



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

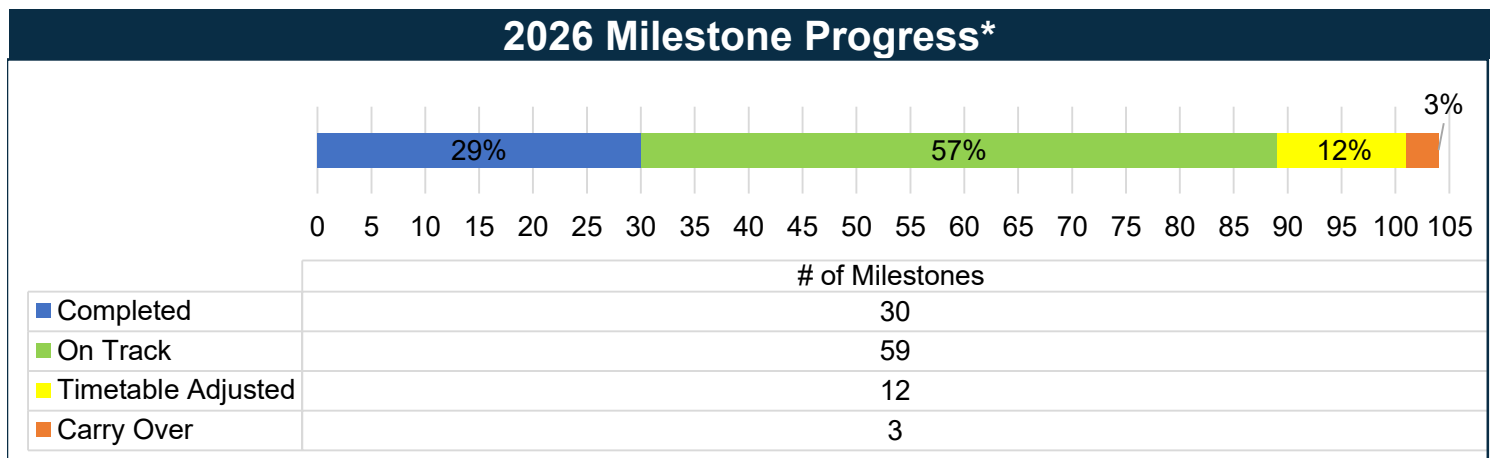
- Provide a Balanced, Sustainable, and Equitable Public Transportation System
- Enhance Organizational Strength through Financial Stewardship and Environmental Leadership
- Sustain a Culture of Excellence, Collaboration, and Inclusion

## 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         |
| <b>TOTAL</b>                    | <b>104</b> |



\*Due to rounding, total percentage may not be equal to 100%.

# 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. However, due to additional time being needed for review, this has been delayed to Q3. The updated draft language was sent to legal for review and will be shared with the City of Placentia and Metrolink, once ready, to coordinate OCTA's negotiating positions. Once concurrence is reached, a meeting with BNSF will be coordinated. |    |    |    |    |
| 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.                                                                                                                                                                                                                                                                     |    |    |    |    |

\*\*2025 Carryover (modified)

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

## Q1 (Continued)

| #   | Project/Program                                        | Objective                                                                                         | Milestone                                                                                                                               | Notes                                                                                                                                                                                                                                                                                                                                                                        | Q1 | Q2 | Q3 | Q4 |
|-----|--------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|
| 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;<br>March 23, 2026 - provided update to Board as part of FY 2026-27 Budget Assumptions item. |    |    |    |    |
| 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;<br>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)

16 of 24 Completed - 67%

| #  | 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   | May 26, 2026 - presented 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 to Q4; October 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 | Due to additional time needed for Caltrans to incorporate recent revisions to one of the alternatives, this has been delayed to Q3; July 2026 - anticipated to release draft environmental document for public review.                                                                                                                                                                      |    |    |    |    |

\*2025 Carryover

\*\*2025 Carryover (modified)

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q2 (Continued)

| #   | Project/Program                      | Objective                                                                                                       | Milestone                                                                                  | Notes                                                                                                                                                                                                                                                      | Q1             | Q2 | Q3 | Q4 |
|-----|--------------------------------------|-----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|----|----|
| 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 |    |    |    |
| 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 26, 2026 - presented to 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; May 26, 2026 - presented results to Board; May 28, 2026 - presented results to TOC Audit Subcommittee.                                                                                            |                |    |    |    |
| 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 - presented 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 2026 - conducted forums with Districts 1, 3, 4, and 5; June 2026 - conducted remaining forum with District 2.                                                                                                                                        |                |    |    |    |

\*\*2025 Carryover (modified)

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

## Q2 (Continued)

| #   | Project/Program                                        | Objective                                                                                                                 | Milestone                                                                                                    | Notes                                                                                                                                                                                           | Q1             | Q2 | Q3 | Q4 |
|-----|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|----|----|
| 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 the FY 2026-27 proposed budget, this has been delayed to Q3; September 2026 - Metrolink anticipated to present update to Board. |                |    |    |    |
| 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 26, 2026 - presented recommendations to Board.                                                                                                                                              |                |    |    |    |
| 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 - presented 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                                                                             | June 8, 2026 - presented draft plan to Board.                                                                                                                                                   |                |    |    |    |

\*\*2025 Carryover (modified)

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

## Q2 (Continued)

| #   | Project/Program               | Objective                                                                                                                                                                                     | Milestone                                   | Notes                                                                                                                                                                                                                                                                                                                                                                                                                              | Q1             | Q2 | Q3 | Q4 |
|-----|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|----|----|
| 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 6 and 27, 2026 - anticipated to present final recommendations to RTP and Board, respectively; August 2026 - anticipated to hold final public meetings; October 2026 - anticipated to publish final report. |                |    |    |    |
| 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 - presented 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 - presented report to Board.                                                                                                                                                                                                                                                                                                                                                                                        |                |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q2 (Continued)

| #   | Project/Program             | Objective                                                                  | Milestone           | Notes                                 | Q1             | Q2 | Q3 | Q4 |
|-----|-----------------------------|----------------------------------------------------------------------------|---------------------|---------------------------------------|----------------|----|----|----|
| 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)

5 of 27 Completed - 19%

| #  | 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/ September 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/ September 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 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. |    |    |    |    |

\*2025 Carryover

\*\*2025 Carryover (modified)

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

### Q3 (Continued)

| #   | Project/Program               | Objective                                                                              | Milestone                                                                  | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                          | Q1 | Q2             | Q3 | Q4 |
|-----|-------------------------------|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------|----|----|
| 8.  | SB 707                        | Meet SB 707 Requirements for Implementation                                            | Implement SB 707 - Q3                                                      | July 1, 2026 - anticipated to implement SB 707.                                                                                                                                                                                                                                                                                                                                                                                                |    |                |    |    |
| 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                            | June 16, 2026 - fully executed new agreement with Cypress College; two (Saddleback and Santiago Canyon Colleges) of six extensions have also been fully executed. Two (Irvine Valley and Goldenwest Colleges) of the remaining four extensions are in the signature phase, while the remaining two (Santa Ana and Fullerton Colleges) agreements are currently being finalized; July 2026 - anticipated to have all agreements fully executed. |    | Early Complete |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

### Q3 (Continued)

| #   | Project/Program                                                   | Objective                                                                                                     | Milestone                                                                              | Notes                                                                                                                                                                                                                                                                                                               | Q1 | Q2 | Q3 | Q4 |
|-----|-------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|
| 13. | OC ACCESS<br>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 - conducted user acceptance testing. OCTA is currently completing system testing, finalizing business processes, and preparing OCTA and Transdev staff for the transition. August 1 and September 5, 2026 - anticipated to implement new software for Same-Day Taxi service and OC ACCESS, respectively. |    |    |    |    |
| 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<br>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. August 24, 2026 - anticipated to present second biannual update to ESC.                                                                                                                                                                             |    |    |    |    |
| 17. | Early Career Academy                                              | Provide Early Career Development to Grow New Professionals                                                    | Launch sixth cohort - Q3                                                               | September 2026 - anticipated to launch sixth cohort.                                                                                                                                                                                                                                                                |    |    |    |    |
| 18. | Employee Health<br>Insurance Renewal Programs                     | Secure Competitive Health Benefits                                                                            | Present health insurance recommendations to Board - Q3                                 | August 24, 2026 - anticipated to present recommendations to Board.                                                                                                                                                                                                                                                  |    |    |    |    |

\*\*2025 Carryover (modified)

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

### Q3 (Continued)

| #   | Project/Program                                      | Objective                                                                                                                                                                                     | Milestone                                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                | Q1 | Q2             | Q3 | Q4 |
|-----|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------|----|----|
| 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; April 1, 2026 - Orange County Sanitation District issued OCTA an Industrial Wastewater Discharge Permit for the vehicle wash. |    |                |    |    |
| 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, with draft comments from CPUC pending. However, due to the forecasted projected start of revenue service for OC Streetcar being pushed out to Q1 of 2027, this has been delayed to Q4; completion of the PTASP is anticipated 30 days prior to revenue service.               |    |                |    |    |
| 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 - presented final 2026 STIP to Board.                                                                                                                                                                                                                                                                                                                                   |    | Early Complete |    |    |

\*2025 Carryover

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

### 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                                                                                                                   | May 18, 2026 - awarded contract.                                                                                                                                                              |    | Early Complete |    |    |
| 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                                                                                            | June 8, 2026 - presented contract to Board for approval to award.                                                                                                                             |    | Early Complete |    |    |
| 26. | Signal Synchronization                              | Improve Roadway Efficiency                                                                                | Provide update to Board on signal synchronization projects (Project P), including the countywide signal synchronization baseline - Q3 | September 14, 2026 - anticipated to provide update to Board.                                                                                                                                  |    |                |    |    |
| 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 - presented programming recommendations to Board to award \$55.67 million to eight RCP projects and \$12.99 million to six RTSSP projects as part of the 2026 call for projects. |    | Early Complete |    |    |

\*\*2025 Carryover (modified)

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

# 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             | Due to inconsistencies with funding and procurement timelines, this has been delayed and will be carried over and reconsidered for Q1 of 2027.                                                                                                                                                                                                               |    |    |    |    |
| 3. | I-5, Avenida Pico to San Diego County Line    | Advance Environmental Phase                  | Approve final environmental document - Q4                             | Due to ongoing VMT mitigation coordination with Caltrans, the timeline to release the draft environmental document for public review was pushed out; as a result, approval of the final environmental document has been delayed and will be carried over and reconsidered for 2027.                                                                          |    |    |    |    |
| 4. | I-5, El Toro Road Interchange                 | Advance Environmental Phase                  | Approve final environmental document - Q4                             | December 2026 - anticipated to approve final environmental document.                                                                                                                                                                                                                                                                                         |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                          | Objective                                                                                                                    | Milestone                                                                                                                | Notes                                                                                                                                                                                                                                                                                                                                                                                          | Q1 | Q2 | Q3 | Q4 |
|-----|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|
| 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; August 2026 - anticipated to provide update to Transit Committee.                                                                                                                                                                                          |    |    |    |    |
| 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                    | Highlighting OCTA initiatives continued throughout the second quarter, including adoption of OCTA's balanced \$2 billion FY 2026-27 budget; recognition of the Measure M2 "Halfway There" milestone and TOC confirmation that OCTA continues delivering transportation improvements as promised to voters; and successful implementation and growing adoption of the Wave fare payment system. |    |    |    |    |
| 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.                                                                                                                                                                                                                                                                                                                                          |    |    |    |    |

\*\*2025 Carryover (modified)

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                        | Objective                                                                                                                                        | Milestone                                                                                                                                  | Notes                                                                                                                                                                                                                                                                                                                                             | Q1 | Q2 | Q3 | 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 | 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.                                                                                                |    |    |    |    |
| 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    | OCTA's FTA Triennial Review continues to progress. Staff is currently working with the FTA review team to provide the next round of requested sample documentation. This review phase allows FTA to verify whether OCTA's day-to-day activities are being carried out in accordance with FTA requirements and OCTA's own policies and procedures. |    |    |    |    |
| 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 - held 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                                                                                 |                                                                                                                                                                                                                                                                                                                                                   |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                                               | Objective                                                                                                                                                                                                                             | Milestone                                                                                                                                                                           | Notes                                                                                                                                                                                            | Q1 | Q2 | Q3 | 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                                                                                                   | September 2026 - anticipated to present update on Same-Day Taxi service to Transit Committee.                                                                                                    |    |    |    |    |
| 20. | ZEB Program                                                   | Advance Zero-Emission Goals                                                                                                                                                                                                           | Receive full delivery of FCEBs - Q4                                                                                                                                                 | The first FCEB has been delivered.                                                                                                                                                               |    |    |    |    |
| 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                       | Community engagement efforts are ongoing, including: April-June 2026 - participated in 32 community, cultural, and small business events, reaching over 13,000 event participants.               |    |    |    |    |
| 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 - hosted first in-person DCLG meeting; June 25, 2026 - hosted second quarterly DCLG meeting virtually in which updates on the FY 2026-27 budget, M2, and the L RTP were provided. |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program              | Objective                                                                                                | Milestone                                                                                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                              | Q1 | Q2 | Q3 | 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                                                                                                                                                    | January 2026 - completed 91 Express Lanes 30th Anniversary campaign.                                                                                                                                                                                               |    |    |    |    |
| 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 16, 2026 - presented 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 artists; March 11, 2026 - signed contracts with local artists and began developing marketing campaign creative concepts.                                                                                          |    |    |    |    |
| 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; June 8, 2026 - presented I-5 (El Toro Interchange) project update to Board. September 14, 2026 - anticipated to present update on I-5 (Avenida Pico to San Diego County Line) project to Board. |    |    |    |    |

\*\*2025 Carryover (modified)

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                               | Objective                                           | Milestone                                                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Q1 | Q2 | Q3 | Q4 |
|-----|-----------------------------------------------|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|
| 27. | Outreach Activities                           | Engage Public on Planning Studies                   | Conduct outreach for planning studies, including the Coastal Rail Resiliency Study, 2026 L RTP, OC Connect, Bikeways Connectivity, Mobility Hubs 2, and others as appropriate, and provide updates to Board - Q1-Q4 | Outreach efforts are ongoing, including:<br>April 12 and May 16, 2026 - held Bikeways Connectivity demo events in Costa Mesa and Mission Viejo, respectively;<br>July 27, 2026 - anticipated to provide L RTP update to Board;<br>July 29, 2026 - anticipated to host Osher Lifelong Learning Institute members at Irvine Transportation Center and UCI Institute of Transportation Studies Master's Program students at UCI;<br>July 30, 2026 - anticipated to attend community meeting at Great Park in Irvine;<br>August 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                          | January 2026 - launched Rosa Parks Day campaign;<br>February 2026 - launched Transit Employee Appreciation Day campaign;<br>March 2026 - launched Commute Calculator and promotion;<br>April 2026 - launched Earth Day campaign; as part of the Youth Ride Free and College Pass programs, relaunched Your Route to Education campaign to coincide with the spring semester.                                                                                                                                                                                                                                                 |    |    |    |    |

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; January-February 2026 - completed transition of the Community College Pass to Wave; April 2026 - completed transition of the Employer Pass Program to Wave; deployed communication campaign about the discontinuation of paper passes. |    |    |    |    |
| 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 - began performance appraisal training; May 2026 - deployed training for performance reviews.                                                                                                                                                              |    |    |    |    |
| 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.<br>September 14, 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.<br>October 12, 2026 - anticipated to present programming recommendations to Board.                                                                                                                                               |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                     | Objective                                                                                                                     | Milestone                                                                                                                | Notes                                                                                                                                                                                                                                                                           | Q1 | Q2 | Q3 | Q4 |
|-----|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|----|----|
| 35. | M2 Environmental Mitigation Program | Ensure Compliance with Resource Agency Permits                                                                                | Present biannual progress reports to Board - Q2 and Q4                                                                   | June 8, 2026 - presented first biannual update to Board.                                                                                                                                                                                                                        |    |    |    |    |
| 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 - presented FY 2025-26 Q2 report to Board;<br>June 8, 2026 - presented FY 2025-26 Q3 report to Board.<br>September 14, 2026 - anticipated to present FY 2025-26 Q4 report to Board;<br>December 14, 2026 - anticipated to present FY 2026-27 Q1 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;<br>April 9, 2026 - presented update to Transit Committee;<br>June 16 and 22, 2026 - presented updates to Transit Committee and Board, respectively, 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 - presented first biannual update to Board.<br>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.                                                                                                                                                                                                                      |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

| #   | Project/Program                           | Objective                                                                      | Milestone                                                                                                                                       | Notes                                                                                                                                                                                                                                                                                                                                                                                                                              | Q1 | Q2 | Q3 | 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                                                                                              | January 2026 - kicked off the study.<br>October 2026 - anticipated to complete study, with a corresponding update to ESC by 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;<br>March 9, 2026 - presented update to Board; April 2026 - executed contract with LA Metro for World Cup 2026 transit services;<br>May 26, 2026 - presented consultant selection for LA28 study to Board for approval.<br>August 2026 - anticipated to provide interim memo to Board on World Cup 2026 performance;<br>September 14, 2026 - anticipated to present update to 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.                                                                                                                                                                                                                                                                                                                                                                                                     |    |    |    |    |

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Acronyms

|                                                                |                                                                     |
|----------------------------------------------------------------|---------------------------------------------------------------------|
| # - Number                                                     | I-605 - Interstate 605                                              |
| % - Percentage                                                 | LA Metro - Los Angeles County Metropolitan Transportation Authority |
| AAP/EEO - Affirmative Action Plan/Equal Employment Opportunity | LA28 - Los Angeles 2028 Olympic and Paralympic Games                |
| BC - Bikeways Connectivity                                     | L&C - Legislative and Communications Committee                      |
| BEB - Battery Electric Bus                                     | LRTP - Long-Range Transportation Plan                               |
| Board - Board of Directors                                     | M2 - Measure M2                                                     |
| 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                                   | UCI - University of California, Irvine                              |
| I-5 - Interstate 5                                             | VMT - Vehicle Miles Traveled                                        |
| I-405 - Interstate 405                                         | ZEB - Zero-Emission Bus                                             |