\$8,824		
I-5 widening, Alicia Parkway to El Toro Road (Segment 3)	C	\$227,523	\$49,897		\$4,728		\$16,915			\$155,983		
I-5 widening, Oso Parkway to Alicia Parkway (Segment 2)	C	\$228,675	\$48,676		\$7,921					\$172,078		
I-5 widening, SR-73 to Oso Parkway (Segment 1) ¹	C	\$248,198	\$28,167		\$6,433	\$73,735	\$18,242	\$29,832		\$91,789		
I-5, SR-73 to El Toro Road landscaping/replacement planting	C	\$12,335	\$790			\$6,000				\$5,545		
I-5/El Toro Interchange	D	\$9,713	\$9,213							\$500		
SR-55 (I-5 to SR-91)	F	\$22,045	\$8,359		\$2,641					\$11,045		
SR-55 widening between I-405 and I-5	F	\$505,720	\$160,500		\$42,375	\$80,000	\$140,000			\$82,845		
SR-57 Orangewood Avenue to Katella Avenue ²	G	\$120,921	\$11,500		\$3,240					\$106,181		
SR-57 truck climbing lane phase II: Lambert Road to LA County Line	G	\$24,500				\$24,500						
SR-91, Acacia Avenue to La Palma Avenue (Segment 3)	I	\$164,492	\$1,770		\$3,000					\$30	\$159,692	
SR-91, La Palma Avenue to SR-55 (Segment 2)	I	\$50,314	\$3,460		\$4,000					\$40	\$42,814	
SR-91, SR-55 to Lakeview Avenue (Segment 1)	I	\$108,124	\$1,770		\$5,000		\$42,566			\$30	\$58,758	
SR-91, SR-57 to SR-55 (Segment 1,2 and 3) Outreach	I	\$2,000									\$2,000	
SR-91, SR-241 to I-15	J	\$41,800									\$41,800	
I-405 improvements, SR-73 to I-605	K	\$2,159,999	\$35,000		\$10,648			\$89,771		\$1,395,650	\$628,930	
I-405 (I-5 to SR-55)	L	\$8,000	\$8,000									
I-605/ Katella Avenue interchange	M	\$38,315	\$17,800							\$20,515		
241/91 Express Lanes (HOT) connector		\$182,298	\$50								\$182,248	
I-5 Managed Lane Project from Avenida Pico to San Diego County Line		\$24,228	\$23,478								\$750	
SR-74 - Gap closure for 0.9 mile and multimodal improvements		\$87,513	\$30,000		\$4,250	\$43,913				\$7,200	\$2,150	
SR-74 widening, City/County line to Antonio Parkway		\$40,905	\$5,285			\$10,000					\$25,620	
SR-91, Acacia Avenue to La Palma Avenue (Segment 3) Multi Asset Project		\$23,170			\$23,170							
SR-91, SR-55 to Lakeview Avenue (Segment 1) Multi Asset Project		\$8,305			\$8,305							
State Highway Project Totals		\$4,586,238	\$523,715		\$131,132	\$333,486	\$229,097	\$119,603		\$2,104,443	\$1,144,762	
Federal Funding Total		\$654,847										
State Funding Total		\$682,186										
Local Funding Total		\$3,249,205										
Total Funding (000's)		\$4,586,238										

State Highway Project Completed												
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds			
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local	
I-5 from SR-55 to SR-57, add one HOV lane each direction	A	\$41,500	\$36,191							\$5,309		
I-5 HOV lane each direction s/o PCH to San Juan Creek Road	C	\$74,300	\$11,326					\$20,789		\$42,185		



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

State Highway Project Completed											
Project Title	M Code	Total Funding	Federal Funds			State Funds			Local Funds		
			STBG/CMAQ	FTA	Other Fed.	STIP	SB1	Other State	M1	M2	Other Local
I-5 HOV lanes from s/o Avenida Vista Hermosa to s/o PCH	C	\$75,300	\$12,065			\$46,779				\$16,456	
I-5 HOV lanes: s/o Avenida Pico to s/o Avenida Vista Hermosa	C	\$83,500	\$26,867		\$1,600	\$43,735				\$11,298	
I-5/SR-74 interchange improvements	D	\$80,300				\$48,683		\$24,109	\$2,500		\$5,008
I-5/SR-74 interchange landscaping/replacement planting	D	\$1,440			\$752	\$688					
SR- 57 n/b widening, Katella Avenue to Lincoln Avenue - landscaping	G	\$2,172								\$2,172	
SR- 57 n/b widening, SR-91 to Yorba Linda Boulevard - landscaping	G	\$946								\$946	
SR-57 n/b widening, Katella Avenue to Lincoln Avenue	G	\$35,827						\$24,127		\$11,700	
SR-57 n/b widening, SR-91 to Yorba Linda Boulevard	G	\$51,354						\$39,475		\$11,879	
SR-57 n/b widening, Yorba Linda to Lambert Road	G	\$52,871						\$41,250		\$11,621	
SR-57 n/b widening, Yorba Linda to Lambert Road - landscaping	G	\$1,193								\$1,193	
SR-91 w/b connect existing aux lanes, I-5 to SR-57	H	\$62,977						\$27,227		\$35,750	
SR-91 w/b connecting existing aux lanes, I-5 to SR-57 - landscaping	H	\$2,290								\$2,290	
SR-91 w/b (SR-55 - Tustin interchange) improvements	I	\$43,753				\$15,753		\$14,000		\$14,000	
SR-91 e/b widening, SR-241 to SR-71	J	\$57,773			\$45,911					\$6,942	\$4,920
SR-91 w/b routes 91/55 - e/o Weir Canyon Road replacement planting	J	\$2,898				\$2,898					
SR-91 widening, SR-55 to Gypsum Canyon (Weir Canyon Road/SR-241)	J	\$76,993				\$22,250		\$54,045		\$698	
I-405 s/b aux lane - University Drive to Sand Canyon and Sand Canyon to SR-133		\$2,328				\$2,328					
I-405/SR-22/I-605 HOV connector - landscaping		\$4,600	\$4,600								
HOV connectors from I-405 and I-605	M1	\$173,091	\$14,787					\$135,430	\$16,200		\$6,674
HOV connectors from SR-22 to I-405	M1	\$115,878	\$64,375		\$49,625				\$1,878		
State Highway Project Completed Totals		\$1,043,284	\$170,211		\$97,888	\$183,114		\$380,452	\$20,578	\$174,439	\$16,602
Federal Funding Total		\$268,099									
State Funding Total		\$563,566									
Local Funding Total		\$211,619									
Total Funding (000's)		\$1,043,284									



Capital Funding Program Report

Pending Approval by OCTA Board of Directors - November 12, 2024

Amendment to Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between State Route 73 and Oso Parkway

1. Authorize the use of up to \$3,929,113 in Measure M2 funds for the construction phase of the Interstate 5 Improvement Project between State Route 73 and Oso Parkway.

Cooperative Agreement with the California Department of Transportation for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue

2. Authorize the use of an additional \$47,300,000 in Measure M2 funds for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Acronyms:

Aux - Auxilliary
Board - Board of Directors
CMAQ - Congestion Mitigation Air Quality Improven Program
E/B - Eastbound
E/O - East of
FTA - Federal Transit Administration
HOT - High-Occupancy Toll
HOV - High-Occupancy Vehicle
I-405 - Interstate 405
I-5 - Interstate 5
I-605 - Interstate 605
LA - Los Angeles
M Code - Project Codes in Measure M1 and M2
M1 - Measure M1
M2 - Measure M2
N/B - Northbound
OC - Orange County
OCTA - Orange County Transportation Authority
PCH - Pacific Coast Highway
S/B - Southbound
S/O - South of
SB 1 - SB 1 (Chapter 5, Statutes of 2017)
SR-133 - State Route 133
SR-22 - State Route 22
SR-241 - State Route 241
SR-55 - State Route 55
SR-57 - State Route 57
SR-71 - State Route 71
SR-73 - State Route 73
SR-74 - State Route 74
SR-91 - State Route 91
STBG - Surface Transportation Block Grant
STIP - State Transportation Improvement Program
W/B - Westbound



November 4, 2024

To: Regional Transportation Planning Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Amendment to Agreement for Regional Modeling-Traffic Operations On-Call Support Staffing Agreement

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "From:" line of the header.

Overview

On February 8, 2021, the Orange County Transportation Authority Board of Directors approved the selection of W.G. Zimmerman Engineering, Inc. as the firm to provide on-call support staffing services for the Regional Modeling and Traffic Operations section for a two-year initial term with two, two-year option terms. The first option term approved by the Board of Directors expires on February 28, 2025. Staff is requesting approval to exercise the second option term effective March 1, 2025 through February 28, 2027.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-0-2608 between the Orange County Transportation Authority and W.G. Zimmerman Engineering, Inc., to exercise the second option term, in the amount of \$400,000, to continue providing regional modeling-traffic operations support staffing services, effective March 1, 2025 through February 28, 2027. This will increase the maximum obligation of the agreement to a contract value of \$1,200,000.

Discussion

The Orange County Transportation Authority (OCTA) has been designated by the local agencies to administer and lead over 15 regionally significant traffic signal synchronization projects. These projects are currently underway or in early development. Regional Modeling-Traffic Operations staff have limited resources to provide this service to local agencies in support of the Regional Traffic Signal Synchronization Program (RTSSP). When internal resources within OCTA are unavailable for performance of projects of a special or unique nature, OCTA uses external, qualified consultant services for that function.

Amendment to Agreement for Regional Modeling-Traffic Page 2 Operations On-Call Support Staffing Agreement

Project management assistance is required and is requested by OCTA in support of its traffic engineering needs for the RTSSP and other transportation engineering and planning projects on an as-needed basis. On February 8, 2021, the Board of Directors (Board) approved W.G. Zimmerman Engineering, Inc. (WGZE) to provide support staff, which includes one on-site engineer and off-site support staff to provide OCTA with the flexibility of engaging and delivering simultaneous traffic signal synchronization projects to meet delivery schedules and assist staff in day-to-day tasks required as part of signal synchronization projects.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. On February 8, 2021, the Board approved the award of the agreement with WGZE to provide regional modeling-traffic operations support staffing services. The original agreement was awarded on a competitive basis and includes a two-year initial term with two, two-year option terms, in the amount of \$400,000. The first option term was approved by the Board on November 14, 2022, as shown in Attachment A.

The proposed Amendment No. 2 is to exercise the second option term of the agreement for a period of two years, effective March 1, 2025 through February 28, 2027. The budget for the amendment, in the amount of \$400,000, is based on current and anticipated usage for support staffing services. The hourly rates for the second option term were originally negotiated when the agreement was established; however, the Contracts Administration and Materials Management Department was able to negotiate with WGZE to hold most of the hourly rates from the first option term through the second option term. Exercising the second option term will allow WGZE to continue providing necessary regional modeling-traffic operations support staffing services through February 28, 2027.

Fiscal Impact

Funds for this project are included in OCTA's Fiscal Year 2024-25 Budget, Account No. 0017-7519-SP001-P2U, and are funded through Measure M2.

**Amendment to Agreement for Regional Modeling-Traffic Page 3
Operations On-Call Support Staffing Agreement**

Summary

Staff is recommending the Board authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-0-2608 between OCTA and WGZE, in the amount of \$400,000, to continue providing regional modeling-traffic operations support staffing services, effective March 1, 2025 through February 28, 2027. This will increase the maximum obligation of the agreement to a contract value of \$1,200,000.

Attachment

A. W.G. Zimmerman Engineering, Inc., Agreement No. C-0-2608 Fact Sheet

Prepared by

:



Alicia Yang
Project Manager
Regional Modeling – Traffic Operations
(714) 560-5362



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

Approved by:



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

**W.G. Zimmerman Engineering, Inc.
Agreement No. C-0-2608 Fact Sheet**

1. February 8, 2021, Agreement No. C-0-2608, \$400,000, approved by the Board of Directors (Board).
 - Agreement for Regional Modeling-Traffic Operations staffing support services.
 - Initial term of the agreement is effective March 1, 2021 through February 28, 2023, with two, two-year option terms.
2. November 14, 2022, Amendment No. 1 to Agreement No. C-0-2608, \$400,000, approved by the Board.
 - Amendment to exercise the first option term of the agreement effective March 1, 2023 through February 28, 2025.
3. November 12, 2024, Amendment No. 2 to Agreement No. C-0-2608, \$400,000, pending approval by the Board.
 - Amendment to exercise the second option term of the agreement effective March 1, 2025 through February 28, 2027.

Total committed to W.G. Zimmerman Engineering, Inc., under Agreement No. C-0-2608: \$1,200,000.



November 4, 2024

To: Regional Transportation Planning Committee
From: Darrell E. Johnson, Chief Executive Officer 
Subject: 2025 Active Transportation Program Regional Project Prioritization Point Assignments for Orange County

Overview

On March 21, 2024, the California Transportation Commission adopted the 2025 Active Transportation Program guidelines and issued a two-tiered call for projects, the State of California Statewide call for projects, and the Southern California Association of Governments' regional program. The Orange County Transportation Authority can assign additional points to project applications to augment scores, which will be considered during the regional program review. The assignment of points for Orange County applications is presented for the Board of Directors' approval.

Recommendations

- A. Approve the Orange County 2025 Active Transportation Program project prioritization point assignments for submittal to the Southern California Association of Governments.
- B. Authorize the Chief Executive Officer, or his designee, to provide concurrence on future project scope changes and substitutions as needed for the 2025 Active Transportation Program projects.
- C. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program to facilitate the above actions.

Background

On March 21, 2024, the California Transportation Commission (CTC) adopted the statewide 2025 Active Transportation Program (ATP) guidelines and issued the associated ATP call for projects (call). The 2025 ATP will provide a total of \$168.7 million in funding for projects in fiscal years (FY) 2025-26 through FY 2028-29.

The ATP includes a two-tiered call for projects. Projects may be funded through the statewide round of funding or through the regional round of funding. All project applications are first ranked according to a project score and considered for the statewide round of funding. The CTC is responsible for overseeing the scoring process and is expected to publish funding recommendations in November 2024. Funding recommendations for the statewide round of funding are based on the highest scoring project applications statewide.

Consistent with state law and approved program guidelines, the 2025 ATP funding is distributed three ways. Fifty percent of the available funding is distributed through the statewide round (approximately \$84.35 million). Ten percent of the available funding is distributed to small urban and rural regions (approximately \$16.87 million of which Orange County applicants are not eligible to receive). The remaining 40 percent of the available funding (approximately \$67.48 million) is distributed through the regional round of funding which is subdivided across metropolitan areas and is further split by county based on population. Orange County expects to receive approximately \$5.6 million in ATP funds through this round of funding.

Orange County projects, which are not recommended for funding through the statewide round, will be considered for the regional round administered through the Southern California Association of Governments (SCAG) process.

The SCAG Regional ATP guidelines were approved by the CTC in June 2024 and outline the SCAG regional project selection process. This process allows for a prioritization methodology to be developed by each of the county transportation commissions to augment the scores received by project applications through the statewide round. Up to 20 points can be added to the statewide project score. The Orange County Transportation Authority (OCTA) Board of Directors (Board) established a prioritization methodology for OCTA in September 2024.

This methodology is provided for reference below and in Attachment A.

Plan	Point Value (Maximum of 20 Points)
A planned bikeway in OC Active	10
Project is included in the Orange County Bike Connectors Gap Closure Feasibility Study or the Nonmotorized Metrolink Accessibility Strategy	10
Pedestrian or bikeway improvements that connect to a Transit Opportunity Corridor identified in OC Transit Vision	10

Plan	Point Value (Maximum of 20 Points)
Pedestrian improvements within a half mile or bikeway improvements within three miles of one of the Prioritized High-Potential Hub Locations identified in the Orange County Mobility Hubs Strategy	5
Project is included in a regional or local agency bicycle or pedestrian master plan, active transportation plan, or complete streets plan	5
Project is included in a local safety plan, including but not limited to, Safe Routes to Schools, Local Roadway Safety Plan, Vision Zero Plan, or implements countermeasures to identified crash typologies in the project area consistent with the Orange County Systemic Safety Plan	5
Project closes a gap on a sidewalk along a roadway on the Master Plan of Arterial Highways	2
Project is included in a specific plan, corridor plan, or multimodal study	2
Project is included in local agency general plan or circulation element	2

Discussion

Applications for the 2025 ATP, including both statewide and regional, were due on June 17, 2024. Orange County agencies submitted 14 applications, requesting a total of \$228.844 million in ATP funding.

OCTA staff reviewed project applications and surveyed Orange County applicant agencies to evaluate the consistency of their projects with the planning documents outlined in the Board-approved project prioritization methodology. OCTA contacted applicant agencies for clarification as needed, and finalized the recommended point assignments for submittal to SCAG included in Attachment B. As noted above, the CTC will perform the primary project scoring, which has not occurred yet. The SCAG/OCTA ranking and augmented scoring will take place once the CTC scoring is complete and will only affect projects not selected for funding in the statewide round of funding. Once SCAG applies the OCTA-assigned points to the CTC scores, the CTC will review and authorize the ATP funding for the selected projects through the regional share of ATP funding.

If a project that is recommended for funding through the SCAG regional project selection process is not able to be delivered or is recommended for partial funding, OCTA will work with applicant agencies and SCAG to substitute the next ranked projects or adjust project scopes for partial funding consistent with the SCAG regional guidelines. Although OCTA does not determine final scores or

award funds to local agencies for ATP projects, future scope changes for Orange County projects may require OCTA concurrence as part of the request to the CTC. To carry out these activities, staff is requesting Board authorization to make these minor adjustments.

Consistent with SCAG's Federal Transportation Improvement Program (FTIP) guidelines, all federally funded, or regionally significant projects, must be included in the FTIP; therefore, Board direction to enter awarded ATP projects into the FTIP is requested because the ATP includes federal funding sources.

Next Steps

With Board approval, staff will submit the project point assignment recommendations to SCAG. The SCAG Regional Council will consider the adoption of the regional program in spring 2025, and the CTC will consider the adoption of the regional program in summer 2025. Following approval, projects will be entered into the FTIP so that local agencies may initiate the process to begin their projects, consistent with the award amount, match required, and timing for when the funds are available.

Summary

As part of the SCAG regional project selection process for the 2025 ATP, staff has reviewed applications and is recommending point assignments for projects submitted by Orange County agencies consistent with OCTA-approved methodology for approval and submittal to SCAG.

Attachments

- A. Orange County Transportation Authority, Active Transportation Program Project Prioritization Methodology
- B. Orange County Transportation Authority, 2025 Active Transportation Program Project Prioritization Point Assignments

Prepared by:



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**Orange County Transportation Authority, Active Transportation Program
Project Prioritization Methodology**

On September 12, 2024, the Orange County Transportation Authority (OCTA) Board of Directors (Board) approved a prioritization methodology for projects submitted for Active Transportation Program (ATP) funding.

The Board-approved methodology assigns points to projects based on what plans recommend the improvements described in the project. The points assignment by plan or project type is listed in the table below.

Plan	Point Value (Maximum of 20 Points¹)
A planned bikeway in OC Active	10
Project is included in the Orange County Bike Connectors Gap Closure Feasibility Study or the Nonmotorized Metrolink Accessibility Strategy	10
Pedestrian or bikeway improvements that connect to a Transit Opportunity Corridor identified in OC Transit Vision	10
Pedestrian improvements within a half mile or bikeway improvements within three miles of one of the Prioritized High-Potential Hub Locations identified in the Orange County Mobility Hubs Strategy	5
Project is included in a regional or local agency bicycle or pedestrian master plan, active transportation plan, or complete streets plan	5
Project is included in a local safety plan, including but not limited to, Safe Routes to Schools, Local Roadway Safety Plan, Vision Zero Plan, or implements countermeasures to identified crash typologies in the project area consistent with the Orange County Systemic Safety Plan	5
Project closes a gap on a sidewalk along a roadway on the Master Plan of Arterial Highways	2
Project is included in a specific plan, corridor plan, or multimodal study	2
Project is included in local agency general plan or circulation element	2

This methodology rewards projects that provide regional connectivity, complement transit service in Orange County, encourage multimodal mobility, and have a clear safety need.

¹ The adopted 2025 ATP Southern California Association of Governments Regional Guidelines establish that the maximum points that can be assigned by the county transportation commission is 20 points. These local prioritization points will be added to the score provided by the State.

Orange County Transportation Authority, Active Transportation Program Project Prioritization Methodology

OCTA-led projects are eligible for the additional points in the same manner as the local agency projects. The regional plans listed in the methodology were developed in coordination with all the local Orange County agencies. Basing the point assignment upon inclusion in various regional and local plans that focus on gap closures, community issues, Safe Routes to Schools, and regional bicycle and pedestrian corridors ensure that all projects can receive equitable consideration.

Disadvantaged Communities Methodology

To maximize funding for Orange County projects, staff evaluates the points assigned to each project to confirm that 25 percent of the regional funding goes to projects that will benefit disadvantaged communities as required by SB 99 (Chapter 359, Statutes of 2013). There is a risk that Orange County projects could lose funding if the region doesn't meet the 25 percent threshold and pulls a project from another region to receive funding. In order to avoid allowing Orange County targeted funds to go to projects in other counties, staff may need to adjust project prioritization to assist the region in meeting this requirement, ensuring the funding stays in Orange County.

Plans, Quick-Builds, and Non-Infrastructure Projects Methodology

The regional guidelines require that up to five percent of funding available for the region be directed to plans, non-infrastructure, and quick-build projects. Once the projects that will be part of the regional project selection process are known, staff will adjust the priorities in order to maximize the use of the funds across Orange County.

Orange County Transportation Authority
2025 Active Transportation Program Project Prioritization Point Assignments

Plan			CBSP or OC Active	District Strategies	Metrolink Study	Master Plan of Arterial Highways	Local or State Agency Plan	Safety Plan or OCSSP	Specific or Corridor Plan	Local Agency General Plan or Circulation Element	Total OCTA Points
Agency	Project Title	ATP Request (000's)	10-point max	10-point max	10-point max	5-point max	5-point max	5-point max	2-point max	2-point max	20-point max
Anaheim	City of Anaheim Active Transportation Plan	\$ 500	0	0	0	0	0	0	0	2	2
Anaheim	OC River Walk Multimodal Connectivity Project	\$ 42,470	10	10	10	5	5	5	0	2	20
Garden Grove	Garden Grove SRTS: Phase II Master Plan	\$ 250	0	0	0	0	0	0	0	0	0
La Habra	La Habra Rails to Trails OC Loop Gap Closure	\$ 13,400	10	10	0	0	5	5	0	2	20
OCTA	Move OC: A Vibrant Path to Active Transportation	\$ 1,000	10	10	10	0	5	5	0	0	20
Orange	Santiago Creek Bike Trail Gap Closure	\$ 9,553	10	10	0	0	5	0	0	2	20
Santa Ana	Monroe Elementary and Edison Elementary SRTS	\$ 12,249	0	0	0	0	0	5	0	2	7
Santa Ana	Santa Ana Vision Zero	\$ 31,679	0	0	0	5	0	5	0	0	10
Santa Ana	Heroes Elementary School, Carver Elementary School, Willard Intermediate, Wilson SRTS	\$ 23,968	0	0	0	0	0	5	0	2	7
Santa Ana	Lathrop Intermediate, Lowell Elementary, Martin Elementary, Pio Pico Elementary and Franklin	\$ 40,490	0	0	0	0	0	5	0	2	7
Santa Ana	Lincoln Elementary, Monte Vista Elementary, King Elementary and Griset Academy SRTS	\$ 19,848	0	0	0	0	0	5	0	2	7

Orange County Transportation Authority
2025 Active Transportation Program Project Prioritization Point Assignments

Plan			CBSP or OC Active	District Strategies	Metrolink Study	Master Plan of Arterial Highways	Local or State Agency Plan	Safety Plan or OCSSP	Specific or Corridor Plan	Local Agency General Plan or Circulation Element	Total OCTA Points
Agency	Project Title	ATP Request (000's)	10-point max	10-point max	10-point max	5-point max	5-point max	5-point max	2-point max	2-point max	20-point max
Santa Ana	Harvey Elementary, Adams Elementary, Carr Intermediate, Valley HS and Godinez HS SRTS	\$ 25,472	0	0	0	0	0	5	0	2	7
Stanton	Orangewood Avenue Traffic Calming Project	\$ 4,630	10	0	0	0	5	0	0	2	17
Westminster	Edwards Street SRTS Complete Street – Phase 3	\$ 3,335	10	10	0	5	0	5	0	2	20

ATP Active Transportation Program
 CBSP - Community Bikeway Strategic Plan
 HS - High School
 OCSSP - Orange County Systemic Safety Plan
 OCTA - Orange County Transportation Authority
 SRTS - Safe Route to Schools



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for On-Call Real Property Appraisals and Related Services

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "To:" and "From:" lines of the memo header.

Overview

On June 10, 2024, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals for consultants to provide on-call real property appraisals and related services for all future Capital Programs projects. Board of Directors' approval is requested to select the firms to perform the required work.

Recommendations

- A. Approve the selection of R.P. Laurain & Associates, Inc., Santolucito Doré Group, Inc., and Hennessey & Hennessey LLC as the firms to provide on-call real property appraisals and related services in the aggregate amount of \$3,000,000.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2217 between the Orange County Transportation Authority and R.P. Laurain & Associates, Inc. as the firm to provide on-call real property appraisals and related services for a five-year term.
- C. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2475 between the Orange County Transportation Authority and Hennessey & Hennessey, LLC as the firm to provide on-call real property appraisals and related services for a five-year term.
- D. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2476 between the Orange County Transportation Authority and Santolucito Doré Group, Inc. as the firm to provide on-call real property appraisals and related services for a five-year term.

Discussion

The Orange County Transportation Authority (OCTA) is seeking to establish a bench of consultants to provide real property appraisals and other related services necessary for public transportation projects involving roadways, highways, freeways, railroad corridors, commuter rail, transit services, land conservation for environmental mitigation, and OCTA-owned facilities. The consultants will also be required to provide additional services in such disciplines as loss of business goodwill (goodwill), furniture, fixtures, and equipment (FF&E), machinery and equipment, appraisal review, and expert witness.

The appraisal process is necessary to determine the fair market value of the properties and to ensure that all property owners are treated fairly and equitably. The appraisal process is one of the first steps necessary to initiate the real property acquisition process. Real property appraisal services will be utilized on an as-needed basis.

Procurement Approach

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

On June 10, 2024, the Board authorized the release of Request for Proposals (RFP) 4-2217 which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on June 10 and June 17, 2024. A pre-proposal conference took place on June 18, 2024, with seven attendees representing five firms. Three addenda were issued to make available the pre-proposal conference presentation and registration sheets, provide responses to questions received, and handle administrative issues related to the RFP.

On July 10, 2024, 13 proposals were received. An evaluation committee consisting of staff from OCTA's Contracts Administration and Materials Management, Real Property, Capital Programs, and Project Development departments met to review the proposals. The proposals were evaluated based on the following evaluation criteria and weightings:

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

Several factors were considered in developing the criteria weightings. Staff assigned the greatest importance to qualifications of the firm to emphasize the importance of the firm demonstrating experience in performing a variety of right-of-way (ROW) appraisal work. Staffing and project organization was assigned a weighting of 25 percent to emphasize the firms' understanding of, and experience performing real property appraisals and a variety of related appraisals. The work plan was weighted the lowest at 20 percent, as each contract task order (CTO) issued under a contract will define the specific scope of work. However, it is still important that the firms demonstrate their understanding of the work involved in potential projects. Cost and price was weighted at 25 percent to ensure hourly rates are competitive and provide value to OCTA.

The procurement sought to establish a pool of qualified firms to perform work in conformity with OCTA's Real Property Department Policies and Procedures manual and in accordance with the California Department of Transportation (Caltrans) ROW manual. Once the pool of qualified firms is established, specific work assignments will be made via the issuance of CTOs on a rotational basis, in accordance with OCTA's procurement policies and procedures.

The evaluation committee reviewed and discussed all responsive proposals based on the evaluation criteria and short-listed the five most-qualified firms listed below in alphabetical order:

Firm and Location

Epic Land Solutions, Inc. (Epic)
Headquarters: Torrance, California
Project Office: San Diego, California

Hendrickson Appraisal Company, Inc. (HAC)
Headquarters: San Diego, California
Project Office: San Diego, California

Hennessey & Hennessey, LLC (HLLC)
Headquarters: Tustin, California
Project Office: Tustin, California

R.P. Laurain & Associates, Inc. (RPLA)
Headquarters: Long Beach, California
Project Office: Long Beach, California

Santolucito Doré Group, Inc. (SDGI)
Headquarters: Canyon Lake, California
Project Office: Canyon Lake, California

On August 14, 2024, the evaluation committee interviewed the five short-listed firms. The interviews consisted of a presentation allowing each firm to present its qualifications, highlight its personnel, and respond to the evaluation committee's questions. In general, each team's presentation addressed the requirements of the RFP, highlighted the project team's experience in working on related projects, its staffing plans, and stressed the firm's commitment to the success of the project. Each firm was asked general questions related to previous experience with appraisal work, knowledge of the Caltrans ROW manual, the qualifications and role of the firm's subconsultants, ability to complete task orders, and quality control procedures.

After considering responses to the questions asked during the interviews, the evaluation committee adjusted the preliminary scores for all five firms, which resulted in a change to the ranking.

Based on the evaluation of the written proposals and information obtained during the interviews, staff recommends HHLLC, RPLA, and SDGI as the firms to provide on-call real property appraisals and related services. These firms ranked highest amongst the proposing firms based on the teams' relevant experience in real property appraisal services for public agencies. The proposed teams are comprised of highly qualified key personnel with relevant and recent experience. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

All short-listed firms are highly qualified and have demonstrated relevant experience providing various appraisal services of similar scope for a number of public agencies. Positive references were received for all firms.

RPLA was founded in 1969 as a professional real estate appraisal services firm with a primary client base of local, state, and federal government agencies. RPLA has eight employees with an office in the City of Long Beach. The firm's recent experience includes completion of the Gerald Desmond Bridge Project with the Port of Long Beach and Caltrans that included five complex appraisal assignments that required multiple appraisal updates with additional easements. RPLA has also prepared various appraisal reports for OCTA, including

assignments impacting properties for the Orange County Flood Control District, Pacific Electric Railroad, the Interstate 5 Improvement Project, and the State Route 91 Improvement Project. These assignments included fee takings, utility easements and temporary construction easements (TCE) with various property types, such as single family, retail, office, and various open space parcels. The firm proposed to utilize two subconsultants to provide FF&E, goodwill, asset appraisals, and litigation consulting services.

HLLC was founded in 1979 as an independent professional firm providing real estate appraisals, appraisal review, and consulting services for both government agencies and private individuals throughout California. HLLC is an Underutilized Disadvantaged Business Enterprise and has three employees with an office in the City of Tustin. The firm's recent experience includes completion of a street abandonment and lot line adjustment project with the City of Anaheim that included 17 appraisals of different property types, including commercial, industrial, and residential use. HLLC has also prepared various appraisal reports for OCTA, including seven partial acquisitions of six industrial properties and one residential apartment complex for the State Route 91 Improvement Project, 11 partial acquisitions of offices, retail, and industrial properties, one hotel property, and three residential apartment complexes for the State Route 55 Improvement Project. The firm proposes to utilize three subconsultants to provide real property appraisals, FF&E, goodwill, asset appraisals, and document preparation.

SDGI was founded in 2015 and provides real estate appraisal, cost estimating, alternative design analysis, full and partial acquisition appraisals and appraisal reviews, litigation support, and expert testimony services. SDGI is a registered Disadvantaged Business Enterprise, Small Business Enterprise, and Woman-Owned Business. SDGI has five employees with an office located in the City of Canyon Lake. The firm's recent experience includes the Jamboree Road and Barranca Parkway Intersection Improvement Project for the City of Irvine that included three appraisals of partial acquisitions. SDGI has worked with OCTA, serving as a subconsultant on the State Route 55 Improvement Project, where work included two appraisals of industrial buildings subject to complex partial acquisitions. SDGI has also worked on multiple projects in Silverado Canyon for the County of Orange, Office of the County Counsel, which included four appraisal reviews subject to roadway easements and TCEs for the Silverado Canyon Road Bridge Replacement Project. The firm proposes to utilize two subconsultants for goodwill and FF&E.

HAC was founded in 1986, providing specialized appraisal and consulting services to public agencies. HAC is a midsize firm with an office in the City of San Diego. The firm's recent experience includes work with OCTA on the State Route 55 Improvement Project in which HAC provided project

management and valuation services for monitoring wells. In addition, HAC performed appraisal work along the Interstate 5, which included appraisal services for seven improved properties and appraisal review services for six parcels. HAC is also currently providing on-call appraisal services for Caltrans and the San Diego Association of Governments. HAC proposed to utilize one subconsultant to provide FF&E and goodwill consulting services.

Epic was founded in 2000 as a full-service real property appraisal and ROW consulting firm. Epic has over 60 employees throughout the firm and is headquartered in the City of Torrance. Epic has performed real estate appraisal for local public agencies, utilities, design engineers, and environmental companies with a focus on the Southern California area. The firm's recent experience includes the Golden Avenue Bridge Replacement and Rehabilitation Project in the City of Placentia where four property appraisals were conducted in addition to TCEs and permanent property acquisitions. Additionally, the firm has worked on the Transit Security and Operations Center Project for OCTA, where the firm provided appraisal review services for the nearby intersection expected to be impacted by the development of Manchester Avenue in the City of Anaheim. The firm proposes to utilize two subconsultants for goodwill and FF&E.

Staffing and Project Organization

All firms proposed qualified staff and subconsultants with relevant appraisal experience.

RPLA proposed a project team experienced in providing appraisal services. The proposed project manager, who will also serve as the lead appraiser, has over 30 years of experience specializing in work for public agencies, including multi-property appraisal assignments for street widenings, grade separations, transportation corridor projects, drainage projects with resident, commercial, and special-use property types. The other primary appraiser has over 19 years of experience and has worked closely with the team providing relevant appraisal experience. The firm detailed its staffing plan and noted that it will vary dependent on the type and complexity of assignments. During the interview, the firm emphasized its understanding of the on-call nature of the work and detailed its approach to providing the required staffing and availability for each CTO assignment, including work assigned to the primary appraisers, as well as work assigned to non-key staff such as market research and clerical work.

HHLLC proposed a project team with experience providing appraisal services supported by one key personnel and a team to provide various support services for the appraisal process. The proposed project manager who is also performing as the senior appraiser has over 35 years of experience appraising real

property for numerous public agencies, including OCTA. HHLLC's proposed subconsultant has over 40 years of experience in the industry and over 20 years of experience working with HHLLC. During the interview, the firm demonstrated its understanding of the on-call nature of this work and emphasized the importance of meeting project deadlines and staying within budget. The firm detailed the role of its support team in conducting research and providing support concurrent to the appraisal process in order to remain efficient with time and resources. Additionally, the firm indicated that it will utilize its subconsultant as needed, depending on the size and timing requirements of CTO assignments.

SDGI proposed a knowledgeable project team supported by two key personnel, and three support personnel experienced in appraising and researching. The proposed project manager/principal appraiser has over 18 years of experience and the second principal appraisal has over 40 years of experience both with real estate appraisal and consultation, specializing in public agency and complex appraisal assignments. During the interview, the firm clearly demonstrated its understanding of the on-call nature of the project detailing the various methodologies the firm utilizes to manage its time and resources. Additionally, the firm emphasized its strong working relationship with its proposed subconsultants to be utilized as needed for projects that require additional staffing resources or specific expertise.

HAC proposed a project team with experience completing a variety of appraisal assignments. The proposed project manager, who is also performing as the senior appraiser, has over 18 years of experience in the appraisal industry specializing in local agency appraisals and a wide range of property types from vacant land, commercial, industrial, and residential. The firm's principal has over 38 years of experience, specializing in ROW appraisal services. During the interview, the firm noted its familiarity with the on-call nature of the project and noted that they would not propose on appraisal assignments they did not have the staffing availability to complete.

Epic proposed a team experienced in completing real property appraisal services for public agencies, comprised of two key personnel, one appraiser, and an individual providing support services, including document control and quality assurance. The proposed appraiser has over 36 years of experience, with eight years working for Epic. The senior appraisal coordinator has over 11 years of experience with five years working for Epic and is a licensed Real Estate Salesperson in California. During the interview, the team was assisted by the proposal coordinator in describing its work experience with the proposed subconsultant team and describing its three-tier quality assurance/quality control (QA/QC) practices. Additionally, as the firm is limited to one appraiser, Epic noted that it would not accept CTO assignments if it was not

feasible to deliver on time and budget and emphasized the importance of adhering to the agreement.

Work Plan

All short-listed firms met the requirements of the RFP and discussed its approach to providing real property appraisal services.

RPLA provided a comprehensive work plan that demonstrated an understanding of the appraisal process through a detailed description of the requirements necessary to successfully complete the process. RPLA included an in-depth discussion of various aspects of the appraisal process, including items such as issuing a notice of decision to appraise, the property appraisal inspection, market research program, and the review and submittal of the appraisal report. The firm discussed situations in which it would utilize valuation analysis, the sales comparison approach, the cost approach, or the income capitalization approach. Additionally, the firm addressed coordination with specialty appraisers for FF&E and goodwill if needed. During the interview, the firm discussed its recent experience performing appraisals in compliance with the Uniform Standard Professional Appraisal Practice (USPAP) and the Caltrans ROW manual the QA/QC measures utilized to ensure assignments are completed on time and within budget. Additionally, the firm answered a situational question regarding methodology for appraising a corridor with an in-depth discussion of different valuation methods.

HHLLC provided a thorough work plan that demonstrated an understanding of the appraisal process. HHLLC highlighted the steps of a typical appraisal process and included a proposed schedule. Some key steps highlighted by HHLLC included mailing a notice of decision to appraise to the parcel owner(s), providing on-site inspections, conducting market research, and the review and submittal of the appraisal report. During the interview, the firm discussed and referenced its recent experience performing appraisals in compliance with the USPAP and the Caltrans ROW manual. The firm also discussed the QA/QC measures it utilizes to review submittals, so they do not contain inconsistencies or ambiguities to ensure assignments are completed on time and within budget. Additionally, the firm answered a situational question regarding methodology for appraising a corridor with a discussion of utilizing an across the fence methodology.

SDGI provided a detailed work plan that demonstrated an understanding of the appraisal process. SDGI described the steps of a typical appraisal process and highlighted the importance of communication with OCTA's project manager and staff throughout the process. The firm emphasized the importance of capturing the highest and best use of the property to justify the appraisal and analysis of each property appraised and noted its ability to provide an accurate appraisal

report. The firm discussed its QA/QC process and indicated that all submittals will be reviewed, checked, and signed by a certified appraiser. During the interview, the firm discussed its recent experience performing appraisals in compliance with the USPAP and Caltrans ROW manual. Additionally, the firm provided examples of the project tracking sheets and binders that the firm utilizes to minimize errors and help to ensure assignments are completed on time and on budget. Additionally, the firm answered a situational question regarding the methodology for appraising a corridor and noted that most appraisal situations are not a “one size fits all” and emphasized the need to determine highest and best use to identify the most appropriate methodology to utilize.

HAC provided a detailed work plan in which it demonstrated its understanding of the appraisal process. HAC provided an overview of the different aspects required throughout the appraisal process and noted that it performs appraisals in compliance with the USPAP and the Caltrans ROW manual. The firm also provided an anticipated appraisal schedule with an eight-to-nine-week delivery timeline. During the interview, the firm briefly discussed its qualifications and highlighted a few recent projects. When responding to a question regarding its QA/QC process, the firm noted the experience and knowledge of the principal appraiser; however, it did not clearly delineate the difference in responsibilities between the appraiser and individual performing QA/QC on the same assignment.

Epic provided a summarized overview of the typical appraisal process. As a part of its workplan, Epic noted the importance of communication throughout the appraisal process with all stakeholders, including the property owners. The firm detailed coordination with its proposed subconsultants when providing goodwill and FF&E appraisal services. The firm included a sample schedule that outlined the typical time frame for a non-complex and complex real estate appraisal. During the interview, the firm discussed completing appraisal reports in accordance with the USPAP and Caltrans ROW manual, as required by the member appraisal institute designation. When asked about completing projects on time and within budget, Epic discussed splitting work between staff to remain on schedule and described its approach to developing its budget using a flat fee proposed cost; however, CTOs issued against this bench will be time and expense.

Cost and Price

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest-weighted average hourly rate and scored the other proposals' weighted average hourly rates based on the relation to the lowest-weighted average hourly rate. The recommended firms' average

fully-burdened hourly rates ranged from \$201 to \$249 and were competitive with the other shortlisted firms.

Procurement Summary

Based on the evaluation of the written proposals and information obtained during the interviews, the evaluation committee recommends award to R.P. Laurain & Associates, Inc., Santolucito Doré Group, Inc., and Hennessey & Hennessey LLC as the top-ranked firms to provide on-call real property appraisals and related services. The firms delivered comprehensive proposals that supported the firms' experience, staffing, work plan, an interview that demonstrated an understanding of the overall requirements, and competitive hourly rates.

Fiscal Impact

Funding for this work is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, Account No. 0017-7514-M0201-F17, and utilizes Measure M2 funds.

Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute agreements with R.P. Laurain & Associates, Inc., Santolucito Doré Group, Inc., and Hennessey & Hennessey LLC, as the selected firms to provide on-call real property appraisals and related services, in the aggregate amount of \$3,000,000, for a five-year term.

Attachments

- A. Review of Proposals, RFP 4-2217 On-Call Real Property Appraisals and Related Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 4-2217 On-Call Real Property Appraisals and Related Services
- C. Contract History for the Past Two Years, RFP 4-2217 On-Call Real Property Appraisals and Related Services

Prepared by:



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Manager, Real Property
(714) 560-5546

Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
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Pia Veessen
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Review of Proposals
RFP 4-2217 On-Call Real Property Appraisals and Related Services
 Presented to Regional Transportation Planning Committee - November 4, 2024
 13 proposals were received, 5 firms were interviewed, 3 firms are being recommended

Overall Ranking	Overall Score	Firm & Location	Subcontractors	Evaluation Committee Comments	Weighted Average Hourly Rate
1	85	R.P. Laurain & Associates, Inc. Long Beach, California	Desmond, Marcello & Amster, LLC Hodges Lacey & Associates, LLC	Firm was founded in 1969 and services include appraising all types of commercial, industrial, and residential properties for large, multi-parcel infrastructure projects. Experience includes providing appraisal services for government agencies, including the Orange County Transportation Authority (OCTA), Port of Long Beach, California Department of Transportation (Caltrans), California High Speed Rail Authority (CHSRA), County of Orange, and Los Angeles County Metropolitan Transportation Authority. Proposed project manager has over 30 years of real estate appraisal experience including eminent domain studies, street widening, grade separation, freeway projects, railroad projects, relocation studies, and leasing of publicly-owned properties. Proposed project team has an average of 19 years of experience in market research and real estate appraisal. Demonstrated an understanding of the appraisal process as a whole and described the quality control/quality assurance (QC/QA) measures the firm implements for every project, including project manager involvement at every stage of the assignment. Demonstrated previous experience working with Caltrans appraisal reviewers and a thorough understanding of the Caltrans Right-of-Way (ROW) manual. Presented an in-depth technical approach and provided detailed responses to questions during the interview.	\$213
2	84	Hennessey & Hennessey, LLC Tustin, California	Easley & Associates Desmond, Marcello & Amster, LLC Hodges, Lacey & Associates, LLC Document All Stars	Firm was founded in 1979 and services include providing real estate appraisal, appraisal for eminent domain, appraisal of properties for negotiated acquisitions surplus property dispositions, appraisal review, and consulting services. Firm has experience providing appraisal services for government agencies, including OCTA, the cities of Anaheim and Santa Ana, and the Riverside County Transportation Commission. Proposed project manager has over 35 years of real property appraisal experience with an emphasis on eminent domain and litigation appraisals. Proposed project team has ten to 30 years of experience and have worked on projects of similar size and scope. Demonstrated an understanding of the appraisal process as a whole and described the QC/QA the firm implements for every project, including the use of subconsultant for proof reading. Demonstrated previous experience working with Caltrans appraisal reviewers and a thorough understanding of the Caltrans ROW manual. Presented an in-depth technical approach and provided detailed responses to questions during the interview.	\$201
2	84	Santolucito Dore Group, Inc. Encino, California	Donna Desmond Associates Hodges, Lacey & Associates, LLC	Firm was founded in 2015 and services include providing real estate appraisal and consultation services. Proposed project team has 18-40 years of experience. Firm has experience providing appraisal services for government agencies including: OCTA, City of Irvine, County of Orange, Los Angeles World Airports, and CHSRA. Proposed project manager has over 18 years of experience in real estate appraisal, specializing in public agency and complex appraisal assignments. Demonstrated an understanding of the appraisal process as a whole and described the firm's Excel Master Tracking Spreadsheet and project binder for QC/QA and to ensure projects are delivered on time. Demonstrated a thorough understanding of compliance with the Caltrans ROW manual. Presented an in-depth technical approach and provided detailed responses to questions during the interview.	\$249
3	79	Hendrickson Appraisal Company, Inc. San Diego, California	Desmond, Marcello & Amster, LLC	Firm was founded in 1986 and services include providing consultation services relating to the real estate and real property appraisals. Proposed project team has an average of 25 years of experience providing valuation services. Firm has experience providing appraisal services for government agencies, including OCTA, City of Irvine, County of Orange, and City of Anaheim. Proposed project manager has over 18 years of experience in real estate appraisal, specializing in ROW appraisal and expert witness testimonial. Other proposed staff has 38 years of experience specializing in agency appraisal and consulting. Explained the general process of completing appraisals, including typical timelines. Explained the importance of complying with Uniform Standard Professional Appraisal Practice (USPAP) guidelines. Demonstrated a thorough understanding of compliance with the Caltrans ROW manual. Proposed project manager presented in-depth technical approach and provided a general overview of the firm's QC/QA process.	\$223

Review of Proposals
RFP 4-2217 On-Call Real Property Appraisals and Related Services
Presented to Regional Transportation Planning Committee - November 4, 2024

13 proposals were received, 5 firms were interviewed, 3 firms are being recommended

Overall Ranking	Overall Score	Firm & Location	Subcontractors	Evaluation Committee Comments	Weighted Average Hourly Rate
4	77	Epic Land Solutions, Inc. Riverside, California	Donna Desmond Associates Hodges, Lacey & Associates, LLC	Firm was founded in 2000 and services include providing real estate appraisal for local public agencies, utilities, design engineers, and environmental companies. Firm has experience providing appraisal services for government agencies, including OCTA, County of Orange, South Coast Water District, Orange County Water District, City of Anaheim, City of Irvine, and City of Fullerton. Proposed project manager has over 36 years of experience in the valuation of various property types. Other staff has 11 years of experience in general real estate. Provided a detailed overview of the general appraisal process, appraisal reviews, furniture, fixtures and equipment, and goodwill. Demonstrated a thorough understanding of compliance with the USPAP guidelines and the Caltrans ROW manual. The proposed project manager explained the firm's three-tier QC/QA process to ensure the accuracy and completion of each report.	\$180

Evaluation Panel: Five Members

Internal:
Contracts Administration and Materials Management (1)
Real Property (2)
Capital Programs (1)
Project Development (1)

Evaluation Criteria:

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

Weight Factors

30%
25%
20%
25%

**PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed)
RFP 4-2217 On-Call Real Property Appraisals and Related Services**

R.P. Laurain & Associates, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.0	4.0	5.0	5.0	4.5	6	27.0
Staffing/Project Organization	4.0	4.0	4.0	4.0	4.5	5	20.5
Work Plan	4.0	4.0	4.0	4.0	4.0	4	16.0
Cost and Price	4.24	4.24	4.24	4.24	4.24	5	21.2
Overall Score	81.2	81.2	87.2	87.2	86.7		85

Hennessey & Hennessey, LLC						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.5	4.0	4.5	4.5	4.5	6	26.4
Staffing/Project Organization	4.0	4.0	4.0	4.0	4.0	5	20.0
Work Plan	4.0	4.0	3.5	4.0	4.0	4	15.6
Cost and Price	4.47	4.47	4.47	4.47	4.47	5	22.4
Overall Score	85.4	82.4	83.4	85.4	85.4		84

Santolucito Dore Group, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.0	4.0	4.5	5.0	4.5	6	26.4
Staffing/Project Organization	4.5	4.5	4.5	4.5	4.0	5	22.0
Work Plan	4.5	4.0	4.5	4.5	4.5	4	17.6
Cost and Price	3.62	3.62	3.62	3.62	3.62	5	18.1
Overall Score	82.6	80.6	85.6	88.6	83.1		84

Hendrickson Appraisal Company, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.0	4.0	4.0	4.0	4.0	6	24.0
Staffing/Project Organization	4.0	4.0	4.0	4.0	3.5	5	19.5
Work Plan	4.0	3.5	4.0	4.0	4.0	4	15.6
Cost and Price	4.04	4.04	4.04	4.04	4.04	5	20.2
Overall Score	80.2	78.2	80.2	80.2	77.7		79

Epic Land Solutions, Inc.						Weights	Overall Score
Evaluator Number	1	2	3	4	5		
Qualifications of Firm	4.0	4.0	4.0	3.5	3.5	6	22.8
Staffing/Project Organization	3.0	3.0	3.0	3.0	3.0	5	15.0
Work Plan	3.5	4.0	3.5	3.5	3.5	4	14.4
Cost and Price	5.00	5.00	5.00	5.00	5.00	5	25.0
Overall Score	78.0	80.0	78.0	75.0	75.0		77

The range of scores for the non-short-listed firms was 49-75.

CONTRACT HISTORY FOR THE PAST TWO YEARS
RFP 4-2217 On-Call Real Property Appraisal and Related Services

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
R. P. Laurain & Associates, Inc.						
Contract Type: Contract Task Order	C-9-1475	On-Call Real Property Appraisals and Related Services	November 20, 2019	March 31, 2025		\$ 144,400
<i>Subconsultants:</i>						
		<i>Donna Desmond Associates</i>				
		<i>Hodges Lacey & Associates LLC</i>				
Total						\$ 144,400
Hennessey & Hennessey, LLC						
Contract Type: Contract Task Order	C-9-1473	On-Call Real Property Appraisals and Related Services	November 20, 2019	March 31, 2025		\$ 252,645
<i>Subconsultants:</i>						
		<i>Desmond, Marcello & Amster, LLC</i>				
		<i>Donna Desmond Associates</i>				
		<i>Easley & Associates</i>				
		<i>Hawran & Malm, LLC</i>				
		<i>Hodges Lacey & Associates LLC</i>				
		<i>Landmark Document Services</i>				
Total						\$ 252,645
Santolucito Dore Group, Inc.						
Contract Type: N/A	N/A	N/A	N/A	N/A		N/A
<i>Subconsultants:</i>						
		<i>N/A</i>				
Total						\$ -
Hendrickson Appraisal Company, Inc.						
Contract Type: Contract Task Order	C-9-0995	On-Call Real Property Appraisals and Related Services	November 20, 2019	March 31, 2025		\$ 109,635
<i>Subconsultants:</i>						
		<i>Crockett & Associates, Ltd.</i>				
		<i>Donna Desmond Associates</i>				
Total						\$ 109,635
Epic Land Solutions, Inc.						
Contract Type: Time and Expense	C-9-1613	On-Call Right-of-Way Support Services for Capital Improvement Projects	July 31, 2020	July 31, 2025		\$ 3,500,000
<i>Subconsultants:</i>						
		<i>Bess Testlab, Inc.</i>				
		<i>CBRE, Inc.</i>				
		<i>Coast Surveying</i>				
		<i>Commonwealth Land Title Company</i>				
		<i>Desmond, Marcello & Amster, LLC</i>				
		<i>Diaz Yourman & Associates</i>				
		<i>Donna Desmond Associates</i>				
		<i>Golden State Escrow, Inc.</i>				
		<i>Guida</i>				
		<i>Hodges Lacey & Associates LLC</i>				
		<i>Keith Settle & Company, Inc.</i>				
		<i>Psomas</i>				
		<i>Santolucito Doré Group, Inc.</i>				
		<i>TLC Interpreting & Translation Services, LLC</i>				
Total						\$ 3,500,000



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Support Services for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "To:" and "From:" lines of the memo.

Overview

On July 8, 2024, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of WSP USA Inc., as the firm to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2241 between the Orange County Transportation Authority and WSP USA Inc. to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the State Route 57 (SR-57) Northbound Improvement Project between Orangewood Avenue and Katella Avenue (Project). The Project is part of Project G in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

The Project will extend the fifth general-purpose lane in the northbound direction on SR-57 between Orangewood Avenue and Katella Avenue, improve the northbound Katella Avenue off-ramp by providing an additional exit lane, for a total of two, reconfigure the existing Orangewood Avenue on- and off-ramps, upgrade the nonstandard median to meet existing standards, improve stopping sight distance, and re-establish the existing auxiliary lane.

The Project is in the final design and right-of-way acquisition phase. The construction contract will be advertised by Caltrans next year.

Cooperative Agreement No. C-4-2574 between Caltrans and OCTA outlines the responsibilities of both agencies for the Project and is anticipated to be considered and approved by the Board on November 12, 2024. As specified in the cooperative agreement, Caltrans will be the implementing agency responsible for advertisement, award, and administration of the construction contract. Caltrans will also provide the resident engineer and structures representative, and environmental services, along with a limited number of field personnel. OCTA will retain a construction management (CM) consultant firm to supplement Caltrans staff with structural, roadway, construction staking, office engineering, materials testing, surveying, and claims support services. OCTA's CM consultant will also provide a field office to house construction staff working on the Project. Through separate contracts, OCTA will lead the public outreach and freeway service patrol efforts.

Procurement Approach

This procurement was handled in accordance with OCTA's Board-approved procedures for architectural and engineering (A&E) services that conform to both federal and state laws. Proposals are evaluated and ranked in accordance with the qualifications of the firm, staffing and project organization, and work plan. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. Evaluation of the proposals was conducted based on overall qualifications to develop a competitive range of offerors. The highest-ranked firm is requested to submit a cost proposal, and the final agreement is negotiated. Should negotiations fail with the highest-ranked firm, a cost proposal will be solicited from the second-ranked firm in accordance with Board-approved procurement policies.

On July 8, 2024, the Board authorized the release of Request for Proposals (RFP) 4-2241 which was issued electronically on CAMMNET. The RFP was advertised in a newspaper of general circulation on July 8 and July 15, 2024. A pre-proposal conference was held on July 17, 2024, with 38 attendees representing 21 firms. Three addenda were issued to make available the

pre-proposal conference registration sheets and presentation materials, provide responses to questions received, and address administrative issues related to the RFP.

On August 7, 2024, seven proposals were received. An evaluation committee consisting of staff from the Contracts Administration and Materials Management and Capital Project Delivery departments, as well as external representatives from Caltrans, met to review all submitted proposals. The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

- Qualifications of the Firm 20 percent
- Staffing and Project Organization 40 percent
- Work Plan 40 percent

In developing the criteria and weightings, several factors were considered. The firm's qualifications and experience in performing relevant work of similar scope, size, and complexity are important to the success of the Project. Staffing and project organization was assigned a weighting of 40 percent as the qualifications of the project manager and other key task leaders are critical to understanding the project requirements and to the timely delivery and successful performance of the work. An equal level of importance is also assigned to the work plan to evaluate the technical approach and resource allocation for the work to ensure successful performance and timely delivery of the Project.

The evaluation committee reviewed and discussed all proposals based on the evaluation criteria and found three firms most qualified to perform the required services. The most qualified firms are listed below in alphabetical order:

Firms and Location

Harris & Associates, Inc. (Harris)
Headquarters: Concord, California
Project Office: Irvine, California

T.Y. Lin International (TY Lin)
Headquarters: San Francisco, California
Project Office: Irvine, California

WSP USA, Inc. (WSP)
Headquarters: New York, New York
Project Office: Irvine, California

On September 24, 2024, the evaluation committee interviewed the short-listed firms. The interviews consisted of a presentation allowing each team to discuss its qualifications, highlight its proposal, and respond to evaluation committee questions. Each firm highlighted its staffing plan, work plan, and perceived project issues. The firms were asked questions regarding the team's approach to the requirements of the scope of work, working in the Santa Ana (SA) River, coordination with various agencies, experiences with similar projects, and solutions in achieving the project goals. After considering the presentations and responses to questions asked during the interviews, the evaluation committee adjusted the preliminary scores for two firms. However, WSP remained as the top-ranked firm with the highest cumulative score.

Based on the evaluation of the written proposals and information obtained during the interviews, the evaluation committee recommends WSP as the top-ranked firm to provide CM support services for the Project. WSP presented a comprehensive proposal that was responsive to the requirements of the RFP, a highly qualified and experienced team of key personnel, a thorough understanding of the overall project requirements, and an interview with focused responses to specific questions which highlighted the firm's experience, staffing, and the technical approach to the work plan.

Qualifications of the Firm

All short-listed firms are established and qualified to perform the required services. Positive references were received for all firms.

WSP, initially founded in 1885 as Parsons Brinkerhoff, has offices nationwide and over 66,000 personnel. The firm has broad engineering experience including CM services for complex highway, bridge, and rail projects. WSP demonstrated recent and relevant experience providing CM services for freeway/roadway improvements and with structures over railroad and channel facilities. The firm's experience includes coordination with Caltrans, OCTA, and other public agencies.

Similar project experience includes serving as the prime consultant for CM/project management (PM) services for the Port of Long Beach's Gerald Desmond Bridge Replacement, CM services for the San Gabriel Valley Council of Governments' (SGVCOG) Fairway Drive Grade Separation and Lemon Avenue Interchange, and CM services for SGVCOG's SR-57/State Route 60 (SR-60) Confluence. Collectively, these projects involved freeway construction, structures construction, Caltrans coordination, and rail coordination. The firm proposed subconsultants to provide structures inspection, roadway inspection, geotechnical services, and materials testing. WSP has project experience with

both proposed subconsultants. The references provided by WSP reported that they were satisfied with the firm's performance on their projects.

Harris has offices statewide and was founded in 1974. The firm has 277 personnel. Harris specializes in CM services for public agencies, including freeway construction and structures. The firm demonstrated some recent and relevant experience on projects involving structural, highway, and rail improvements as a prime consultant and in the subconsultant role.

Harris' experience includes coordination with Caltrans, OCTA, and other public agencies. Harris performed quality verification and related services as a subconsultant on OCTA's Interstate 405 (I-405) Improvement Project, CM services as the prime consultant on OCTA's West County Connectors' East Connector Project from State Route 22 (SR-22) to I-405, and managed independent quality assurance as a joint venture prime for California High Speed Rail Authority's Belmont Avenue Grade Separation Project. The firm proposed subconsultants to provide structural inspection, critical path method scheduling, roadway inspection, field materials testing, gamma gamma log services, and pile dynamic analysis. Harris has project experience with all the proposed subconsultants. The references provided by Harris reported that they were satisfied with the firm's performance on their projects.

TY Lin was founded in 1954. The firm has over 3,400 personnel in offices across the Americas and Asia. TY Lin's specialization includes engineering and CM services. The firm demonstrated relevant CM experience including coordination with Caltrans and local agencies, although they did not demonstrate experience with a highway widening project.

TY Lin, serving as the prime consultant, performed CM and inspection services on the Riverside County Transportation Commission's (RCTC) Interstate 10 (I-10)/Jefferson Street Interchange Project, and CM and construction engineering on the City of Los Angeles' (LA) Sixth Street Viaduct Replacement over the LA River. The firm is currently providing CM services for the LA County Metropolitan Transportation Authority's Firestone Boulevard Widening from Studebaker Road to Imperial Highway Project. Collectively, these projects involve street construction, structures construction, Caltrans coordination, and rail coordination. The firm proposed subconsultants to provide roadway inspection, electrical inspection, field material testing, source inspection, cross-hole ultrasonic logging, and gamma gamma logging. TY Lin has project experience with all proposed subconsultants. The references provided by TY Lin reported that they were satisfied with the firm's performance on their projects.

Staffing and Project Organization

All short-listed firms proposed qualified project managers, key personnel, and subconsultants with relevant experience.

WSP proposed a qualified project team with each key personnel demonstrating relevant and comprehensive experience with complex freeway and bridge widening projects, including a river crossing, with extensive Caltrans coordination experience. WSP's proposed project manager (PM) has 32 years of experience with PM and resident engineer (RE) experience on similar projects, including highway improvements, raised railroad tracks, and bridge construction. Similar project experience in part includes serving as the PM on OCTA's I-5 Improvement State Route 55 (SR-55) to SR-57 Project, principal RE on OCTA's West County Connectors' West Segment Project, and principal assistant RE for OCTA's I-5 Gateway Project.

WSP's proposed senior inspector/deputy senior RE has successfully delivered projects with freeway and bridge improvements, bridge replacements, and interchange improvements for over 30 years, many as a RE with Caltrans, as well as delivering projects in partnership with OCTA. Experience relevant to the Project includes serving as RE on Caltrans' I-405 Sepulveda Pass Improvements Project in LA, RE for Caltrans' I-5 High-Occupancy Vehicle Widening Project from the Artesia Boulevard Undercrossing to North Fork Coyote Creek, and assistant RE for the San Bernardino County Transportation Authority's I-10/Cedar Interchange Project.

WSP's proposed structures inspector has 23 years of experience. Relevant experience includes serving as the RE/structures representative on RCTC's State Route 71/State Route 91 (SR-91) Interchange Project with proposed subconsultant Falcon Engineering Services, Inc. which crosses the SA River. Construction manager/RE/structures representative for RCTC's SR-60 Truck Lanes, in the cities of Beaumont and Moreno Valley including Caltrans coordination and retaining walls, and CM services for RCTC's SR-91 Corridor Operations in the City of Corona.

Harris proposed a qualified project team with CM experience. Harris' proposed PM has nearly 30 years of experience in public works and engineering. Examples of relevant experience include serving as the PM with the cities of Palm Springs and Rialto. Relevant projects as PM on behalf of the City of Palm Springs includes the I-10/Indian Canyon Drive Interchange Project, Indian Canyon Drive Widening at Whitewater River, and Indian Canyon Drive Union Pacific Railroad Bridge Replacement Project.

Harris' proposed senior inspector/deputy senior RE has 28 years of experience. Demonstrated relevant project experience includes serving as a RE on the I-405 Improvement Project, working in the capacity of an assistant PM on the OCTA's West County Connectors-East Connector SR-22 to I-405 Project, and assistant structures representative for OCTA's SR-22 Improvements Project.

Harris' proposed structures inspector has 37 years of experience including extensive structures experience. Some relevant experience includes serving as the assistant structure representative on OCTA's SR-55 Improvement Project from I-405 to I-5, assistant structure representative on OCTA's I-5 Improvement Project between Alicia Parkway and El Toro Road, and structures representative for OCTA's Lakeview Avenue Grade Separation Project.

TY Lin proposed a qualified project team with CM experience with some demonstration of projects involving Caltrans' standards. Experience with highway widening projects was not cited. The team's expertise includes experience with soundwalls, bridges, rivers, and some highway interchanges. The proposed PM has 33 years of civil engineering experience, including relevant project experience. Examples of relevant project experience includes the role of PM/RE for the City of Indio's I-10/Jefferson Street Interchange Project, PM on the City of Norwalk's Firestone Boulevard Widening Project (Firestone), the City of Jurupa's Road Grade Separation Project, and the City of LA's CM/general contractor services for the Sixth Street Viaduct Replacement Project.

The firm's proposed senior inspector/deputy senior RE has 32 years of experience, some with Caltrans as a RE. Relevant project experience includes serving as the RE/structures representative for the City of Irvine/Caltrans District 12 Venta Spur/State Route 133 Bicycle-Pedestrian Bridge and the I-5/Jeffrey Open Space Trail Pedestrian and Bicycle Bridge. Other relevant experience includes the role of RE for the City of Southgate's Interstate 710 Corridor Soundwall Project.

Two personnel were proposed for the role of structures inspector. The proposed personnel have 25 and 39 years of experience. Relevant project experience includes the role of RE/structures representative for the City of Norwalk's Firestone Bridge Replacement over the San Gabriel River Project, structures representative for the City of Irvine's Five Point Gateway-Marine Way Plaza Bridge Project, and structures representative for the Sixth Street Viaduct Project.

Work Plan

The short-listed firms met the requirements of the RFP, and each firm adequately discussed its approach to the Project.

WSP presented a comprehensive and viable work plan that demonstrated an understanding of the project requirements, key risks and experience with mitigation measures, such as work with the SA River and cast-in-drilled-hole (CIDH) piles. CIDH piles are a significant project risk. Staging descriptions were detailed and prepared correctly. The stakeholders and adjacent projects were identified and mapped, describing the approach to ensure collaboration and the least impact possible with all parties. The proposal provided a thorough discussion of schedule, cost, scope, change management, and approach to claims avoidance. The firm presented an innovative approach to bridge construction by eliminating falsework in the SA River, allowing for work during the winter season. WSP presented an interview demonstrating knowledge of its proposed approach to the scope of work, and the team provided detailed responses to interview questions. The PM led the responses and efficiently directed participants to provide responses.

Harris demonstrated an understanding of the Project. The proposal included a breakdown of the key risks and challenges and proposed mitigation measures. While the discussion of evaluating CIDH piles was limited in the proposal, the team demonstrated complete understanding during the interview. The proposal demonstrated an understanding of the staging plans. The technical approach did not address challenges posed by working in the SA River, but this was discussed at the interview. The proposal provided a high-level discussion on working with stakeholders. The main components of quality assurance were addressed, along with a brief statement about addressing claims avoidance. Harris expanded on the firm's awareness and approach to project challenges at the interview, such as working in the SA River, providing detailed responses to interview questions.

TY Lin mostly demonstrated an understanding of the Project. The firm presented a detailed understanding and approach to transportation management and stakeholder engagement required for this Project, including identification of the stakeholders. A constructability review was discussed in the proposal though not required by the RFP. There was no mention of Caltrans being involved in the final inspection walk-throughs or relief of maintenance though this scope was discussed at the interview. A staging diagram was not accurate in the proposal though accurately referenced at the interview. The team's interview responses were less structured and cohesive with interjection by various members during responses.

Consultant Selection for Construction Management Support Services for the State Route 57 Northbound Improvement Project Between Orangewood Avenue and Katella Avenue **Page 9**

Fiscal Impact

The Project will be included in the OCTA's Fiscal Year 2025-26 Budget and subsequent fiscal years' budget, Capital Programs Division, Account No. 0017-9085-FG104-02K, and will be funded with M2 funds.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-4-2241 with WSP USA Inc., as the firm to provide construction management support services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue.

Attachments

- A. Review of Proposals, Request for Proposals 4-2241 Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 4-2241 Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue
- C. Contract History for the Past Two Years, RFP 4-2241: Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue

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Approved by:



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Review of Proposals

Request for Proposals 4-2241 Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue

Presented to the Regional Transportation Planning Committee - November 4, 2024

7 proposals were received, 3 firms were interviewed, 1 firm is being recommended

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments
1	90	WSP USA, Inc. Irvine, California	Falcon Engineering Services, Inc. Verdantas Inc.	Firm demonstrated recent, relevant experience providing construction management (CM) support services on complex highway widening projects. Qualified team, including key personnel, technical staff and subconsultants with extensive experience involving highway widening projects. Proposed project manager (PM) has 32 years of experience including serving in the same capacity for highway widening CM services. Proposed senior inspector/deputy senior resident engineer (RE) has over 30 years of experience, including with highway and bridge widening. Proposed structures inspector has over 23 years of experience, including in the same capacity on an interchange project over the Santa Ana River. Comprehensive work plan identified key issues, provided sound recommendations and solutions, with a focus on track design, environmental concerns, and community outreach. Thorough team presentation and interview with comprehensive responses to all questions. Positive references received.
2	82	Harris and Associates, Inc. Irvine, California	Bureau Veritas North America, Inc. AIX Consulting, Inc. Verdantas Inc. EarthSpectives	Firm demonstrated some recent and relevant experience providing CM support services on various projects. Qualified team, including key personnel, technical staff, and subconsultants, with relevant experience on street widening, interchange improvement, and railroad bridge replacement. Proposed PM has nearly 30 years of experience and has served as PM overseeing various projects with cities. The proposed senior inspector/deputy senior RE has 28 years of experience including as the RE on the Interstate 405 Improvement Project. The proposed structures inspector has 37 years of experience including extensive structures experience, including on OCTA projects. Work plan mostly demonstrated an understanding of the project requirements with a high level breakdown of some scope elements. Provided responses to all interview questions, expanding on the proposal information. Positive references received.
3	72	T.Y. Lin International Irvine, California	Dynamic Engineering Services, Inc. EarthSpectives Verdantas Inc. ZT Consulting Group, Inc.	Firm demonstrated relevant experience providing CM support services on street projects. Qualified team, including key personnel, technical staff, and subconsultants, with some demonstration of roles on projects involving California Department of Transportation standards. Proposed PM has 33 years of experience, including in the role of PM for interchange and boulevard widening projects. Proposed senior inspector/deputy senior RE has 32 years of experience including on bicycle and trail bridges and soundwall projects. The structures inspector is proposed as a split between personnel with 25 and 39 years of experience respectively, with collective bridge replacement experience and working over a river. Work plan mostly addressed the project requirements with some incorrect or missing information. Interview participants were not entirely cohesive with less structured responses to questions. Positive references received.

Evaluation Panel:

- Contracts Administration and Materials Management (1)
- Capital Project Delivery (2)
- California Department of Transportation (2)

Proposal Criteria

- Qualifications of the Firm
- Staffing and Project Organization
- Work Plan

Weight Factors

- 20%
- 40%
- 40%

PROPOSAL EVALUATION CRITERIA MATRIX (SHORT-LISTED)							
RFP 4-2241 Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue							
WSP USA Inc.							
Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.0	4.5	4.5	4.5	4.5	4	17.6
Staffing/Project Organization	5.0	4.5	4.5	4.5	4.5	8	36.8
Work Plan	4.5	4.5	4.5	4.5	4.5	8	36.0
Overall Score	92	90	90	90	90		90
Harris and Associates, Inc.							
Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.0	4.0	4.0	4.0	4.0	4	16.0
Staffing/Project Organization	4.5	4.5	4.5	4.0	4.0	8	34.4
Work Plan	4.0	4.0	4.0	4.0	4.0	8	32.0
Overall Score	84	84	84	80	80		82
T.Y. Lin International							
Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	3.5	3.5	4.0	4.0	3.5	4	14.8
Staffing/Project Organization	3.5	3.5	3.5	3.5	3.5	8	28.0
Work Plan	3.5	3.5	4.0	3.5	4.0	8	29.6
Overall Score	70	70	76	72	74		72
Range of scores for the non short-listed firms was 19 to 67.							

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 4-2241: Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
WSP USA INC.	C-0-2690	Back-Office System and Customer Service Center for 405 Express Lanes	January 14, 2022	July 15, 2030		\$ 106,069,864
Subconsultants:						
None						
WSP USA INC.	C-2-2919	Construction Management Support Services for the State Route 91 Improvement Project from State Route 55 to Lakeview Avenue	December 20, 2023	February 29, 2028		\$ 7,981,069
Subconsultants:						
Coast Surveying						
Dynamic Engineering Services,						
TRC Engineers, Inc.						
Verdantas Inc., formerly Leighton Consulting, Inc.						
WSP USA INC.	C-3-2818	Pedestrian and Bicycle Modeling Support Services	January 30, 2024	December 31, 2024		\$ 50,000
Subconsultants:						
None						
WSP USA INC.	C-8-1465		June 21, 2018	March 31, 2023		\$ 600,000
Subconsultants:						
None						
					Total	\$ 114,700,933
T.Y. LIN INTERNATIONAL	C-0-2073	Plans, Specifications, and Estimates for the State Route 91 Improvement Project between Acacia Street and La Palma Avenue	November 30, 2020	December 31, 2028		\$ 11,712,902
Subconsultants:						
Earth Mechanics Inc						
Guida						
ICF						
Jacobs Engineering Group Inc.						
Jones And Stokes						
Lynn Capouya, Inc						
T.Y. LIN INTERNATIONAL	C-2-2239	Project Study Report/Project Development Support for State Route 57 Northbound between Lambert Road to Tonner Canyon Road	March 6, 2023	February 28, 2025		\$ 770,172
Subconsultants:						
Earth Mechanics Inc						
Epic Land Solutions, Inc.						
Vandermost Consulting Services						
Verdantas Inc., Formerly Leighton Consulting, Inc.						
VRPA Technologies, Inc.						
					Total	\$ 12,483,074

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 4-2241: Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
HARRIS & ASSOCIATES	N/A	N/A	N/A	N/A	N/A	N/A
<i>Subconsultants:</i>						
<i>None</i>						
Total						\$ -



November 4, 2024

To: Regional Transportation Planning Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Active Transportation Program Biannual Update

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "From:" line of the header.

Overview

The Orange County Transportation Authority coordinates regional active transportation efforts with local jurisdictions, key stakeholders, and the public. An update on recent and upcoming activities is provided.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA) is engaged in regional active transportation projects, programs, and planning in Orange County (OC). These efforts support OCTA's vision for a balanced multimodal transportation system. To realize this vision, OCTA works with local jurisdictions, stakeholders, and the public to advance the development of safe, accessible, and connected bicycling, walking, and other active transportation mode networks. Updates on the Electric Bicycles (E-bike) Safety Action Plan (Plan), Next Safe Travels Education Program (Next STEP), and additional active transportation efforts are discussed below.

Discussion

E-bikes Safety Action Plan

In July 2023, OCTA began the Plan to address gaps in e-bike safety resources at local, regional, and state levels. The Plan proposes strategies to close these gaps and identifies potential funding sources to facilitate future safety initiatives and outreach efforts.

The project team conducted an inventory of available e-bike data and non-infrastructure safety resources for e-bike riders in OC. The data assessment process included identification of gaps in e-bike data, particularly collision and injury data, as well as e-bike ridership data.

The non-infrastructure inventory used a multi-step process including a survey, interviews, and a literature review. The project team distributed a survey to stakeholders across the County to assess local resources and needs. Staff received responses from 51 OC jurisdictions, law enforcement agencies, retailers, and other local stakeholders involved in e-bike safety efforts. Staff then utilized interviews with e-bike stakeholders and public input to gather deeper insights into the challenges and opportunities presented by e-bike use. Through the data and non-infrastructure analyses, the following key gaps and challenges were identified:

- Collision and injury data specific to e-bikes is limited. Currently, there is not a standard and/or dedicated e-bike coding for collisions, leaving it up to local agencies to add coding on their systems without consistency between agencies.
- While e-bike ridership is increasing, count data is limited and constrained by the difficulties in distinguishing e-bikes from pedal bicycles.
- National e-bikes sales trends show year-over-year increases in units sold, but sales data on a local and regional level are not accessible.
- Local agencies are responding to the growing e-bike use with a desire to manage safe operation by implementing ordinances; most agencies have Active Transportation Plans (ATP), but ATPs often do not specifically address e-bikes at a planning, engineering, and/or programmatic level.
- Education and encouragement efforts are not consistent countywide or within the same school district. Existing efforts include e-bike permits/registration for students, presentations from law enforcement, e-bike rodeos, and youth-focused messaging and educational campaigns.
- Enforcing safe e-bike riding behavior has been a challenge for local law enforcement due to limited resources and capacity.
- Retailers surveyed by the project team are not currently providing educational materials to customers who purchase e-bikes nor were they willing to share sales data with the OCTA project team.

Using stakeholder input, public outreach, data gap analysis, and current e-bike safety efforts and policies, the Plan recommends actions in six key goal areas: infrastructure, legislation, collisions and injuries, ridership, education/encouragement, and retail collaboration. Each goal area is accompanied by strategies and recommended actions to move towards safe e-bike use in OC.

Recommendations identified in the Plan include:

- Infrastructure: Continue to advance bikeway infrastructure, particularly protected infrastructure, which fosters safe e-bike riding.
- Legislation: Promote e-bikes as a sustainable transportation mode and encourage safe adoption of active modes.
- Collision and injuries: Build understanding of crash and risk factors, especially those that result in severe injury or fatality.
- Ridership: Understand growth trends and hot spots for e-bike use.
- Education/encouragement: Target behavior change for key groups affected by e-bike safety issues.
- Retailer collaboration: Leverage e-bike retailers for outreach and data collection.

The final E-bike Safety Action Plan will be completed and made available to stakeholders and the public by the end of 2024.

Safe Routes to School (SRTS) Program

In fall 2023, OCTA and the Orange County Health Care Agency (OCHCA) established the OC SRTS Program. The program promotes and facilitates safe walking, bicycling, and other active modes of transportation for students traveling to and from schools. OCTA's SRTS webpage offers resources such as planning tools, maps, and educational materials to assist schools and parents as well as linking to useful OCHCA resources. Additionally, the site highlights success stories that showcase local efforts to improve safe student travel across OC. OCTA and OCHCA continue to look for methods to support cities and schools to improve safe active transportation access to schools. The Next STEP, as well as a portion of the Active Transportation Education and Engagement Support events, are being completed in support of the OC SRTS Program.

Next STEP

In June 2024, OCTA, in partnership with OCHCA, launched Next STEP in support of the OC SRTS Program. Next STEP partners with local city staff and police to promote walking and bicycling education, evaluate infrastructure needs, and encourage safe travels and will be implemented in 25 eligible public elementary schools across OC. Next STEP is funded by an \$850,000 California Transportation Commission ATP grant and a \$1.25 million Southern California Association of Governments Regional Early Action Planning (SCAG REAP 2.0) grant. Using the eligibility criteria established in the SRTS Action Plan, school recruitment efforts to identify and select 25 participating schools began in September 2024. School selection takes into account active transportation safety around and near a school, how well the transportation network supports walking and bicycling to school, and community need. OCTA will highlight participating schools and activities on the project website once recruitment is complete.

Active Transportation Education and Engagement Support

The Active Transportation Education and Engagement Support project began in summer 2024. The project includes conducting a series of education, engagement, and safety activities aimed at empowering residents with the knowledge and tools to safely and confidently use bicycling and walking as a viable mode of transportation. The project team will attend community events, conduct bike rodeos, develop online education modules, and deploy mobile street team ambassadors to distribute safety materials to the public. This project is funded with a \$400,000 SCAG REAP 2.0 grant. To date, the project team has attended the following events:

- September 14, 2024: Fiestas Patrias in the City of Santa Ana
- September 21, 2024: Fourth District Supervisor Chaffee's Community Bike Ride to Raise Prostrate Cance Awareness in the City of Fullerton
- October 9, 2024: Walk to School Day at Washington Elementary School in the City of Santa Ana

OCTA staff is working with local jurisdictions and stakeholders to identify additional community events that support and provide an opportunity for active transportation engagement. The project will end in April 2026.

OC Bicycle Counts

OCTA is collecting bicycle count data from 450 locations on roads and bicycle paths across the county and updating the OCTA bicycle counts database. This data supports active transportation in the region by providing data for analysis, grant applications, and project development. Data collection took place from June 2 to June 30, 2024, and will also take place from May 1 to May 20, 2025. Counts are taken at each location on one weekday and one weekend day during the collection period. The count information includes a range of data categories such as direction of travel, sidewalk vs. street usage, electric vs. non-electric bicycles, and helmet usage. In spring 2024, OCTA created a web-based platform for local agencies to request counts at specific locations, a process which will be used again for the 2025 counts. The final 2024 bicycle count data has been incorporated into the database and is available to cities by request.

OC Connect

OCTA, in partnership with the cities of Santa Ana and Garden Grove, as well as the California Department of Transportation and Orange County Public Works, is planning a four-mile Class I shared-use path between Santa Ana Boulevard and downtown Garden Grove. As part of this effort, OCTA is undergoing the Project Approval/Environmental Document Phase that is expected to be complete by June 2025.

OCTA Coordination

E-bike Multimedia

In 2024, OCTA created three videos that use concise messaging and humor to help parents and children understand the importance of e-bike safety. The videos were promoted on four social media platforms: Facebook, Instagram, YouTube, and Twitch. Using these social media methods, the video reached 1.3 million people (the video appeared on their feed or the media they were viewing) and the video was played over 170,000 times. OCTA used a new distribution approach by purchasing advertisement time at movie theaters across the County, including the Anaheim Garden Walk 6, Century Huntington Beach and XD, Brea 22 East, Aliso Viejo 20 with IMAX, and Yorba Linda IMAX10. The videos were played over 33,000 times during movie previews and advertisement time in the theater lobby area. The videos are currently available on YouTube, Amazon, and OCTA's e-bike website <https://www.octa.net/getting-around/active/oc-bike/e-bikes/>. OCTA recently procured a new two-year contract to develop additional e-bike safety videos over the next two years.

OCTA maintains an e-bike webpage to enhance public understanding of e-bike safety guidelines, benefits, and regulations. The webpage provides e-bike safety basics, rules of the road, and other safety information. OCTA also promotes local safety initiatives, such as the California Highway Patrol's e-bike training module and the OC bikeways map. Staff is also finalizing a searchable database that provides plain-language versions of all local e-bike ordinances to make it easier to understand the responsibilities of being an e-cyclist in all jurisdictions within OC.

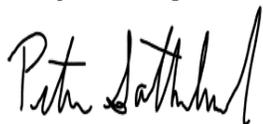
Summary

OCTA supports efforts to improve active transportation throughout OC. This includes ongoing education, encouragement, engineering, and evaluation efforts for active transportation. Coordination and collaboration will continue between state, regional and local agencies, key stakeholders, and the public to encourage and support safer walking and bicycling in OC.

Attachment

- A. Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Prepared by:



Peter Sotherland
Active Transportation Coordinator
(714) 560-5386

Approved by:



Kia Mortazavi
Executive Director, Planning
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Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

ATTACHMENT A

Last Update: October 1, 2024 (Not exhaustive and is subject to change)

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
	<p>A. Designated Trails. No person shall operate a bicycle on a road or trail in any designated park or recreational area except upon roads or trails designated for bicycle traffic by the director or, in the case of a private park, the consenting owner.</p> <p>B. Unsafe Operation. No person shall operate a bicycle in any designated park or recreational area in any manner that endangers any person or animal or at a speed that is greater than is reasonable or prudent, having due regard for other users and the surface, width, and grade of the road or trail, and in no event in excess of 10 miles per hour, unless a greater speed is posted.</p> <p>C. Bicycle Parking. No person shall leave a bicycle lying on its side on a road or trail in any designated park or recreational area in such a way to obstruct pedestrian, equestrian, or vehicle traffic.</p> <p>D. Helmets. No person under 18 years of age shall operate a bicycle, or ride upon a bicycle as a passenger on any road, bikeway or trail in any designated park or recreational area unless that person is wearing a properly fitted and fastened bicycle helmet. The bicycle helmet must meet the standards set forth in California Vehicle Code Section 21212. [Ord. 2010-126 § 1 (Ech. A)].</p> <p>N. Motorized Wheeled Conveyance Prohibited. No person shall operate or drive any electric or combustible motorized skateboard, scooter, electric personal assistive mobility device, as defined in California Vehicle Code Section 313 (e.g., SegwaysTM), dirt bike, mini bike, mini motor bike, mini motorcycle, go-kart, go-ped, moped, all-terrain vehicle, quad runner, dune buggy or any similar electric or combustible motorized wheeled conveyance in any designated park or recreational area. The prohibition in this subsection shall not apply to motorized wheelchairs, scooters or similar modes of personal conveyance when in operation by a disabled person. - Amended Chapter 10.06 of Title 10 and Chapter 11.10 of the municode(As of 09/21/22)</p> <p>10.06.020 Bicycles operation.</p> <p>A. Direction of Travel. Persons riding or operating a bicycle or electric bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one-way traffic by appropriate markings or signs.</p> <p>B. Walking Bicycles. Bicycles and electric bicycles may be walked subject to all provisions of the law applicable to pedestrians.</p> <p>10.06.030 Recreational transportation on sidewalks.</p> <p>A. Riding on Sidewalks. Bicycles, electric bicycles, roller skates, roller blades, nonmotorized and motorized scooters, nonmotorized skateboards, electrically motorized boards, electric personal assistive mobility devices, and other similar nonmotorized and motorized forms of transportation may be ridden or operated on all sidewalks within the City at a speed not to exceed five miles per hour except as otherwise prohibited by this chapter. Motorized vehicles shall not be permitted to be ridden upon sidewalks.</p> <p>B. Nonmotorized and motorized recreational transportation, as provided in subsection (A) of this section, shall be operated at a speed that is reasonable or prudent, having due regard for weather, visibility, pedestrian and vehicular traffic, and the surface and width of the sidewalk, and in no event at a speed that endangers the safety of any person or property.</p> <p>C. Prohibitions. Notwithstanding subsection (A) of this section, bicycles, electric bicycles, roller skates, roller blades, nonmotorized and motorized scooters, nonmotorized skateboards, electrically motorized boards, electric personal assistive mobility devices, and other similar nonmotorized and motorized forms of transportation shall not be ridden or operated upon the following:</p> <ol style="list-style-type: none"> 1. Sidewalks within a commercial or business center or complex. 2. Sidewalks adjacent to any public school building when school is in session. 3. Sidewalks and parking lots adjacent to or within any community or recreation center when in use; 4. Sidewalks adjacent to a church during services. 5. Parking lots of any property owned or operated by the City; or 6. Any pedestrian overcrossing or other sidewalk where prohibited by posted signs. <p>D. Public Works Director to Designate Additional Prohibitions. Notwithstanding subsection (A) of this section, the public works director, or his or her designee, may designate and declare certain portions of sidewalk where the riding or operation of bicycles, electric bicycles, roller skates, roller blades, nonmotorized and motorized scooters, nonmotorized skateboards, electrically motorized boards, electric personal assistive mobility devices, and other similar nonmotorized and motorized forms of transportation is prohibited.</p> <p>E. Public Works Director to Post Signs. The public works director, or his or her designee, shall erect and maintain signs adjacent to sidewalks designating limits and prohibitions authorized by this chapter.</p> <p>F. No Effect on ADA Power-Driven Mobility Devices. Notwithstanding anything to the contrary, wheelchairs and other power-driven mobility devices used as a mobility aid by a person with a disability may be ridden or operated on all sidewalks in the City at the speed of pedestrian traffic and in a manner which is safe for the user and other pedestrians.</p> <p>G. Yielding Right-of-Way. Whenever any person is riding a bicycle, electric bicycle, roller skates, roller blades, a nonmotorized or motorized scooter, a nonmotorized skateboard, electrically motorized board, electric personal assistive mobility devices, or other similar nonmotorized or motorized form of transportation, such person shall yield right-of-way to any and all pedestrians. A person riding or operating any such form of transportation shall further yield to all traffic upon entering a roadway or driveway.</p> <p>10.06.040 Skateboards, roller skates and similar pedestrian traffic.</p> <p>A. No person shall ride a nonmotorized skateboard, electric personal assistive mobility devices, roller skates, roller blades, nonmotorized scooter, or other conveyance propelled by human power other than a bicycle, or cause or permit the same to roll or coast on the roadway of any street in the city.</p> <p>B. The provisions of subsection (A) of this section shall not apply to cul-de-sacs where the length of the cul-de-sac is 500 feet or less.</p> <p>10.06.050 Pedestrian movements.</p> <p>The public works director, or his or her designee, is hereby authorized to place and maintain signs or markings to prohibit or to restrict pedestrian crossings at certain intersections.</p>				
Aliso Viejo		Similar to Bicycle Policy Chapter 10.06. Pedestrian, bicycle, and skateboard regulations of Title 10 (Streets and sidewalks)	Similar to Bicycle Policy	N/A	s3.amazonaws.com/leboards/attachement/pdf/1558513/2022-09-21_E-Recreration.pdf
Anaheim	<p>13.08.120 BICYCLE USES IN SPECIAL USE PARKS.</p> <p>The rules and regulations hereafter prescribed shall govern bicycle (non-motorized) operations within Special Use Parks, as defined in subsection .010 of Section 13.08.020. With the exception of use by police and park rangers, bicycles are not allowed in any other park within the City of Anaheim.</p> <p>.010. Rules and Regulations for Bicycle Use.</p> <p>.0101. Motorized bicycles are prohibited.</p> <p>.0102. Operation of bicycles is restricted to paved and unpaved roads with a minimum width of eight feet.</p> <p>.0103. Specific facility paved and unpaved roads may be excluded from use for bicycles by written determination of the Director of Community Services, or his or her designee. Such determinations will be based upon public safety and the potential impact on natural resources. Such prohibition shall be effective upon the posting of signs at or near each entrance to such road specifying that bicycles are prohibited therefrom.</p> <p>.0104. Bicycles shall be operated at a safe speed and in a reasonable manner.</p> <p>.0105. Bicyclists must yield the right-of-way to pedestrians (walkers, hikers and/or joggers) and equestrians.</p> <p>.0106. Bicycles are permitted on designated roads and trails only.</p> <p>.0107. Bicycles are prohibited in designated "closed" areas.</p> <p>.0108. Bicycle-designated roads and trails will be posted at each park.</p> <p>.0109. Operation of bicycles is prohibited on unpaved roads and areas during wet or muddy conditions. (Ord. 5919 § 12, June 8, 2004.)</p> <p>.0110. Trail and road closures are to be determined by the Director of Community Services, or his or her designee.</p> <p>.0111. Exceptions to any of the restrictions require the approval of the Director of Community Services, or his or her designee.</p> <p>.020. Violation of any rule or regulation specified in this section shall be punishable as an infraction. (Ord. 5842 § 2, November 5, 2002.)</p>	Pending Initial Draft		N/A	https://codetlibrary.anaheim.org/codes/anaheim/latest/anaheim_ca/0-0-0-61048
Brea	<p>§ 10.44.020 YIELDING THE RIGHT-OF-WAY.</p> <p>A. The driver of a motor vehicle, prior to driving over or upon any sidewalk, shall yield the right-of-way to any bicycle rider thereon.</p> <p>B. Whenever any person is riding a bicycle on a public sidewalk, such person shall yield the right-of-way to any pedestrian and, when overtaking or passing a pedestrian, shall give an audible alarm. (B1 Code, § 5.2-1) (Ord. 550, passed -- ; Am. Ord. 604, passed --)</p>	N/A	Motorized Scooters. Operators to have valid driver's license/permit, wear a helmet, have a braked wheel; if riding during the dark, there must be a white light in front and red light in back as well as yellow reflectors on each side; can only operate if posted speed limit is before 25MPH; if it is over 25MPH, it may only operate in Class II bike lane; can not operate on sidewalks	N/A	https://codetlibrary.anaheim.org/codes/brea/latest/brea_ca/0-0-0-63645

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Buena Park	N/A	N/A	N/A	<p>10,500 Impoundment authorized following chapter violation. The police department shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, and may retain possession of such bicycle until the provisions of this chapter are complied with. If such bicycle is not claimed within three months, it shall be deemed to be abandoned. A fee for impoundment and storage shall be charged, as established by resolution of the city council. (Amended during 1990 codification; prior code § 6-10)</p>	<p>https://library.pcods.us/lib/buena_park_ca/pub/city_codes/itemfile_10-chapter_10_50</p>
Costa Mesa	<p>§ 4-20 Rules of the road. a) No person shall drive a motor vehicle in a bicycle lane established on a roadway pursuant to Section 21207 except as follows: 1) To park where parking is permitted. 2) To enter or leave the roadway. 3) To prepare for a turn within a distance of 200 feet from the intersection. 4) Motorized bicycles as defined by the California Vehicle Code Section 4061(a) and electric bicycles as defined in § 4-22(b) are permitted in a bicycle lane, at a speed no greater than is reasonable or prudent, and in a manner that does not endanger the safety of other bicyclists or the rider. b) Whenever a bicycle lane has been established on a roadway pursuant to § 4-23, any person riding a bicycle upon the roadway at a speed less than the normal speed of traffic moving in the same direction at that time shall ride within the bicycle lane, except that the person may move out of the lane under any of the following situations: 1) When overtaking and passing another bicycle, vehicle, or pedestrian within the lane or about to enter the lane if the overtaking and passing cannot be done safely within the lane. 2) When preparing for a left turn at an intersection or into a private road or driveway. 3) When reasonably necessary to leave the bicycle lane to avoid debris or other hazardous conditions (including, but not limited to, fixed or moving objects, vehicles, bicycles, pedestrians, animals, surface hazards, or substandard width lanes) that make it unsafe to continue in the bicycle lane. 4) When approaching a place where a right turn is authorized. c) No person riding a bicycle shall leave a bicycle lane until the movement can be made with reasonable safety and then only after giving an appropriate signal in the event that any vehicle may be affected by the movement. d) Any person riding a bicycle upon a roadway at a speed less than the normal speed of traffic moving in the same direction at that time shall ride as close as practicable to the right hand curb or edge of the roadway except under any of the following situations: 1) When overtaking and passing another bicycle or vehicle proceeding in the same direction. 2) When preparing for a left turn at an intersection or into a private road or driveway. 3) When reasonably necessary to avoid conditions (including, but not limited to, fixed or moving objects, vehicles, bicycles, pedestrians, animals, surface hazards, or substandard width lanes) that make it unsafe to continue along the right-hand curb or edge, subject to the provisions of Section 21656 of the California Vehicle Code. For purposes of this section, a "substandard width lane" is a lane that is too narrow for a bicycle and a vehicle to travel safely side by side within the lane. 4) When approaching a place where a right turn is authorized. 5) When the roadway carries traffic in one direction and has two or more marked traffic lanes, then the person may ride as near the left-hand curb or edge of that roadway as practicable. e) No person shall ride a bicycle in a manner or at an unreasonable speed upon a roadway or sidewalk which endangers the safety of pedestrians, the rider, other cyclists, motorists or property. Bicycle riders will ride in a manner and at speeds that are reasonable and prudent having due regard for weather, visibility, traffic conditions, and the surface and width of the roadway or sidewalk. f) Any person riding a bicycle upon a sidewalk shall yield the right-of-way to any pedestrian, and when overtaking and passing a pedestrian, shall give an audible signal and shall pass to the left of the pedestrian only under conditions permitting such movement in safety. For the purpose of this section, Class I Multipurpose Trails shall be considered sidewalks. g) A person riding a bicycle upon a roadway or Class I Multipurpose Trail has all the provisions applicable to the driver of a vehicle by this division, including, but not limited to, provisions concerning driving under the influence of alcoholic beverages or drugs, and except those provisions applicable to a driver of a vehicle which by their very nature can have no application to the rider of a bicycle. h) All persons riding a bicycle shall yield the right of way to pedestrians, other cyclists, and vehicles in the following situations: 1) When entering a roadway or sidewalk from private property, including but not limited to an alley, driveway and residential or commercial property. 2) When entering a roadway from a sidewalk or Class I Multipurpose Trail i) A person operating a bicycle upon a highway shall not ride other than upon or astride a permanent and regular seat attached thereto, unless the bicycle was designed by the manufacturer to be ridden without a seat. An operator shall not allow a person riding as a passenger, and a person shall not ride as a passenger, on a bicycle upon a highway other than upon or astride a separate seat attached thereto. If the passenger is four years of age or younger, or weighs 40 pounds or less, the seat shall have adequate provision for retaining the passenger in place and for protecting the passenger from the moving parts of the bicycle.</p>	<p>Same as § 4-20 Rules of the road. (a-d) Motorized bicycles as defined by the California Vehicle Code Section 4061(a) and electric bicycles as defined in § 4-22(b) are permitted in a bicycle lane, at a speed no greater than is reasonable or prudent, and in a manner that does not endanger the safety of other bicyclists or the rider.</p>	N/A	<p>4-10. Bicycles in violation of chapter, impounding fee. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, or Division 16.7, commencing with section 3900 of the California Vehicle Code, and may retain possession on such bicycle until the provisions of this chapter are complied with. Bicycles which remain impounded pursuant to this section for longer than a ninety-day period may be sold at auction in accordance with laws governing the disposal of abandoned property generally. (Ord. No. 77-10, § 2, 3-21-77)</p> <p>4-11. Violation, penalty. The violation of any of the provisions of this chapter shall be deemed to be an infraction and shall be subject to a punishment by a fine not to exceed five dollars (\$5.00) for each offense. (Ord. No. 77-10, § 2, 3-21-77)</p>	<p>http://pcods080.com/426105627?highlight=bicycle.bicycles&searchId=1138495824708307442610562</p>
Cypress	<p>Sec. 4-2 Bicycle licensing required. On and after July 1, 1975, no person residing in this city shall ride or propel any bicycle upon any public street, sidewalk, alley, bicycle lane or path, or any other public property, or, have in his possession any bicycle which has not been licensed and for which the appropriate license fee has not been paid or which does not bear a bicycle plate as required by the provisions of this chapter. Those licenses in effect as of this date and issued prior to January 1, 1975, shall remain valid until January 1, 1978.</p>	N/A	N/A	<p>4-10. Bicycles in violation of chapter, impounding fee. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, or Division 16.7, commencing with section 3900 of the California Vehicle Code, and may retain possession on such bicycle until the provisions of this chapter are complied with. Bicycles which remain impounded pursuant to this section for longer than a ninety-day period may be sold at auction in accordance with laws governing the disposal of abandoned property generally. (Ord. No. 77-10, § 2, 3-21-77)</p> <p>4-11. Violation, penalty. The violation of any of the provisions of this chapter shall be deemed to be an infraction and shall be subject to a punishment by a fine not to exceed five dollars (\$5.00) for each offense. (Ord. No. 77-10, § 2, 3-21-77)</p> <p>4-12. Enforcement. The chief of police and his representatives and the licensing agent shall herewith be granted all authority to enforce and carry out the provisions of this chapter pursuant to the provisions included in the California Vehicle Code and all other laws of the State of California.</p>	<p>https://library.pcods.us/lib/cypress_ca/pub/city_codes/item/chapter_4</p>
Dana Point	<p>13.04.130 Bicycles, Skateboards, Rollerblades and Similar Items. It is unlawful for any person to bicycle, skateboard, rollerblade or use a similar item of any type on tennis courts, handball courts, ball diamonds, patios, porches, play apparatus areas, and all other areas which are not designed or customarily used for such a purpose. A bicyclist shall be permitted to wheel or push a bicycle by hand over any grassy area or path reserved for pedestrian use. It is unlawful for any person to bicycle, skateboard, rollerblade, or use a similar item of any type on the trails or on any other area of Hilltop Park, Harbor Point Park, South Strand Switchback Trail, Strand Beach Park including the reveiment trail, Mid-Central Strand Access Trails, the Funicular Beach Access and the Center for Natural Lands Management Dana Point Preserve. It is unlawful for any person to bicycle, skateboard, rollerblade, use motorized or electric bikes or scooters, or use a similar item within City parks, trails, sidewalks, tennis courts, handball courts, ball diamonds, patios, porches, play apparatus areas, and all other areas which are not designed or customarily used for such a purpose. A bicyclist shall be permitted to wheel or push a bicycle by hand over any grassy area, sidewalk or path reserved for pedestrian use. It is also unlawful for any person to bicycle, skateboard, rollerblade, or use motorized or electric bikes or scooters, or use a similar item of any type in any city park or city facility, unless expressly authorized by the City Manager or designee. (Ord. 94-12, 8/23/94, amended by Ord. 06-07, 9/13/99, Ord. 09-05, 5/11/09, Ord. 10-03, 3/22/10)</p>	No specific rules related to Ebikes, therefore regulations are the same as traditional bicycles.	N/A	N/A	<p>http://pcods.us/codes/danapoint/?view=edit&doc</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Fountain Valley	<p>10.64.030 License receipt/bicycle plate—Issuance. At the time that any person licenses a bicycle and pays the appropriate license fee in accordance with the provisions of this chapter, the licensing agency or agent shall provide said person with a license receipt bearing the owner's name, address, telephone number, bicycle plate number, the bicycle manufacturer, type and frame number, and any other descriptive material concerning the bicycle deemed necessary by the licensing agency, together with information for the transfer of ownership of the bicycle. In addition, also at the time of licensing, the bicycle owner shall be issued his permanent bicycle plate bearing the unique number permanently assigned to that bicycle by the State Department of Motor Vehicles. The bicycle license shall remain in effect for the period designated by the Department of Motor Vehicles in accordance with Section 39001 of the Vehicle Code. (Ord. 756 § 2, 1975)</p>	<p>Proposed: Amendment to Section 10.64.010. "Electric bicycle" is a bicycle is a bicycle equipped with fully operable pedals and an electric motor of less than 750 watts as defined by California Vehicle Code Section 312.5(a). P.V.M.C. 10.64.065 Electrical Bicycle Operation. (a) No person shall ride a conventional bicycle, electric bicycle, moped, motor-driven cycle, electric motorcycle, pocket bike, or any other electric conveyance not previously named in an unsafe manner on any publicly owned property, including but not limited to a public roadway, highway, sidewalk, park, nor any private property open to the public. (1) "Unsafe manner" means any act or acts in violation of the Fountain Valley Municipal Code, California Vehicle Code, or other existing law. An "unsafe manner" can also be defined as operating the conveyance in such a way as to constitute a danger to the operator, a passenger, other motorists, other riders, or pedestrians in the area. (2) Examples of riding in an unsafe manner may include, but are not limited to, the following actions: (A) Riding on a sidewalk without due caution for pedestrians. (B) Riding on a sidewalk, highway, bicycle path, or bicycle lane against the flow of traffic. (C) Not yielding to vehicles or pedestrians when required by the California Vehicle Code. (D) Intentionally weaving or riding around stopped or slowed traffic. (E) Operating a conveyance in a manner it was not designed for, including carrying passengers when not designed for carrying passengers, or standing on the seat of the bicycle. (F) Not obeying posted signs. (G) A person under the age of 18 riding without a properly fitted and fastened helmet. (H) Intentionally lifting one or more wheels into the air while riding on a highway, sidewalk, bicycle lane, or bicycle path. It is not a violation of this section if one or more wheels loses contact with the ground briefly due to the condition of the road surface or other circumstances beyond the control of the rider. (I) Riding on a bicycle path, bicycle lane, or sidewalk at a speed greater than is reasonable or prudent under the existing conditions, or at a speed which endangers the safety of persons or property.</p> <p>Amendment to Section 12.08.100. (a) No person shall operate, drive, or ride any automobile, truck, motorcycle, motor scooter, motorized bicycle, go-cart, electric bicycle, moped, motor-driven cycle, pocket bike, or any other motorized or electric conveyance, or any other vehicle at any time in any park except in designated areas. The provisions of this section shall not apply to city vehicles nor to authorized commercial delivery vehicles. No person shall ride or use a bicycle, skateboard or roller skates upon any tennis, handball, basketball, shuffleboard or multipurpose court.</p>	N/A	<p>10.64.100 Bicycles in violation of chapter—Impoundment. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, and may retain possession of such bicycle until the provisions of this chapter are complied with. (Ord. 756 § 2, 1975)</p> <p>10.64.110 Violation—Penalty. The violation of any of the provisions of this chapter is an infraction and shall be subject to punishment by a fine not to exceed five dollars. (Ord. 756 § 2, 1975)</p> <p>10.64.120 Enforcement. The chief of police and his designated representatives shall enforce and carry out the provisions of this chapter pursuant to the provisions included in the California Vehicle Code and all other laws of the state. (Ord. 756 § 2, 1975)</p>	<p>https://library.ccods.ca.us/hq/fountain_valley_ca/sub/municipal_code/item/title_10_chapter_10_64</p>
Fullerton	<p>12.12.100 Bicycles. No person in a park shall: A. Ride a bicycle on other than a paved vehicular road or path designated for that purpose. A bicyclist shall be permitted to wheel or push a bicycle by hand over any grassy area or wooded trail or any paved area reserved for pedestrian use. B. Ride a bicycle other than on the right-hand side of the road seeing as close as conditions permit, and bicycles shall be kept in single file when two or more are operating as a group. Bicyclists shall at all times operate their machines with responsible regard to the safety of others, signal all turns, pass to the right of any vehicle they are overtaking, and pass to the right of any vehicle they may be meeting. C. Ride any other person on a bicycle. D. Leave a bicycle in a place other than a bicycle rack when such is provided and there is a space available. E. Leave a bicycle lying on the ground or paving, or set against trees, or in any place or position where other persons may trip over or be injured by them. F. Ride a bicycle on any road between thirty minutes after sunset or before thirty minutes before sunrise without an attached headlight plainly visible at least two hundred feet in front of, and without a red taillight or red reflector plainly visible from at least two hundred feet from the rear of such bicycle. G. Notwithstanding the foregoing provisions of this section, when signs are erected giving notice thereof, no person shall ride a bicycle in Ametage Park or in such other parks in the city as the City Council shall from time to time designate by resolution. It shall be the duty of the City Traffic Engineer to place and maintain such signs at each and every park as designated by ordinance or resolution of the City Council.</p>	N/A	N/A	N/A	<p>https://codeslibrary.amegal.com/codes/fullerton/fullerton_ca/0-0-0-6563</p>
Garden Grove	<p>10.16.050 Application to Bicycle or Animal Rider. Every person riding a bicycle, or riding, or driving an animal upon a highway shall be granted all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle by this title, except those provisions that by their very nature can have no application. (2804 § 1, 2011; prior code § 311)</p>	<p>§ 10.36.030 Prohibited Operations. A. No person shall operate a motorcycle or motor-driven cycle other than a publicly owned motorcycle or motor-driven cycle upon any public sidewalk, walkway, parkway, or in any public park unless otherwise permitted, or recreational area or upon any other publicly owned property, except highways, within the City. This shall not be construed to prohibit the operation of a motorcycle or motor-driven cycle having a valid California vehicle registration by any person possessing a valid California operator's license upon the public highways in the City. B. No person shall operate a motorcycle or motor-driven cycle, other than a publicly owned motorcycle or motor-driven cycle, upon any unimproved parcel of real property within the City except as set forth in Section 10.73.040. (1283 § 1, 1972; 2804 § 1, 2011)</p> <p>§ 10.80.040 Exemptions. Any person desiring to operate a motorcycle or motor-driven cycle, and any owner of private property desiring to allow a person or persons to operate a motorcycle or motor-driven cycle on his or her private property, may do so upon first obtaining a permit from the Police Chief of the City. Permits shall be issued upon his or her determination that: A. The owner or owners of said real property concerned, or the person or persons in lawful possession thereof, have consented in writing to the proposed operation. B. That the City Fire Marshal has certified that such proposed operation will not create any undue fire hazard by reason of the nature of the vehicle and its proposed operation or by reason of the nature of the property concerned. C. That such operation is of sufficient distance from occupied residences, churches, assembly halls, or schools, as to likely not constitute a noise, dust, or fumes nuisance. (1283 § 1, 1972; 2804 § 1, 2011)</p>	N/A	N/A	<p>http://codes.us/codes/gardengrove/</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Huntington Beach	<p>10.84.160 Riding on Sidewalk No person shall ride a bicycle upon a sidewalk within any business district, or upon the sidewalk adjacent to any public school building, church, recreation center, playground or over any pedestrian overcrossing, or within any crosswalk. (22-809, 322-1/29, 1784-12/72, 1913-5/74, 2270-3/76)</p> <p>10.84.170 Yielding Right-of-Way Whenever any person is riding a bicycle upon a sidewalk, such person shall yield the right-of-way to a pedestrian, and when overtaking and passing a pedestrian shall give an audible signal. A person riding a bicycle on a sidewalk and onto a roadway shall yield to all traffic on the roadway. (22-808, 1784-12/72, 1913-5/74)</p> <p>10.84.180 Riding in Group Persons operating bicycles on a bicycle lane or path shall not ride more than two abreast. (1784-12/72, 1913-5/74)</p> <p>10.84.200 Bicycles on Pier No person shall ride a bicycle or any similar type vehicle on the municipal pier. Bicycles or similar type vehicles may be walked or pushed on the pier. (344-10/31, 554-12/40, 1784-12/72, 1913-5/74, 3185-5/93)</p> <p>10.84.210 Bicycle Lanes and Paths Established The City Council establishes those bicycle lanes and paths as designated on the Preliminary Plan; Trails Element to the Master Plan of the City of Huntington Beach, and as such Preliminary Plan. Trails Element to the Master Plan may be amended hereafter from time to time. (1784-12/72, 1913-5/74)</p> <p>10.84.220 Implementing Establishment of Bicycle Lanes and Paths The City Manager is authorized, empowered and directed to implement the establishment of the bicycle lanes and paths, as designated on the Preliminary Plan, Trails Element to the Master Plan of the City of Huntington Beach, and as such Preliminary Plan, Trails Element to the Master Plan may be amended hereafter from time to time. (1913-5/74)</p> <p>10.84.230 Bicycle Lane—Yielding and Right-of-Way A. The Traffic Engineer is authorized to erect or place signs upon any street or adjacent to any street in the City indicating the existence of a bicycle lane or path, and otherwise regulating the operation and use of vehicles and bicycles with respect thereto. When such signs are in place, no person shall disobey same. B. The bicycle lane shall be designated on such street by a six-inch wide reflectorized white line. (1913-5/74, 2175-4/77)</p> <p>10.84.250 Direction of Travel No person shall ride or operate a bicycle within a bicycle lane or path in any direction except that permitted vehicular traffic traveling on the same side of the roadway; provided that bicycles may proceed either way across a lane or path where arrows appear on the surface of the lane designating two-way traffic. (1913-5/74)</p> <p>10.84.260 Walking Bicycles Bicycles may be walked subject to all provisions of law applicable to pedestrians. (1913-5/74)</p> <p>10.84.270 Vehicular Traffic in Bicycle Lanes or Paths No person shall park a motor vehicle across or on a bicycle path or lane except to obtain emergency parking where signs are posted prohibiting such parking. No person shall drive a motor vehicle across a bicycle lane except after giving the right-of-way to all bicycles operated within the lane. No motor vehicle, motorized bicycle, motor-driven cycle, or motorcycle may be operated on a bicycle path or sidewalk. (1913-5/74, 2059-6/76, 2148-1/77, 2175-3/77)</p>	<p>§ 10.84.140 Riding a Bicycle or Similar Conveyance in an Unsafe Manner. No person shall ride a conventional bicycle, electric bicycle, moped, motor-driven cycle, electric motorcycle, pocket bike, or any other electric conveyance not previously named in an unsafe manner on a public roadway, highway, sidewalk, park, or private property open to the public. A. "Unsafe manner" means a rider violating any existing Huntington Beach Municipal Code, California Vehicle Code, or other existing law. An "unsafe manner" can also be defined as operating the conveyance in such a way as to constitute a danger to the operator, a passenger, other motorists, other riders, or pedestrians in the area. B. Examples of riding in an unsafe manner may include, but are not limited to, the following actions: 1. Riding on a sidewalk without due caution for pedestrians. 2. Riding on a sidewalk, highway, bicycle path, or bicycle lane against the flow of traffic. 3. Not yielding to vehicles or pedestrians when required to by the California Vehicle Code. 4. Intentionally swerving or riding around stopped or slowed traffic. 5. Operating a conveyance in a manner it was not designed for, including carrying passengers when not designed for carrying passengers. 6. Not obeying posted signs. 7. A person under the age of 18 riding without a properly fitted and fastened helmet. 8. Intentionally lifting one or more wheels into the air while riding on a highway, sidewalk, bicycle lane, or bicycle path. 9. Riding on a bicycle path, bicycle lane, or sidewalk at a speed greater than 25 mph or any speed greater than is reasonable or prudent under the conditions then existing, or at a speed which endangers the safety of persons or property.</p>	<p>10.84.275 Motorized Scooter For the purpose of this chapter, a motorized scooter shall be subject to each and every section that applies to bicycles. (3458-5/00)</p>	<p>Ordinance No. 4307: 10.84.120 Impound; Parked Bicycles. No person shall park or leave a bicycle in the area between PCH and the mean high tide of the Pacific Ocean in a manner so as to block or impede any road, vehicle route, walkway or pathway, or so to block or impede ingress or egress from any building, stair, pier or bridge. 10.84.140 Riding a Bicycle or Similar Conveyance in an Unsafe Manner: No person shall ride a conventional bicycle, electric bicycle, moped, motor-driven cycle, electric motorcycle, pocket bike, or any other electric conveyance not previously named in an unsafe manner on a public roadway, highway, sidewalk, park, or private property open to the public.</p> <p>10.84.150 Impounding of Bicycle or Similar Conveyance: If a juvenile subject is cited or arrested for a violation of any section in this Chapter, the officer may impound the bicycle to the Huntington Beach Police Department such that the conveyance may be released to a responsible adult. The fee for release will be consistent with the HBPD Fee schedule. (https://huntingtonbeachlegislator.com/view.aspx?M=F&ID=12299264&GUID=E2D355F9-5E4B-4622-88F5-5A8F4F3681A)</p> <p>10.84.280 Penalty It shall be unlawful for any person knowingly to violate or knowingly to permit any other person to violate any of the provisions contained in Sections 10.84.160 through 10.84.270 of this chapter, and any person violating any of the provisions contained in such sections shall be guilty of an infraction and punished upon a first conviction by a fine not exceeding \$50.00 and for a second or any subsequent conviction within a period of one year, by a fine not exceeding \$100.00. (1913-5/74, 2059-6/76, 2148-1/77)</p>	<p>https://library.municode.us/lib/huntington_beach_ca/municipal_code/items/municipal_code/10-84</p>
Irvine	<p>Sec. 4-7-201 - Applicability of traffic laws. Every person riding a bicycle upon a street or sidewalk shall be granted all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle by the laws of the State pertaining to the rules of the road, or by the terms of this Code or other ordinances of this City applicable to the driver of a vehicle, except as to those provisions which by their nature can have no application to bicycles, and except as otherwise provided in this division. (Code 1976, § IV.F-201; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-202 - Obedience to traffic-control devices. It shall be unlawful for any person operating a bicycle to fail to obey the instructions of official traffic-control signs and other traffic-control devices applicable to vehicles or bicycles, unless otherwise directed by a police officer. (Code 1976, § IV.F-202; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-203 - Method of riding number of riders. No person operating a bicycle shall allow more persons at one time than the number for which the bicycle is designed and equipped. (Code 1976, § IV.F-203; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-204 - Riding on roadways and bicycle lanes. A. Any person operating a bicycle upon a roadway at a speed less than the normal speed of traffic moving in the same direction at such time shall ride as close as practicable to the right-hand curb or edge of the roadway, except under any of the following situations: 1. When overtaking and passing another bicycle or vehicle proceeding in the same direction. 2. When preparing for a left turn at an intersection or into a private road or driveway. 3. When reasonably necessary to avoid conditions (including, but not limited to, head or moving objects, vehicles, bicycles, pedestrians, animals, surface hazards, or substandard width lanes) that make it unsafe to continue along the right-hand curb or edge, subject to width lane" is a lane that is too narrow for a bicycle and a vehicle to travel safely side-by-side within the lane. B. Any person operating a bicycle upon a roadway of a highway, which highway carries traffic in one direction only and has two or more marked traffic lanes, may ride as near the left-hand curb or edge of such roadway as practicable. C. Persons riding bicycles upon a roadway or bike lane shall not ride more than two abreast. (Code 1976, § IV.F-204; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-205 - Speed. No person shall operate a bicycle at a speed greater than is reasonable and prudent under the conditions then existing, and in no event at a speed which endangers the safety of persons or property. (Code 1976, § IV.F-205; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-207 - Egress from residential alley, driveway, bicycle path, etc. The operation of a bicycle emerging from an alley, driveway, bicycle path, building or otherwise approaching upon a sidewalk or sidewalk area shall yield the right-of-way to all pedestrians on such sidewalk or sidewalk area, and upon entering a bicycle lane or roadway, shall yield the right-of-way to all vehicles or bicycles on the roadway. (Code 1976, § IV.F-207; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-208 - Leaving bicycle lane. A. Whenever a bicycle lane has been established, any person operating a bicycle upon the roadway at a speed of less than the normal speed of traffic moving in the same direction shall ride within the bicycle lane, except that such person may move out of the lane under any of the following situations: 1. When overtaking and passing another bicycle, vehicle, or pedestrian within the lane or about to enter the lane if such overtaking and passing cannot be done safely within the lane. 2. When preparing for a left turn at an intersection or into a private road or driveway. 3. When reasonably necessary to leave the bicycle lane to avoid debris or other hazardous conditions. 4. When approaching a place where a right turn is authorized. B. No person operating a bicycle within a bicycle lane shall leave such lane until movement can be made with reasonable safety, and then only after giving the appropriate signal in the manner provided in Vehicle Code div. 11, ch. 6 (Vehicle Code § 22100 et seq.) in the event that any vehicle may be affected by the movement. (Code 1976, § IV.F-207; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-209 - Parking. No person shall leave a bicycle lying on its side on any sidewalk, nor shall park a bicycle upon the public right-of-way or the sidewalk rack to support the bicycle or against a building or at a curb, except in such a manner as to afford the least obstruction to pedestrian traffic. Where appropriate signs are erected, no person shall park a bicycle in a public highway in the area designated by appropriate signs. (Code 1976, § IV.F-209; Ord. No. 192, 5-10-77)</p> <p>Sec. 4-7-210 - Riding on sidewalks, playgrounds, etc. A. Riding of bicycles on any sidewalk or roadway is permitted unless prohibited by appropriate signs authorized pursuant to the terms of this division. B. Whenever any person is riding a bicycle upon a sidewalk, such person shall yield the right-of-way to any pedestrian and shall give an audible signal before overtaking and passing pedestrians. C. No person shall ride or operate a bicycle upon any playground, park or school ground not designated as a bicycle path or route, where children are playing, without first having secured the permission of the persons having supervision of the playground, park or school ground.(Code 1976, § IV.F-209; Ord. No. 192, 5-10-77)</p>	<p>Municipal Code -Set a speed limit for e-bikes of 28 mph on the highway and 20 mph on bike/pedestrian paths and trails in Irvine. -Requires all bicycle and e-bike users to yield to the right-of-way to all pedestrians and vehicles when entering a highway from an alley, driveway, bicycle path, or sidewalk. -Mandate all bicyclists and e-bike users travel in the same direction as vehicles on the roadway unless there is no accompanying sidewalk on the opposite side of the street, or whenever posted signs prohibit such behavior.</p>	N/A	N/A	<p>https://library.municode.com/ca/irvine/codes/code_of_ordinances?nodeId=TT4T4USA_D17381</p>
La Habra	N/A	N/A	N/A	N/A	<p>http://code.us.codes/lahabra/</p>
La Palma	<p>ARTICLE VII - BICYCLES, Sec. 40-288 No person shall operate or permit to be operated on any public street in the City any bicycle unless such bicycle shall first have been registered with the Police Department as provided in this article.</p>	N/A	N/A	N/A	<p>https://library.municode.com/ca/la_palma/codes/code_of_ordinances</p>
Laguna Beach	<p>10.02.020 Bicycles and electric personal assistive mobility devices on sidewalks and within city parks. (a) It is unlawful for any person, except for authorized law enforcement personnel, to operate a bicycle upon any sidewalk, the Main Beach Boardwalk, or any area within any city park. (b) It is unlawful for any person, except for authorized law enforcement personnel and for persons with disabilities, to operate any electric personal assistive mobility device (as defined by the California Vehicle Code and sometimes also known or referred to as Segways, T-3 Motions and/or motorized scooters) or any golf cart or low speed vehicle (as defined by the California Vehicle Code) on any sidewalk on Pacific Coast Highway, within the central business district, Main Beach Boardwalk, or any area within any city park. (Ord. 1614 § 1, 2016; Ord. 1546 § 1, 2011; Ord. 1509 § 1, 2009; Ord. 1298 § 1, 1995; Ord. 1081 § 1, 1985).</p>	<p>Possibly: 10.02.020 Bicycles and electric personal assistive mobility devices on sidewalks and within city parks. (a) It is unlawful for any person, except for authorized law enforcement personnel, to operate a bicycle upon any sidewalk, the Main Beach Boardwalk, or any area within any city park. (b) It is unlawful for any person, except for authorized law enforcement personnel and for persons with disabilities, to operate any electric personal assistive mobility device (as defined by the California Vehicle Code and sometimes also known or referred to as Segways, T-3 Motions and/or motorized scooters) or any golf cart or low speed vehicle (as defined by the California Vehicle Code) on any sidewalk on Pacific Coast Highway, within the central business district, Main Beach Boardwalk, or any area within any city park. (Ord. 1614 § 1, 2016; Ord. 1546 § 1, 2011; Ord. 1509 § 1, 2009; Ord. 1298 § 1, 1995; Ord. 1081 § 1, 1985).</p>	<p>10.02.020 Bicycles and electric personal assistive mobility devices on sidewalks and within city parks. (a) It is unlawful for any person, except for authorized law enforcement personnel, to operate a bicycle upon any sidewalk, the Main Beach Boardwalk, or any area within any city park. (b) It is unlawful for any person, except for authorized law enforcement personnel and for persons with disabilities, to operate any electric personal assistive mobility device (as defined by the California Vehicle Code and sometimes also known or referred to as Segways, T-3 Motions and/or motorized scooters) or any golf cart or low speed vehicle (as defined by the California Vehicle Code) on any sidewalk on Pacific Coast Highway, within the central business district, Main Beach Boardwalk, or any area within any city park. (Ord. 1614 § 1, 2016; Ord. 1546 § 1, 2011; Ord. 1509 § 1, 2009; Ord. 1298 § 1, 1995; Ord. 1081 § 1, 1985).</p>	<p>10.72.100 Bicycles in violation of chapter—impounding—Fee. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, and may retain possession of such bicycle until the provisions of this chapter are complied with. A fee to be determined by the city council pursuant to Section 30011 of the California Vehicle Code shall be charged for each bicycle so impounded. (Ord. 837 § 1, 1975).</p> <p>10.72.110 Enforcement. The chief of police and his representatives shall be granted all authority to enforce and carry out the provisions of this chapter pursuant to the provisions included in the California Vehicle Code and all other laws of the state of California. (Ord. 837 § 1, 1975).</p>	<p>https://code360.com/c2929116</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Laguna Hills	<p>11-32-020 Bicycle operation Share A. Riding in Group. Persons operating bicycles within a bicycle lane or upon a bicycle path shall ride in single file except as provided for in CIVC Section 21202(a). B. Direction of Travel. Persons riding or operating a bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one-way traffic by appropriate markings or signs defined by the direction of adjacent vehicular traffic. C. Walking Bicycles. Bicycles may be walked subject to all provisions of law applicable to pedestrians. D. Yielding Right-of-Way. Whenever any person is riding a bicycle upon a sidewalk, such person shall yield right-of-way to any and all pedestrians. A person riding a bicycle upon entering a roadway or driveway from a sidewalk shall yield to all traffic. (Ord. 2000-5 § 6; prior code § 6-4-01(b))</p> <p>11-32-030 General prohibition Share A. It is unlawful and subject to punishment in accordance with Section 11-32-080 of this chapter for any person utilizing or riding upon roller skates, bicycles, skateboards, scooters, or similar devices to ride or move about in or on any public or private property when the same has been designated by resolution of the City Council and posted as a no roller skating, skateboarding, bicycling or scooter area. B. It is unlawful and subject to punishment in accordance with Section 11-32-080 of this chapter, for any person utilizing or riding upon roller skates or skateboards, or similar devices to ride upon the roadway of any public street, except cut-dee-acc streets of five hundred (500) feet or less in length. (Ord. 2000-5 § 2, prior code § 6-12-000)</p> <p>11-32-040 Designation of public property as no roller skating, skateboarding, bicycling or scooter area Share The City Council may designate any public sidewalk or other public property as a no roller skating, skateboarding, bicycling or scooter area. The City Council shall designate such area by resolution and order the posting of appropriate signage in accordance with Section 11-32-060 of this chapter. Notice of the City Council's proposed designation shall be provided as follows: A. For sidewalks and highways, listed in the master plan of arterial highways, the City Clerk shall cause notice of City Council consideration of such action to be published in a newspaper of general circulation at least five days prior to the City Council consideration. B. For other public property the City Clerk shall cause additional notice of City Council consideration by means of posting such notice along the highway or sidewalk or on the public property. (Ord. 2000-5 § 3, prior code § 6-12-000)</p> <p>11-32-050 Designation of private property as no roller skating, skateboarding, bicycling or scooter area Share The City Council may, by resolution, designate any private property within a business district, or which is primarily used for commercial or recreational purposes, as a no roller skating, skateboarding, bicycling or scooter area. The City Council may designate this private property subject to the following: A. If the property is owner-occupied property, the property owner shall submit a written petition requesting a designation of no roller skating, skateboarding, bicycling, or scooter area. B. If the property is occupied by tenants of the owner, then the tenants shall submit a written petition by a majority of the tenants on the property supporting a designation of a no roller skating, skateboarding, bicycling or scooter area and the petition shall also contain written consent of the property owner. C. The City Clerk shall cause notice of City Council consideration of this petition to be mailed to all tenants in the subject private property as well as to the owner at least five days prior to City Council consideration.</p>	N/A	<p>C. Scooter or Bicycle. It is unlawful and subject to punishment in accordance with Section 11-32-080 of this chapter for any person utilizing or riding upon a scooter or a bicycle within the Laguna Hills Community Center and Sports Complex facility to ride or move about on such equipment in any area other than on the park walkways. Persons utilizing or riding upon a scooter or a bicycle within the Laguna Hills Community Center and Sports Complex facility are expressly prohibited from riding or moving about on such equipment on any monument, sign, building, roof, railing, fence, gate, table, bench, planter, curb, bleacher, stair, step, stairway, handrail, fountain, sculpture, play equipment, rubberized surface, or feature of any kind located within the Community Center and Sports Complex.</p>	<p>11-32-070 Fees set by resolution The City Council may, by resolution, establish fees for the receipt and processing of petitions for no roller skating, skateboarding, bicycling, and/or scooter areas. In addition, the City Council may, by resolution, establish fees sufficient to cover the costs of developing, printing, and posting the areas so designated pursuant to this chapter. (Ord. 2000-5 § 6; prior code § 6-12-060)</p> <p>11-32-080 Violation—Penalty and enforcement A. Any violation of this chapter is deemed an infraction, punishable by a fine of fifty dollars (\$50.00). A second violation of this chapter shall be punishable by a fine of one hundred dollars (\$100.00), and a third and subsequent violation shall be deemed a misdemeanor. B. The privilege of any person to use the parks is expressly conditioned upon compliance by that person with the provisions of this chapter as they apply to such use. In addition to being subjected to the fine schedule set forth in this section, a person is subject to immediate eviction from the park in which the violation occurs, and other parks if necessary, where a person is found to be in violation of this chapter. C. In addition, with respect to adults whose roller skating, skateboarding, scootering, or bicycling activities are in violation of this chapter and where such activities result in damage to public property, the city may pursue a civil complaint in tort against that person for property damage caused by such activity. With respect to minors whose roller skating, skateboarding, scootering, or bicycling activities are in violation of this chapter and where such activities result in damage to public property, the city may, pursuant to California Civil Code section 1714.1, pursue a civil complaint in tort for property damage caused by such activity against the minor's parent or guardian having custody and control of the minor. (Ord. 2000-5 § 7; prior code § 6-12-070)</p>	<p>https://www.codexpublishing.com/CA/LagunaHills90/LagunaHills111/LagunaHills1132.htm#111-32</p>
Laguna Niguel	<p>Sec. 7-4-599.1 - Electric Bicycle Operation All references to this section 7-4-500.1 shall include section 7-4-500. These requirements are in addition to the other regulations for Bicycle Operation set forth in section 7-4-500. (a) No person shall ride an electric bicycle in an unsafe manner on any publicly owned property, including but not limited to a public roadway, highway, sidewalk, park, nor on any private property open to the public. (1) "Unsafe manner" means an act or acts in violation of the Laguna Niguel Municipal Code, California Vehicle Code, or other existing law. An "unsafe manner" can also be defined as operating an electric bicycle in such a way as to constitute a danger to the operator, a passenger, other motorists, other riders, or pedestrians in the area. (2) Examples of riding in an unsafe manner may include, but are not limited to, the following actions: a. Intentionally lifting one or more wheels into the air while riding on a Highway, sidewalk, bicycle lane, or bike path. It is not a violation of this subsection if one or more wheels lose contact with the ground briefly due to the condition of the road surface or other circumstances beyond the control of the rider. b. Riding on the sidewalk without due caution for pedestrians. c. Riding on the highway, or bicycle lane against the flow of traffic. d. Intentionally swerving or riding around stopped or slowed traffic. e. Operating an electric bicycle in a manner it was not designed for carrying passengers when not designed for carrying passengers or standing on the seat of the bicycle. f. Not obeying posted signs or traffic lights. g. A person under the age of 18 riding without a properly fitted and fastened helmet. (b) No person shall operate an electric bicycle while holding and operating a handheld wireless telephone or an electronic wireless communications device unless the wireless telephone or electronic wireless communications device is specifically designed and configured to allow voice-operated and hands-free operation, and it is used in that manner while riding. (1) An "electronic wireless communications device" includes, but is not limited to, a broadband personal communication device, a handheld device, or pager.</p>	N/A	N/A	<p>Cyclists who don't follow the rules are subject to ticketing and fines as defined by the California Vehicle Code or Municipal Code</p>	<p>https://library.municode.com/laguna_niguel/codes/code_of_ordinances/40645-IT77_HIRVUE_DIV1008_ART5PERBSEKIDE</p>
Laguna Woods	<p>Sec. 8-12-010 - Bicycle operation. (a) Direction of travel: Persons riding or operating a bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one-way traffic by appropriate markings or signs defined by the direction of adjacent vehicular traffic. (b) Walking bicycles. Bicycles may be walked subject to all provisions of law applicable to pedestrians. (Ord. 6-4-500)</p> <p>Sec. 8-12-020 - Bicycles on sidewalks. (a) Riding on sidewalks. Bicycles may be ridden on all sidewalks at a speed not in excess of five miles per hour except upon sidewalks within a business district, other sidewalks adjacent to any public school building when school is in session, recreation center when in use, church during services, over any pedestrian overcrossing or other sidewalk where prohibited by posted signs. (b) Director to designate prohibitions. The City Manager or designee may designate and declare certain portions of sidewalk to be prohibited to bicycle use. (c) Director to post prohibitions. The City Manager or designee is authorized to erect and maintain signs adjacent to sidewalks designating limits of bicycle prohibitions. (d) Yielding right-of-way. Whenever any person is riding a bicycle upon a sidewalk, such person shall yield right-of-way to any and all pedestrians. A person riding a bicycle upon entering a roadway or driveway from a sidewalk shall yield to all traffic.</p>	N/A	<p>Sec. 8-12-030 - Skateboards, roller skates and similar pedestrian traffic. (a) No person shall ride a skateboard, roller skates or other conveyance propelled by human power other than a bicycle or cause or permit same to roll or coast on the roadway of any highway. (b) The provisions of Subsection (a) shall not apply to cut-dee-sacs where the length of the cut-dee-sac is 500 feet or less.</p>	<p>Sec. 8-16-050 - Administration and enforcement. Except as otherwise provided herein, the provisions of this chapter shall be administered and enforced by the Sheriff. In the enforcement of this chapter such officer and his regularly salaried fulltime deputies may enter upon private or public property to examine a vehicle or parts thereof, or obtain information as to the identity of the owner of the vehicle and to remove or cause the removal of a vehicle or parts thereof declared to be a nuisance pursuant to this chapter. (Ord. 6-4-504)</p>	<p>https://library.municode.com/laguna_woods/codes/code_of_ordinances/40645-IT78_TRCO_CH8_IDAPREFAFA</p>
Lake Forest	<p>12-24-010 Bicycle operation. A. Direction of Travel. Persons riding or operating a bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one (1) way traffic by appropriate markings or signs defined by the direction of adjacent vehicular traffic. B. Walking Bicycles. Bicycles may be walked subject to all provisions of law applicable to pedestrians. (Ord. 171 § 1, 2007)</p> <p>12-24-020 Recreational transportation on sidewalks. A. Riding on Sidewalks. Bicycles, electric bicycles, roller skates, roller blades, non-motorized and motorized scooters, nonmotorized skateboards, electrically motorized boards, and other similar forms of transportation may be ridden on all sidewalks in the City of Lake Forest at a speed not to exceed five (5) miles per hour except upon sidewalks within a business district, upon sidewalks adjacent to any public school building when school is in session, recreation center when in use, church during services, over any pedestrian overcrossing or other sidewalk where prohibited by posted signs. B. Director to Designate Prohibitions. Director to Designate Prohibitions. Notwithstanding subsection (A) of this section, the Director, or his or her designee, may designate and declare certain portions of sidewalks and public property where the riding or operation of bicycles, electric bicycles, roller skates, roller blades, nonmotorized and motorized scooters, nonmotorized skateboards, electrically motorized boards, electric personal assistive mobility devices, and other similar nonmotorized and motorized forms of transportation are prohibited. The Director is authorized to erect and maintain signs adjacent to sidewalks designating limits of bicycle prohibitions. C. Yielding Right-of-Way. Whenever any person is riding a bicycle, electric bicycle, roller skates, roller blades, a nonmotorized or motorized scooter, a nonmotorized skateboard, electrically motorized boards, electric personal assistive mobility devices, or other similar nonmotorized or motorized form of transportation, such person shall yield right-of-way to any and all pedestrians. A person riding or operating any mode of transportation shall further yield to all traffic upon entering a roadway or driveway.</p>	Same as bicycle policy "Section 12.24.020 Recreational transportation on sidewalk"	<p>12-24-030 Skateboards, roller skates, etc. A. No person shall ride a skateboard, scooter, roller skates or similar coaster devices other than a bicycle or cause or permit same to roll or coast within the right-of-way of any street or highway in the City of Lake Forest. B. The provisions of subsection A shall not apply to cut-dee-sacs where the length of the cut-dee-sac is five hundred (500) feet or less. (Ord. 302 § 44, 2018; Ord. 171 § 1, 2007) C. Unsafe Operation. In any event, no person shall ride or operate a skateboard, scooter, roller skates, or other similar vehicle in any manner that endangers any person or animal or at a speed that is greater than is reasonable and prudent, having due regard for other users and the surface, width, and grade of the road or trail, and in no event in excess of 10 miles per hour, unless a different speed is posted. The operation of such modes of transportation on sidewalks is subject to additional requirements and prohibitions set forth in Section 12-24-020 of this Code. D. Parking. No person shall leave a skateboard, scooter, roller skates, or other similar vehicle on or in a road or trail in such a way as to obstruct pedestrian, equestrian, equestrian, bicycle, or other vehicular traffic. E. Helmets. No person under 18 years of age shall operate or ride, whether as a passenger or not, a skateboard, scooter, roller skates, or other similar vehicle on any road, bikeway, sidewalk, or trail unless that person is wearing a properly fitted and fastened bicycle helmet. The bicycle helmet must meet the standards set forth in California Vehicle Code Section 21212."</p>	N/A	<p>https://library.ccods.us/lib/lake_forest/capsub/municipal_code/itemfile/12_chapter_12_24-12_24_010</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Los Alamitos	N/A	N/A	N/A	<p>10.36.110 Bicycles in violation of this chapter—Impounding and fee. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, and may retain possession of such bicycle until the provisions of this chapter are complied with. A fee to be determined by the city council pursuant to Section 39011 of the California Vehicle Code, shall be charged for each bicycle so impounded. (Ord. 313, 1975)</p> <p>10.36.120 Fines for violation of this chapter. A fee to be determined by the city council pursuant to Section 39011 of the Vehicle Code shall be charged for violation of the provisions of this chapter. (Ord. 313, 1975)</p> <p>10.36.130 Enforcement. The chief of police and his representatives shall herewith be granted all authority to enforce and carry out the provisions of this chapter pursuant to the provisions included in the California Vehicle Code and all other laws of the state of California. (Ord. 313, 1975)</p>	<p>https://cod4060.com/4284386</p>
Mission Viejo	<p>Sec. 12.15.090 - Bicycle operation. (a) Riding in group. Persons operating bicycles within a bicycle lane or upon a bicycle path shall ride in single file except as provided for in Vehicle Code § 21202(a). (b) Direction of travel. Persons riding or operating a bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one-way traffic by appropriate markings or signs or defined by the direction of adjacent vehicular traffic. (c) Walking bicycles. Bicycles may be walked subject to all provisions of law applicable to pedestrians. (Ord. No. 88-12, § 6(6-4-50), 6-27-88)</p> <p>Sec. 12.15.100 - Bicycles on sidewalks. (a) Riding on sidewalks. Bicycles may be ridden on all sidewalks in the city at a speed not to exceed five miles per hour except upon sidewalks within a business district, upon sidewalks adjacent to any public school building when school is in session, recreation center when in use, church during services, over any pedestrian overcrossing or other sidewalk where prohibited by posted signs. (b) Sidewalks designated as multi-use trail shared sidewalks (MUTSS). Bicycles may be ridden on all MUTSS in the city at a speed not to exceed 12 miles per hour. (c) Director to designate prohibitions. The director may designate and declare certain portions sidewalk to be prohibited to bicycle use. (d) Director to post prohibitions. The director is authorized to erect and maintain signs adjacent to sidewalks designating limits of bicycle prohibitions. (e) Yielding right-of-way. Whenever any person is riding a bicycle upon a sidewalk, such person shall yield right-of-way to any and all pedestrians. A person riding a bicycle upon entering a roadway or driveway from a sidewalk shall yield to all traffic. (Ord. No. 88-12, § 6(6-4-50), 6-27-88; Ord. No. 19-334, § 1, 1-14-20)</p>	<p>No specific rules related to Ebicycles, therefore regulations are the same as traditional bicycle (Section 12.15) and those established within the CVC. https://www.cityofmissionviejo.org/departments/police-services/bicycle-e-bicycle-safety</p> <p>What is an E-Bike? An "electric bicycle" is a bicycle equipped with fully operable pedals and an electric motor of less than 750 watts (CVC 312.5). Class 1 E-Bike: A class 1 e-bike is a low-speed pedal-assisted bicycle that has a motor that provides assistance when the rider is pedaling. The bike stops providing assistance when the speed reaches 20 mph. Class 2 E-Bike: A class 2 e-bike is a low-speed throttle-assisted bicycle that has a motor that can propel the bicycle without pedaling. The bicycle stops providing assistance when the speed reaches 20 mph. Class 3 E-Bike: A class 3 e-bike is a pedal-assisted bicycle that has a motor that provides assistance only when the rider is pedaling. The bicycle stops providing assistance when the speed reaches 28 mph. This e-bike has a speedometer. Electric bicycles with the motors of more than 750 watts are technically motorcycles according to the law and require Class M licenses and helmets. No person under 16 years of age shall operate a class 3 e-bike CVC 21213 (a). All individuals must wear a properly fitted and fastened helmet while operating a class 3 e-bike CVC 21213 (b). If your e-bike does not fall within the above listed categories, it is no longer considered an electric bicycle and may not be permitted on the roadway without proper licensing and vehicle registration requirements. Additionally, it is against the law in California to modify or otherwise tamper with electric bicycles in a way that changes the speed capability, unless the rider also changes the bicycles classification CVC 24016(d).</p>	N/A	<p>Sec. 12.15.110 - Enforcement of chapter. (a) The chief of police and his representatives shall herewith be granted all authority to enforce and carry out the provisions of this chapter pursuant to the provisions included in the Vehicle Code and all other laws of the state. (b) Each violation of this chapter shall be an infraction subject to a fine not to exceed \$50.00. (Ord. No. 90-41, § 1(12.15.090), 2-12-90)</p>	<p>https://library.municode.com/ca/mission_viejo/codes/code_of_ordinances?nodeId=ORLCO_12_15_150</p>
Newport Beach	<p>Chapter 12.56: 12.56.030 Operating Bicycle on Sidewalk A. Prohibition. No person shall operate or ride a bicycle upon any sidewalk in the City. B. Exceptions. The provisions of this section shall not apply to: 1. Sidewalks on which bicycles are permitted pursuant to a resolution adopted by the City Council; 2. Tricycles, wheelchairs, or wheeled devices operated by the disabled or the elderly; 3. Roller skates, roller blades or skateboarders or similar devices, except when operation is prohibited by the provisions of Chapter 12.57 of this Code; 4. Tricycles which measure less than one of the following: a. Eighteen (18) inches from ground level to the neck joint, b. Twenty-four (24) inches in width measured from the outer rear wheels, c. Eighteen (18) inches in front tire diameter, or d. Twelve (12) inches in rear tire diameter. 5. To a bicycle operated by any peace officer employed by the City of Newport Beach and acting within the course and scope of his or her employment. (Ord. 97-41 § 5 (part), 1997; Ord. 95-40 § 2, 1995; Ord. 91-12 § 1, 1991; Ord. 86-3 § 1, 1986; Ord. 85-18 § 2, 1985; Ord. 1806 § 1, 1979; Ord. 1608 § 1, 1975; Ord. 1452 § 1, 1972; Ord. 1435 § 1, 1972; Ord. 1256 § 1, 1965; Ord. 1244 § 1, 1967; Ord. 896, 1949; Code § 2025-1)</p> <p>Chapter 12.54 OCEANFRONT BOARDWALK SAFETY PROGRAM 12.54.030 Speed Limit. No person using the boardwalk shall exceed eight miles per hour while on the boardwalk. (Ord. 2020-24 § 1 (part), 2020; Ord. 2001-16 § 3, 2001; Ord. 2001-10 § 2, 2001; Ord. 2001-7 § 2 (part), 2001; Ord. 91-53 § 2 (part), 1991)</p> <p>12.54.050 Direction of Flow/Rules of the Road. A. Any person using the boardwalk shall keep to the right of the centerline of the boardwalk except when passing. B. No person shall pass any other person except when it is safe to do so. C. No person shall pass any other person when there is a solid single or double centerline. (Ord. 2020-24 § 1 (part), 2020; Ord. 2001-16 § 5, 2001; Ord. 2001-10 § 4, 2001; Ord. 2001-7 § 2 (part), 2001; Ord. 91-53 § 2 (part), 1991)</p>	<p>No specific rules related to Ebicycles, therefore regulations are the same as traditional bicycle (Section 12.56) and those established within the CVC.</p>	N/A	N/A	<p>https://www.codpublishing.com/CA/NewportBeach96.html#NewportBeach12NewportBeach1256.html</p>
Orange	<p>10.10.180 - Rules of the Road. It is unlawful for any person to ride or operate a bicycle in the City of Orange in violation of the rules of the road as set forth in Sections 21200 et seq. of the California Vehicle Code (Ord. 19-82)</p> <p>10.10.190 - Riding Bicycles on Sidewalks. A. No person shall ride or operate a bicycle upon any sidewalk in a business district unless such sidewalk is officially designated as a bicycle route. This subsection shall not apply to Police Officers carrying out their official duties. B. Any person riding or operating a bicycle upon any sidewalk shall exercise due care and shall yield the right-of-way to a pedestrian. (Ord. 19-82; 19-82)</p> <p>10.10.200 - Riding Bicycles on Streets. Except as provided by the California Vehicle Code, any person riding or operating a bicycle upon any street where a bicycle lane or trail appropriate to his direction of travel is established and officially designated shall ride or operate such bicycle only in such bicycle lane or trail or on the sidewalk where otherwise allowed by the Orange Municipal Code (Ord. 19-82)</p> <p>10.10.210 - Vehicles Prohibited from Bicycle Lanes and Trails. No person shall operate a motor vehicle within an established and officially designated bicycle lane or trail except when necessary to park where parking is allowed, for purposes of ingress or egress to and from driveways, or for purposes of intersectional travel. (Ord. 19-82)</p> <p>10.10.220 - Hitchhike Rides on Vehicles. No person riding or operating any bicycle, coaster, roller skates, sled, toy vehicle, motorcycle or moped shall attach the same or himself to any vehicle on the roadway. (Ord. 19-82)</p> <p>10.10.230 - Passengers on Bicycles. It is unlawful for the operator of a bicycle, when upon a public right-of-way, to carry another person upon said bicycle, provided, however, that this prohibition shall not apply to bicycles which are built for two persons and are properly equipped. (Ord. 19-82)</p> <p>10.10.240 - Racing. No person riding or operating a bicycle upon a public highway or street shall participate in any race, speed or endurance contest unless such race or endurance contest has the written permission of the City Manager, and under the supervision of the Chief of Police, or his designee. (Ord. 19-82)</p>	N/A	N/A	<p>10.10.290 - Enforcement. The Chief of Police and his representatives shall be granted the authority to enforce and carry out the provisions of this chapter under the provisions of the California Vehicle Code and other laws of the State of California. (Ords. 19-82; 12-75; 462; Prior Code 10.68.100)</p> <p>10.10.300 - Bicycles in Violation of this Chapter. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter and may retain possession of such bicycle until the provisions of this chapter are complied with. (Ords. 19-82; 12-75; 462; Prior Code 10.68.110)</p> <p>10.10.310 - Fines for Violation of this Chapter. Any person convicted of a violation of Section 10.10.080 (which is not enacted pursuant to Section 39000 et seq. of the California Vehicle Code) shall be guilty of a misdemeanor. Any person convicted of any other violation of this chapter shall be guilty of an infraction. (Ords. 19-82; 1-80; 12-75; Prior Code 10.68.120)</p>	<p>https://library.municode.us/tx/orange_ca/pub/municipal_code/nem/title_10-chapter_10_10</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
Placenta	<p>§ 13.20.050 Driving or riding on sidewalks. No person shall ride, drive, propel or cause to be propelled any vehicle or animal across or upon any sidewalk or any parkway, except at a permanent or temporary driveway, to include all commercial areas.</p> <p>Bicycles, as defined in subsection (1) of Section 13.76.020 shall be excepted from the above as follows:</p> <p>(1) Bicycles shall be allowed on sidewalks designated as city bike routes and bike paths.</p> <p>(2) Bicycles shall be allowed on the sidewalk adjacent to Kraemer Boulevard between Madison Avenue and Fairway Lane.</p> <p>(3) Bicycles shall be allowed on sidewalks in residential areas only when ridden by persons enrolled below the seventh (7th) grade or under the age of 12 years.</p> <p>Every person riding a bicycle or riding or driving an animal upon a highway shall be granted all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle by this title, except those provisions which by their very nature can have no application.</p>	N/A	N/A	<p>13.76.110 Bicycles in violation of chapter—Impound fees—Fines. The licensing agency shall have the right to impound and retain possession of any bicycle in violation of the provisions of this chapter, or in lieu of impounding, shall have the right to issue a citation for such violations. All bicycles impounded pursuant to this section may be retained until the provisions of this chapter are complied with. Bicycles remaining unclaimed after a period of three (3) months shall be subject to disposal in accordance with Sections 2.20.010, 2.20.020 and 2.20.030 of Chapter 2.20 of this code. A fine of two dollars (\$2.00) shall be charged for each violation of this chapter. (Ord. 75-O-115, 1975)</p> <p>13.76.120 Enforcement. The police chief and his representative shall herewith be granted all authority to enforce and carry out the provisions of this chapter pursuant to the provisions included in the California Vehicle Code and all other laws of the state of California. (Ord. 75-O-115, 1975)</p>	<p>https://library.municode.us/lib/placenta_cafpub/municipal_code/itemfile_13_chapter_13_7/</p>
Rancho Santa Margarita	<p>Sec. 12.01.010 - Bicycle operation. (a) Direction of travel - Persons riding or operating a bicycle on a bicycle trail or path may proceed in either direction except on those trails or paths designated for one-way traffic by appropriate markings or signs defined by the direction of adjacent vehicular traffic. (b) Walking bicycles - Bicycles may be walked subject to all provisions of law applicable to pedestrians. (OCC § 6-4-501; Ord. No. 3768, § 2, 11-7-1989; Ord. No. 98-15, § 64, 12-8-1998)</p> <p>Sec. 12.01.020 - Bicycles on sidewalks. (a) Riding on sidewalks. Bicycles may be ridden on all sidewalks at a speed not to exceed five miles per hour except upon sidewalks within a business district, upon sidewalks adjacent to any public school building when school is in session, recreation center when in use, or church during services, or over any pedestrian overcrossing or other sidewalk where prohibited by posted signs. (b) City Engineer to designate prohibitions. The City Engineer may designate and declare certain portions of sidewalk to be prohibited to bicycle use. (c) City Engineer to post prohibitions. The City Engineer is authorized to erect and maintain signs adjacent to sidewalks, designating limits of bicycle prohibitions. (d) Yielding right-of-way. Whenever any person is riding a bicycle upon a sidewalk, such person shall yield right-of-way to any and all pedestrians. A person riding a bicycle upon entering a roadway or driveway from a sidewalk shall yield to all traffic. (OCC § 6-4-501; Ord. No. 3768, § 2, 11-7-1989)</p> <p>State Law reference— Authority to regulate operation of bicycles on sidewalks, Vehicle Code § 21100(b).</p>	<p>Sec. 12.08 Regulated Mobility Devices Sec. 12.08.040 - Designated and Posted Prohibited Operation Areas. (a) City Council May Designate Prohibitions. The City Council may by resolution designate and declare any street, road, highway, sidewalk, trail, or other area generally open to public access, or portions thereof, to be locations where the operation of regulated mobility devices are prohibited. (b) City Engineer to Post Prohibitions. The City Engineer is authorized to cause signs and/or markings to be placed giving notice of such prohibitions as necessary to implement the regulations established by subsection (a) above.</p>	<p>Sec. 12.03.030 - Skateboards, roller skates, and similar pedestrian traffic. (a) No person shall ride a skateboard, roller skates, or other conveyance propelled by human power, other than a bicycle, or cause or permit same to roll or coast on the roadway of any highway in the City. (b) The provisions of subsection (a) shall not apply to cut-de-sacs where the length of the cut-de-sac is 500 feet or less. (OCC § 6-4-502; Ord. No. 3768, § 2, 11-7-1989)</p>	<p>Sec. 12.05.050 - Administration and enforcement. Except as otherwise provided herein, the provisions of this chapter shall be administered and enforced by the Sheriff. In the enforcement of this chapter, such officer and his regularly salaried fulltime deputies may enter upon private or public property to examine a vehicle or parts thereof or obtain information as to the identity of the owner of the vehicle and to remove or cause the removal of a vehicle or parts thereof declared to be a nuisance pursuant to this chapter.</p> <p>Sec. 12.06.050 - Penalties (a) Any person who violates the provisions of this Chapter shall be guilty of an infraction. (b) In the discretion of the Enforcement Officer, any person violating the provisions of this Chapter may, in lieu of an infraction penalty, be issued an administrative citation in accordance with Chapter 1.0.5 of this Code in the following amounts: (1) A fine of \$100.00 for a first violation. (2) A fine of \$200.00 for a second violation of this Chapter within one year from the date of the first violation. (3) A fine of \$500.00 for each additional violation of this Chapter within one year from the date of the first violation. (c) Upon issuance of an administrative citation, an Enforcement Officer, in their sole discretion, may allow a person who violates any provision(s) of this Chapter to complete an approved safety diversion program within 120-days, at the violator's expense, as assigned by the Enforcement Officer. Upon successful completion of an approved safety diversion program, the administrative citation issued pursuant to this Chapter will be dismissed. Where the violator issued an administrative citation is under the age of 18, a parent or legal guardian must accompany the violator to and attend the approved safety diversion program. The City may establish a safety diversion program fee reflecting the City's personnel, administrative, and programmatic costs, which shall be established by resolution of the City Council. The City Manager is authorized to develop additional regulations regarding the safety diversion program authorized by this section not in conflict with this Chapter. (d) This Chapter shall not preclude or prohibit an Enforcement Officer from issuing a misdemeanor or infraction citation to a court of competent jurisdiction for any violation of the California Vehicle Code or other offense committed while operating a regulated mobility device. (e) If a person under the age of 18 is found in violation of any provisions of this Chapter, and no parent or legal guardian is present, and the unsafe manner in which the regulated mobility device was operated constitutes an immediate danger to the health and safety of the juvenile operator and/or to members of the public, the Enforcement Officer may take immediate possession of the regulated mobility device and transport the device for safekeeping to the nearest City facility; thereafter, the regulated mobility device shall be released by the City to the legal owner of the device and/or to the parent or legal guardian of the person under the age of 18. (f) If a person under the age of 18 is found in violation of any provision of this Chapter, and no parent or legal guardian is present, the Enforcement Officer may also contact the parent or legal guardian of the person under the age of 18 to notify them of the violation.</p>	<p>https://library.municode.com/ca/rancho_santa_margarita/codes/code_of_ordinances/true?db=COR-TIT12VETR_CH12.03BPLVEPE</p>

Bicycle and Electric Bicycle (e-bike) Ordinance(s) by Agency

Agency	Bicycle Ordinance(s)	E-Bike Ordinance(s)	Other Related Policy (Motorized Scooters, Mopeds, etc)	Regulation	Sources
San Clemente	<p>10.06.110 - Persons Riding Bicycles or Driving an Animal Every person riding a bicycle or riding or driving an animal upon a highway has all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle by this title, except those provisions which by their very nature can have no application.</p> <p>12.32.130 - Cyclists, Skateboarders and Similar Activities on Municipal Pier, Access Road, Beach and Beach Trail B. Prohibited Activities on Municipal Pier and Access Road.No person shall ride or permit to be ridden, drive, or permit to be driven, any bicycle, electric bicycle, tricycle, skateboard, roller skates, or similar type device on the municipal pier, access to the municipal pier, service roads, or beach access roads. Moreover, no person shall walk, push, carry, park, or permit to be parked any bicycle, electric bicycle, tricycle, skateboard, or similar type device on the municipal pier. In addition, no person shall throw any "trash" or other similar devices on the municipal pier, access roads, service roads, or beach access roads. C. Permitted Uses of Bicycles on Beach and Beach Trail.Riding of bicycles and personal assistive mobility devices is permitted on the beach trail, including those portions that overlie the beach service road, subject to the restrictions of subsection (b) below. Bicycle owners are permitted to walk their bicycles through such restricted areas and at such restricted times. When permitted to be ridden, bicycles may be ridden at a maximum speed of ten miles per hour on all permitted portions of the beach trail. At all times, bicycles must yield to pedestrians. D. Prohibited Uses of Bicycles on Beach and Beach Trail.Riding of bicycles on the beach is prohibited at all times. Riding of bicycles on the beach trail is not permitted between the municipal pier and the southern end of the Trailgair Canyon Bridge from June 15 through Labor Day. Riding of bicycles is not permitted on Riviera Beach Trail Bridge, Moravia Beach Trail Bridge, Mariposa Trail Bridge, the portion of the trail extending north from the base of the pier asphalt to the Corto Lane restrooms, and the asphalt area extending north and south of the base of the municipal pier at any time. Bicycles owners are permitted to walk their bicycles through such restricted areas and at such restricted times. Reckless riding of bicycles is prohibited, and at no time shall any persons allow their bicycle(s) to be left unattended on the beach or beach trail, nor beach access thereto. E. Electric Bicycles, Motorized Scooters, Electrically Motorized Boats, and Other Similar Motorized Recreational Devices Prohibited.No person shall drive, operate, or propel any electric bicycle, motorized scooter, electrically motorized boat, or other similar motorized recreational device, however powered, upon any portion of the beach or beach trail. This section shall not prohibit the use of such devices upon these areas by any officer, employee, or agent of the City, any City department, or any public safety officer, while engaged in their official duty, or any City-authorized person providing maintenance, repair, or emergency services on the beach or beach trail. F. Unsafe Operation.Reckless riding of bicycles is prohibited, and at no time shall any persons allow their bicycle(s) to be left unattended on the beach or beach trail, nor beach access thereto. No person using the beach or beach trail shall engage in any activity that creates an unreasonable risk of injury to any person. G. Penalty.Violations of this chapter may be prosecuted as a misdemeanor or infraction and are subject to the notice, hearing, and enforcement provisions of this Code, including, but not limited to, the provisions of Chapter 1.16. H. Modification.In the event of special circumstances so warranting, the City Council may by resolution modify the requirements established herein. Modifications by the City Council shall only be made if the City Council determines that such modification will not be contrary to the public health, safety, or welfare.</p>	<p>Section 10.62.020 - Operation and Use of Electric Bicycles and Electric Motorcycles A. It shall be unlawful for any person to ride or operate any electric bicycle, motor-driven cycle, or any other electric or motorized conveyance unless such ride or operation complies with the following provisions: 1. Unsafe Operation Prohibited. No person shall ride or operate an electric bicycle, motor-driven cycle, or any other electric or motorized conveyance in an unsafe manner. "Unsafe manner" shall mean operating in such a way as that violates any provision of state law or the City's municipal code or constitutes a danger to the operator, a passenger, other motorists, other riders, or pedestrians in the area. 2. Helmet Requirement. All operators and passengers under 18 years of age shall wear a helmet properly strapped while riding or operating an electric bicycle, motor-driven cycle, or any other electric or motorized conveyance, as specified in California Vehicle Code Section 21212. 3. Direction of Travel. The operator of a bicycle, electric bicycle, electric scooter, or electric skateboard shall travel in the same direction as vehicles are required to be driven upon the roadway, regardless of whether or not the operator is in the roadway or in a bike lane. 4. Passenger Restrictions. No person riding or operating an electric bicycle, motor-driven cycle, or any other electric or motorized conveyance shall transport another person upon an electric bicycle, motor-driven cycle, or any other electric or motorized conveyance unless such passenger is seated upon a seat attached to the vehicle in a safe manner. No person shall be a passenger on an electric bicycle, motor-driven cycle, or any other electric or motorized conveyance unless such passenger is seated upon a seat attached to the vehicle in a safe manner. 5. Requirements During Hours of Darkness. a. During Hours of Darkness, electric bicycles shall only be operated by persons 18 years of age or older. b. During Hours of Darkness, electric bicycles shall only be operated with a front lamp emitting a white light visible from a distance of 300 feet and a rear solid or flashing red light with a built-in reflector visible from a distance of 500 feet. 6. Prohibited Actions. a. It shall be unlawful to operate electric bicycles on highways, roadways, or sidewalks while performing stunts such as wheelies or endbrakes (stoppies). b. It shall be unlawful to operate electric bicycles while utilizing a handheld mobile communication device, such as using a mobile phone to text. 7. Use of Designated Lanes. E-bike operators must use designated bicycle lanes where available. In the absence of a designated bicycle lane, cyclists and e-bike riders are permitted to use sidewalks; however, e-bike operators must yield the right-of-way to all pedestrians and bicycle riders and maintain a cautious speed that does not endanger pedestrian safety. 8. Requirements for Class 3 Electric Bicycles. a. A person must be 16 years of age or older to operate a Class 3 electric bicycle. b. All persons operating a Class 3 electric bicycle shall comply with Section 21213 of the California Vehicle Code regarding the wearing of a properly fitted and fastened bicycle helmet. c. Class 3 E-bikes shall not be ridden on any sidewalks or any public off-road trails within the City of San Clemente. d. Compliance with Safety Standards. An electric bicycle shall meet the following criteria: 1. Conform with the equipment and manufacturing requirements for bicycles adopted by the United States Consumer Product Safety Commission (16 C.F.R. 1512.1, et seq.). b. Operate in a manner so that the electric motor is disengaged or ceases to function when the brakes are applied or operated in a manner such that the motor is engaged through a switch or mechanism that, when released or activated, will cause the electric motor to disengage or cease to function. c. A person shall not tamper with or modify an electric bicycle so as to change the speed capability of the bicycle unless he or she appropriately replaces the label indicating the classification. 10. Electric Motorcycles. Electric Motorcycles shall not be operated within the limits of the City of San Clemente without the following: a. The operator shall have a valid motorcycle license as required by California Vehicle Code Section 12500(b); and b. The Electric motorcycle shall have, and the operator shall carry proof of, valid registration and license plate as required by California Vehicle Code Section 40000.11) and c. All operators and riders shall wear a helmet approved by the United States Department of Transportation (DOT) as required by California Vehicle Code Section 27800(b); and d. All operators shall have and maintain evidence of financial responsibility (insurance) as required by California Vehicle Code Section 1602(b). Section 10.62.030 - Restrictions on Beach and Beach Trail A. The operation and use of electric bicycles, motorized scooters, electrically motorized boats, and other similar motorized recreational devices on the beach and beach trail shall be governed by Section 12.32.130 of the San Clemente Municipal Code.</p>	<p>Section 10.62.040 - Enforcement and Penalties A. Responsibility of Parent. Each parent or legal guardian having custody and control of a minor who violates this Chapter shall be jointly and severally liable with such minor for each violation. B. Regulations Provided upon Retail Sale or Rental of an Electric Bicycle. Every store or business selling or renting E-bikes shall supply a copy of this Chapter (SDMC Chapter 10.62) to every person(s) purchasing or renting an E-Bike, and shall maintain proof of providing such copy for minimum of three years. Records of proof shall be provided to the City immediately upon request by the Chief of San Clemente Police Services during normal business hours of the store or business. C. Violations and Penalties: 1. Violation of any provision of this Chapter shall be subject to enforcement as specified in Chapter 1.16 of the San Clemente Municipal Code. 2. Any person found in violation of any provision of this Chapter, or the California Vehicle Code while operating an E-Bike, may, in lieu of payment of a fine or other penalty, be required to complete a City-approved training and education class on the safe operation of electric bicycles. Payment for the costs for such class shall be the responsibility of the offender. Proof of completion must be provided to the City's Police Services Division within 90 days of the violation notice if such class is required. The violation shall not be deemed adjudicated until the offender provides such notice timely. 3. Every person violating any provisions of this Chapter shall be deemed guilty of a misdemeanor unless specifically provided otherwise in this Chapter. In no case shall the fine for violation of this Chapter exceed an amount specified by the City.</p>	<p>https://library.municode.com/ca/san_clemente/codes/code_of_ordinances?nodeId=PTT1-0312P1CR_CH12_3202R_12_32_13002P2SACMUPAC00R1E1T5</p>	
San Juan Capistrano	<p>Sec. 4.6.206. Persons riding bicycles and riding or driving animals. Every person riding a bicycle or driving an animal upon a street shall have all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle as set forth in this chapter, except those provisions which by their very nature can have no application. (Ord. No. 295, § 2-4)</p>	N/A	N/A	N/A	<p>https://library.qcde.us/lib/san_juan_capistrano_ca/pub/municipal_code/item/title_4-chapter_6/article_2/sec_4_6_206</p>
Santa Ana	<p>Sec. 36-38. - Persons riding bicycles or animals shall obey traffic regulations. Every person riding a bicycle or riding or driving an animal upon a highway shall be granted all of the rights and shall be subject to all of the duties applicable to the driver of a vehicle as provided for by this chapter, except those provisions which by their very nature can have no application. Sec. 36-41(b) Ride a bicycle or skateboard upon a sidewalk within a business district, or in any other public place, such person shall yield the right-of-way to any pedestrian. (Code 1952, § 3224; Ord. No. NS-560, § 1, 1-15-62)</p>	N/A	N/A	N/A	<p>https://library.municode.com/ca/santa_ana/codes/code_of_ordinances?nodeId=PT12HC_0_CH36TR_ART38E_DIV2ADENMPR_38-38PERBANSVCH0TRHE</p>
Seal Beach	<p>1.05.010 Applicability to Bicycle and Animal Riders. Every person riding a bicycle or riding or driving an animal upon a highway shall have all the rights and be subjected to all of the duties applicable to the driver of a vehicle by this title, except those provisions that by their very nature can have no application. (Ord. 1515)</p> <p>8.05.040 Wheeled Devices Prohibition A. Wheeled Device. For the purposes of this section, a "wheeled device" is any wheeled device propelled by human or mechanical power. "Wheeled device" includes without limitation: bicycles, roller skates, scooters, segways, and skateboards. "Wheeled devices" does not include: cars, trucks and equivalent vehicles; baby strollers; shopping carts utilized for transportation of goods; wheelchairs; and motorized tricycles and motorized quadricycles utilized by persons otherwise unable to move about as pedestrians in reason of physical disability. B. Prohibition. No person shall ride or operate a wheeled device in any of the following locations: 1. City sidewalks, unless authorized by Seal Beach Municipal Code Section 8.10.040. 2. Public property other than sidewalks where signs prohibiting such activity are conspicuously posted. 3. Privately owned sidewalks used for pedestrian traffic where signs prohibiting such activity are conspicuously posted. C. Infraction. Any person who rides or operates a wheeled device in violation of this section shall be guilty of an infraction. (Ord. 1608; Ord. 1533; Ord. 1515)</p> <p>8.10.040 Bicycle Riding on Sidewalks The traffic engineer may post signs permitting bicycle riding on sidewalks at locations where riding in the street would be hazardous. Any person may ride a bicycle on a sidewalk where such a sign has been posted. (Ord. 1515)</p>	<p>"Electric bicycle" has the same meaning as in California Vehicle Code Section 312.5, as it may be amended from time to time. "Regulated mobility device" means bicycles, electric bicycles, etc. 8.2.65.010 Operation of Regulated Mobility Devices. It is prohibited to operate or ride on a regulated mobility device in public areas where such prohibition is posted by signs or as otherwise set forth in this chapter. A list of public locations where regulated mobility devices are prohibited shall be on file in the city clerk's office. The list may be amended from time to time by resolution of the city council. No person shall operate or ride a regulated mobility device upon any sidewalk, in any public drainage facility, culvert, ditch, channel, or any other public athletic/sports court, or gymnasium in the city. Duty to operate with due care, reduce speed. The operator of a regulated mobility device shall exercise all due care and shall reduce the speed of the device, obey all traffic control devices, and take all other action relating to operation of the device as necessary to safeguard the safety of the operator, passengers, and any persons or other vehicles or devices in the immediate area. It shall also be unlawful to transport any other person upon the bar, handle bars, front-end or other area of regulated mobility device not designed for passenger riding or designed for a single person, or cling to or attach oneself or one's regulated mobility device with an operator or rider on board to any moving vehicle or motorized or non-motorized wheeled device. Persons operating or riding a regulated mobility device on a city or county trail must dismount the regulated mobility device where the trail width is less than 5 feet and a pedestrian or equine is within a distance of 50 feet from the regulated mobility device. (Ord. 1704) 8.2.65.015 Enforcement. In lieu of a fine or administrative citation as authorized by this code, and in lieu of filing charges in any court having jurisdiction over a violation, the police chief or designee may allow a violator of this chapter to complete a police department provided safety course for regulated mobility devices</p>	N/A	N/A	<p>https://library.qcde.us/lib/seal_beach_ca/pub/municipal_code/item/title_8-chapter_8_title_10_040</p>
Stanton	<p>14.04.050 Riding. No person shall ride a horse, bicycle, motorcycle, mini-bike, automobile, or other vehicle or animal within a public park or playground; provided, however, that bicycles may be ridden on any road or path designated for such purposes and may be wheeled or pushed by hand over any grass area or trail reserved for pedestrian use. (Prior code, § 14.04.050)</p>	N/A	N/A	N/A	<p>https://library.qcde.us/lib/stanton_ca/pub/municipal_code/item/title_14-chapter_14_04_14_04_050</p>
Tustin	<p>5345 - USE OF BICYCLES Persons riding a bicycle on a public sidewalk, walkway, parkway, off-street bicycle trail or in any public park, recreational area or upon any other publicly owned property shall yield the right-of-way to pedestrians at all times. (Ord. No. 786, Sec. 29, 2-5-79) CROSS REFERENCE: Bicycle registration, Art. 5, Ch. 4.</p>	N/A	<p>5344 - USE OF MOTORIZED CYCLES (A) "Motor-driven" cycle for purposes of this Section is any motorcycle, moped, motor scooter or moped with a motor which produces not in excess of five (5) horsepower, and every bicycle with a motor attached. (B) No person shall drive a motor-driven cycle on any public sidewalk, walkway, parkway or in any public park or recreational area or upon any other publicly owned property except City streets and public highways within the City provided, however, that bicycles with motors attached may be operated on off-street bicycle trails under pedal power and without use of their motors. (Ord. No. 786, Sec. 28, 2-5-79)</p>	N/A	<p>https://library.municode.com/ca/tustin/codes/code_of_ordinances?nodeId=ARTPEUSAR_5345ORNO1453ADDE0013_CH27TR_27ASPR_5345SUBI</p>

Active Transportation Program Biannual Update

Overview

E-bike Safety Study

Safe Routes to School Program

Next STEP

Active Outreach and Education

Ongoing Active Transportation Efforts

E-bike - Electric Bicycle
STEP - Safe Travels Education Program

E-bike Safety Study

- **Analyze gaps** in existing e-bike safety resources and strategies
- **Engage the community** and provide e-bike safety education
- **Provide recommendations** to facilitate e-bike use as a safe and reliable form of transportation in Orange County
- **Recommendation Elements**
 - Key roles
 - Priority actions
 - Benchmarks to evaluate progress
- **Project Status:** Finalized Plan posted and available to public/stakeholders in December 2024



Safety Strategies: Structure

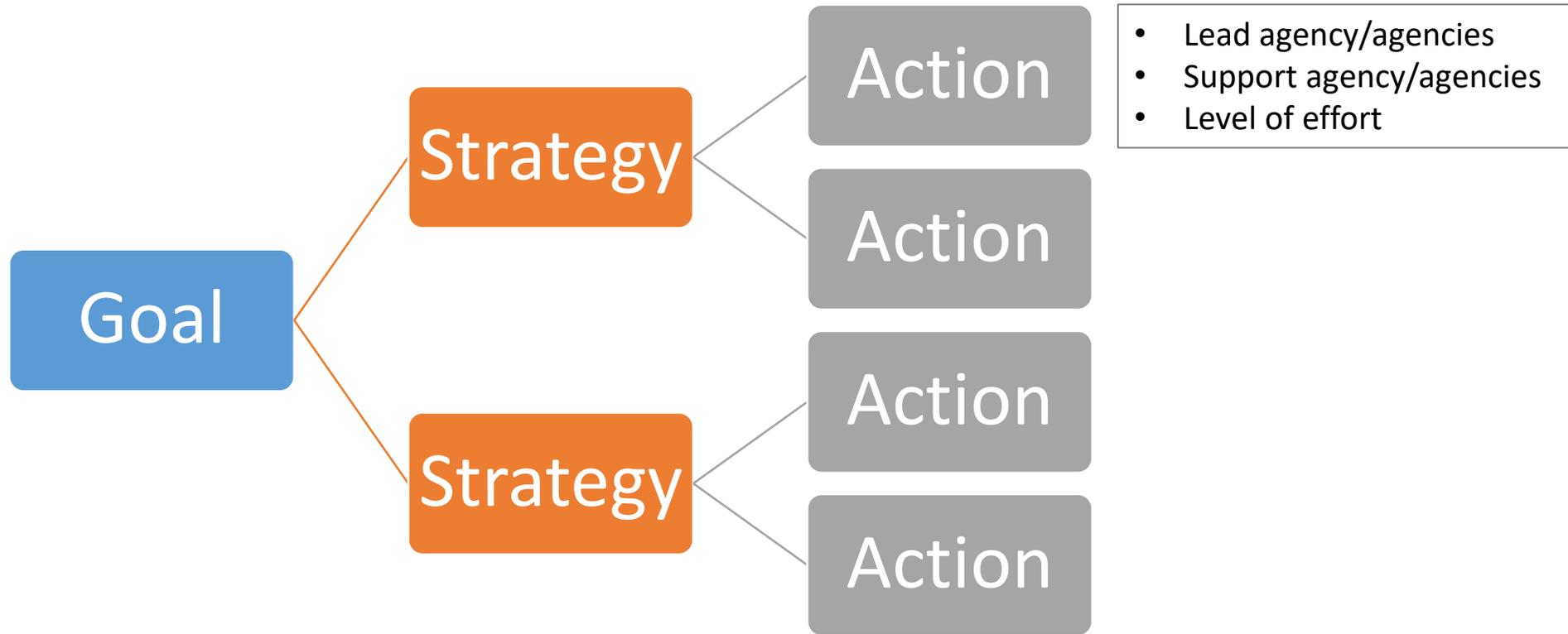
Recommendations Summary

- Six goal focus areas
- 12 strategies
- 25 actions
- Identifies lead/support agencies/organizations and level of difficulty
- Identifies potential funding sources
- How-to toolkit for developing e-bike safety activities

Six goal focus areas

- Infrastructure
- Legislation
- Collisions and injuries
- Ridership
- Education/Encouragement
- Retailer Collaboration

Safety Strategies Structure



Collisions and Injuries

Goal

Build understanding of e-bike crash and risk factors, especially those resulting in severe injuries

Strategy

Collaborate with agencies to enhance standardized tracking and monitoring of county wide e-bike involved crashes

Example Action

Collaborate with Orange County Health Care Agency to monitor and track injuries of e-bike users

Ridership

Goal

Understand growth trends and hot spots for e-bike usage

Strategy

Broaden the sources of e-bike ridership and activity data collection

Example Action

Explore and evaluate e-bike activity and ridership data from data vendors

Education and Encouragement

Goal

Target behavior change for key groups affected by e-bike safety issues

Strategy

Develop targeted education on e-bike safety to riders most at risk in Orange County: the school community (parents, students, and staff) and older adults

Example Action

Develop delivery method for education/encouragement to effectively engage the community in a cost-effective manner

Safe Routes to School Webpage and Coordination

Program Background

The Orange County Transportation Authority (OCTA), in partnership with the Orange County Health Care Agency (OCHCA), completed the Safe Routes to School Action Plan (SRTS AP) in 2021. The SRTS AP outlines initial goals, strategies, and actions to create and manage a countywide SRTS program. Through this process, the agencies jointly developed and supported a recommendation to establish a countywide SRTS program to support schools in need of SRTS programming. In Fall 2023, OCTA and OCHCA established a SRTS program in Orange County, continuing both agencies partnership. The SRTS AP also included the establishment of a Stakeholder Committee that will “serve as a resource to program staff and will play a central role in actively promoting and implementing this Action Plan.” Committee members will cultivate relationships to foster collaboration in the SRTS community, which continues to build a culture of safety for the Countywide SRTS program along with OCTA’s Next STEP (Safe Transportation Education Program) and Orange County Health Care Agency’s (OCHCA) Injury Prevention for SRTS and future programs.

Events

Costa Mesa

STEPPING UP SAFE ROUTES TO SCHOOL IN COSTA MESA

Costa Mesa is making significant strides in promoting active transportation and enhancing safety for students. The City has been building momentum through programs and planning efforts related to Safe Routes to School.

[+ Learn More](#)

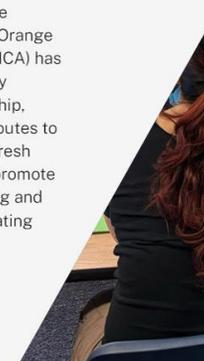


OCHCA

OCHCA AND MAPLE ELEMENTARY TEAM UP FOR SAFER, HEALTHIER STUDENTS

In a collaborative effort to improve student safety and wellness, the Orange County Health Care Agency (OCHCA) has teamed up with Maple Elementary School in Fullerton. This partnership, under the umbrella of the Safe Routes to School (SRTS) Program and CalFresh Healthy Living initiative, aims to promote physical activity, including walking and biking to school, and nutritious eating among students and families.

[+ Learn More](#)



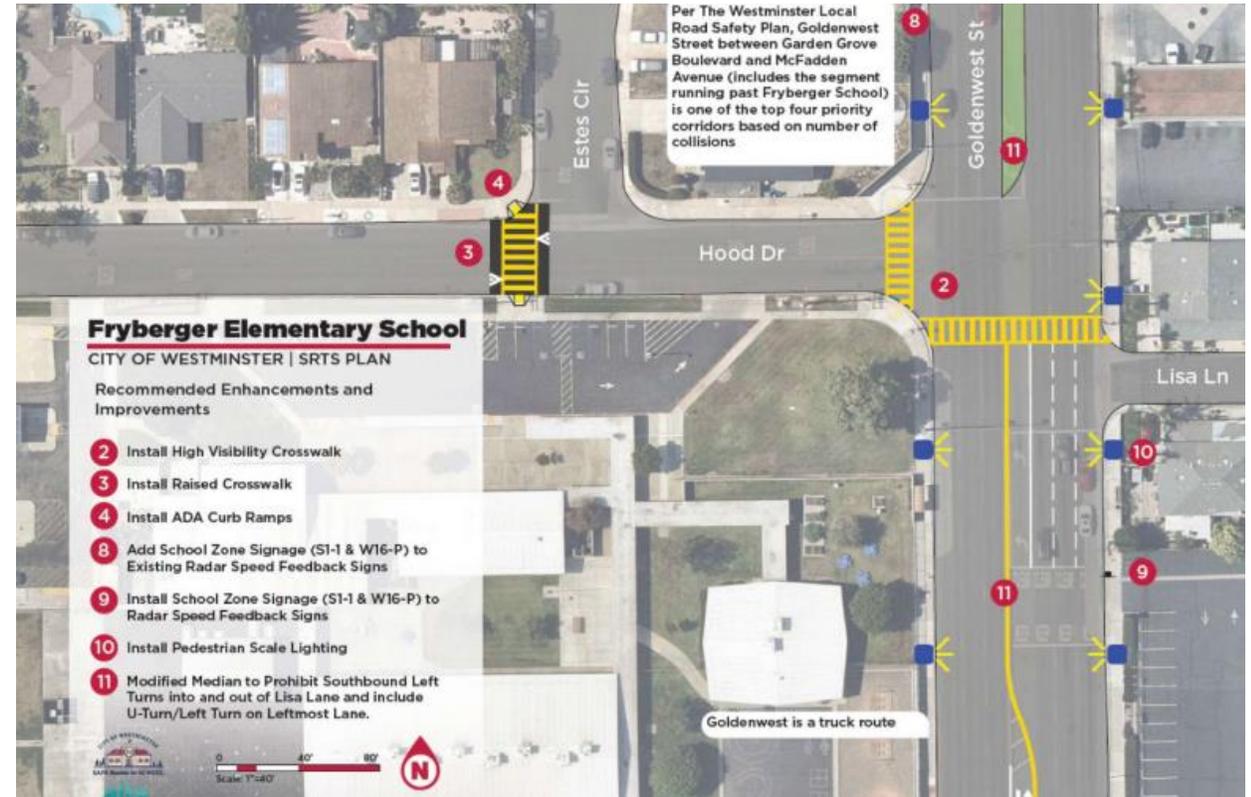
Next Safe Travels Education Program

Project Summary

- 25 schools - Eligibility determined by SRTS Action Plan needs analysis
- Educational programming
- Evaluation/concept development

Current Activities

- School recruitment
- City coordination
- Data gathering/analysis



Westminster SRTS Plan (Alta) – Fryberger Elementary

SRTS – Safe Routes to School

Active Outreach and Education

Project Overview

- Bike rodeos
- Pop-up tables and street teams
- Online education
- Safety equipment distribution
- Stakeholder development
- Staff are taking event requests



Sample safety equipment (L: bell, R: spoke reflectors)

Recent events

- Fiestas Patrias, 9/14/24 in Santa Ana
- Fourth District Supervisor Chaffee Community Bike Ride to Raise Prostate Cancer Awareness, 9/21/24 in Fullerton
- Walk to School Day, 10/9/24 at Washington Elementary in Santa Ana
- Trunk-or-Treat Resource Fair, 10/23/24 in Santa Ana



Sample OCTA Bicycle Stickers

Ongoing Active Transportation Efforts

Bicycle counts

- 2024 Data incorporation - complete
- Data distribution - complete

Bicycle network update

- Existing bikeways network - complete
- OC bikeways map – complete

OC Connect Project

- 4-mile Class I bike path in Santa Ana and Garden Grove
- Project Approval/Environmental Document Phase
- Finalize Spring 2025

E-bike Coordination

E-bike Coordination Meeting

Ordinance Database

- Updated with proposed ordinances in October

Webpage

- Partner agency efforts
- Plain language ordinance finder

Video Development

- Promoted on Facebook, Instagram, Twitch, and YouTube
- Reach: 1.3 million
- Plays: 170,000
- New outreach method: movie theaters in Aliso Viejo, Anaheim, Brea, Huntington Beach, and Yorba Linda
- New video project underway



Next Steps

- Return to the Board of Directors with updates on active transportation efforts including:
 - OC Connect, e-bike coordination efforts, grant awards
 - Partnering with stakeholders
- Seek funding opportunities to support active transportation activities
 - Continue working with local agencies and community groups to advance active transportation measures for all Orange County residents



November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

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Subject: OC Connect Project Update and Intent to File a California Environmental Quality Act Statutory Exemption for the OC Connect Project

Overview

The Orange County Transportation Authority is the lead agency for the OC Connect Project, a proposed shared-use path connecting the cities of Santa Ana and Garden Grove along the Pacific Electric Right-of-Way. Pursuant to Section 21080.25 of the Public Resources Code, the Orange County Transportation Authority intends to file a California Environmental Quality Act statutory exemption of this project.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA), in cooperation with the cities of Garden Grove and Santa Ana (cities), the California Department of Transportation (Caltrans) District 12, and the Orange County Public Works (OCPW), proposes approximately four miles of Class I shared-use path (path). This new active transportation facility would connect the cities and close a three-mile-long gap between a future bikeway on Santa Ana Boulevard and downtown Garden Grove.

Discussion

Location and Activities

The proposed OC Connect Project (Project) would be constructed as a paved shared-use path, allowing nonmotorized use, and following Caltrans Class I bikeway design standards as specified in the Caltrans Highway Design Manual Chapter 1000. It may include a parallel unpaved walking trail where space

allows. The Project will add connectivity to the region by building approximately 1.6 miles of new path in the City of Garden Grove and 2.4 miles of new path in the City of Santa Ana, creating a seamless four-mile facility connecting two downtown areas as well as two important active transportation corridors including the countywide 66-mile Class I OC Loop via the Santa Ana River Trail and the Class IV separated bikeway on Hazard Avenue. OC Connect is funded by a \$3 million Active Transportation Program grant to prepare the environmental analysis for the path. Caltrans, as assigned by the Federal Highway Administration, is the lead agency under the National Environmental Policy Act (NEPA). OCTA is the lead agency under the California Environmental Quality Act (CEQA). The current project phase, also known as the Project Approval and Environmental Document (PA/ED), will define the preferred alignment of the trail by completing preliminary design, determining the trail's feasibility, estimating project costs, and determining what, if any, avoidance or mitigation measures must be taken to complete the Project. The Project includes extensive communication to local stakeholders and the surrounding community through a public outreach and input campaign.

Project Purpose and Need

The purpose of the Project is to build active transportation infrastructure for the local communities (cities) and the region by:

- Increasing local and regional active transportation connectivity by closing the active transportation gap between the City of Santa Ana, the Santa Ana River Trail, and the City of Garden Grove.
- Providing an equitable, accessible, sustainable, and convenient first and last mile transit connectivity with an improved active transportation network.

The project is needed to address the following deficiencies:

- There are limited reliable and direct active transportation options connecting residents from the cities to one another and to the regional bikeway network (Santa Ana River Trail).
- First and last mile active transportation connectivity to the OCTA Transit network is limited due to road network characteristics such as right-of-way (ROW) constraints, high vehicular traffic speeds, and volumes.

Environmental Approach

NEPA

NEPA requires the analysis of environmental impacts for all federally funded projects. For the Project, Caltrans is serving as the NEPA Lead Agency. Based on the analysis completed by OCTA during the proposed project's 2022 Preliminary Environmental Study, it was determined that there were likely no significant impacts and that a NEPA categorical exclusion would be appropriate. A NEPA categorical exclusion means that the Project does not require preparation of an environmental assessment or an environmental impact statement.

CEQA

Public Resources Code Section 21080.25 establishes statutory exemptions for certain transportation projects. Projects that qualify for a statutory exemption are not subject to the requirement to prepare a CEQA document or other project-specific environmental analysis. The Project aligns with the exemptions as summarized below:

- Class I multi-use trail supporting active transportation users within OCTA-owned ROW and along the County of Orange/Orange County Flood Control District East Garden Grove-Wintersburg Channel maintenance road ROW. The multi-use trail would have up to 16 different entry points providing access to affordable transit, including the 66-mile Class I OC Loop, the Santa Ana Regional Transportation Center, the future OC Streetcar, as well as multiple bus stops. (Section 21080.25(b)(1))
- New wayfinding and customer information for path and transit users within the public ROW would be included as part of the Project. (Section 21080.25(b)(2))
- OCTA is the local agency and the lead CEQA agency implementing this Project during the PA/ED phase. (Section 21080.25(c)(1))
- Modifications to existing roadways in support of vehicle capacity needs are not included as part of the Project. (Section 21080.25(c)(2))
- The Project would not require the demolition of affordable housing units. (Section 21080.25(c)(3))

Based upon the above criteria, this Project meets the definition of a statutorily exempt project and is consistent with the provisions of Public Resources Code Section 21080.25, which accelerates sustainable transportation projects.

Public Outreach

Phase I

The project team conducted Phase I of public outreach between October and December 2023. The goal of this phase was to assess the public's walking and bicycling habits, gauge their interest in a variety of trail amenities, and prioritize design criteria being used by the project team to vet various trail alignments and alternatives. The project team interfaced with the public using the following:

- Online survey,
- Interactive story map,
- Two public meetings (one virtual and one in-person),
- Five pop-up tables at community events,
- Social media engagement,
- Development and distribution of a communications resource toolkit to 51 local organizations,
- Digital noticing, and
- An interview with Vietnam America Television.

Outreach activities and materials were made available in English, Spanish, and Vietnamese and focused on the areas immediately surrounding the project in the cities.

Phase II

The project team is in the process of delivering Phase II of public outreach, which began on September 18, 2024, and continues through November 15, 2024. The Phase II outreach goal is to inform the public of how their feedback on walking and bicycling habits, potential trail amenities, and design criteria was used to vet various trail alignments and alternatives. This information will be incorporated into the design plans as well as further prioritizing and developing trail amenity options to inform the design phase of the project. In addition, this phase is being conducted to advise residents and stakeholders that OCTA intends to file a CEQA statutory exemption for the Project.

As a part of this process, OCTA is holding three publicly noticed meetings:

- Wednesday, October 2, 2024, 6:00 a.m. to 8:00 p.m., Vista Global Academy,
- Monday, November 4, 2024, OCTA Regional Transportation Planning Committee meeting, beginning at 10:30 a.m., and
- Thursday, November 7, 2024, Artesia Pilar Neighborhood Association Meeting, 6:00 p.m. – 7:00 p.m.

These meetings will afford an opportunity to hear and respond to public comments related to the Project and the intent of OCTA to file a CEQA statutory exemption.

Concurrently with both phases of public outreach, the project team held meetings with both internal and external project stakeholders to introduce the Project, discuss alignment and amenity options, and identify and troubleshoot any potential issues. Stakeholders include the cities, the Orange County Flood Control District, Caltrans District 12, the OC Streetcar, the OCTA Garden Grove Bus Base, and the California Public Utilities Commission, as well as community stakeholder groups such as the Artesia Pilar Neighborhood Council, schools, and businesses in the area. The project team maintains an ongoing dialogue with all stakeholders as the environmental document and design plans are developed and refined.

Trail Design

The project team has completed draft 35 percent design plans and is incorporating comments by project stakeholders. The design plans include layout and typical section elements for the trail. This will provide sufficient detail to complete the requisite engineering and technical studies as well as the environmental documents. Implementation of the subsequent project phases will be at the discretion of the local agencies.

A key element identified in the Project is the original Red Car Pegram truss bridge spanning the Santa Ana River. The project team completed a Structural Evaluation Report and Advanced Planning Study for the structure and determined that the bridge will be reusable with minimal impact to the existing structure. Retrofits will be necessary including replacement of the existing bearings, raising the bridge by approximately 4.5 feet to provide a minimum 12.5-foot clearance for maintenance and emergency vehicles under the bridge, bridge decking for active transportation use, and safety railing attached to the decking along the length of the bridge.

\$6 million in funding for final design has been secured through the following:

- \$750,000 earmark from Congressman Lou Correa for the design of the upgraded bridge,
- \$350,000 Department of Toxic Substances Control grant for the Phase II environmental site assessment,
- \$1,000,000 Environmental Protection Agency grant for site assessment and cleanup, and
- \$3,900,000 through the State Transportation Improvement Program.

Pending the final cost estimate for design activities, the Project has secured funding to proceed through the final design phase.

Summary

OCTA, in cooperation with the cities, Caltrans, and OCPW, proposes approximately four miles of Class I shared-use path. The new active transportation facility would connect the cities and close a three-mile-long mobility gap between a future bikeway on Santa Ana Boulevard and downtown Garden Grove. The PA/ED phase of the Project is anticipated to be completed by June 2025. This Project meets the definition of a CEQA statutorily exempt project and is consistent with the intent of Public Resources Code 21080.25, which accelerates sustainable transportation projects. This project meets the criteria for, and will be filed as, a NEPA categorical exclusion.

Attachment

- A. OC Connect Fact Sheet

Prepared by:



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Approved by:



Kia Mortazavi
Executive Director, Planning
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OC CONNECT

GARDEN GROVE - SANTA ANA



PARTNER JURISDICTIONS

Garden Grove, Santa Ana, County of Orange

AT A GLANCE

PROJECT MANAGER: Peter Sotherland
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COMMUNITY OUTREACH: Marissa Espino
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WEBSITE: octa.net/OCConnect

Fact Sheet as of 9/25/23

OVERVIEW

The Orange County Transportation Authority (OCTA) is studying the development of a biking and walking trail connection along the former Pacific Electric Right-of-Way (PE ROW) corridor in Santa Ana and Garden Grove. The OC Connect study area includes 3.1 miles of the PE ROW between Raitt Street in Santa Ana and Euclid Avenue in Garden Grove, as well as 0.85 miles of the Wintersburg Channel between the PE ROW and Hazard Avenue in Santa Ana.

The project creates a 4-mile biking and walking trail connection between the downtown areas of Garden Grove and Santa Ana as well as to the Santa Ana River Trail and the countywide 66-mile OC Loop bikeway. This project would improve the transportation network along the corridor and provide a safe, well connected active transportation route.

This study will complete the environmental review of the corridor, known as the Project Approval & Environmental Document (PA/ED) phase for a Class 1 bike path, which is a shared bicycle and pedestrian path separated from vehicular traffic. The PA/ED phase will refine the alignment of the trail by completing preliminary design, determine the trail's feasibility, estimate project costs, and determine what, if any, avoidance or mitigation measures must be taken to complete the project.

BENEFITS

The OC Connect trail project would provide critical connections between Garden Grove and Santa Ana with public access from various entry points along the trail. It would increase the use of active transportation travel modes, provide a no-cost, zero-emission transportation option, enhance safety and mobility for non-motorized users, and facilitate active travel away from high-speed and high-volume traffic. The completed study will support the advancement of subsequent project phases to be led by the cities of Garden Grove and Santa Ana.

SCHEDULE

Milestones	Approximate Timeline
Project Initiation	July 2023
Public Engagement	Ongoing
Preliminary Engineering & Technical Studies	Fall 2023 to Spring 2024
Environmental Documentation	Spring 2024 to Winter 2024
Study Completed	Spring 2025

GET INVOLVED

Stay involved and connected by signing up at www.octa.net/OCConnect.



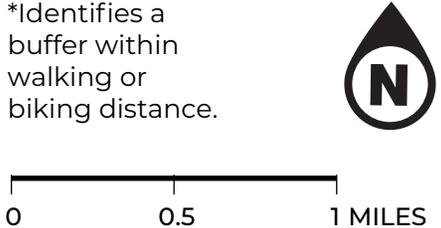
Orange County Transportation Authority
550 S. Main Street
P.O. Box 14184
Orange, CA 92863-1584
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www.octa.net

GARDEN GROVE

LEGEND

- OC Connect Project Study Area
- Existing Trails and Separated Bikeways
- OC Streetcar and Stops
- Garden Grove
- Santa Ana
- 1 Mile Buffer*

*Identifies a buffer within walking or biking distance.



0 0.5 1 MILES



OC Connect Project Update and Intent to File a California Environmental Quality Act Statutory Exemption for the OC Connect Project



Project Partners



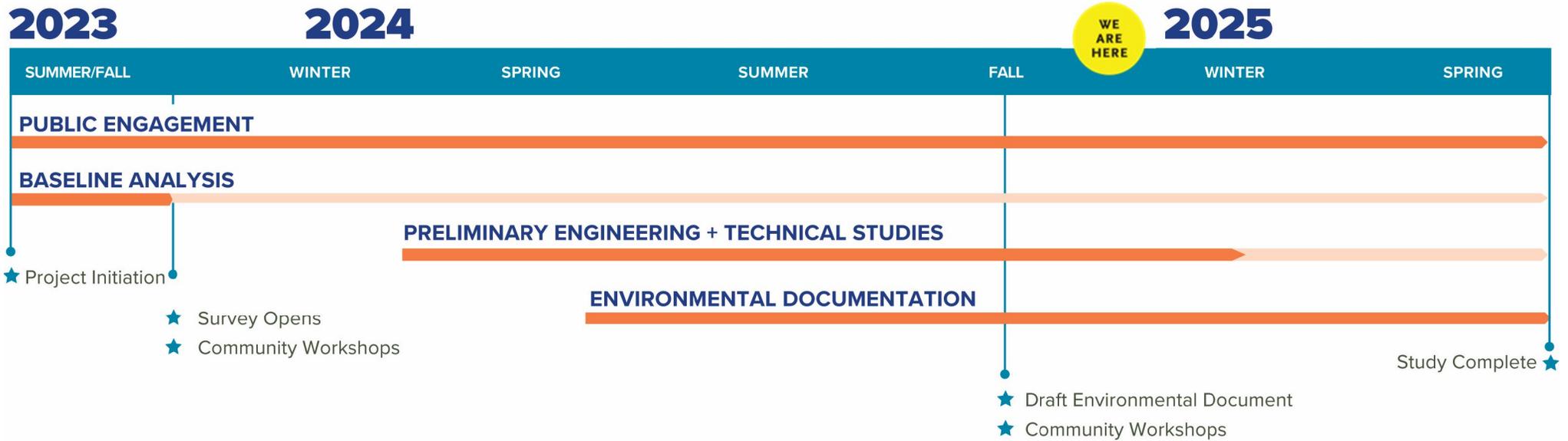
Project Background



- 1.5 miles in Garden Grove
- 2.3 miles in Santa Ana
- Preliminary engineering and environmental approval phase
- Adjacent to OC Streetcar from Harbor Boulevard to Raitt Street



Project Schedule



OC Connect Benefits



Greater Connectivity



Promotes Health + Wellness



Historic Preservation



New Parks and Green Space



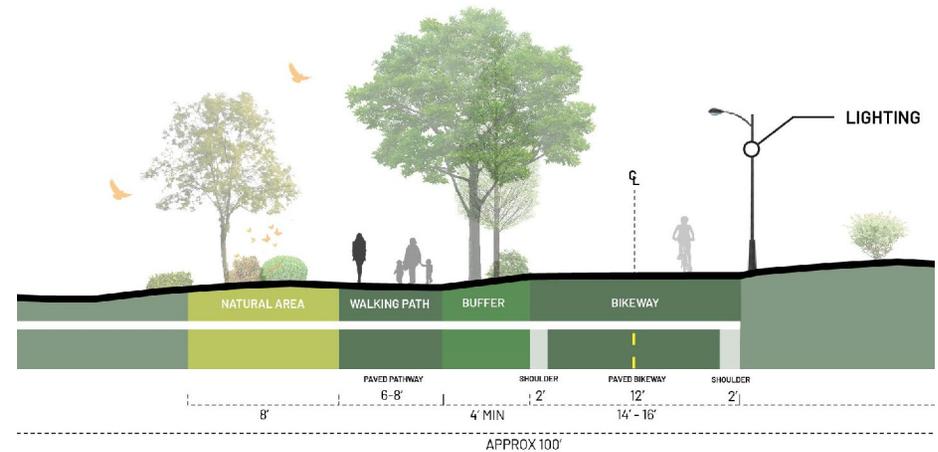
Provides a Low-Cost
Transportation Option



Community Identity

Design Updates

- Phase I outlines the **project design**, **features**, and **limiting existing conditions** for environmental documentation and permitting.
- **Coordinating** the preliminary concept designs with project stakeholders and agencies.



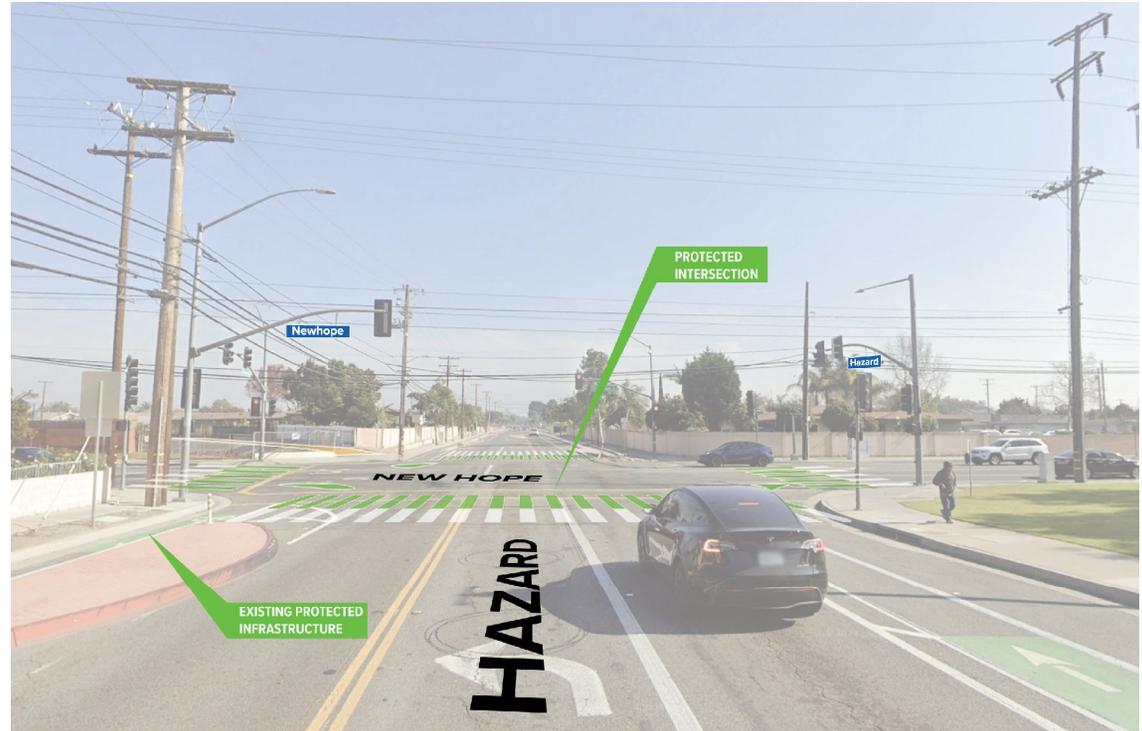
Design Updates

- Phase I identifies opportunities for **trail features** to be refined in response to feedback received from public outreach and coordination with local jurisdictions.



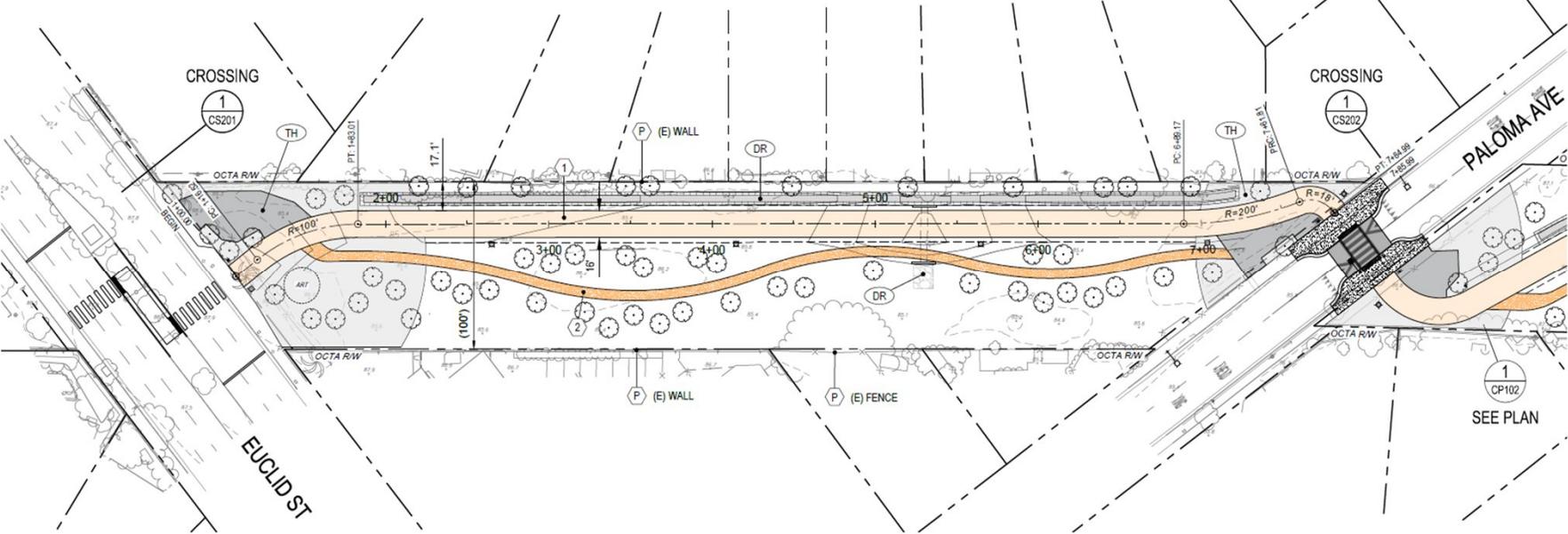
Design Updates

- Final 35% plans under review
- Design Memo
Document to bridge the gap between this 35% design phase and the 100% PS&E Phase



PS&E - Plans, Specifications, and Estimates

Trail Design Progress



Euclid to Paloma, Linear Park with Wide Right-of-Way

Community Engagement

Phase I November 6 - December 18, 2023 (six-week engagement period)



Collected **287** survey responses



Received **106** comments on the public input map



Hosted **2** PDT meetings, **1** virtual and **1** in-person community workshop



Engaged **1,280** community members at **5** community pop-ups/events in Garden Grove and Santa Ana



Featured a webpage viewed more than **1,300** times



Collaborated with **2** paid CBO Partners



Promoted the survey and project website on **social media** **10** Facebook posts, **3** Instagram posts **3 X** (Twitter) posts with **6,132** impressions



Distributed **3,620** fact sheets to local organizations and businesses



Developed and distributed **toolkits**, providing easy-to-share communication resources to **51** local organizations



Reached **285** community members through **digital noticing**



Shared materials in **English, Spanish, and Vietnamese**

CBO – Community-Based Organization
PDT – Project Development Team

Community Engagement (Cont.)

Phase II: September 18, 2024 – November 15, 2024

- **Comprehensive Outreach Campaign (English, Spanish and Vietnamese)**
- **Multilingual Community Survey**
- **Public Meetings**
 - In-Person Meeting – Wednesday, October 2; Vista Heritage Global Academy, Santa Ana
 - Virtual Meeting – Wednesday, October 9
 - OCTA RTP – Monday, November 4; OCTA Administrative Offices
 - In-person Meeting – Thursday November 7; El Salvador Park
- **Targeted Outreach (Nina Place & Wintersburg Channel)**
- **Pop-Ups, StoryMap, Multilingual Helpline, CBO Engagement**



OCTA – Orange County Transportation Authority
RTP – Regional Transportation Planning

Environmental Process

- **National Environmental Policy Act (NEPA - Federal)**

- Caltrans is the NEPA lead agency
- Categorical exclusion – category of actions that individually or cumulatively have no significant effect on the quality of the human environment
- NEPA approval must be completed before a federal grant agreement can be executed and funding can be obligated
- Supported by technical studies

- **California Environmental Quality Act (CEQA - State)**

- OCTA is the CEQA lead agency
- Public Resources Code Section 21080.25 - statutory exemption for sustainable transportation projects
- Criteria: (1) local agency carries out project and is lead agency; (2) project would not add new auto capacity; and (3) project would not demolish affordable housing
- Environmental documentation to be retained by OCTA

- **Submit a Written Comment**

- Please use the form at [octa.net/OC Connect](https://octa.net/OC_Connect) to submit your comments. All feedback will be reviewed and considered
- To receive a response, written comments must be submitted by 5:00 p.m. on November 15, 2024

Environmental Process – Next Steps

- Solicit public and stakeholder input – fall 2024
- Analyze Phase II outreach results – winter 2024
- Complete design memo and environmental studies – winter 2024
- Finalize and file environmental documents – spring 2025

Stay Connected

- **StoryMap:** occonnect-storymap.com
- **Online Survey:** bit.ly/OC-Connect-Survey
- **Project Helpline:** (800) 716-8518
- **Written Comment Form:** octa.net/OCConnect

Peter Sotherland

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Marissa Espino

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**Scan the QR Code to
take our survey!**





November 4, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Regional Planning Update

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "From:" line of the email header.

Overview

Regular updates on regional planning matters are provided to highlight current transportation planning issues impacting the Orange County Transportation Authority and the Southern California region.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA) regularly coordinates with other planning and regulatory agencies within the Southern California region. This coordination is conducted at many levels, involving the OCTA Board of Directors (Board), executives, and technical staff. Some examples of the regional planning forums in which OCTA participates include:

- Southern California Association of Governments (SCAG) Regional Council, policy committees, and technical working groups,
- State Route 91 Advisory Committee,
- Regional Chief Executive Officers meetings,
- South Coast Air Quality Management District (AQMD) working groups
- Interregional planning coordination meetings (OCTA, SCAG, the San Diego Association of Governments, and the California Department of Transportation [Caltrans] districts 7, 11, and 12).

Regional planning updates are prepared twice a year, with the last update provided to the Board in May 2024. Attachment A includes regional planning activities that are being monitored by staff, including relevant activities highlighted in previous updates.

Since the May 2024 update, there have been new developments in the following planning activities:

- Resolution on potential federally imposed highway funding sanctions
- SCAG's Expert Panel on Induced Travel Impacts of Priced Managed Lanes

A discussion of each is provided below.

Discussion

Resolution on Potential Federally Imposed Highway Funding Sanctions

In May 2024, staff presented a report to the Board about the potential for federally imposed highway funding sanctions. The report highlighted ongoing disagreements between the United States Environmental Protection Agency (EPA), California Air Resources Board (CARB), and South Coast AQMD over the Contingency Measure Plan (CMP) for the 1997 ozone National Ambient Air Quality Standard. The EPA proposed disapproving the CMP, arguing that it did not fully meet Clean Air Act requirements, particularly concerning the distribution of responsibilities between federal and state agencies. OCTA's primary concern was the possibility of highway funding sanctions, which could restrict federal funding for critical transportation projects beginning in fiscal year 2026-27 if the disapproval was finalized.

Since the May 2024 update, EPA, CARB, and South Coast AQMD have resolved their disagreements and avoided the need for sanctions. Instead, the agencies agreed to work collaboratively to meet ozone standards in the South Coast Air Basin. On July 22, 2024, the agencies issued a Joint Statement on Advancing Emissions Reductions (Attachment B). The agencies also issued individual letters of intent detailing the actions each agency will undertake to reduce emissions (Attachments C, D, and E). These actions are summarized below:

- EPA: Reduce emissions from locomotives, aviation, non-road engines, and ocean-going vessels by advancing zero-emission technologies, tightening emissions standards, and collaborating on innovations to lower NOx emissions.
- CARB: Develop regulations to reduce NOx emissions across sectors, including aircraft, ocean-going vessels, and heavy-duty vehicles, aiming to achieve five tons per day of NOx reductions by 2033.
- South Coast AQMD: Implement zero-emission projects for locomotives and off-road equipment, introduce indirect source rules for rail yards and marine ports, and conduct technology demonstrations for cleaner aviation and maritime practices.

The agreement resulted in the withdrawal of the 2019 CMP and, while the EPA maintains its proposed disapproval, the withdrawal prevents the issuance of a final determination. Going forward, the agencies will pursue their commitments from the letters of intent and revise the CMP to meet federal requirements and ensure compliance with EPA standards. OCTA will continue to monitor this process to safeguard the agencies' interests.

Related to this resolution, AQMD was awarded approximately \$500 million from the EPA's Climate Pollution Reduction Grant (CPRG) program. The CPRG funds are intended to reduce diesel pollution and invest in zero-emission infrastructure targeting heavy-duty freight vehicles and trains. By investing in zero-emission technologies, smog-forming emissions will be reduced, helping to meet the federal air quality standards that were at the center of the proposed disapproval discussed above.

SCAG has reported that they will receive \$50 million from this grant to advance its Last Mile Freight Program, which aims to transition last-mile delivery vehicles to clean technologies. Staff is continuing to monitor for other specific programs that will be used to direct investments for the remainder of the award.

Summary of SCAG's Expert Panel on Induced Travel Impacts of Priced Managed Lanes

In July 2024, Professor Michael Manville from the University of California, Los Angeles' Institute of Transportation Studies, published the SCAG-funded expert panel study, *Induced Travel Estimation Revisited*. The study reviews the effect of priced managed lanes (express lanes) on inducing vehicle miles traveled (VMT), as required by SB 743 (Chapter 386, Statutes of 2013).

A key question raised in the report is whether the use of VMT as a standalone environmental metric for evaluating transportation impacts under the California Environmental Quality Act is appropriate. The report highlights the need to recognize that not all VMT impose equal environmental burdens. For instance, an electric vehicle driving in off-peak hours produces far fewer impacts than a gasoline-powered vehicle in rush-hour traffic. Therefore, it is suggested that VMT alone does not capture the full complexity of transportation systems' performance, and that more nuanced measures of environmental impact would provide for a more accurate and appropriate analysis.

The report also explores whether it is appropriate for Caltrans to continue using the same methodology to analyze general purpose lanes as for express lanes. While express lanes differ from general purpose lanes in terms of pricing and occupancy policies, the report concludes that there is insufficient research to support altering the current assumption that adding new express lanes will likely increase VMT at a rate similar to that of general purpose lanes. The current assumption presumes that when vehicles move to the new express lanes, any

space freed up in general purpose lanes is quickly filled by new trips, resulting in more total driving. The report recommends that further research is needed to differentiate the impact of express lanes from that of general purpose lanes. It is also noted that the induced VMT calculator used by Caltrans does not adequately account for the local context of project areas, suggesting it may be insufficient for estimating induced VMT accurately for individual projects.

Until sufficient research is conducted demonstrating that express lanes generate a lower rate of induced VMT compared to general purpose lanes, projects that add capacity on freeways (that are not already environmentally cleared) will likely require extensive mitigation to offset induced VMT.

Summary

OCTA staff is actively engaged in monitoring regional planning efforts, including developments such as the resolution of potential federal highway funding sanctions and SCAG's expert panel on induced travel impacts of priced managed lanes. As part of these efforts, staff will continue to track updates and provide input to ensure OCTA's interests are represented.

Attachments

- A. Regional Planning Activities – November 2024
- B. Letter from Joseph Goffman, Assistant Administrator for Air and Aviation, U.S. Environmental Protection Agency, and others, Joint Statement on Advancing Emissions Reductions in the South Coast Air Quality Management District – Dated July 22, 2024
- C. Letter from Martha Guzman, Regional Administrator, U.S. Environmental Protection Agency, and Alejandra Nunez, Principal Deputy Assistant Administrator, U.S. Environmental Protection Agency, to Liane M. Randolph, Chair, California Air Resources Board, and Vanessa Delgado, Chair, South Coast Air Quality Management District Governing Board, Dated July 22, 2024
- D. Letter from Liane M. Randolph, Chair, California Air Resources Board, to Joseph Goffman, Assistant Administrator for Air and Aviation, U.S. Environmental Protection Agency, and others, re: Letter of Intent for Further Measures to Improve Air Quality in South Coast, Dated July 22, 2024
- E. Letter from Vanessa Delgado, Governing Board Chair, South Coast Air Quality Management District, to Joseph Goffman, Assistant Administrator for Air and Aviation, U.S. Environmental Protection Agency, and Liane M. Randolph, Liane M. Randolph, Chair, California Air Resources Board, Dated July 22, 2024

Prepared by:



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**Regional Planning Activities
November 2024**

California Department of Transportation (Caltrans)

	Summary	Key Dates	OCTA Interest	OCTA Role
<p>Interstate 5 (I-5) Managed Lane Project (Red Hill Avenue to Orange/ Los Angeles County Line)</p>	<p>Caltrans District 12 is studying implementation of high-occupancy toll lanes on I-5 between the Los Angeles County Line and State Route 55.</p> <p>Caltrans finalized a project study report (PSR) and an initial concept of operations (ConOps) in November 2019 and presented a summary to the Orange County Transportation Authority (OCTA) in December 2019. The OCTA Board of Directors (Board) requested that Caltrans include a high-occupancy vehicle (3+ occupancy) alternative as part of the subsequent environmental studies that are currently underway.</p> <p>Caltrans provided subsequent project updates to the Board in August 2022, and in April 2023. Another update is anticipated in early 2025.</p>	<p><u>November 2019</u> – Caltrans finalized ConOps and PSR</p> <p><u>May 2022</u> – Caltrans initiated environmental studies for I-5 managed lanes</p> <p><u>Summer 2023</u> – Draft project report and environmental document released for public review</p> <p><u>July 20, 2023</u> – Comments submitted by OCTA</p> <p><u>Fall 2024</u> – Anticipate final project report and environmental document</p> <p><u>December 2024</u> – Seek California Transportation Commission (CTC) tolling approval</p> <p><u>2025</u> - Begin design</p> <p><u>2026</u> – Begin construction</p> <p><u>2029</u> – Anticipated opening year</p>	<p>Prioritize corridor-wide (general purpose and managed lanes) operational benefits and reliability.</p> <p>Development of toll policies, integration with adjacent toll facilities, equity considerations, support for transit services, and any necessary mitigation for vehicle miles traveled.</p>	<p>Coordinate executive-level meetings.</p> <p>Assist with planning efforts and provide technical support to Caltrans and other partner agencies throughout development of the ConOps, PSR, and subsequent studies.</p>

Caltrans (continued)

	Summary	Key Dates	OCTA Interest	OCTA Role
<p>Games Route Network (GRN) (Caltrans District 7)</p>	<p>The GRN is a network of roads for traveling between official venues during the Los Angeles (LA) 2028 Olympics (LA28). These will be dedicated lanes for the use of Olympic Games vehicles. General traffic will be prohibited from using these dedicated travel lanes. The network is intended to promote “No Venue Parking” at the LA28 – part of a “Transit First” objective for LA28.</p>	<p>TBD</p>	<p>OCTA to continue monitoring as developments occur.</p> <p>Provide input and service recommendations to ensure alignment with Orange County plans.</p>	<p>Ensure that OCTA operations are prepared to support the GRN and meet the needs of Orange County transit riders.</p>

Regional Planning Activities November 2024

CTC

	Summary	Key Dates	OCTA Interest	OCTA Role
SB 1121 (Chapter 508, Statutes of 2022)	SB 1121 requires the CTC, in consultation with California State Transportation Agency and Caltrans, to prepare a needs assessment of the cost to operate, maintain, and provide for the necessary future growth of the state and local transportation system for the next ten years. The assessment is focused on potential funding gaps resulting from a drop in gas tax revenue due to increased electric vehicle adoption.	<p><u>January 2024</u> – Interim needs assessment report submitted to State Legislature</p> <p><u>Fall 2024</u> – Release Draft SB 1121 complete needs assessment and hold public workshop</p> <p><u>January 2025</u> – Transmit final assessment to State Legislature</p>	Provide input on assumptions included in scenarios used to project revenue and needs such as zero-emissions vehicle adoption rates, vehicle miles traveled, and local needs.	Provide input to Caltrans on status of regional transportation plans, ten-year multimodal transportation needs, ten-year revenue projects.

Regional Planning Activities November 2024

Southern California Association of Governments (SCAG)

	Summary	Key Dates	OCTA Interest	OCTA Role
<p>2024 Regional Transportation Plan/ Sustainable Communities Strategy (RTP/SCS)</p>	<p>The 2024 RTP/SCS is a federally required transportation planning document. The 2024 RTP/SCS addresses needs over a 20-plus year planning horizon and is constrained by a reasonably foreseeable revenue forecast. It must also demonstrate air quality conformity and greenhouse gas emission reductions with budgeted levels set by the United States Environmental Protection Agency and California Air Resources Board (CARB).</p> <p>The 2024 RTP/SCS, or Connect SoCal 2024, is an update to the 2020 RTP/SCS, Connect SoCal 2020.</p> <p>Note: CARB is currently conducting a technical review of SCAG’s SCS. SCAG has received preliminary feedback from CARB and is actively working to address the concerns raised. One key issue centers around SCAG’s auto operating cost methodology. SCAG remains confident in its approach and continues to engage in discussions with CARB to resolve the matter.</p>	<p><u>2021-2022</u> – Initiate plan development process and establish foundation and frameworks</p> <p><u>Spring 2022 – Fall 2022</u> – Data collection and policy development; OCTA submitted projects consistent with 2022 Long-Range Transportation Plan (LRTP)</p> <p><u>Winter 2023</u> – Outreach and analysis</p> <p><u>Spring 2023</u> – Draft plan policy discussions</p> <p><u>Fall 2023</u> – Draft plan, transportation conformity determination, and environmental document release</p> <p><u>January 2023</u> – OCTA submitted comment letter on the draft 2024 RTP/SCS</p> <p><u>April 2024</u> – Adoption of the final 2024 RTP/SCS by SCAG</p>	<p>Ensure inclusion of projects identified in OCTA’s LRTP.</p> <p>Support policies that are consistent with OCTA policies and programs.</p>	<p>Coordinate with SCAG and other partner agencies.</p> <p>Participate in working groups.</p> <p>Monitor SCAG policy committees.</p> <p>Review and comment on related materials.</p>

Regional Planning Activities November 2024

SCAG (continued)

	Summary	Key Dates	OCTA Interest	OCTA Role
<p>Federal Transportation Improvement Program (FTIP)</p>	<p>The FTIP is a listing of multimodal transportation projects proposed over a six-year period for the SCAG region. The projects include highway improvements, transit, rail and bus facilities, high-occupancy vehicle lanes, active transportation, and signal synchronization, amongst others. SCAG produces a biennial FTIP update for the region on an even-year cycle.</p> <p>The FTIP is prepared to implement projects and programs listed in the RTP/SCS and is developed in compliance with state and federal requirements.</p>	<p><u>September 2024</u> – Regional Council adopted 2025 FTIP and Connect SoCal 2024 Amendment 1</p>	<p>Ensure inclusion of projects identified in OCTA's LRTP.</p>	<p>Coordinate with SCAG and other partner agencies for implementation of FTIP projects.</p>

SCAG (continued)

	Summary	Key Dates	OCTA Interest	OCTA Role
SoCal Greenprint	<p>SCAG is developing the SoCal Greenprint Tool (Tool), a conservation mapping program that highlights the benefits of natural lands, waters, and agricultural lands, including access to parks and trails, habitat protection and connectivity, clean water, clean air, food production, and increased resilience to climate change.</p> <p>SCAG has established a Technical Advisory Committee (TAC) to develop data guidelines, parameters, and criteria for the Tool. The Tool will align with SCAG’s Regional Advance Mitigation Program Policy Framework and 2020 RTP/SCS Programmatic Environmental Impact Report (EIR) mitigation measures.</p>	<p><u>June 2023</u> – Formation of TAC</p> <p><u>June 2023</u> – Consultant selection (Arup) for development of SoCal Greenprint Tool</p> <p><u>June-October 2023</u> – Three TAC meetings held – one OCTA staff member sat on TAC</p> <p><u>February 2024</u> – Regional Council adopted draft data standards for Greenprint Tool</p> <p><u>Summer 2024</u> – Perform beta testing and complete development</p> <p><u>Fall 2024</u> – Release Tool and conduct training and workshops</p> <p><i>*SCAG notes that the timeline is tentative</i></p>	<p>Monitor and provide input to ensure OCTA’s environmental mitigation programs and policies are considered and not impacted.</p>	<p>Review and comment on related materials and attend training/workshops.</p>
LA28	<p>SCAG is coordinating with LA Metro to develop mobility plans and secure funding.</p> <p>SCAG will support several mobility strategies and lead the effort on freight/demand management.</p>	<p><u>October 2024</u> – Mayor of Paris is invited to come and speak to SCAG Executive Administration Committee</p>	<p>Coordinate with SCAG and LA Metro to develop inter-jurisdictional mobility plans for LA28.</p> <p>Support the development of traffic demand management strategies.</p>	<p>Monitor SCAG’s LA28 planning coordination with LA Metro, and other agencies as needed.</p>

Regional Planning Activities November 2024

Los Angeles County Metropolitan Transportation Authority (LA Metro)

Summary		Key Dates	OCTA Interest	OCTA Role
LA28	<p>The Greater Los Angeles Area is preparing for LA28. This will include coordination between OCTA, LA Metro, and other planning agencies in the area.</p> <p>LA Metro’s refined project list (48 total projects) is comprised of the following:</p> <ul style="list-style-type: none"> • Congestion management (nine projects) • First-last mile and active transportation (seven projects) • Bus (11 projects) • Rail (ten projects) • Systemwide (eight projects) • Regional rail (five projects) <p>Projects are anticipated to also prepare the region for the FIFA World Cup in 2026 and Super Bowl in 2027.</p>	<p><u>December 2020</u> – LA Metro Board of Directors approved Mobility Concept Plan</p> <p><u>April 2022</u> – Mobility Concept Plan presented to stakeholders</p> <p><u>December 2023</u> – Mobility Concept Plan and Projects List approved by LA Metro Board of Directors</p> <p><u>October 2024</u> – Meeting of Ad Hoc 2028 Olympic & Paralympic Games Committee</p>	<p>Coordinate with LA Metro and the City of Los Angeles as preparations begin for LA28.</p> <p>Monitor development of financing/ funding strategy and potential implementation of program of projects.</p>	<p>Coordinate with LA Metro and other partner agencies.</p>
LA Metro E Line Eastside Transit Corridor Phase 2	<p>Environmental process and advanced conceptual engineering for extending the E Line further east from its current terminus at Pomona Boulevard and Atlantic Boulevard in East Los Angeles potentially through the cities of Commerce, Montebello, Pico Rivera, Santa Fe Springs, Whittier, and the unincorporated communities of East Los Angeles and West Whittier-Los Nietos.</p>	<p><u>February 2020</u> – LA Metro Board of Directors approved proceeding with the project’s environmental process and withdrawing the State Route 60 and combined alternatives from further consideration in the environmental study</p> <p><u>May 2024</u> – Final EIR certified by LA Metro Board of Directors</p> <p><u>2023- 2028</u> – Final design phase</p> <p><u>2029</u> – Start of construction</p> <p><u>2035</u> – Phase 2 in service</p>	<p>Support alternatives that create potential for future connections into Orange County.</p>	<p>Monitoring.</p>

Regional Planning Activities November 2024

LA Metro (continued)

	Summary	Key Dates	OCTA Interest	OCTA Role
Southeast Gateway Line	<p>In January 2022, the LA Metro Board of Directors approved Los Angeles Union Station as the northern terminus and the 14.5-mile route from Slauson/A (Blue) Line to Pioneer Boulevard in the City of Artesia as the locally preferred alternative for the initial segment between the City of Artesia and downtown Los Angeles. The new light rail transit line will connect downtown Los Angeles to southeastern Los Angeles County, which could provide potential for a future extension into Orange County along the Pacific Electric Right-of-Way.</p>	<p><u>July 2021</u> – Draft environmental document for public comment</p> <p><u>January 2022</u> – Selection of a locally preferred alternative and project terminus</p> <p><u>January 2024</u> – Project renamed from West Santa Ana Branch Transit Corridor to Southeast Gateway Line</p> <p><u>April 2024</u> – LA Metro Board of Directors certified Final EIR</p> <p><u>2041</u> – Anticipate opening service of initial segment</p>	<p>Support alternatives that create potential for future connections into Orange County.</p>	<p>Monitoring.</p>



July 22, 2024

Joint Statement on Advancing Emissions Reductions in the South Coast Air Quality Management District

The South Coast Air Quality Management District (South Coast AQMD) is home to 17 million people where ozone levels continue to exceed the health-based national ambient air quality standards. Although air quality in the South Coast AQMD region has improved significantly since the 1970's as a result of substantial nitrogen oxides (NOx) and volatile organic compounds (VOC) emission reductions, the air pollutants that form ground-level ozone, challenges remain. Emissions from sources like aircraft, locomotives, ocean-going vessels, and nonroad engines will be an increasing fraction of total emissions of NOx in the South Coast AQMD region absent additional action by regulatory agencies. The significant additional emissions reductions needed to provide healthy air in the South Coast AQMD will take a sustained and collaborative effort at the local, state, and federal levels to reduce emissions from all sources – both mobile and stationary.

Today, the South Coast AQMD, the California Air Resources Board (CARB), and the U.S. Environmental Protection Agency (EPA) are re-committing to a long-term collaboration to reduce emissions from all sources utilizing agency specific authority for stationary and mobile sources.

The commitments from each Agency form a part of our shared strategy for attainment of the ozone standards established by EPA in 1997, 2008, and 2015 (see agency specific attachments). Jointly, the undersigned will work to reduce NOx emissions from aircraft, locomotives, ocean-going vessels, and nonroad engines, as well as stationary sources.

Through this long-term partnership, South Coast AQMD, CARB, and EPA will be taking steps to catalyze the emissions reductions needed to improve air quality for the 17 million residents of the South Coast AQMD region. The actions proposed by the three agencies will help attain federal air quality standards, and reduce exposure to toxic air pollutants, especially for people living in disproportionately impacted communities, many of which are located near ports, railyards, warehouses, freeways, and airports in the South Coast AQMD region.



Joseph Goffman
Assistant Administrator for Air and Radiation
U.S. Environmental Protection Agency



Liane Randolph, Chair
California Air Resources Board



Martha Guzman
Regional Administrator, Region IX
U.S. Environmental Protection Agency



Vanessa Delgado, Chair
South Coast Air Quality Management District



WASHINGTON, D.C. 20460

July 22, 2024

Liane M. Randolph, Chair
California Air Resources Board
1001 I Street
Sacramento, California 95814

Vanessa Delgado, Chair
South Coast Air Quality Management District Governing Board
21865 Copley Drive
Diamond Bar, California 91765

Dear Chair Randolph and Chair Delgado:

Despite stringent regulations governing air emissions and innovative strategies to incentivize pollution reductions, the South Coast ozone nonattainment area experiences some of the highest levels of ground-level ozone pollution in the United States. Notwithstanding the efforts of the South Coast Air Quality Management District (AQMD), the California Air Resources Board (CARB), and the U.S. Environmental Protection Agency (EPA) to bring the area into compliance with the national ambient air quality standards (NAAQS) for ozone, the area continues to exceed the NAAQS.

In an effort to address this challenge, the South Coast AQMD, CARB, and the EPA formed a three-agency workgroup to assess strategies to attain the 1997, 2008, and 2015 ozone NAAQS in the South Coast air basin. The goal of the workgroup is to evaluate all significant emissions categories, the availability of technologies and practices that support emissions reductions, and regulatory and other pathways, both traditional and innovative, to drive the required emissions reductions. The three-agency workgroup selected four sectors for the initial evaluation: aviation, non-road engines, locomotives and railyards, and ocean-going vessels (OGVs). Because the federal government retains substantial authority to develop emissions standards for these sectors, we recognize that the EPA will play an important role in this partnership. Experts from the three agencies are participating in the sector workgroups to assess emissions reduction opportunities and to define the significant roles for each of our agencies in the path to improved air quality. The sector workgroups have recommended a number of actions for South Coast AQMD, CARB, and the EPA to undertake. As a result of this process, EPA is committing to the following:

General Commitments

1. Continue to work in partnership with SCAQMD and CARB to attain all ozone standards, recognizing the need for reductions from the aviation, locomotive, non-road engine, and ocean-going vessels sectors.
2. Work with SCAQMD and CARB to support additional Indirect Source Rules and support efforts to credit these measures in the SIP.
3. Evaluate and act on the waiver and authorization requests submitted by CARB.

Locomotives

4. Explore opportunities with CARB and SCAQMD that can significantly accelerate the transition of the locomotives operating in California to a much cleaner locomotive fleet.
5. Work with SCAQMD and CARB to support technology demonstrations for zero-emission locomotives and infrastructure deployment.
6. Continue to pursue national emissions standards for newly built and remanufactured locomotives.

Aviation

7. In collaboration with Federal partners, continue to work with the International Civil Aviation Organization on more stringent NO_x emissions standards.
8. Work with CARB, SCAQMD, and other agencies as appropriate, to explore development of measures that use economic incentives at South Coast airports to prioritize use of aircraft with lower NO_x emissions.
9. Work with CARB on zero-emission ground support equipment and zero-emission taxiing technology assessments.
10. Work with CARB and SCAQMD on a technology forum on how on-airport operations are managed, focusing on optimizing zero-emission support equipment, auxiliary unit operation, and airplane operations (e.g., taxiing).
11. Jointly host a technology forum with CARB, SCAQMD, and other agencies as appropriate, on the operational practices and economics of aircraft routing with the State, country, and internationally.
12. Jointly host a technology forum with CARB, SCAQMD, and other agencies as appropriate, on strategies for lowering NO_x emissions from aircraft, including through improved combustor design, selective catalytic reduction, water-in-fuel strategies, or other strategies.

Non-road Land-Based Diesel Equipment

13. Begin exploration of a more stringent national "Tier 5" criteria pollutant emissions standards for nonroad land-based compression-ignition engines, including the potential role zero-emission equipment can play to significantly reduce emissions.

Ocean Going Vessels (OGVs)

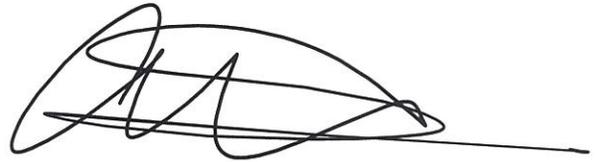
14. In collaboration with Federal partners, engage with the International Maritime Organization to work towards strengthening the NOx standards for new and existing OGVs, including resolution of the low load Tier III issue for OGVs.
15. Jointly host a technology forum with SCAQMD, CARB, and other agencies as appropriate, on low-load NOx issues, fuels of the future, and solicit ideas from the public, shippers, carriers, and other supply chain stakeholders for future emissions reductions.

In light of the ongoing challenges the South Coast faces in attaining the ozone NAAQS and the important role the EPA plays in improving air quality, we reiterate our commitment not only to the actions identified above, but also to continuing to work both within the federal government and in collaboration with CARB and the SCAQMD to develop the necessary tools, strategies, and regulatory approaches that will be needed for the South Coast Air Basin to attain the ozone NAAQS. Thank you for the constructive engagement of your agencies and we look forward to our continued collaboration.

Sincerely,



Martha Guzman
Regional Administrator
Region IX



Alejandra Nunez
Principal Deputy Assistant Administrator
Office of Air and Radiation



Gavin Newsom, Governor
Yana Garcia, CalEPA Secretary
Liane M. Randolph, Chair

July 22, 2024

Joseph Goffman
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Vanessa Delgado
Board Chair
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, California 91765
VDelgado@aqmd.gov

RE: Letter of Intent for Further Measures to Improve Air Quality in South Coast

Dear Assistant Administrator Goffman, Regional Administrator Guzman, and Chair Delgado:

For over 50 years, the California Air Resources Board (CARB) and the South Coast Air Quality Management District (District) have been at the forefront of air pollution control, consistently identifying and adopting new controls. Air pollution levels have dramatically decreased as a result, but there is more work to be done to meet increasingly stringent federal health-based air quality standards. CARB's 2022 State Strategy for the State Implementation Plan identified 19 new State measures for the coming years, and even still, additional reductions are necessary to meet the federal standards and protect public health.

CARB has been working for several months with staff at the U.S. Environmental Protection Agency (U.S. EPA) and the District to identify actions each agency could take to help meet ozone standards and improve public health in the South Coast Air Basin (South Coast). Teams at each of our agencies have spent many hours assessing potential solutions to ensure we reduce emissions and make progress towards attaining the standards, with the understanding that each of our agencies would put forth a list of new commitments each agency intends to pursue.

As a result of this ongoing evaluation and continuing public health need, with this letter of intent, CARB hereby documents its intent to pursue the below actions to achieve approximately five tons per day of new oxides of nitrogen (NOx) emission reductions in the South Coast in 2033 from the aircraft, non-road, ocean-going vessel, on-road heavy-duty vehicle, and building sectors as specified below:

Aircraft/Airports

- Host a technology forum on how on-airport operations are managed, focusing on optimizing zero-emission support equipment, auxiliary unit operation, and airplane operations (e.g., taxiing).
- Jointly host a technology forum with the District, U.S. EPA, and other agencies, as appropriate, on the operational practices and economics of aircraft routing within the State, country, and internationally.
- Jointly host a technology forum with the District, U.S. EPA, and other agencies, as appropriate, on strategies for lowering NOx emissions from aircraft, including improved combustor design, selective catalytic reduction, water-in-fuel strategies, or other strategies.
- Collaborate with U.S. EPA and the Federal Aviation Administration (FAA) on additional NOx-focused aircraft research (FAA CLEEN Program).
- Collaborate with U.S. EPA and FAA to advocate for tighter aircraft NOx emissions standards with the International Civil Aviation Organization.
- Explore developing a Zero Emission Airport Ground Operations Regulation to require zero emissions taxiing, zero-emissions ground support equipment, and zero-emissions gate operations.

Ocean-Going Vessels/Ports

- Prioritize exploration of an Ocean-Going Vessel In-Transit Regulation to reduce emissions from vessels transiting California waters.
- Jointly host a technology forum with the District and U.S. EPA, and other agencies, as appropriate, to focus on excess low-load NOx emissions, fuels of the future, and solicit ideas from the public, shippers, carriers, and other supply chain stakeholders for future emission reductions.

Off-Road/Non-Road

- Pursue Tier 5 Off-Road Vehicles and Equipment Emissions Standard.
- Develop Cargo Handling Equipment Amendments.
- Develop Transport Refrigerant Unit Part II Regulation.
- Develop further amendments to In-Use Off-Road Diesel-Fueled Fleets Regulation (contingent on U.S. EPA first adopting next-level Tier 5 standards and zero-emission standards for off-road equipment).

On-Road Heavy-Duty Vehicles

- Develop Zero-Emission Trucks Regulation to drive transition to zero-emission in fleets not covered by Advanced Clean Fleets Regulation.
- Incentivize the turnover of on-road vehicles or other categories of mobile source equipment using \$185 million in dedicated funding from a joint settlement with an engine manufacturer.

Buildings

- Develop Zero-Emission Standard for Space and Water Heaters.

If you have any questions, please contact [Edie Chang](#), Deputy Executive Officer, at (916) 445-4383 or have your staff contact [Michael Benjamin](#), D.Env., Chief, Air Quality Planning and Science Division at (916) 201-8968.

Sincerely,



Liane M. Randolph, Chair

Enclosure

cc: Steven S. Cliff, Ph.D., Executive Officer

Matthew Lakin, Director, Air and Radiation Division, U.S. Environmental Protection Agency, Region 9
lakin.matthew@epa.gov

Edie Chang, Deputy Executive Officer

Michael Benjamin, D.Env., Chief, Air Quality Planning and Science Division



South Coast Air Quality Management District

21865 Copley Drive, Diamond Bar, CA 91765-4182
(909) 396-2000 • www.aqmd.gov

July 22, 2024

Joseph Goffman, Assistant Administrator
Office of Air and Radiation
U.S. Environmental Protection Agency
1200 Pennsylvania Avenue, N.W.
Washington, DC 20460

Liane M. Randolph, Chair
California Air Resources Board
1001 I Street
Sacramento, California 95814

Dear Mr. Goffman and Chair Randolph:

The South Coast Air Quality Management District (South Coast AQMD) is committed to providing clean air for all, including the critical mission to further reduce NO_x emissions that contribute to ozone pollution in the South Coast Air Basin. In valued partnership with the U.S. Environmental Protection Agency (U.S. EPA) and the California Air Resources Board (CARB), South Coast AQMD will continue to do its part, rising to the collective challenge, using its authorities, and working with stakeholders and communities to deliver solutions to address the region's ozone pollution. To do this, South Coast AQMD will extend the agency's legacy of embracing innovative technologies and adopting rules and regulations with nation-leading stringency. South Coast AQMD, as a measure of good will, here memorializes certain existing works-in-progress and intended, future actions that have a common purpose to reduce NO_x or to lay important groundwork for potential future NO_x reductions.

While air quality has dramatically improved over the years, our region still exceeds National Ambient Air Quality Standards (NAAQS) for particulate matter and ozone, and experiences some of the worst air pollution in the nation. Over 17 million people reside in our region, and we are home to two-thirds of California's environmental justice (EJ) population. These frontline communities suffer the brunt of the impacts of air pollution. We estimate that approximately 1,500 premature deaths would be avoided annually if our region were able to attain the NAAQS.

As an extreme ozone nonattainment area, South Coast AQMD has implemented the most stringent regulations in the nation for stationary sources – power plants, refineries, and industrial facilities for which we have direct regulatory authority. We have established Best Available Retrofit Control Technology (BARCT) standards in rules that impose strict emission limits for virtually every combustion category of stationary sources to reduce NOx emissions to the greatest extent feasible. Since the 80 ppb ozone standard was established in 1997, we have cut emissions dramatically – emissions of nitrogen oxides (NOx), the key pollutant responsible for ozone formation in our region – have been reduced by over 75 percent. Despite these aggressive actions, NOx emissions must be reduced even further to meet ozone standards. Per our 2022 Air Quality Management Plan, we are implementing strategies to pursue zero emission technologies across all sectors wherever feasible.

The South Coast Air Basin is home to the Ports of Long Beach and Los Angeles, the largest port complex in the nation, and LAX, the fifth largest airport in the nation. Goods delivered to and from these facilities traverse across our region to rail yards and warehouses, and are often ultimately bound for destinations throughout the nation. This activity results in significant emissions from ships, aircraft, interstate trucks, locomotives, and other non-road engines. Today, over 80 percent of NOx emissions within the basin are from mobile sources, and of these, it is the ships, aircraft, interstate trucks, locomotives, and similar heavy-duty engines that are responsible for about three-quarters of these emissions.

It is impossible to attain all ozone standards absent further action from U.S. EPA. In particular, new and continued actions are needed on sources primarily under federal authority, including ships, aircraft, interstate trucks, locomotives, and other non-road engines. And it is not just our area that needs federal action to meet ozone standards. Regions of the country that have never had to contend with protracted ozone nonattainment are slipping into higher levels of ozone nonattainment. In the future, these areas will find themselves in the same position as South Coast AQMD unless U.S. EPA takes immediate action to reduce emissions from federally regulated sources.

Recognizing that all agencies have a role to play in continuing to reduce emissions, the attachment to this letter details actions that South Coast AQMD intends to pursue. These actions, combined with actions from U.S. EPA and CARB, will be needed to meet all ozone standards. We anticipate that the actions below will result in approximately four and a half tons per day of new NOx emission reductions in the South Coast Air Basin in 2033, primarily from stationary sources. Facility-based measures may add to this total, depending in part on future actions also taken by U.S. EPA and CARB. Further, our agencies must commit to work for a “Whole of Government” approach as air quality intersects with

transportation, energy, and other sectors to protect public health and economic activity and jobs.

This letter does not purport to be exhaustive or comprehensive of all actions that South Coast AQMD could or would endeavor to pursue to meet ozone health standards in the South Coast Air Basin. South Coast AQMD staff, consistent with Governing Board direction, will develop and seek adoption of new rules or measures as potential State Implementation Plan revisions following any applicable procedural requirements and, wherever needed, ensure appropriate supporting administrative and technical information is provided to CARB and U.S. EPA. This letter is not intended to, and does not, create any right or benefit, substantive or procedural, enforceable at law or in equity by any person against South Coast AQMD. South Coast AQMD reserves all rights and defenses, including the right to petition. Recognizing that emission standards for mobile sources are established by state or federal agencies, South Coast AQMD will continue to tirelessly advocate for all practical and innovative strategies to reduce those sources of emissions. Above all, South Coast AQMD, whether in a leading, partnering or supporting role, commits to following the science and the law as it continues to work to clean the air and protect the health of all residents.

Sincerely,



Vanessa Delgado
Governing Board Chair
South Coast AQMD

Attachment

Attachment: South Coast AQMD Commitments for Action

Aircraft/Airports:

- Leverage partnerships from existing Memoranda of Understanding (MOUs) between South Coast AQMD and airports to explore technology demonstration projects for lower emission technologies.
- Explore new mechanisms to reduce emissions from airports including potentially revisiting existing Airport MOUs or through a future airport indirect source rule.
- Pursue technology demonstration projects for zero emissions ground operation for aircraft and its supporting equipment and associated infrastructure.
- Jointly host a technology forum with CARB, U.S. EPA, and other agencies as appropriate on the operational practices and economics of aircraft routing within the state, country, and internationally.
- Jointly host a technology forum with the CARB, U.S. EPA, and other agencies as appropriate on strategies for lowering NOx emissions from aircraft, including through improved combustor design, selective catalytic reduction, water-in-fuel, or other emission reduction strategies.

Locomotives/Railyards:

- Bring an indirect source rule on freight rail yards (Proposed Rule 2306) to our Governing Board for consideration in August 2024.
- Pursue technology demonstration projects for zero emissions locomotives and associated infrastructure.

Off-Road/Non-Road:

- Explore development of a loaner program for zero emissions construction equipment, including associated infrastructure.
- Develop and bring new Facility-Based Mobile Source Measures for new/redevelopment projects to our Governing Board for consideration, including potential development of an indirect source rule.
- Collaborate with relevant agencies on other facilitating measures such as:
 - Technology assessments of charging fueling standards and infrastructure for non-road applications; and
 - Market assessments of zero emissions technology for different non-road applications and duty cycles.

Ocean-Going Vessels (OGVs)/Ports:

- Bring indirect source rule on container terminals at marine ports (Proposed Rule 2304) to our Governing Board for consideration by 1st quarter 2025.
- Jointly host a technology forum with CARB, U.S. EPA, and other agencies as appropriate to focus on excess low-load NOx emissions, fuels of the future, and solicit ideas from, the public, shippers, carriers, and other supply chain stakeholders for future emission reductions.

- Seek funding and pursue emissions testing for conventional and alternative fuels.
- Continue to seek funding and opportunities for OGV engine retrofit demonstration projects.
- Seek opportunities for establishing long term funding to support a Clean Ship Visit Program.
- Provide technical support and build on previous work for the Pacific Rim Maritime Emissions Reduction (PRIMER) initiative to develop a Clean Ship Visit Program.

Stationary Sources:

- Review where accelerated reductions could be possible, including through rulemaking to achieve emission reductions on a more accelerated timeline than identified in the 2022 AQMP.

Regional Planning Update

This update focuses on:

Resolution on Federal Highway Funding Sanctions

SCAG's Expert Panel on Induced Travel Impacts of Priced Managed Lanes

Resolution on Federal Highway Funding Sanctions

May 2024 – EPA was expected to start federal funding sanction clock by July 31, 2024

- Following proposed action to disapprove CARB and AQMD's Contingency Measure Plan for meeting the 1997 ozone standard

July 22, 2024 - EPA, CARB, and AQMD agree to prevent sanctions and address ozone standards collaboratively

- EPA: Advance zero-emission technologies in aviation, marine, and rail sectors
- CARB: Target five tons per day of NOx reductions by 2033, by supporting zero-emission technology across multiple sectors
- AQMD: New rules and technology demonstrations focused on high-emission sources and impacted communities

Funding for South Coast Emissions Reductions

\$500 million from EPA's CPRG Program awarded to AQMD

AQMD Investment Focus: Incentives to deploy zero-emission goods movement technologies to help meet federal air quality standards

Incentives to target electrification of:

- Cargo handling equipment
- Switcher locomotives
- Heavy-duty trucks and last-mile freight vehicles

Expert Panel on Induced Travel Impacts of Priced Managed Lanes

Is VMT, by itself, a meaningful measure?

Findings:

- Not all VMT is equal
- VMT alone does not fully capture performance of transportation systems

Takeaway:

- Additional metrics can provide more accurate analysis of system performance

Should priced managed lanes and general purpose lanes use the same VMT methodology?

Findings:

- Potentially significant differences between priced managed and general purpose lanes

Takeaway:

- Further research needed to document differences between priced managed and general purpose lanes

Regional Monitoring Next Steps

Continue monitoring and engaging in:

Specific investments from AQMD's CPRG award

Coordination on managed lane planning and implementation

Interstate 605/Katella Avenue Interchange Project Update



I-605  | Katella
INTERCHANGE



Safer. Smarter. Smoother.



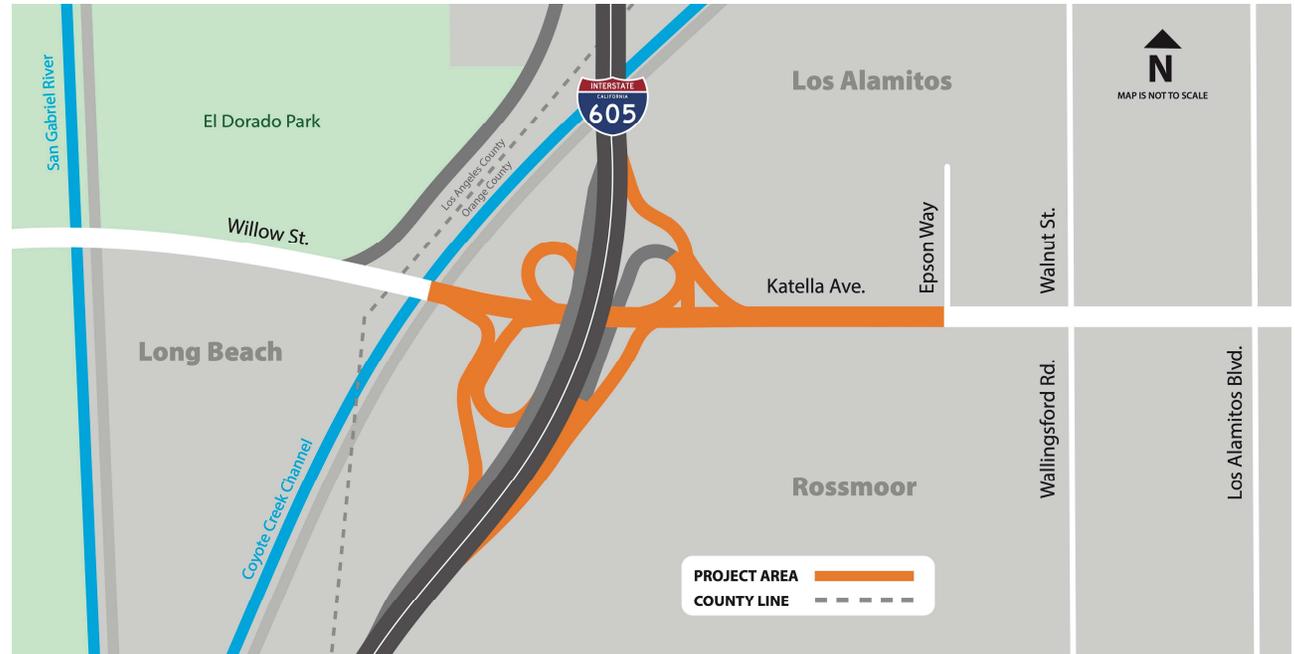
Project Overview

- Measure M2 - Project M
- Project included in Next 10 Delivery Plan; advanced by ten years
 - Environmental phase completed in October 2018
 - Design phase completed in September 2024
- Construction estimate \$30 million
 - funded by federal Surface Transportation Block Grant and Measure M2 funds



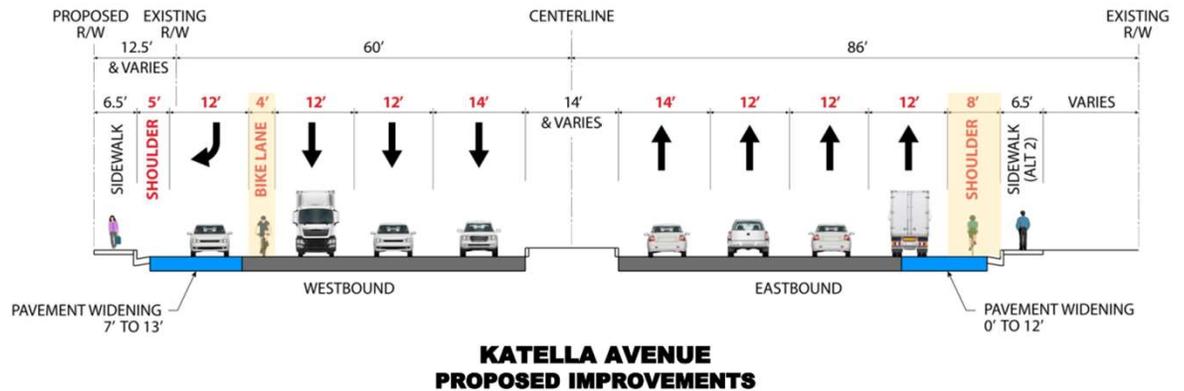
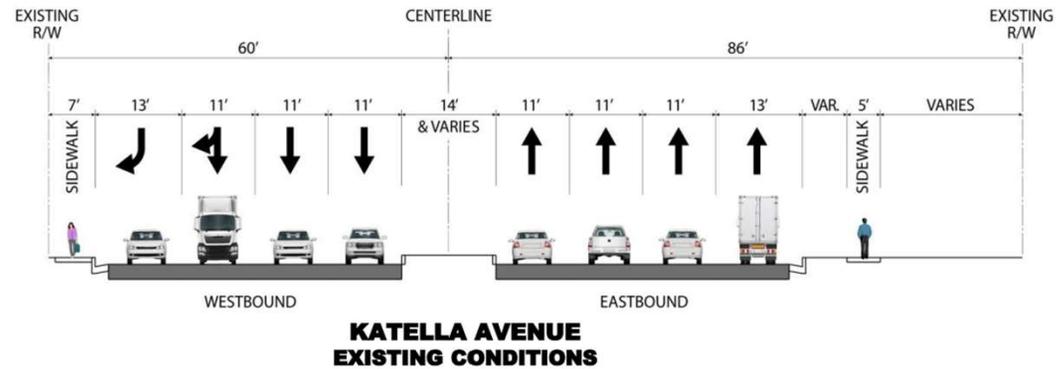
Project Overview

- Modifies northbound and southbound ramps at Katella Avenue
- Improves operations for all modes (vehicular, bicycle, and pedestrian)
- Closes the gaps in existing bicycle lanes
- Enhances sidewalk connectivity through interchange



Project Improvements

- Provide continuous sidewalks between Coyote Creek Channel and Civic Center Drive
- Add class II bicycle lanes in each direction of Katella Avenue
- Enhance pedestrian safety



Milestone Schedule



Milestone	Timeframe
Completed Final Design	September 2024
Advertise for Construction	November 2024
Begin Construction	Spring 2025
Complete Construction	Fall 2026

Dates are subject to change.

Public Outreach

- Stakeholder ascertainment
- Briefings and presentations
- In-person/virtual community meetings
- Community booths and events
- Business and school outreach
- Collateral development
- Construction alert
- Social media
- Closures/detour map

