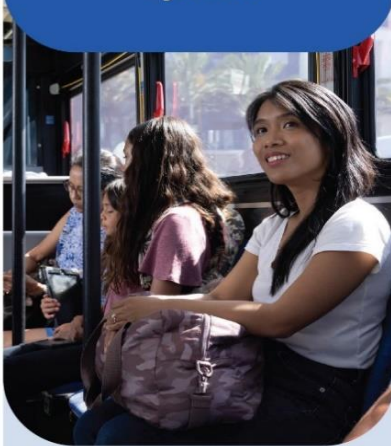




Orange County Transportation Authority

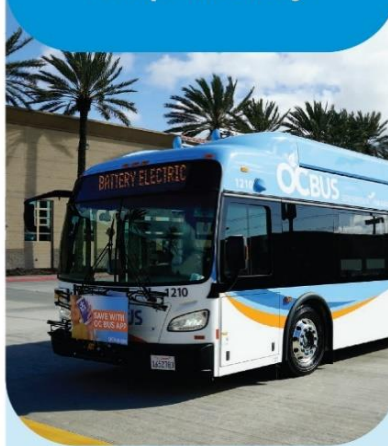
# 2025 Board & CEO Initiatives

## Deliver the Public a Balanced, Sustainable, & Equitable Transportation System



- Provide Efficient, Reliable, and Accessible Options to Move People and Goods
- Continue to Fulfill Commitments through the Voter-Approved Measure M2 Local Sales Tax Program
- Actively Engage with Stakeholders and Seek Input from Diverse Communities

## Ensure Organizational Resiliency through Fiscal & Environmental Responsibility



- Maintain Financial Integrity and Effectively Administer Taxpayer Dollars for Transportation
- Adapt to Changes in the Environment through Enhanced Resiliency Initiatives
- Support Thriving Communities by Advancing Environmental Stewardship and Sustainability

## Uphold Continued Excellence, Diversity, & Collaboration



- Optimize Relationships with Regional, Business, and Community Partners to Advance Shared Priorities
- Reflect Community Values through a Continued Commitment to an Inclusive and Diverse Work Culture
- Promote Employee Development and Belonging by Providing a Safe and Welcoming Workplace

  
Doug Chaffee  
Chair

  
Darrell E. Johnson  
Chief Executive Officer

Revised: March 2025

## 2025 Board Initiatives

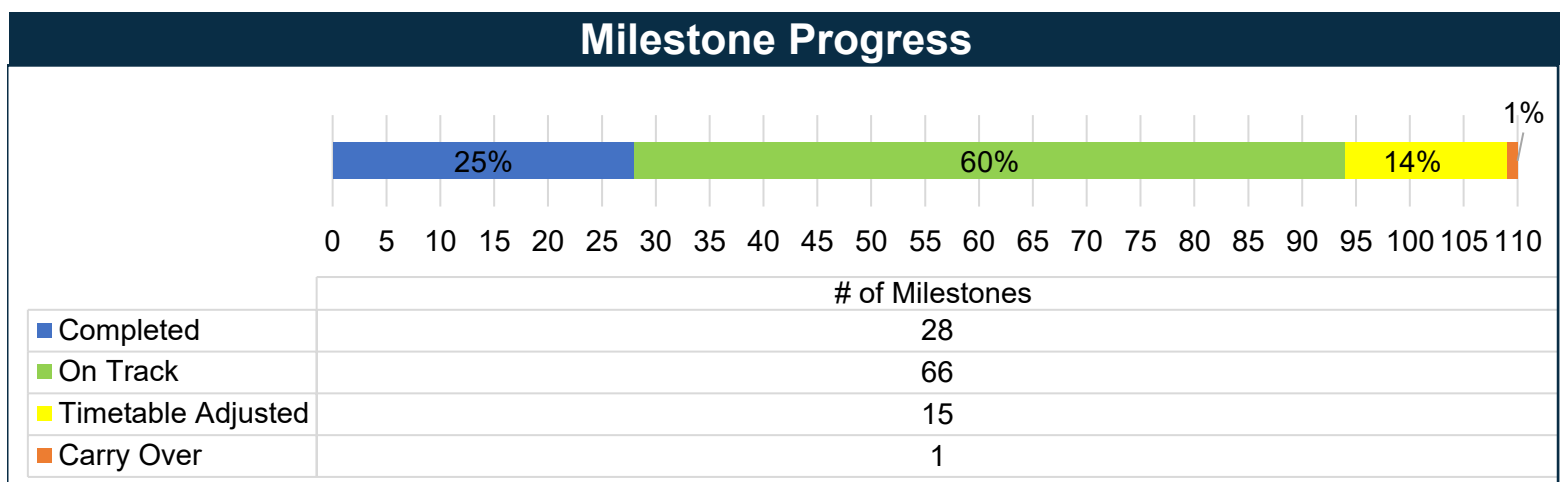
- Deliver the Public a Balanced, Sustainable, and Equitable Transportation System
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## 2025 CEO Initiatives

- Provide Efficient, Reliable, and Accessible Options to Move People and Goods
- Continue to Fulfill Commitments through the Voter-Approved Measure M2 Local Sales Tax Program
- Actively Engage with Stakeholders and Seek Input from Diverse Communities
- Maintain Financial Integrity and Effectively Administer Taxpayer Dollars for Transportation
- Adapt to Changes in the Environment through Enhanced Resiliency Initiatives
- Support Thriving Communities by Advancing Environmental Stewardship and Sustainability
- Optimize Relationships with Regional, Business, and Community Partners to Advance Shared Priorities
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## 2025 CEO Milestone Summary

Number of Milestones by Quarter	
Quarter Due	Number
First Quarter	9
Second Quarter	30
Third Quarter	24
Fourth Quarter	47
<b>TOTAL</b>	<b>110</b>



# FIRST QUARTER (Q1)

6 of 9 Completed -

67%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	BEB Charging Infrastructure (Santa Ana Bus Base)**	Advance Zero-Emission Goals	Seek Board approval to release public works IFB - Q1	March 10, 2025 - presented to Board for approval to release IFB.				
2.	Bus Base Gates*	Enhance Security at Bus Bases with Security Gate Installations	Complete construction - Q1	Due to additional time being needed to assemble a functionality test plan for OCTA's Security and Emergency Preparedness department, this has been delayed; May 2025 - completed integration of the Access Control System (ACS) and Video Surveillance System into the OCTA security department's back-office management system; June 2025 - completed ACS field acceptance testing at Garden Grove Bus Base, with testing at Santa Ana Bus Base to follow. July 2025 - anticipated to complete construction.				
3.	Mission Viejo/Laguna Niguel Rail ROW Slope Stabilization**	Ensure Asset Preservation and Climate Resiliency	Advertise for construction - Q1	Due to additional time being needed to address some final comments from the IFB documents, this has been delayed; July 14, 2025 - anticipated to present to Board for approval to release IFB.				

\*2024 Carryover

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q1 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
4.	Renewable Solar Energy at Bus Bases**	Advance Climate Goals by Introducing Renewable Energy into Agency Operations	Seek Board approval to release RFP for design - Q1	Although OCTA is now focused on the completion of a feasibility study, this will help inform the design and installation of solar photovoltaic systems at the OCTA bus bases. Due to additional time being needed to finalize the scope of work, this has been delayed; July 2025 - anticipated to release RFP for feasibility study.				
5.	Local Government Outreach	Establish Relationships with Newly Elected Officials	Conduct outreach to all new mayors and city council members - Q1	February 2025 - sent out communications; March 2025 - conducted follow-up, which continued through April 2025, including various tours and briefings with city council members and mayors.				
6.	Surface Transportation Reauthorization	Inform Reauthorization	Develop priorities for reauthorization and present to Board - Q1	March 24, 2025 - presented to Board for adoption.				
7.	Coach Operator Barriers	Enhance Bus Operator Safety	Start installation of operator barriers on buses - Q1	March 2025 - began second phase of coach operator barrier installations.				
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	February 24, 2025 - provided progress report to Board.				
9.	Management Development Academy (MDA)	Provide Professional Development Opportunities	Launch sixth cohort - Q1	January 30, 2025 - launched sixth cohort.				

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## SECOND QUARTER (Q2)

20 of 30 Completed -

67%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	Hydrogen Fueling Station (Garden Grove Bus Base)**	Advance Zero-Emission Goals	Seek Board approval to award design-build agreement - Q2	Due to unforeseen challenges during the procurement process, this has been delayed; July 2025 - anticipated to present to Board for approval to select contractor for design and construction.				
2.	I-605, Katella Avenue Interchange**	Advance Construction	Initiate construction - Q2	April 25, 2025 - received contract approval from Caltrans, initiating the official start of construction.				
3.	OC Streetcar	Prepare for OC Streetcar Operations	Receive delivery of first vehicles - Q2	May 4, 2025 - received delivery of first vehicle.				
4.	Orange County Maintenance Facility**	Support Metrolink Efforts to Optimize and Expand Service	Seek resolution to proceed to design phase - Q2	Due to there being no updates on a resolution from the City of Irvine to allow the facility to be built, this has been delayed.				
5.	SR-55, I-5 to SR-91	Advance Design Phase	Present update on design status and project schedule to Board - Q2	March 10, 2025 - presented update on status and project schedule as part of the Upcoming Measure M2 Freeway Construction Projects Update to Board.				
6.	SR-91, SR-55 to Lakeview Avenue	Advance Construction	Initiate construction - Q2	April 14, 2025 - initiated physical construction.				
7.	405 Express Lanes	Update Board on Latest Traffic and Revenue Data	Present update to Board - Q2	April 2025 - received forecast. June 23, 2025 - presented update to Board.				
8.	M2 Compliance Audit Report	At the Request of the Taxpayer Oversight Committee (TOC), Provide Results of an Independent Measure M2 Compliance Audit	Present results of M2 Compliance Audit to TOC and Board - Q2	April 28, 2025 - presented results to Board; May 27, 2025 - presented results to TOC Audit Subcommittee; June 10, 2025 - presented results to TOC.				

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
9.	Headquarters Building	Implement Long-Term Strategy for the OCTA Administrative Headquarters	Submit permit to the City of Santa Ana for Board/conference room construction and procure design services for headquarters building improvements - Q2	January 13, 2025 - presented RFP for design services to Board for approval. Due to delays in scheduling interviews for short-listed firms, this has been delayed; July 28, 2025 - anticipated to award contract; permit anticipated to be submitted during the design process in FY 2025-26.				
10.	OCTA's Operating and Capital Budget	Develop a FY 2025-26 Balanced Budget	Present a comprehensive and balanced OCTA FY 2025-26 budget for adoption by the Board - Q2	June 9, 2025 - presented FY 2025-26 budget to Board for adoption.				
11.	Federal Compliance Training	Provide Federal Compliance and Oversight Training Agencywide on New and Current Federal Requirements	Conduct federal compliance training for agency's project managers and subject matter experts - Q2	May 2025 - successfully completed federal compliance training, which was well received with over 50 staff members participating.				
12.	State and Federal Delegation Outreach	Establish Relationships with Newly Elected Officials	Meet with all newly elected Orange County state and federal offices - Q2	March 2025 - completed outreach with newly elected offices; however, a special election added one new member that OCTA met with in June 2025.				
13.	Bus Fleet Management	Maintain Fleet in a State of Good Repair	Seek Board approval to award contract to purchase six 60-foot buses - Q2	Due to the State of California contract having expired and not being renewed, the procurement process has been delayed; OCTA intends to use the State of Washington contract to purchase the buses; a presentation to Board for approval to award contract is now anticipated in Q3.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER



## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
14.	College Pass Program	Continue Working with Community Colleges to Renew or Extend Agreements for the Program	Exercise option term with Coastline College, Orange Coast College, and Santiago Canyon College Continuing Education - Q2	January 2025 - executed a new agreement with Coastline College; Santiago Canyon College Continuing Education opted not to renew and let its agreement expire, as it was superseded when non-credit students were added to the new agreements with Santa Ana and Santiago Canyon Colleges. Due to unforeseen administrative constraints, processing the new agreement for Orange Coast College (OCC) has been delayed; July 2025 - anticipated to circulate agreement for signature with OCC.				
15.	Metrolink Service	Plan, Fund, and Administer Sustainable Metrolink Service	Receive updates from Metrolink on the financial and operational performance of the service optimization - Q2	April 28, 2025 - update on Metrolink proposed FY 2025-26 budget presented to Board.				

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
16.	Metrolink Special Event Train	Increase Opportunities for Special Metrolink Service	Implement Angels Express Service consistent with Metrolink's service optimization - Q2	Although the Angels Express will not be operated this year due to financial constraints, OCTA partnered with Metrolink to promote existing service to special events in the region, such as Transit Equity Day, Earth Day, Bike to Work Week, Fullerton Day of Music, Irvine Greek Festival, and the San Clemente Ocean Festival. These special event services helped to support Metrolink's ongoing service optimization efforts and will continue throughout the year.				
17.	OC ACCESS	Deliver Required Complementary ADA Paratransit Service and Microtransit Service	Seek Board approval to exercise option term for OC ACCESS paratransit agreement - Q2	March 24, 2025 - presented to Board for approval to exercise first option term.	Early Complete			
18.	OC ACCESS Eligibility Assessment Contract	Establish Certification Process for Determining Eligibility for Complementary Paratransit Service per ADA Requirements	Seek Board approval to award contract for the OC ACCESS eligibility assessment - Q2	March 24, 2025 - presented to Board for approval to release RFP. While no delays have occurred in the project schedule, award of contract is not expected until Q3; August/ September 2025 - anticipated to present to Board for approval to award contract.				

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
19.	OC ACCESS Eligibility Assessments Software Implementation	Implement Software Needed to Perform OC ACCESS Eligibility Assessments	Implement use of new software for eligibility assessments tracking - Q2	Due to an upheld procurement protest, this has been delayed and requires a re-release of the RFP; implementation of the new software is now anticipated for Q4; July 2025 - anticipated to present to Board for approval to award contract; September 2025 - anticipated to kick off project.				
20.	OC Flex*	Explore Efficient and Effective Transit Options to Better Meet Mobility Demands in Orange County	Assess OC Flex performance and provide a report to Board on future direction - Q2	March 24, 2024 - presented report to Board and recommendations to discontinue OC Flex service.	Early Complete			
21.	OC Streetcar*	Prepare for OC Streetcar Operations	Initiate OC Streetcar testing with Herzog Contracting Corp. - Q2	Due to construction delays related to electrification of the system, testing with Herzog Contracting Corp. has been delayed; July 2025 - anticipated to initiate testing.				
22.	Personnel and Salary Resolution	Attract and Retain Top Talent	Present recommendations to Board as part of the OCTA FY 2025-26 budget - Q2	June 9, 2025 - presented to Board for adoption as part of the FY 2025-26 budget.				
23.	Public Transportation Agency Safety Plan (PTASP)	Update OCTA's PTASP to Adopt New FTA Requirements (Joint Safety Committee, Performance Targets, etc.)	Seek Board approval for the 2025 PTASP - Q2	February 10, 2025 - presented to Board for approval.	Early Complete			

\*2024 Carryover

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
24.	Workday	Support Agencywide Adoption of New Workday Software System	Launch change management plan and employee communications - Q2	Change management plan has been launched; employee communications have been ongoing, including at management team meetings and CEO Connections, and will continue throughout the year leading up to the Workday launch date, anticipated in December 2025.				
25.	2027-2028 CMAQ-STBG Call for Projects Nominations	Establish Priorities for OCTA Project Recommendations to SCAG	Present report to Board - Q2	March 10, 2025 - presented prioritization guidance to Board for approval. July 14, 2025 - anticipated to present project prioritization recommendations for SCAG consideration to Board.				
26.	Fullerton Park-and-Ride Joint Use Master Plan	Review Conceptual Site Designs and Feasibility Analysis	Provide update to ESC - Q2	May 12, 2025 - provided update to ESC.				
27.	M2 Triennial Performance Assessment	Evaluate the Efficiency, Effectiveness, Economy, and Results of the Agency's Delivery of M2	Present the sixth performance assessment covering FY 2021-22 through FY 2023-24 - Q2	March 10, 2025 - presented performance assessment to Board.	Early Complete			
28.	Signal Synchronization	Improve Roadway Efficiency	Provide update to Board on signal synchronization projects (Project P), including the countywide signal synchronization baseline - Q2	To be consistent with the timing of the previous update, this has been delayed; an update is anticipated to be provided in Q3.				

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q2 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
29.	World Cup 2026 and LA28 Olympics Planning	Develop an Action Plan to Guide Preparations	Coordinate with LA Metro, Orange County cities, and other regional transit providers and provide update to Board - Q2	February 26, 2025 - participated in separate meetings with LA Metro and the City of Anaheim to discuss World Cup 2026 and LA28 planning; March 4 and 14, 2025 - met with LA Metro for the World Cup Regional Task Force and LA28 Olympics Planning, respectively; May 12, 2025 - presented update to ESC; June 9, 2025 - presented update to Board.				
30.	ZEB Transition Plan**	Evaluate Charging Infrastructure Needs and Facilities for ZEB Rollout Plan	Award contract to initiate project and present update to ESC - Q2	Due to additional time being needed to coordinate with Caltrans on the transportation planning grant and gain more experience and data from current pilots, award of contract to initiate the project has been delayed; July 2025 - anticipated to present update to ESC; September 2025 - anticipated to award contract.				

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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# THIRD QUARTER (Q3)

2 of 24 Completed -

8%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	I-5, Avenida Pico to San Diego County Line**	Advance Environmental Phase	Release Draft Environmental Document for public review - Q3	Fall 2025 - anticipated to release document for public review.				
2.	I-5, SR-73 to El Toro Road Project	Continue to Advance Construction on All Segments	Complete construction on all segments - Q3	Summer 2025 - anticipated to complete construction on all segments.				
3.	I-5, Yale Avenue to SR-55	Advance Construction	Advertise for construction - Q3	August 2025 - anticipated to advertise for construction.				
4.	Transit Security and Operations Center	Ensure Transit Service Continuity	Provide construction update to Board - Q3	To provide additional time for more meaningful progress to be made and report on, this has been delayed. November 2025 - anticipated to provide update to Board.				
5.	241/91 Express Connector (EC)**	Advance Project Development Phase	Seek Board direction for the Master Agreement, Operating Agreement, and Letter of Support for the 241/91 EC project - Q3	Agencies continue to meet and negotiate terms for the agreements; July 28, 2025 - anticipated to present to Board for direction on next steps.				
6.	405 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3	September 8, 2025 - anticipated to provide report to Board.				
7.	91 Express Lanes	Update Board on Activities of the Recently Completed Fiscal Year	Provide fiscal year-end report to Board - Q3	September 8, 2025 - anticipated to provide report to Board.				
8.	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					
9.	Credit Ratings	Maintain OCTA's Positive Credit Rating	Conduct annual rating agency meeting - Q3	July 28-31, 2025 - anticipated to conduct meetings.				

\*2024 Carryover

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
10.	Cybersecurity	Protect OCTA's Information Systems	Require completion of annual cybersecurity training for all employees - Q3					
11.	Enterprise Asset Management (EAM)**	Implement New EAM System	Transition Infor EAM System from test into full production and provide periodic updates to ESC - Q3	To address the cure, vendor completed a successful technical assessment and system demos, restoring project team confidence; data load issues are being addressed with a resolution plan in place; change management and communications are underway; September 28, 2025 - anticipated to go live with new EAM software.				
12.	Rider Validation System (RVS)	Modernize OCTA's Fare Collection System	Implement RVS - Q3	October 2025 - anticipated to implement RVS.				
13.	Bus Fleet Management	Maintain Fleet in a State of Good Repair and Advance Zero-Emission Goals	Receive delivery of ten battery electric vans for paratransit service - Q3	July 2025 - anticipated to receive battery electric vans.				
14.	Diversity, Equity, Inclusion, and Belonging - Affirmative Action Plan/Equal Employment Opportunity (AAP/EEO)	Provide Updates on Progress of AAP/EEO Development and Implementation and Adhere to Federal Requirements	Present biannual updates to ESC - Q1 and Q3	April 28, 2025 - presented first biannual update to ESC. September 2025 - anticipated to present second biannual update to ESC.				
15.	Early Career Academy (ECA)	Provide Early Career Development to Grow New Professionals	Launch fifth cohort - Q3	July 16, 2025 - anticipated to launch fifth ECA cohort.				
16.	Employee Health Insurance Renewal Programs	Secure Competitive Health Benefits	Present health insurance recommendations to Board - Q3	July 28, 2025 - anticipated to present health insurance recommendations to Board.				

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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### Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
17.	RVS	Create Awareness of Wave Card, Mobile Application, and Other Fare Changes	Launch an awareness, customer education, and promotional program for RVS - Q3	Completed Title VI Public Involvement Plan in Q1; May 27, 2025 - began comprehensive awareness and education campaign. Due to unforeseen adjustments to the project schedule, launch of the RVS awareness campaign and promotion has been delayed and is now anticipated in Q4.				
18.	2026 Long-Range Transportation Plan (LRTP)	Identify Draft Challenges and Goals	Provide update to ESC - Q3	June 23, 2025 - provided update to ESC.		Early Complete		
19.	Coastal Rail Resiliency Study	Identify Potential Short-Term and Mid-Term Solutions to Protect the Existing Coastal Rail Infrastructure	Present preliminary options for short- and mid-term protection strategies and seek stakeholder input - Q1 and Q3	February 10, 2025 - presented update to Board. July 15 and 19, 2025 - anticipated to hold two public meetings; August 2025 - anticipated to present update to RTP and Board.				
20.	Coastal Rail Solutions	Develop Long-Term Strategies for Coastal Rail Infrastructure	Develop framework for an agreement with the State of California to study long-term coastal resiliency solutions - Q3					

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q3 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
21.	Coastal Rail Stabilization Priority Project	Advance Preliminary Engineering, Environmental, and Permitting Processes to Expedite the Four Reinforcement Areas	Continue to work with regulatory agencies and external stakeholders to advance projects and provide updates to Board - Q1 and Q3	February 10, 2025 - provided update to Board; April 14, 2025 - presented emergency declaration to Board for approval to proceed completing work as an emergency, with bi-weekly updates presented to Board since; project progress includes completing Areas 1 and 2 riprap repairs and receiving CCC approval on Area 3 CDP permit. Efforts are ongoing to execute agreement with the design-build contractor to begin construction, work with CCC to submit the required documents under a CDP permit, and place sand for Areas 1, 2, and 4 following environmental and permitting completion.				
22.	SR-91 Eastbound Corridor Operations Project (ECOP)	Advance Measure M2 Improvements Along SR-91	Initiate agreement with RCTC for Eastbound SR-91 operational improvements between SR-241 and SR-71 and present update to ESC - Q3					
23.	SR-91 Implementation Plan	Collaborate with RCTC to Update the Plan in Support of Regional SR-91 Corridor Transportation Improvements	Present Plan to Board - Q3	June 9, 2025 - presented draft Plan to Board.		Early Complete		
24.	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					

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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# FOURTH QUARTER (Q4)

0 of 47 Completed -

0%

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
1.	BEB Charging Infrastructure (Irvine Construction Circle Bus Base)	Advance Zero-Emission Goals	Complete design phase - Q4	September 30, 2025 - anticipated to complete design phase.				
2.	Placentia Metrolink Station	Secure Approval from BNSF for Placentia Metrolink Station	Support Metrolink efforts to develop a cooperative agreement with BNSF and provide status report to Board - Q4					
3.	SR-57, Orangewood Avenue to Katella Avenue	Advance Construction	Initiate construction - Q4					
4.	SR-91, Acacia Street to La Palma Avenue	Advance Construction	Initiate construction - Q4					
5.	Crisis Communications	Ensure Agency and Staff Preparedness	Conduct a tabletop exercise for the Crisis Communications team and revise Crisis Communications Plan as appropriate - Q4					
6.	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	Efforts to highlight OCTA initiatives have been ongoing throughout the year, including the selection of the new Board Chair and Vice Chair, unveiling of the 2025 Board and CEO Initiatives, coastal rail emergency permitting efforts, coastal rail closure construction work, SR-91 Improvement Project groundbreaking, I-5 South County Improvements Project completion, and first OC Streetcar vehicle delivery.				
7.	Annual Comprehensive Financial Report	Ensure Accountability and Transparency	Obtain an unmodified opinion from the external auditors and provide the annual financial statements to Board - Q4	November 24, 2025 - anticipated to present to Board for approval.				
8.	Comprehensive Business Plan (CBP)	Develop OCTA's Business Plan	Update program cash flows - Q4					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
9.	Workday	Implement Scalable Enterprise Solution and Improve Operational Effectiveness, Efficiency, and Internal Collaboration	Replace current PACE and Payroll Lawson/Infor System with Workday - Q4	Replacement to new Workday system is underway and in the end-to-end testing phase; December 2025 - anticipated to go live with Workday.				
10.	Federal Compliance Review Simulation	Conduct Compliance Review Simulation to Prepare Agency for FTA's Official Triennial Review	Conduct mock triennial review using same methodology and intensity as FTA's official Triennial Review - Q4	The preparatory triennial review is currently underway and is anticipated to be completed by the end of the year.				
11.	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 17, 2025 - conducted first legislative forum.				
12.	Legislative Platforms	Set Legislative Priorities	Present final 2026-27 state and federal legislative platforms to Board for approval - Q4	November 2025 - anticipated to present final platforms to Board for approval.				
13.	Legislative Priorities	Provide End-of-Session Report	Discuss outcomes of legislative priorities with L&C - Q4	November 2025 - anticipated to present legislative priorities to L&C.				
14.	Local Government Forums	Conduct Mayors Forums by District	Conduct forums with city leaders and report to management team - Q4	September 2025 - anticipated to conduct forums and report to management team.				
15.	OC ACCESS Operations Software Implementation	Implement Software Aimed to Improve OC ACCESS Performance and Provide Riders with Alternative Transit Options	Begin implementation of new software for paratransit scheduling and operations - Q4	Due to an upheld procurement protest, which requires a re-release of the RFP, implementation of the new software has been delayed and will be carried over and reconsidered for 2026.				
16.	Paratransit Vehicles	Replace Existing 121 Cutaway Buses with a Mix of Cutaways and Vans	Begin receiving delivery of 108 vans and 13 cutaways - Q4	July 2025 - anticipated to receive delivery of first van; no date set as of yet for the cutaway bus delivery.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
17.	Same-Day Taxi	Deliver Enhanced OC ACCESS Service	Seek Board approval to exercise option term for agreement for same-day taxi service - Q4	October 2025 - anticipated to present to Board for approval to exercise option term.				
18.	91 and 405 Express Lanes Communications	Provide Customer Communications and Enhance Brand Awareness, Perceptions, and Usage of the Express Lanes	Implement multilingual Express Lanes marketing, communications, and outreach at community events and through social media - Q4					
19.	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 - Q4	October 2025 - anticipated to present M2 Ten-Year Review Outreach Report to Board.				
20.	Diversity Outreach	Maintain Participation of Diverse Communities in Transportation Planning Process and Promote Inclusivity to Ensure Transit Services are Accessible and Welcoming to People from all Backgrounds and Communities	Track number of people reached and survey responses with in-person outreach activities and mailings to disadvantaged communities via email and postcards - Q1-Q4	OCTA completed major activities to engage with diverse communities, such as: April - June 2025 - participated in 35 community and business events (collected over 1,000 community and Measure M2 Ten-Year Review surveys); April 28, 2025 - distributed bilingual Vietnamese/English e-newsletter commemorating 50th anniversary of the Vietnamese community in America; May 1, 2025 - mailed bilingual postcards to Spanish and Vietnamese language households; May 6, 2025 - distributed bilingual Spanish/English e-newsletter celebrating Mother's Day with bicycle safety information.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
21.	Diversity Outreach - Diverse Community Leaders Group (DCLG)	Maximize Relationships with Key Stakeholders and Leaders that Represent Diverse 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	February 18, 2025 - hosted first quarterly meeting virtually with 24 diverse community leaders and shared information on capital projects, the RVS, and the Employee Appreciation Day campaign; June 4, 2025 - hosted second quarterly meeting with 35 diverse community leaders and shared information on the new OCTA budget, Measure M2 Ten-Year Review, Long-Range Transportation Plan, and the new Wave rider-validation card. September 2025 - anticipated to present update to Board as part of the overall Public Outreach Update and host third quarterly meeting in person.				
22.	Maintenance Collective Bargaining Agreement	Negotiate and Renew Agreement	Present agreement to Board - Q4					
23.	Marketing Activities	Promote and Educate Public on OCTA Services	Present biannual updates on ongoing campaigns promoting bus, rail, OC Flex, rideshare, and vanpool services to L&C - Q2 and Q4	June 19, 2025 - presented first biannual marketing activities update to L&C. November 2025 - anticipated to present second biannual update to L&C.				
24.	OC Streetcar	Ensure Alignment, Systems, Maintenance and Storage Facility, and Vehicles Meet All Health, Safety, and Environmental Compliance Requirements through Vehicle Delivery, Testing, and Pre-Revenue Service	Work directly with all applicable regulatory agencies to ensure compliance, approval, and permits are obtained - Q4	Coordination with regulatory agencies is ongoing and permit acquisition will follow project completion, system testing, and pre-revenue service.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
25.	OC Streetcar Marketing and Customer Communications**	Create Awareness and Interest in OC Streetcar to Build Ridership	Develop and launch awareness campaign and promotion to encourage use and implement customer communications - Q4	While the comprehensive marketing strategy has been developed, implementation is anticipated to occur six months prior to revenue service date, which has yet to be determined.				
26.	OC Streetcar Testing/Operations Safety Education and Public Awareness	Educate Various Target Audiences About OC Streetcar Safety During Testing Period Leading Up to Revenue Service	Expand reach and penetration of safety education campaign to raise public awareness once vehicles arrive and testing begins on tracks and present quarterly reports to Board - Q1-Q4	February 2025 - briefed Artesia Pilar Neighborhood Association; March 2025 - briefed Santa Ana City Council; April 2025 - presented at two community meetings on OC Streetcar construction status, safety education messaging, and vehicle/operation status; June 2025 - provided briefing at Santa Ana City Manager event; June 24, 2025 - presented on OCTA Safety Education at Frida Cinema. July 2025 - anticipated to brief to Washington Square Park Neighborhood Association; anticipated to share information at Fiestas Patrias and back-to-school events in Q3.				

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
27.	Outreach Activities	Conduct Outreach to Support Capital Projects	Provide updates to Board on OC Streetcar, I-5 corridor projects, SR-55 corridor projects, I-605/Katella Avenue interchange, and SR-91, and other projects - Q1-Q4	January 13, 2025 - presented I-5 (SR-73 to El Toro Road) Project and SR-91 (SR-57 to SR-55) Project updates to Board; January 27 and February 24, 2025 - presented OC Streetcar updates to Board; February 10, 2025 - presented I-5 (I-405 to SR-55) Project update to Board; March 10, 2025 - presented M2 construction projects update to Board. August 2025 - anticipated to present I-5 (I-405 to SR-55) Segment 1 to Board for contract award approval and SR-55 (I-405 to I-5) to Board for contract amendment approval.				
28.	Outreach Activities	Conduct Outreach to Support Planning Studies	Provide outreach updates to Board for planning studies, including OC Connect, OC Transportation Demand Management Plan, OC Transit Vision Plan, OC Coastal Rail Resiliency Study, 2026 LRTP, and others as appropriate - Q1-Q4	February 10, 2025 - presented CRRS and CRSP updates to Board. June 2025 - presented CRRS and CRSP updates to Board. September 8, 2025 - anticipated to present LRTP update to Board.				
29.	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 and present update to Board - Q4	Efforts to raise awareness and educate the public on OCTA transit services are ongoing, such as launching several multilingual marketing campaigns in Q1 and Q2 promoting Youth Ride Free, College Pass Program, and Free Ride Days, as well as communicating major service changes.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
30.	Workday	Support Agencywide Adoption of New Workday Software System	Complete employee training on the use of new software - Q4	Replacement to new Workday system is underway and in the end-to-end testing phase; employee training will align with the launch of the new software, anticipated for December 2025.				
31.	2026 State Transportation Improvement Program (STIP)	Maximize State Funding Opportunities	Present the 2026 STIP proposal to Board for approval - Q4	August 25, 2025 - anticipated to present 2026 STIP overview to Board; October 13, 2025 - anticipated to present STIP submittal item to Board for approval.				
32.	405 Express Lanes Excess Toll Revenue Expenditure Plan	Complete Express Lanes Excess Toll Revenue Policies to Satisfy Requirements to Develop 405 Expenditure Plan	Present 405 Express Lanes Excess Toll Revenue policies to Board for approval - Q4					
33.	Active Transportation Initiatives	Implement Programs in Support of Non-Motorized Transportation	Provide biannual updates on active transportation initiatives, including OC Connect, Safe Routes to School, and Bike Counts to Board - Q2 and Q4	April 14, 2025 - provided first biannual update to Board. September 8, 2025 - anticipated to present second biannual update to Board.				
34.	Climate Adaptation and Sustainability	Advance Agency Sustainability Practices and Resiliency Efforts to Adapt to Climate Change Impacts	Provide update on recommended follow-up activities to ESC - Q4	Efforts to develop and refine potential strategies for implementation to make OCTA more efficient and resilient are ongoing.				
35.	Congestion Management Program (CMP)	Report on the CMP Status and Local Jurisdiction Compliance	Present to Board for approval - Q4	November 2025 - anticipated to present CMP to Board for approval.				
36.	E-Bikes	Highlight Active Transportation Coordination	Publish local ordinances and resolutions on OCTA webpage, including easy to understand versions for quick reference - Q4	Efforts to update OCTA's e-bike information is ongoing and anticipated to be completed in Q3.				
37.	I-5 Managed Lanes Interagency Agreement Framework	Establish Potential Roles and Responsibilities Related to Transit for Vehicle Miles Traveled Mitigation	Complete and present update to ESC - Q4					

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
38.	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 10, 2025 - presented Tier 1 Grant Program call for projects to Board.				
39.	M2 Environmental Mitigation Programs	Ensure Compliance with Resource Agency Permits	Present biannual progress reports to Board - Q2 and Q4	June 9, 2025 - presented first biannual report to Board. December 8, 2025 - anticipated to present second biannual report to Board.				
40.	M2 Quarterly Reports	Provide Updates on Progress of M2 Implementation and Fulfill the Requirements of the M2 Ordinance No. 3	Present quarterly reports to Board - Q1-Q4	March 10, 2025 - presented FY 2024-25 Q2 report to Board; June 9, 2025 - presented FY 2024-25 Q3 report to Board. September 8, 2025 - anticipated to present FY 2024-25 Q4 report to Board; December 8, 2025 - anticipated to present FY 2025-26 Q1 report to Board.				
41.	M2 Ten-Year Review	Evaluate Performance of the M2 Program through a Comprehensive Review	Present report to Board - Q4	March 10, 2025 - presented Ten-Year Review Look Ahead to Board; June 9, 2025 - presented update to Board.				
42.	Rail Strategic Plan	Inventory Current and Future Rail Infrastructure Capacity and Assess if Modifications to Planned Rail Service Enhancements are Recommended to Better Serve Orange County	Present update to ESC - Q4	June 2025 - awarded contract for consultant services to develop rail strategic plan.				
43.	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	May 12, 2025 - presented first biannual report to Board. November 2025 - anticipated to present second biannual report to Board.				

COMPLETED

ON TRACK

TIMETABLE ADJUSTED

CARRYOVER

## Q4 (Continued)

#	Project/Program	Objective	Milestone	Notes	Q1	Q2	Q3	Q4
44.	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	November 2025 - anticipated to provide update to Board.				
45.	Transit Asset Management (TAM) Plan	Update Agency's Existing TAM Plan to Maintain Assets in a State of Good Repair	Award contract to initiate project - Q4					
46.	Transit Optimization Study	Identify Bus Operation Enhancements to Improve Speed and Reliability	Complete study - Q4					
47.	Transit Ridership Optimization**	Assess Transit Service to Meet Current Ridership Demand	Implement Making Better Connections Service Plan, as appropriate, to reflect current ridership trends and provide updates to ESC - Q4					

\*\*2024 Carryover (modified)

COMPLETED	ON TRACK	TIMETABLE ADJUSTED	CARRYOVER
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# Acronyms

AAP/EEO - Affirmative Action Plan/Equal Employment Opportunity	LA28 - Los Angeles 2028 Olympic and Paralympic Games
ACS - Access Control System	L&C - Legislative and Communications Committee
ADA - Americans with Disabilities Act	LRTP - Long-Range Transportation Plan
Board - Board of Directors	M2 - Measure M2
BEB - Battery Electric Bus	MDA - Management Development Academy
BNSF Railway - Burlington Northern and Santa Fe	OCC - Orange Coast College
Caltrans - California Department of Transportation	OCTA - Orange County Transportation Authority
CBP - Comprehensive Business Plan	PACE - People and Community Engagement
CCC - California Coastal Commission	PTASP - Public Transportation Agency Safety Plan
CDP - Coastal Development Permit	RCTC - Riverside County Transportation Commission
CEO - Chief Executive Officer	RCP - Regional Capacity Program
CMAQ - Congestion Mitigation Air Quality	RFP - Request for Proposals
CMP - Congestion Management Program	ROW - Right-of-Way
CRRS - Coastal Rail Resiliency Study	RTP - Regional Transportation Planning Committee
CRSPP - Coastal Rail Stabilization Priority Project	RTSSP - Regional Transportation Signal Synchronization Program
DCLG - Diverse Community Leaders Group	RVS - Rider Validation System
E-Bike - E-Bicycle	SCAG - Southern California Association of Governments
EAM - Enterprise Asset Management	SR-55 - State Route 55
EC - Express Connector	SR-57 - State Route 57
ECA - Early Career Academy	SR-71 - State Route 71
ECOP - Eastbound Corridor Operations Project	SR-73 - State Route 73
ESC - Executive Steering Committee	SR-91 - State Route 91
FCEB - Fuel-Cell Electric Bus	SR-241 - State Route 241
FTA - Federal Transit Administration	STBG - Surface Transportation Block Grant
FY - Fiscal Year	STIP - State Transportation Improvement Program
I-5 - Interstate 5	TAM - Transit Asset Management
I-405 - Interstate 405	TOC - Taxpayer Oversight Committee
I-605 - Interstate 605	ZEB - Zero-Emission Bus
IFB - Invitation for Bids	