



May 5, 2025

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Cooperative Agreement with the California Department of Transportation for the Interstate 5 Improvement Project Between Interstate 405 and Yale 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 Interstate 5 Improvement Project between Interstate 405 and Yale Avenue, which is Segment 1 of the Interstate 5 Improvement Project between Interstate 405 and State Route 55.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-5-4067 between the Orange County Transportation Authority and the California Department of Transportation, in an amount of \$267,725,000, comprised of a construction capital share of \$223,000,000, and a construction management services share of \$44,725,000, for the Interstate 5 Improvement Project between Interstate 405 and Yale Avenue.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the Interstate 5 (I-5) Improvement Project between the Interstate 405 (I-405) and Yale Avenue (Project). The Project is Project B 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 2024.

Final design for the Project is nearing completion in two segments with the following project limits:

- Segment 1 extends from I-405 to Yale Avenue
- Segment 2 extends from Yale Avenue to State Route 55

Segment 1 will add one general purpose lane in both directions on the Project. The Project will re-establish existing auxiliary lanes, provide new auxiliary lanes where necessary, provide continuous access to the high-occupancy vehicle lanes and improve the existing on- and off-ramps. The Project will also provide new bicycle lane striping and pavement markings along Alton Parkway, Jeffrey Road, and Sand Canyon Avenue. Separately, Caltrans has developed the plans, specifications, and estimates (PS&E) for a multi-asset project (MAP) within the same project limits, which includes pavement rehabilitation, safety device upgrades, census stations, a weigh-in-motion facility, additional signage, and electrical conduit replacements. The MAP scope is funded by the State Highway Operation and Protection Program (SHOPP), and the 100 percent design plans have been combined with the Segment 1 plans with all improvements to be advertised in one construction bid package. This will ensure efficient construction of all improvements and will minimize disruption to the traveling public, construction fatigue, potential construction conflicts, and redundant work.

On June 8, 2020, the Board authorized Cooperative Agreement No. C-0-2317 with Caltrans to provide oversight of the PS&E, and to advertise and award the construction contract for the Project. On August 8, 2022, the Board authorized Cooperative Agreement No. C-2-2592 with Caltrans to be the implementing agency for project right-of-way acquisition and utility relocation activities.

OCTA and Caltrans are proposing to enter into Cooperative Agreement No. C-5-4067 to define the specific roles and funding responsibilities for each agency to provide the construction capital and construction management support services for Segment 1, between I-405 and Yale Avenue.

Bid documents for Segment 1 are being prepared for the construction contract, which is expected to be advertised by late 2025. The total construction capital funding required for Segment 1 is \$223,000,000, comprised of \$38,957,200 in federal Surface Transportation Block Grant (STBG) funds, \$80,718,000 in State Transportation Improvement Program (STIP) funds, \$31,273,400 in Caltrans SHOPP funds, and \$72,051,400 in M2 funds. The total construction support funding for the Project is \$44,725,000, comprised of \$4,042,800 in STBG funds, \$14,620,000 in STIP funds, \$5,126,600 in SHOPP funds, and \$20,935,600 in M2 funds.

As the implementing agency for construction of the Project, Caltrans will be responsible for 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 resident engineer and structures representative, and minimal other field personnel, along with construction administrative support and environmental and paleontology monitoring for the Project, at an estimated cost of \$23,789,400. Caltrans will draw down the federal STBG funds and state SHOPP and STIP funds directly. OCTA will retain a consultant firm to augment Caltrans' field staff with structural and roadway inspection, surveying, office engineering, materials testing, 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 OCTA consultant construction support is \$20,935,600 in M2 funds. Through a separate contract, OCTA will lead the public outreach efforts.

Fiscal Impact

The Project will be included in OCTA's Fiscal Year (FY) 2025-26 Budget and subsequent FY budgets, Capital Programs Division, account nos. 0017-9084-FB102-1OC and 0017-9085-FB102-1OC and will be funded with a combination of state, federal, and local funds.

Summary

Staff requests Board approval for the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-5-4067 between OCTA and Caltrans, in the amount of \$267,725,000, comprised of a construction capital share of \$223,000,000 and a construction management services share of \$44,725,000, for the Project.

Attachment

None.

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