

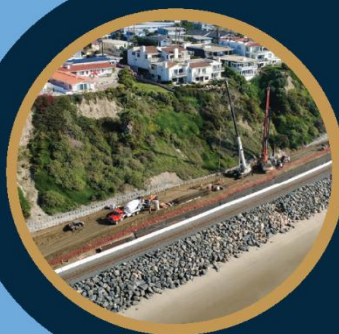


Orange County Transportation Authority

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



Jamey M. Federico
Chair

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

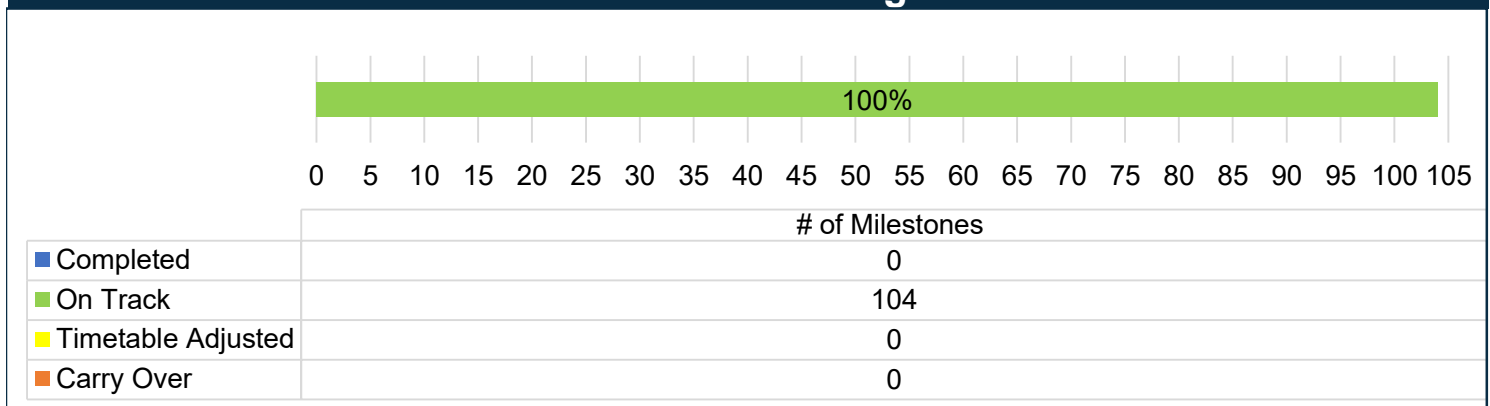
2026 CEO Initiatives

- 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

2026 Milestone Progress



FIRST QUARTER (Q1)

0 of 10 Completed - 0%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	I-5, I-405 to Yale Avenue	Advance Construction	Initiate construction - Q1					
2.	I-5, Yale Avenue to SR-55	Advance Construction	Initiate construction - Q1					
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					
4.	San Clemente Pedestrian Audible Warning System Rehabilitation	Advance Construction	Begin construction - Q1					
5.	SR-57 Truck Climbing Lane	Advance Environmental Phase	Initiate environmental and engineering studies - Q1					
6.	SB 707	Meet SB 707 Requirements for Implementation	Seek Board direction on SB 707 requirements - Q1					
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					
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					
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					
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					

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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SECOND QUARTER (Q2)

0 of 24 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 - Q2					
2.	Hydrogen Fueling Station (Garden Grove Bus Base)**	Advance Zero-Emission Goals	Select design-build entity to construct improvements - Q2					
3.	I-5, Avenida Pico to San Diego County Line*	Advance Environmental Phase	Release draft environmental document for public review - Q2					
4.	I-5, El Toro Road Interchange	Advance Environmental Phase	Release draft environmental document for public review - Q2					
5.	Orange County Maintenance Facility**	Support Metrolink Efforts to Optimize and Expand Service	Present settlement agreement to Board for approval - Q2					
6.	Slope Stabilization	Advance Construction	Complete Phase II construction - Q2					
7.	91 Express Lanes	Determine Direction for 91 Express Lanes Operating Services Agreement	Present Operating Services Agreement to Board for approval - Q2					
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					
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					
10.	Rider Validation System	Modernize OCTA's Fare Collection System	Transition College Pass Program to the Wave platform - Q2					
11.	Mayors Forums	Conduct Mayors Forums by District	Conduct forums with city leaders and report to management team - Q2					
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					
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					

*2025 Carryover

**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					
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					
16.	Personnel and Salary Resolution	Attract and Retain Top Talent	Present recommendations to Board as part of the OCTA FY 2026-27 budget - Q2					
17.	2026 LRTP	Highlight Initial Preferred Plan Project List	Present update to Board - Q2					
18.	405 Express Lanes Excess Toll Revenue Expenditure Plan	Develop 405 Express Lanes Excess Toll Revenue Expenditure Plan	Present draft plan to Board - Q2					
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					
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					
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					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
22.	Ten-Year Review	Evaluate Performance of the M2 Program through a Comprehensive Review	Present report to Board - Q2					
23.	Transit Optimization Study*	Identify Bus Operation Enhancements to Improve Speed and Reliability	Complete study - Q2					
24.	ZEB Transition Plan**	Evaluate Charging Infrastructure Needs and Facilities for ZEB Rollout Plan	Award contract - Q2					

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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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					
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					
4.	SR-91, La Palma Avenue to SR-55	Advance Construction	Initiate construction - Q3					
5.	405 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3					
6.	91 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3					
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					
8.	SB 707	Meet SB 707 Requirements for Implementation	Implement SB 707 - Q3					
9.	Credit Ratings	Maintain OCTA's Positive Credit Rating	Conduct annual rating agency meeting - Q3					
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					
12.	College Pass Program	Continue Working with Community Colleges to Renew or Extend Agreements for the Program	Execute new agreement with Cypress College - Q3					

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
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					
14.	OC Streetcar	Begin OC Streetcar Operations	Open to public for revenue service - Q3					
15.	ZEB Program	Advance Zero-Emission Goals	Receive full delivery of BEBs - Q3					
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					
17.	Early Career Academy	Provide Early Career Development to Grow New Professionals	Launch sixth cohort - Q3					
18.	Employee Health Insurance Renewal Programs	Secure Competitive Health Benefits	Present health insurance recommendations to Board - Q3					
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					
20.	Public Transportation Agency Safety Plan (PTASP)	Adopt OC Streetcar and Operations and Maintenance Contractor PTASP	Seek Board approval for the 2026 PTASP - Q3					
21.	2026 LRTP	Initiate Draft 2026 LRTP Public Review	Seek Board approval to release draft 2026 LRTP - Q3					
22.	2026 State Transportation Improvement Program (STIP)	Maximize State Funding Opportunities	Present final 2026 STIP to Board - Q3					

*2025 Carryover

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
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					
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					
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					

**2025 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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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					
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					
4.	I-5, El Toro Road Interchange	Advance Environmental Phase	Approve final environmental document - Q4					
5.	Transit Security and Operations Center**	Ensure Transit Service Continuity	Provide construction updates to Board - Q1 and Q4					
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					
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					
9.	Comprehensive Business Plan (CBP)	Develop OCTA's FY 2026-27 CBP	Present the FY 2026-27 CBP to Board for adoption - Q4					
10.	Farebox Project	Modernize OCTA's Fareboxes for Fixed-Route Fleet	Complete installation of new fareboxes on OCTA's fixed-route fleet - Q4					
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					

**2025 Carryover (modified)

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					
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					
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					
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					
19.	Same-Day Taxi	Deliver Enhanced OC ACCESS Service	Present update to Board on Same Day Taxi service expansion and subsidy pilot - Q4					
20.	ZEB Program	Advance Zero-Emission Goals	Receive full delivery of FCEBs - Q4					

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					
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					
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					
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					
25.	OC Streetcar Marketing**	Promote OC Streetcar Ridership	Launch awareness campaign, promote ridership, continue safety education, and implement customer communications - Q1-Q4					

**2025 Carryover (modified)

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
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					
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					
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					
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					
30.	Workday	Continue to Support Agencywide Adoption of New Workday Software System	Launch post go-live training support and employee communications - Q2-Q4					
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					
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					
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					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	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					
35.	M2 Environmental Mitigation Program	Ensure Compliance with Resource Agency Permits	Present biannual progress reports to Board - Q2 and 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					
37.	Newport Transportation Center (NTC)	Assess Potential Relocation of NTC	Present draft feasibility study to Board - Q4					
38.	Next 10 Delivery Plan	Ensure M2 Delivery Commitment	Review and present status of the Next 10 Delivery Plan deliverables to Board - Q4					
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					
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					
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					
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					
43.	ZEB Transition Plan	Evaluate Charging Infrastructure Needs and Facilities for ZEB Rollout Plan	Present update to ESC - Q4					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

Acronyms

AAP/EEO - Affirmative Action Plan/Equal Employment Opportunity	L&C - Legislative and Communications Committee
Board - Board of Directors	LRTP - Long-Range Transportation Plan
BEB - Battery Electric Bus	M2 - Measure M2
Cal OES - California Governor's Office of Emergency Services	OCTA - Orange County Transportation Authority
Caltrans - California Department of Transportation	PTASP - Public Transportation Agency Safety Plan
CBP - Comprehensive Business Plan	RCTC - Riverside County Transportation Commission
CEO - Chief Executive Officer	RCP - Regional Capacity Program
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
FCEB - Fuel-Cell Electric Bus	SR-55 - State Route 55
FEMA - Federal Emergency Management Agency	SR-57 - State Route 57
FTA - Federal Transit Administration	SR-91 - State Route 91
FY - Fiscal Year	STIP - State Transportation Improvement Program
HMP - Hazard Mitigation Plan	TAM - Transit Asset Management
I-5 - Interstate 5	TOC - Taxpayer Oversight Committee
I-405 - Interstate 405	VMT - Vehicle Miles Traveled
I-605 - Interstate 605	ZEB - Zero-Emission Bus
LA28 - Los Angeles 2028 Olympic and Paralympic Games	