

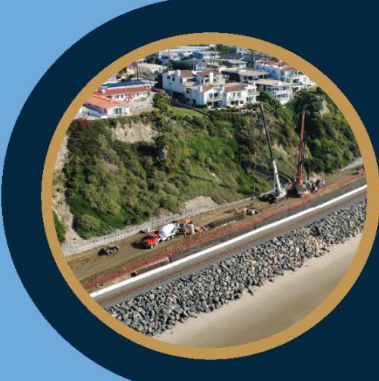


Orange County Transportation Authority

2026 BOARD & CEO INITIATIVES

PROVIDE A BALANCED, SUSTAINABLE, AND EQUITABLE PUBLIC TRANSPORTATION SYSTEM

- Deliver safe, reliable, and accessible travel choices for residents, commuters, and visitors
- Uphold commitments to voters by advancing Measure M2 projects and programs
- Engage stakeholders and invite meaningful public input to inform decision-making



ENHANCE ORGANIZATIONAL STRENGTH THROUGH FINANCIAL STEWARDSHIP AND ENVIRONMENTAL LEADERSHIP

- Demonstrate prudent financial management and responsible use of taxpayer dollars
- Strengthen adaptability and resilience to evolving economic and environmental conditions
- Champion sustainability initiatives that support healthy communities

SUSTAIN A CULTURE OF EXCELLENCE, COLLABORATION, AND INCLUSION

- Expand partnerships with key agencies, organizations, and communities to advance shared goals
- Foster a safe, inclusive, and supportive work environment that empowers employees to succeed
- Promote innovation, accountability, and teamwork throughout the organization



Handwritten signature of Jamey M. Federico in black ink.

Jamey M. Federico
Chair

Handwritten signature of Darrell E. Johnson in black ink.

Darrell E. Johnson
Chief Executive Officer

2026 Board Initiatives

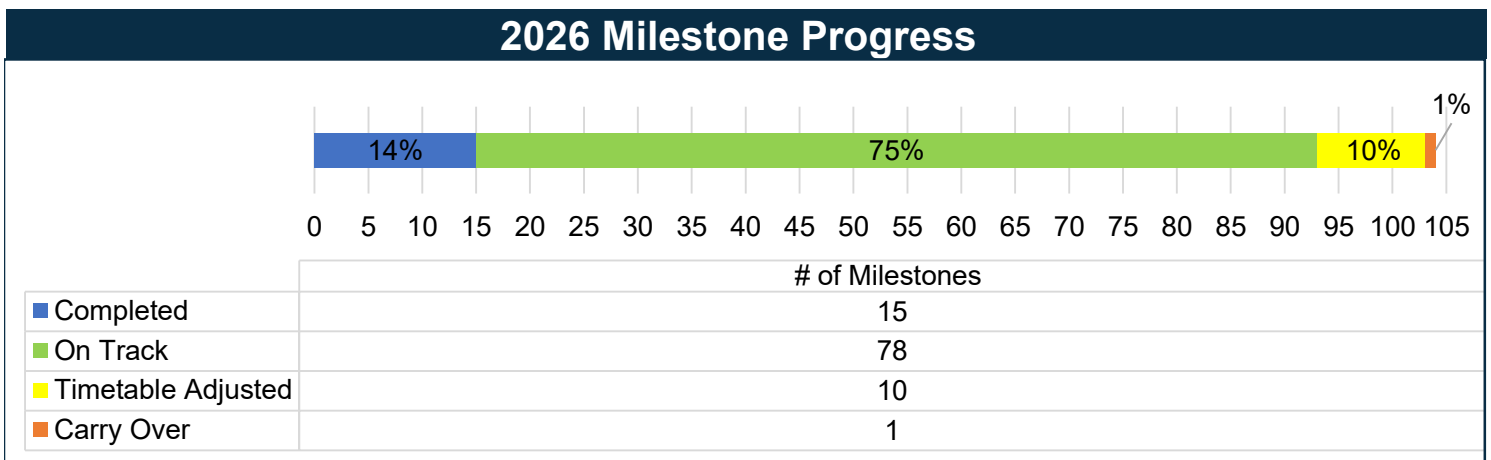
- Provide a Balanced, Sustainable, and Equitable Public Transportation System
- Enhance Organizational Strength through Financial Stewardship and Environmental Leadership
- Sustain a Culture of Excellence, Collaboration, and Inclusion

2026 CEO Initiatives

- Deliver safe, reliable, and accessible travel choices for residents, commuters, and visitors
- Uphold commitments to voters by advancing Measure M2 projects and programs
- Engage stakeholders and invite meaningful public input to inform decision-making
- Demonstrate prudent financial management and responsible use of taxpayer dollars
- Strengthen adaptability and resilience to evolving economic and environmental conditions
- Champion sustainability initiatives that support healthy communities
- Expand partnerships with key agencies, organizations, and communities to advance shared goals
- Foster a safe, inclusive, and supportive work environment that empowers employees to succeed
- Promote innovation, accountability, and teamwork throughout the organization

2026 CEO Milestone Summary

Number of Milestones by Quarter	
Quarter Due	Number
First Quarter	10
Second Quarter	24
Third Quarter	27
Fourth Quarter	43
TOTAL	104



FIRST QUARTER (Q1)

9 of 10 Completed - 90%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	I-5, I-405 to Yale Avenue	Advance Construction	Initiate construction - Q1	February 2026 - initiated construction.				
2.	I-5, Yale Avenue to SR-55	Advance Construction	Initiate construction - Q1	February 2026 - initiated construction.				
3.	Placentia Metrolink Station**	Coordinate with Stakeholders to Reach Agreement on Station Concept to Advance into Environmental Review Phase	Negotiate Letter of Agreement for station concept with the City of Placentia, BNSF, and Metrolink - Q1	Coordination with key stakeholders is ongoing. An internal meeting took place to discuss the deal points, and the Letter of Agreement has been drafted for internal review. However, due to additional time being needed for review by other stakeholders, this has been delayed to Q2.				
4.	San Clemente Pedestrian Audible Warning System Rehabilitation	Advance Construction	Begin construction - Q1	February 2026 - NTP was issued and materials order placed.				
5.	SR-57 Truck Climbing Lane	Advance Environmental Phase	Initiate environmental and engineering studies - Q1	January 2026 - initiated studies.				
6.	SB 707	Meet SB 707 Requirements for Implementation	Seek Board direction on SB 707 requirements - Q1	February 2, 2026 - presented to Executive Committee for direction; March 9, 2026 - presented to Board for adoption.				
7.	Metrolink Service	Plan, Fund, and Administer Sustainable Metrolink Service	Provide update to Board on long-term Metrolink funding concerns and discuss potential courses of action - Q1	January 5, 2026 - sent letter to Metrolink regarding OCTA Board direction to establish a financially sustainable rail service plan, including setting a target funding level for FY 2026-27, to ensure OCTA's continued support of regional rail service through the life of M2; March 23, 2026 - provided update to Board as part of FY 2026-27 Budget Assumptions item.				

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q1 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
8.	Zero-Emission Bus (ZEB) Program Update	Advance Zero-Emission Goals	Provide progress report to Board on ZEB Program, including the hydrogen FCEBs and plug-in BEBs - Q1	March 23, 2026 - provided progress report to Board.				
9.	Community Opinion and Public Support Research*	Obtain Public Input and Preferences for OCTA's Various Projects, Programs, and Services	Conduct qualitative and quantitative surveys to evaluate customer satisfaction, including the M2 Ten-Year Review and other surveys - Q1	January 15, 2026 - completed quantitative survey analysis and report; February 26, 2026 - submitted final M2 Review Outreach Summary Report to M2 Project Management Office.				
10.	2027 Federal Transportation Improvement Program (FTIP)	Comply with State and Federal Law to Update the FTIP (Allows for the Obligation of Federal Funds)	Seek Board approval to submit 2027 FTIP - Q1	February 9, 2026 - presented to Board for approval.				

*2025 Carryover

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

SECOND QUARTER (Q2)

6 of 24 Completed - 25%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	Coastal Rail Stabilization Priority Project	Advance Work on the Four Reinforcement Areas	Obtain State and Federal regulatory permits - Q2	Work is ongoing to develop a shoreline protection structure design, including completing geotechnical work. However, riprap was encountered in the vicinity of the proposed structure; a survey for property boundary is underway; March 2026 - FRA indicated they will seek management review and approval for CE in Area 4. Acquisition of the regulatory permits has been delayed to Q3.				
2.	Hydrogen Fueling Station (Garden Grove Bus Base)**	Advance Zero-Emission Goals	Select design-build entity to construct improvements - Q2	April 2026 - anticipated to present design-build contract to Board for approval.				
3.	I-5, Avenida Pico to San Diego County Line*	Advance Environmental Phase	Release draft environmental document for public review - Q2	Due to ongoing VMT mitigation coordination with Caltrans, this has been delayed; August 2026 - anticipated to release draft environmental document for public review.				
4.	I-5, El Toro Road Interchange	Advance Environmental Phase	Release draft environmental document for public review - Q2	June 2026 - anticipated to release draft environmental document for public review.				
5.	Orange County Maintenance Facility**	Support Metrolink Efforts to Optimize and Expand Service	Present settlement agreement to Board for approval - Q2	Although no Board presentation is anticipated in 2026, a memo was provided to Board on December 30, 2025 regarding the status of the litigation and settlement agreement. In coordination with the City of Irvine, the settlement agreement was finalized.	Early Complete			

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
6.	Slope Stabilization	Advance Construction	Complete Phase II construction - Q2	Due to additional time being needed to fully execute the contract, this has been delayed and completion of Phase II construction is now anticipated in Q3; February 5, 2026 - NTP issued for construction.				
7.	91 Express Lanes	Determine Direction for 91 Express Lanes Operating Services Agreement	Present Operating Services Agreement to Board for approval - Q2	May 2026 - anticipated to present to F&A and Board for approval.				
8.	M2 Compliance Audit Report	At the Request of the Taxpayer Oversight Committee (TOC), Provide Results of an Independent M2 Compliance Audit	Present results of M2 Compliance Audit to TOC and Board - Q2	January 2026 - compliance audit initiated by audit firm. June 2026 - anticipated to present report to TOC and Board.				
9.	OCTA's Operating and Capital Budget	Develop a Balanced FY 2026-27 Budget	Present a comprehensive and balanced OCTA FY 2026-27 budget for adoption by the Board - Q2	June 8, 2026 - anticipated to present FY 2026-27 budget to Board for adoption.				
10.	Rider Validation System	Modernize OCTA's Fare Collection System	Transition College Pass Program to the Wave platform - Q2	March 2026 - completed transition to Wave platform.	Early Complete			
11.	Mayors Forums	Conduct Mayors Forums by District	Conduct forums with city leaders and report to management team - Q2	April-May 2026 - anticipated to conduct forums with city leaders and report to management team.				
12.	Bus Fleet Management**	Maintain Fleet in a State of Good Repair	Seek Board approval to award contract to purchase seven 60-foot buses - Q2	Due to additional time being needed to identify funding, procurement has been delayed as it is currently on hold.				
13.	Metrolink Service	Plan, Fund, and Administer Sustainable Metrolink Service	Receive updates from Metrolink on the financial and operational performance of its service optimization - Q2	Due to additional time being needed to allow Metrolink to draft a proposed service plan, this has been delayed to Q3; July 2026 - Metrolink anticipated to present update to Board.				

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
14.	OC Streetcar	Prepare for OC Streetcar Operations	Achieve conditional acceptance of first vehicle - Q2	Based on the schedule for energization and traffic signal modifications, conditional acceptance of first vehicle has been delayed to Q3.				
15.	Insurance Renewals	Renew OCTA's Insurance Policies and Obtain Board Approval to Remain Self-Insured on Excess Liability or Purchase a Policy	Present recommendations on excess liability to Board - Q2	May 21 and June 8, 2026 - anticipated to present recommendations to F&A and Board, respectively.				
16.	Personnel and Salary Resolution	Attract and Retain Top Talent	Present recommendations to Board as part of the OCTA FY 2026-27 budget - Q2	June 8, 2026 - anticipated to present recommendations to Board for adoption as part of the FY 2026-27 budget.				
17.	2026 LRTP	Highlight Initial Preferred Plan Project List	Present update to Board - Q2	March 9, 2026 - presented update to Board.	Early Complete			
18.	405 Express Lanes Excess Toll Revenue Expenditure Plan	Develop 405 Express Lanes Excess Toll Revenue Expenditure Plan	Present draft plan to Board - Q2	May 4 and 11, 2026 - anticipated to present draft plan to Executive Committee and Board, respectively.				
19.	Coastal Rail Resiliency Study	Identify Potential Short-Term and Mid-Term Solutions to Protect the Existing Coastal Rail Infrastructure	Present final recommendations to Board - Q2	The draft feasibility study is currently ongoing. However, additional time is needed to refine the final set of recommendations along with accommodating the public meeting dates, so this has been delayed to Q3; July 2026 - anticipated to present final recommendations to RTP and Board; August 2026 - anticipated to complete final study.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
20.	SR-91 Implementation Plan	Collaborate with RCTC to Update the Plan in Support of Regional SR-91 Corridor Transportation Improvements	Present Plan to Board - Q2	May 11, 2026 - anticipated to present Plan to Board.				
21.	Strategic Rail Plan	Evaluate Current and Future Passenger and Freight Rail Plans to Identify and Address Potential Misalignments with Operators, Ensuring Coordinated and Optimized Rail Service in Orange County	Present update to ESC - Q2	February 23, 2026 - presented update to ESC.	Early Complete			
22.	Ten-Year Review	Evaluate Performance of the M2 Program through a Comprehensive Review	Present report to Board - Q2	April 27, 2026 - anticipated to present report to Board.				
23.	Transit Optimization Study*	Identify Bus Operation Enhancements to Improve Speed and Reliability	Complete study - Q2	March 2026 - completed study.	Early Complete			
24.	ZEB Transition Plan**	Evaluate Charging Infrastructure Needs and Facilities for ZEB Rollout Plan	Award contract - Q2	February 23, 2026 - awarded contract.	Early Complete			

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

THIRD QUARTER (Q3)

0 of 27 Completed - 0%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	Coastal Rail Stabilization Priority Project	Advance Work on the Four Reinforcement Areas	Complete restoration of the pedestrian trail and construction of the catchment wall in Area 3 - Q3	March 2026 - completed installation of 225 piles; the City of San Clemente began sewer lining work to protect the pipe. Lagging, grading, drainage, and construction of the trail continues.				
2.	Renewable Solar Energy at Bus Bases**	Advance Emissions Reduction Goals by Introducing Renewable Energy into Agency Operations	Award contract for feasibility study - Q3					
3.	SR-55, I-5 to SR-91	Advance Construction	Advertise for construction - Q3	August 2026 - anticipated to advertise for construction.				
4.	SR-91, La Palma Avenue to SR-55	Advance Construction	Initiate construction - Q3	Due to right-of-way issues with Caltrans, this has been delayed; October 2026 - anticipated to initiate construction.				
5.	405 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3	August 2026 - anticipated to present to F&A and Board.				
6.	91 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3	August 2026 - anticipated to present to F&A and Board.				
7.	91 Express Lanes*	Install Toll Entrance Readers to Register Vehicles Entering the 91 Express Lanes	Complete installation of infrastructure gantries, cameras, and readers at the three entrances of the 91 Express Lanes - Q3	Due to electrical issues, installation has been delayed to Q4. July/August 2026 - anticipated to present electrical services for two gantries to Board for award; once electrical issues are resolved, lane-system provider can install required equipment.				
8.	SB 707	Meet SB 707 Requirements for Implementation	Implement SB 707 - Q3	July 1, 2026 - anticipated to implement SB 707.				

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
9.	Credit Ratings	Maintain OCTA's Positive Credit Rating	Conduct annual rating agency meeting - Q3	August 3-6, 2026 - anticipated to conduct annual rating agency meeting.				
10.	Cybersecurity	Protect OCTA's Information Systems	Require completion of annual cybersecurity training for all employees - Q3					
11.	Elected Officials Roundtables	Host Elected Officials Roundtables to Inform LRTP	Host roundtables for local elected officials - Q3	July and August 2026 - anticipated to host roundtables.				
12.	College Pass Program	Continue Working with Community Colleges to Renew or Extend Agreements for the Program	Execute new agreement with Cypress College - Q3	Progress to execute new agreement is underway; staff has reviewed new contract language and pricing with Cypress College.				
13.	OC ACCESS Operations Software Implementation**	Implement Software Aimed to Improve OC ACCESS Performance and Provide Riders with Alternative Transit Options	Complete implementation of new software for paratransit scheduling and operations - Q3	April 2026 - user acceptance testing anticipated to take place.				
14.	OC Streetcar	Begin OC Streetcar Operations	Open to public for revenue service - Q3	Due to ongoing mediation of contractor disputes and litigation, the forecasted projected start of revenue service has been delayed and will be carried over and reconsidered for Q1 of 2027.				
15.	ZEB Program	Advance Zero-Emission Goals	Receive full delivery of BEBs - Q3	The first BEB has been delivered. August 2026 - anticipated to receive remaining nine BEBs.				
16.	Affirmative Action Plan/Equal Employment Opportunity (AAP/EEO)	Provide Updates on Progress of AAP/EEO Development and Implementation and Adhere to Federal Requirements	Present biannual updates to ESC - Q1 and Q3	March 9, 2026 - presented first AAP/EEO biannual update to ESC.				
17.	Early Career Academy	Provide Early Career Development to Grow New Professionals	Launch sixth cohort - Q3	August 2026 - anticipated to launch sixth cohort.				

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
18.	Employee Health Insurance Renewal Programs	Secure Competitive Health Benefits	Present health insurance recommendations to Board - Q3	August 24, 2026 - anticipated to present recommendations to Board.				
19.	OC Streetcar*	Ensure Alignment, Systems, Maintenance and Storage Facility, and Vehicles Meet All Health, Safety, and Environmental Compliance Requirements through Testing, Pre-Revenue and Revenue Service	Work directly with all applicable regulatory agencies to ensure compliance, approval, and permits are obtained - Q3	Work is ongoing to ensure compliance requirements are met; thus far, the Maintenance and Storage Facility Certificate of Occupancy has been obtained; currently addressing punch list items and system/vehicle testing and commissioning are underway.				
20.	Public Transportation Agency Safety Plan (PTASP)	Adopt OC Streetcar and Operations and Maintenance Contractor PTASP	Seek Board approval for the 2026 PTASP - Q3	The PTASP is currently in draft form and under internal review; January 29, 2026 - sent draft to CPUC.				
21.	2026 LRTP	Initiate Draft 2026 LRTP Public Review	Seek Board approval to release draft 2026 LRTP - Q3	July 27, 2026 - anticipated to present to Board for approval.				
22.	2026 State Transportation Improvement Program (STIP)	Maximize State Funding Opportunities	Present final 2026 STIP to Board - Q3	June 8, 2026 - anticipated to present final 2026 STIP to Board.				
23.	Freeway Bus Rapid Transit (BRT) / Express Bus Study	Assess the Viability of Additional BRT and Intra- and Inter-County Express Bus Service to Improve Transit	Award contract - Q3	March 2026 - released RFP. April 2026 - anticipated to select consultant.				
24.	I-5 Managed Lanes Project**	Coordinate with Caltrans on VMT Mitigation to Support Enhanced Transit Services	Complete and present update to ESC - Q3					
25.	Move OC	Develop Strategy Integrating New Mobility and Emerging Technologies to Reduce Emissions and VMT	Seek Board approval to award contract - Q3	May 11, 2026 - anticipated to present contract to Board for approval to award.				

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
26.	Signal Synchronization	Improve Roadway Efficiency	Provide update to Board on signal synchronization projects (Project P), including the countywide signal synchronization baseline - Q3					
27.	Streets and Roads Grants	Fund Streets and Roads Improvements	Present recommendations for RCP (Project O) and RTSSP (Project P) projects grant awards to Board - Q3	June 8, 2026 - anticipated to present recommendations for grant awards to Board.				

FOURTH QUARTER (Q4)

0 of 43 Completed -

0%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	Coastal Rail Stabilization Priority Project	Advance Work on the Four Reinforcement Areas	Obtain State and Federal regulatory permits for sand nourishment - Q4	Updated sand nourishment description has been submitted to FRA for review and to determine class of action. Sand offshore borrow source at Surfside Sunset was approved by the Dredged Material Management Team; additional sampling proposed through the City of San Clemente to ensure there is sufficient good sand available to support project efforts.				
2.	Hydrogen Fueling Station (Santa Ana Bus Base)	Advance Zero-Emission Goals	Select design-build entity to construct improvements - Q4					
3.	I-5, Avenida Pico to San Diego County Line	Advance Environmental Phase	Approve final environmental document - Q4	December 2026 - anticipated to approve final environmental document.				
4.	I-5, El Toro Road Interchange	Advance Environmental Phase	Approve final environmental document - Q4	December 2026 - anticipated to approve final environmental document.				
5.	Transit Security and Operations Center**	Ensure Transit Service Continuity	Provide construction updates to Board - Q1 and Q4	Due to additional time being needed to allow for more progress to report on, a construction update to Board in Q1 has been delayed; June 2026 - anticipated to provide update to Board.				
6.	Crisis Communications	Ensure Agency and Staff Preparedness	Conduct a tabletop exercise for the Crisis Communications team and revise Crisis Communications Plan as appropriate - Q4					
7.	Hazard Mitigation Plan (HMP)	Identify Potential Projects to Mitigate Risks to OCTA Service Areas from Natural Hazards	Revise OCTA HMP and submit to Cal OES / FEMA for approval - Q4					

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
8.	OCTA in the News	Share Newsworthy OCTA Activities and Actions to Obtain Coverage and Raise Awareness of OCTA Programs, Initiatives, and Plans	Continue to highlight OCTA initiatives through mainstream, ethnic, industry, and social media - Q1-Q4	Highlighting OCTA initiatives were ongoing throughout the year, including the groundbreaking for the I-5 Improvement Project construction in the cities of Irvine and Tustin; selection of new Board Chair Federico and Vice Chair Jung; unveiling of the 2026 Board and CEO Initiatives; and continuing to provide transit service to the City of Anaheim residents, visitors, and employees following the discontinuation of the Anaheim Transportation Network.				
9.	Comprehensive Business Plan (CBP)	Develop OCTA's FY 2026-27 CBP	Present the FY 2026-27 CBP to Board for adoption - Q4	December 14, 2026 - anticipated to present the FY 2026-27 CBP to Board for adoption.				
10.	Farebox Project	Modernize OCTA's Fareboxes for Fixed-Route Fleet	Complete installation of new fareboxes on OCTA's fixed-route fleet - Q4	December 2026 - anticipated to complete installation.				
11.	Headquarters Building	Advance Design for the Headquarters Building	Complete design of the office tower improvements and determine path forward and advance design for the Board/Conference Room facility - Q4	January 29, 2026 - completed and determined path forward for Board/conference room facility and design is being advanced; March 9, 2026 - provided update to Board. December 28, 2026 - anticipated to complete 90 percent design of office tower.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
12.	Federal Triennial Review	Convey OCTA's Strong Performance as a Federal Grantee Through a Well-Coordinated Response and Thorough Documentation During FTA Triennial Review	Carry out all required activities to ensure compliance with FTA Triennial Review requirements and present final report to Board - Q1-Q4	FTA has initiated OCTA's Triennial Review as the first round of documents were due for review on February 27, 2026; staff is currently reviewing and updating documents as needed based on FTA's new guidance released on January 20, 2026.				
13.	Legislative Forums	Communicate Transportation Needs and Challenges and OCTA's Ongoing Plans, Programs, and Projects	Conduct forums with local delegation representatives and report to management team - Q2 and Q4	April 8, 2026 - anticipated to hold first legislative forum.				
14.	Legislative Platforms	Set Legislative Priorities	Present final 2027-28 state and federal legislative platforms to Board for approval - Q4					
15.	Legislative Priorities	Provide End-of-Session Report	Discuss outcomes of legislative priorities with L&C - Q4					
16.	Local Elected Officials Tours	Offer Project and Program Tours to Local Officials	Host project tours for local elected officials - Q4	June-September 2026 - anticipated to host project tours.				
17.	Surface Transportation Reauthorization	Provide Informational Status Report	Present update to Board on reauthorization activities - Q4					
18.	Paratransit Vehicles	Replace Existing 121 Cutaway Buses with a Mix of Cutaways and Vans	Receive full delivery of paratransit vehicles - Q4	The first cutaway bus and first van have been delivered. November 2026 - anticipated to receive remaining vehicles.				
19.	Same-Day Taxi	Deliver Enhanced OC ACCESS Service	Present update to Board on Same Day Taxi service expansion and subsidy pilot - Q4	June 2026 - initial analysis anticipated to take place.				
20.	ZEB Program	Advance Zero-Emission Goals	Receive full delivery of FCEBs - Q4	The first FCEB has been delivered.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
21.	Community Engagement	Maintain Participation of Underserved and Hard-to-Reach Communities in Transportation Planning Process and Promote Inclusivity to Ensure Transit Services are Accessible and Welcoming to People from All Backgrounds and Communities	Attend events with clear nexus to OCTA services, programs, or planning initiatives that engage communities impacted by or likely to benefit from them - Q1-Q4	January-March 2026 - participated in Orange County Black Chamber Future Leaders Luncheon, Garden Grove Chamber Network Nexus event, Black History Parade and Unity Festival, six Lunar New Year events, Orange County Social Services Agency Health and Wellness Resource Fair, North Orange Continuing Education (NOCE) Resource and Career Fair; NOCE Disability Support Services Program Countywide Transition Event, Islamic Society of Orange County Ramadan Iftar event, and the City of Buena Park's Korean Resource Fair.				
22.	Community Engagement - Diverse Community Leaders Group (DCLG)	Maximize Relationships with Key Stakeholders and Leaders that Represent Underserved and Hard-to-Reach Communities to Solicit Feedback and Incorporate their Suggestions into Transit Improvements and Future Planning Efforts	Continue engagement with DCLG through quarterly meetings, participation in events and activities with DCLG organizations, and feedback surveys and provide updates to Board - Q1-Q4	March 31, 2026 - anticipated to host first in-person DCLG meeting.				
23.	Express Lanes Communications	Provide Customer Communications and Enhance Brand Awareness, Perceptions, and Usage of the Express Lanes	Implement multilingual Express Lanes marketing, communications, and through social media - Q1-Q4	January 2026 - completed 91 Express Lanes 30th Anniversary campaign.				

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
24.	Marketing Activities	Promote and Educate Public on OCTA Services	Present biannual updates on ongoing campaigns promoting bus, rail, rideshare, vanpool, and OC streetcar to a Board committee - Q2 and Q4	June 11, 2026 - anticipated to present first biannual update to Transit Committee.				
25.	OC Streetcar Marketing**	Promote OC Streetcar Ridership	Launch awareness campaign, promote ridership, continue safety education, and implement customer communications - Q1-Q4	January 5, 2026 - launched OC Streetcar call for artist with recruitment running through March 2026.				
26.	Outreach Activities	Inform Public About Capital Projects	Conduct public outreach on projects in the I-5, SR-55, SR-91, and SR-57 freeway corridors, the I-605/Katella Avenue Interchange Project, emergency rail projects, and OC Streetcar, and others as appropriate, and provide updates to Board - Q1-Q4	February 9, 2026 - presented I-5 (I-405 to SR-55) update to Board.				
27.	Outreach Activities	Engage Public on Planning Studies	Conduct outreach for planning studies, including the Coastal Rail Resiliency Study, 2026 LRTP, OC Connect, Bikeways Connectivity, Mobility Hubs 2, and others as appropriate, and provide updates to Board - Q1-Q4	March 9, 2026 - presented LRTP update to Board. April 12, 2026 - anticipated to hold Bikeways Connectivity (BC) demo event in Costa Mesa; May 16, 2026 - anticipated to hold BC demo event in Mission Viejo; July 27, 2026 - anticipated to provide LRTP update to Board; July 2026 - anticipated to host in-person and virtual meetings for the Coastal Rail Resiliency Study.				
28.	Transit Marketing and Customer Communications	Promote and Educate Public on OCTA Transit Services	Develop and implement multilingual campaigns and programs to promote the Youth Ride Free and College Pass Programs, major service changes, Metrolink service, and other activities - Q1-Q4	As part of the Youth Ride Free and College Pass programs, relaunched Your Route to Education campaign to coincide with the spring semester.				

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
-----------	----------	--------------------	-----------

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
29.	Wave Communications	Continue Ongoing Marketing and Customer Communications for Wave Card and Mobile Application, OC Streetcar Fares, and New Ticket Vending Machines	Continue awareness and customer education campaigns - Q1-Q4	Marketing and customer engagement supporting the Wave Card are ongoing: deployed communications and conducted outreach for the Wave transition for community colleges, universities, and employers.				
30.	Workday	Continue to Support Agencywide Adoption of New Workday Software System	Launch post go-live training support and employee communications - Q2-Q4	Post go-live communications are ongoing; April 2026 - anticipated to begin performance appraisal training.				
31.	2026 LRTP	Report on Responses to Comments Received	Seek Board approval to finalize and provide LRTP to SCAG as input for their 2028 RTP - Q4	December 14, 2026 - anticipated to present to Board for approval to finalize LRTP.				
32.	Active Transportation Initiatives	Implement Programs in Support of Non-Motorized Transportation	Provide biannual updates on active transportation initiatives, including Move OC, E-Bike Safety Plan Implementation, OC Connect, and Bike Counts to Board - Q2 and Q4	February 9, 2026 - presented first biannual update to Board. September 2026 - anticipated to present second biannual update to Board.				
33.	Climate Adaptation and Sustainability	Advance Agency Sustainability Practices and Resiliency Efforts to Adapt to Climate Change Impacts	Provide update on the implementation of near-term CASP follow-up activities to ESC - Q4					
34.	M2 Environmental Cleanup Program (Project X)	Fund Localized Water Quality Improvements	Present programming recommendations for Tier 1 water quality projects grant awards to Board - Q4	March 9, 2026 - presented to Board for approval to release call for projects. October 12, 2026 - anticipated to present programming recommendations to Board.				
35.	M2 Environmental Mitigation Program	Ensure Compliance with Resource Agency Permits	Present biannual progress reports to Board - Q2 and Q4					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
36.	M2 Quarterly Reports	Provide Updates on Progress of M2 Implementation and Fulfill Requirements of the M2 Ordinance No. 3	Present quarterly reports to Board - Q1-Q4	April 27, 2026 - anticipated to present FY 2025-26 Q2 report to Board; June 8, 2026 - anticipated to present FY 2025-26 Q3 report to Board.				
37.	Newport Transportation Center (NTC)	Assess Potential Relocation of NTC	Present draft feasibility study to Board - Q4	January 28, 2026 - awarded contract. April 9, 2026 - anticipated to present update to Transit Committee, with the draft study anticipated to be completed in Q4.				
38.	Next 10 Delivery Plan	Ensure M2 Delivery Commitment	Review and present status of the Next 10 Delivery Plan deliverables to Board - Q4	November 9, 2026 - anticipated to present report to Board.				
39.	Regional Planning Activities	Highlight Transportation Planning Activities	Present biannual reports on activities underway that impact OCTA and the Southern California region to Board - Q2 and Q4	June 8, 2026 - anticipated to present first biannual update to Board; November 9, 2026 - anticipated to present second biannual update to Board.				
40.	South County Mobility Improvements	Collaborate with Key Agencies to Advance Development and Implementation of Transportation Improvements in South Orange County	Provide update to Board - Q4	October 12, 2026 - anticipated to present update to Board.				
41.	Transit Asset Management (TAM) Plan	Update Agency's Existing TAM Plan to Maintain Assets in a State of Good Repair	Complete study and present final draft to ESC - Q4	January 2026 - kicked off the study. October 2026 - anticipated to complete study, with a corresponding update to ESC by Q4.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
42.	World Cup 2026 and LA28 Olympics Planning	Develop an Action Plan to Guide Preparations	Continue to coordinate with LA28, LA Metro, Orange County cities, and other regional transit providers and provide updates to Board - Q2 and Q4	January 2026 - released RFP for an LA28 study; March 9, 2026 - presented update to Board. April 2026 - anticipated to execute contract with LA Metro for World Cup 2026 transit services; May 2026 - anticipated to present consultant selection for LA28 study to Executive Committee and Board.				
43.	ZEB Transition Plan	Evaluate Charging Infrastructure Needs and Facilities for ZEB Rollout Plan	Present update to ESC - Q4	March 2026 - kicked off study.				

Acronyms

# - Number	I-605 - Interstate 605
% - Percentage	LA28 - Los Angeles 2028 Olympic and Paralympic Games
AAP/EEO - Affirmative Action Plan/Equal Employment Opportunity	L&C - Legislative and Communications Committee
BC - Bikeways Connectivity	L RTP - Long-Range Transportation Plan
BEB - Battery Electric Bus	M2 - Measure M2
Board - Board of Directors	NOCE - North Orange Continuing Education
BRT - Bus Rapid Transit	NTC - Newport Transportation Center
Cal OES - California Governor's Office of Emergency Services	NTP - Notice to Proceed
Caltrans - California Department of Transportation	OCTA - Orange County Transportation Authority
CBP - Comprehensive Business Plan	PTASP - Public Transportation Agency Safety Plan
CE - Categorical Exemption	RCTC - Riverside County Transportation Commission
CEO - Chief Executive Officer	RCP - Regional Capacity Program
CPUC - California Public Utilities Commission	RFP - Request for Proposals
DCLG - Diverse Community Leaders Group	RTP - Regional Transportation Planning Committee
E-Bike - E-Bicycle	RTSSP - Regional Transportation Signal Synchronization Program
ESC - Executive Steering Committee	SCAG - Southern California Association of Governments
F&A - Finance and Administration Committee	SB - Senate Bill
FCEB - Fuel-Cell Electric Bus	SR-55 - State Route 55
FEMA - Federal Emergency Management Agency	SR-57 - State Route 57
FRA - Federal Railroad Administration	SR-91 - State Route 91
FTA - Federal Transit Administration	STIP - State Transportation Improvement Program
FTIP - Federal Transportation Improvement Program	TAM - Transit Asset Management
FY - Fiscal Year	TOC - Taxpayer Oversight Committee
HMP - Hazard Mitigation Plan	VMT - Vehicle Miles Traveled
I-5 - Interstate 5	ZEB - Zero-Emission Bus
I-405 - Interstate 405	