

2024
ORANGE COUNTY
TRANSPORTATION AUTHORITY
REGIONAL TRANSPORTATION
IMPROVEMENT PROGRAM
DECEMBER 2023





AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

December 15, 2023

Ms. Tanisha Taylor
Executive Director
California Transportation Commission
1120 North Street
Mail Station 52, Room 2233
Sacramento, CA 95814

Subject: **2024 Regional Transportation Improvement Program
Submittal**

Dear Ms. Taylor:

The Orange County Transportation Authority (OCTA) is pleased to submit the Regional Transportation Improvement Program (RTIP) for the 2024 State Transportation Improvement Program (STIP). OCTA is proposing to utilize \$222.326 million in STIP funds to support nine high-priority projects in Orange County during the five-year 2024 STIP period, from fiscal years 2024-25 through 2028-29.

OCTA is proposing the following 2024 STIP program of projects:

New Projects:

- OC Loop - Segment A - Rails to Trails (La Habra) (\$38.233 million),
- Orange County Maintenance Facility (\$20 million),
- OC Connect Santa Ana - Garden Grove - Rails to Trails (\$3.9 million),

Existing STIP Projects:

- Interstate 5 (I-5) Improvement from Interstate 405 to Yale Avenue (\$95.338 million),
- State Route 74 gap closure for 0.9 mile and multimodal improvements (\$24.6 million),
- State Route 57 Truck Climbing Lane Phase II – Lambert Road to County Line (\$24.5 million),
- Planning, Programming, and Monitoring (\$7.255 million),
- Replacement planting for the I-5 Improvement Project from State Route 73 to El Toro Road (\$6 million), and
- Digital bus stop signs (\$2.5 million)

The overall strategy for the 2024 STIP is to maintain funding for existing projects already underway and implement a multimodal STIP. For the 2024 STIP, OCTA is proposing three new projects for the STIP, which will improve regional active transportation and commuter rail throughout Orange County.

Ms. Tanisha Taylor
December 15, 2023
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The recommended projects are a high priority for OCTA, ready to move forward in the delivery process, have limited funding opportunities, fit within the guidelines of the STIP, and serve as a balanced and multimodal approach to meet the transportation needs of Orange County.

OCTA's RTIP is also consistent with the Southern California Association of Government's Connect SoCal 2020-2045 Regional Transportation Plan/Sustainable Communities Strategy.

Please find the details for OCTA's submittal in the attached template that includes the required submittal information, or online at:

<https://www.octa.net/programs-projects/programs/funding-programs/state-funding/state-transportation-improvement-program/>

Thank you in advance for your consideration of OCTA's submittal. If you have any questions regarding OCTA's submittal, please contact Kia Mortazavi, Executive Director, Planning, at (714) 560-5741.

Sincerely,



Darrell E. Johnson
Chief Executive Officer

DEJ:bk
Attachment

c: Kacey Ruggiero, California Transportation Commission
Rambabu Bavirisetty, California Department of Transportation (Caltrans)
Headquarters
James Anderson, Caltrans Headquarters
Mario Orso, Caltrans District 12
Warren Whiteaker, Southern California Association of Governments
Kia Mortazavi, OCTA

**2024 Orange County Transportation Authority (OCTA)
2024 Regional Transportation Improvement Program
(2024 RTIP)**

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A. Overview and Schedule

Section 1. Executive Summary

The Orange County Transportation Authority (OCTA) is pleased to submit the Regional Transportation Improvement Program (RTIP) for the 2024 State Transportation Improvement Program (STIP). OCTA is proposing to use \$222.326 million in STIP funds to support nine high priority projects in Orange County during the five-year 2024 STIP program period, from fiscal years (FY) 2024-25 through 2028-29. The STIP funding will be utilized in combination with OCTA Measure M2 funds, as well as federal funds and other State funds to make significant improvements to the multi-modal regional transportation system. New projects for this cycle and from the 2022 STIP funding cycle are in better alignment with the State's goals and will help mitigate the other carryover projects. OCTA is asking for the California Transportation Commission (CTC) to continue to fund several carry-over projects which are needed in order to reduce choke points, improve safety and were added into the STIP and have been carried over through multiple STIP cycles.

New Projects

All three of the new projects provide opportunities for alternative modes of transportation and are in alignment with the State's goals. Two of the projects will provide bike lanes that support regional transportation. The Orange County Maintenance Facility will help the Metrolink Commuter Rail Service improve service throughout the region.

- OC Loop Segment A - Rails to Trails (Construction Phase): \$38.233 million in STIP
- Orange County Maintenance Facility (Phase 1) (Con Phase): \$20 million in STIP
- OC Connect Santa Ana – Garden Grove Rail to Trails (PS&E Phase): \$3.9 million in STIP

Existing Projects

Information for the existing projects has been updated to reflect the most recent estimates and schedules. Also \$4.139 million is added into FY's 2027-28 and 2028-29 for Planning, Programming and Monitoring (PPM) project and an additional 18 million is requested for the Plans, Specifications, and Estimates (PS&E) Phase for the State Route 57 (SR-57) Truck Climbing Lane.

- Interstate 5 (I-5) Improvement Project from Interstate 405 to Yale Avenue, Segment 1 (Construction Phase): \$95.338 million in STIP
- SR-74 Gap closure and multimodal improvements (Construction Phase): \$24.6 million in STIP
- SR-57 Truck Climbing Lane Phase II - Lambert Road to Orange County Line (ENV and PS&E phase): \$24.5 million in STIP
- PPM in FY's 2027-28 through 2028-29: \$7.255 million in STIP
- I-5 Improvements from State Route 73 (SR-73) to El Toro Road (replacement planting / landscaping) (\$6 million in STIP)
- Digital Bus Stop Signs (acquisition, installation, and testing) (\$2.5 million in STIP)

Section 2. General Information – Regional Agency

Orange County Transportation Authority (OCTA)

OCTA Website Link: <http://www.octa.net>

RTIP document link:

<https://www.octa.net/Projects-and-Programs/Funding-Programs/State-Funding/State-Transportation-Improvement-Program/>

RTP link:

<https://www.octa.net/Projects-and-Programs/Plans-and-Studies/Long-Range-Transportation-Plan/Overview/?frm=9707>

OCTA Chief Executive Officer and Contact Information

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California Department of Transportation Headquarter Staff Contact Information

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California Transportation Commission (CTC) Staff Contact Information

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Section 3. Background for the Regional Transportation Improvement Program (RTIP)

A. What is the Regional Transportation Improvement Program?

The Regional Transportation Improvement Program (RTIP) is a program of highway, local road, transit and active transportation projects that a region plans to fund with State and Federal revenue programmed by the California Transportation Commission in the State Transportation Improvement Program (STIP). The RTIP is developed biennially by the regions and is due to the Commission by December 15 of every odd numbered year. The program of projects in the RTIP is a subset of projects in the Regional Transportation Plan (RTP), a federally mandated master transportation plan which guides a region's transportation investments over a 20 to 25 year period. The RTP is based on all reasonably anticipated funding, including federal, state and local sources. Updated every 4 to 5 years, the RTP is developed through an extensive public participation process in the region and reflects the unique mobility, sustainability, and air quality needs of each region.

B. OCTA's Historical and Current Approach to developing the RTIP

OCTA is responsible for the development and programming of the STIP, which is submitted to the CTC for approval and adoption. OCTA dedicates STIP funds for use on projects of countywide significance, consistent with the OCTA Board of Directors (Board) adoption of the Capital Programming Policies, which includes Measure M2 freeway, commuter rail and fixed-guideway projects, OC Bus, planning/programming activities, and complementary activities which seek an equitable balance among all modes and consistent with state goals. The overall strategy for the 2024 STIP is to maintain funding for existing projects and provide multimodal transportation options. For the 2024 STIP, several projects were considered, including active transportation projects, freeway improvements, transit capital improvements, and managed lanes. Projects were selected and proposed for funding based on OCTA's consideration of prior 2020 and 2022 STIP projects, prior Board-approved funding commitments, project readiness, statewide goals for transportation, emission reduction per SB 375 (Chapter 728, Statutes 20080, and AB 32 (Chapter 488, Statutes 2006), freight mobility, consistency with STIP guidelines and performance measures. The recommended projects are a high priority for OCTA, fit within the guidelines of the STIP, and serve as a balanced and multimodal approach to meet the transportation needs of Orange County. The 2024 package retains commitments to advance freeway improvements, eliminate highway chokepoints, ease the use of public transit, improve goods movement, expand the network of bicycling and walking trails, and provide for efficient rail transit operations.

Section 4. Completion of Prior RTIP Projects (Required per Section 78)

Provide narrative on projects completed between the adoption of the RTIP and the adoption of the previous RTIP in text field below as is required per Section 78 of the STIP Guidelines.

There were no RTIP projects completed between the adoption of the 2022 STIP and the submittal of the 2024 STIP.

Section 5. RTIP Outreach and Participation

Insert dates below – Regional agencies can add rows to the schedule – Rows included below should remain for consistency.

A. RTIP Development and Approval Schedule

Action	Date
CTC adopts Fund Estimate and Guidelines	August 16-17, 2023
Caltrans identifies State Highway Needs	September 15, 2023
Caltrans submits draft ITIP	October 15, 2023
CTC ITIP Hearing, South	November 1, 2023
CTC ITIP Hearing, North	November 8, 2023
Regional Agency adopts 2024 RTIP	RTPA Board Approval Date
Regions submit RTIP to CTC	December 15, 2023
Caltrans submits ITIP to CTC	December 15, 2023
CTC STIP Hearing, North	January 25, 2024
CTC STIP Hearing, South	February 1, 2024
CTC publishes staff recommendations	March 1, 2024
CTC Adopts 2024 STIP	March 21-22, 2024

B. Community Engagement

The 2024 RTIP projects have undergone significant public review during the development and approval of the regional transportation plan, project level planning, and the 2024 RTIP.

OCTA Long Range Transportation Plan

The 2024 RTIP projects are included in Orange County's Long Range Transportation Plan (LRTP), Direction 2045. Community outreach and engagement were key components of Directions 2045. Outreach included three community leader roundtables, two public webinars, one telephone townhall, one transportation planning forum and one elected official's roundtable. Additionally, two qualitative surveys were designed and administered to gather public input and identify community preference. Several thousand multilingual flyers and social media notifications were sent out to stakeholders and organizations that serve diverse and disadvantaged communities were sent out. Also, the LRTP was presented to OCTA's board of directors five times starting in September of 2021.

Connect SoCal Community Engagement

All projects proposed for the 2024 RTIP are also included in the 2020 - 2045 Connect SoCal Regional Transportation Plan/Sustainable Communities Strategy. The community was engaged to review and provide input using a robust community engagement process that included 28 public workshops, an extensive advertisement campaign, a telephone town hall meeting and a widely distributed online survey. SCAG considered input gathered during the community engagement process to ensure Connect SoCal addresses challenges faced by residents in the region. To ensure that underrepresented voices were involved in the planning process, SCAG also implemented a new grassroots outreach initiative to engage diverse constituencies across Southern California including children and youth, individuals with access and functional needs,

low-income communities of color, older adults, populations with limited English proficiency, and women and female-headed households. SCAG partnered with 18 community-based organizations to assist with workshop and survey outreach as well as hosting local gatherings for community members to provide input on the Connect SoCal plan. The various components of Connect SoCal were reviewed by SCAG's Regional Council and Policy Committees in a series of meetings. At their November 7, 2019, meeting the Regional Council authorized the release of Connect SoCal and its accompanying Technical Reports for public review and comment. This final version of Connect SoCal, which incorporates adjustments based on feedback received during the public review process, was presented to the Regional Council on May 7, 2020, and approved for federal transportation conformity purposes only. On September 3, 2020, the Regional Council adopted Connect SoCal in full after an additional 120-day outreach and technical refinement period.

Project Level Planning Community Engagement

The public was also afforded the opportunity to review and comment on RTIP projects during project level planning and preliminary engineering.

The **OC Loop Segment A Rails to Trails project** is the direct result of extensive outreach, engagement, data collection, and feasibility analysis conducted as a part of the June 2015 OC Loop 70/30 Plan, the March 2015 OC Loop Gap Feasibility Study, and the 2012 Fourth District Bikeways Strategy. Community engagement efforts included: 1) An open house community meeting to coincide with the Team Velocity group cycle ride, a regular cycling event that typically involves 100 to 150 participants; 2) An online survey made available to the public for three weeks; and 3) Four bikeway summits that brought together public agencies and bicycle advocates in an open forum to discuss the efforts, progress, and recommendations.

A Mitigated Negative Declaration Notice of Determination (environmental document) was filed by the City of La Habra and posted by the Orange County Clerk-Recorder on January 25, 2018, for 30 days. Mitigation measures made as conditions of the environmental document approval include: Two 1.5-foot landscape stripes located on the outside of the paved bikeway when located in the Union Pacific Railroad right-of-way; Storm water treatment enhancements including swales to treat the "first flush" of storm water runoff before allowing the runoff to drain into drainage facilities; Traffic signal enhancements and outdoor pedestrian-level lighting to improve safety; and Fencing to prevent trespassing and improve security.

In anticipation of the release of the **Orange County Maintenance Facility project** draft environmental document, OCTA held public meetings with the nearby residential community of Travata on various dates (one virtual and two in-person meetings) to provide residents with ways to access project information and to answer questions and clarify the environmental process. The virtual meeting was recorded and was posted on YouTube and the OCTA website. A third in-person public meeting was held at the Travata community Clubhouse during the environmental document public review period. Comment cards were handed out at the meeting to allow people to submit an official comment the same day. A total of 85 comment letters were received during the public review period. All comments and responses to comments were summarized in the environmental document. Public concerns related to noise, pollution, traffic, and lighting generated by the project were studied and found to be less than significant.

The **OC Connect Santa Ana – Garden Grove Rails-to-Trails project** engaged residents in the early stages of providing feedback on the community needs and desires related to active transportation. Community outreach efforts included: stakeholder meetings, public workshops, online surveys, project website, and focus groups; questionnaires; open streets event with temporary pedestrian crossing and bicycle lane treatments; advisory committees including local residents, PTA, high school students, city staff and a planning commissioner; and "chalk, walk and roll" contest for students. There was also an interactive map on the internet in which 220 suggestions were mapped by residents, and commuters identified over 37 gaps and barriers to biking and walking and indicated a multi-use trail on the OCTA-owned former Pacific Electric right-of-way would be a great way to increase access throughout the cities and create a regional connection.

The project environmental document phase is currently underway and is scheduled to be completed in March 2024; therefore, a summary of community outreach efforts conducted as part of the environmental document phase and mitigation measures is not available at this time.

Community engagement for the **I-5 Improvement Project from Interstate 405 to Yale Avenue, Segment 1** was conducted during the environmental phase. Outreach activities included:

- project websites (OCTA & Caltrans) that provided information to the public regarding the status of the environmental document and the environmental documentation process;
- two public information meetings in January 2015 to help participants understand the scope and schedule of the project and learn about the planning and environmental review process and the proposed alternatives;
- public notices published in local papers and mailed to stakeholders to inform them of the community engagement process and activities and where and how to access draft documents and submit comments; and
- consultation with representatives from Native American Organizations (groups and individuals) was carried out in late fall of 2016.

Additionally, this is an existing 2020 and 2022 STIP Project and thus was made available to the public through the STIP Hearings and CTC meetings.

Comments received from the public and other stakeholders were incorporated into project environmental documents prior to federal approval. Mitigation measures include the following: replacement landscaping and irrigation in areas impacted by construction; noise barriers to reduce permanent significant noise; and aesthetic treatments to noise barriers, retaining walls and elevated features to reduce visual impacts.

The **SR 74 Gap Closures and Multimodal Improvements project** community engagement also occurred during the environmental phase and conducted by Caltrans. Outreach efforts include:

- public hearing on June 25, 2019 to review project details with the community and to receive input;
- project website making the environmental document available for download; and
- public notices published in local papers and mailed to stakeholders to inform them of the community engagement process and activities,

- meetings with local stakeholder groups including the Hunt Club Community Association and Aesthetics Committee, and
- where and how to access draft documents and submit comments. Additionally, this is an existing 2022 STIP Project and thus was made available to the public through the STIP Hearings and CTC meetings.

Comments received from the public and other stakeholders were incorporated into project environmental documents prior to federal approval and into the project design. Mitigation measures included: landscape enhancements and additional trees where feasible; tree replacement at a minimum ratio of three replacement trees for each removed tree; noise barriers to reduce permanent significant noise; and aesthetic enhancements to minimize the visual impacts by the proposed retaining walls and noise barriers.

The environmental phase including community engagement for the **SR 57 Truck Climbing Lane Phase II project** is proposed to be funded in the 2024 RTIP; therefore, a summary of community outreach efforts and mitigation measures is not available at this time.

2024 RTIP Development and Adoption

OCTA worked cooperatively with Caltrans, SCAG, and local agencies to develop the 2024 RTIP. The draft 2024 RTIP was presented to the Regional Transportation Planning Committee on August 7, 2023, and the OCTA Board of Directors adopted the 2024 RTIP on October 9, 2023. Both meetings were advertised and open to the public.

Summary of RTIP Project Benefits

Community benefits generated by RTIP projects are listed below.

Rails-to-Trails:

- Improves public health
- Reduces greenhouse gas emissions and congestion
- Improves pedestrian and bicycle safety

Orange County Maintenance Facility:

- Reduces greenhouse gas emissions and congestion
- Supports future expansion of the Metrolink system
- Allows for more frequent passenger rail service
- Improves on-time train performance by allowing trains to be serviced and stored locally

Digital Bus Stop Signs:

- Reduces passenger travel time
- Attracts new transit riders which reduces greenhouse gas emissions and congestion

Highway Improvements:

- Reduces travel time and improves travel time reliability
- Reduces greenhouse gas emissions and congestion
- Improve safety by removing chokepoints/adding gap closures.

Consultation with Caltrans District (Required per Section 20)

Caltrans District: 12

Provide narrative on consultation with Caltrans District staff in the text field below as is required per Section 20 of the STIP Guidelines.

- June 8, 2023 – OCTA and Caltrans District 12 discussed 2024 STIP at monthly Preconstruction meeting
- July 7, 2023 – OCTA and Caltrans Project Manager had a conference call regarding 2024 STIP
- August 22, 2023 – OCTA and Caltrans District 12 staff met virtually to discuss 2024 STIP.
- October 3, 2023 – OCTA staff presented 2024 STIP information to Caltrans District 12.
- October 9, 2023 – 2024 STIP approved by OCTA Board. Caltrans District 12 Director serves the OCTA Board in an Ex-officio capacity.

2024 STIP Regional Funding Request

Section 6. 2024 STIP Regional Share and Request for Programming

A. 2024 Regional Fund Share Per 2024 STIP Fund Estimate

Insert your agency's target share per the STIP Fund Estimate in the text field below.

Orange County 2024 STIP Total Target: \$71.965 million

Orange County 2024 STIP Maximum: \$320.675 million

Orange County 2024 STIP Total: \$138.054 million (2022 STIP Prior), \$71.965 million (New 2024 STIP Capacity), and \$12.307 million (over STIP Target) totals \$222.326 million

B. Summary of Requested Programming

Project Name and Location	Project Description	Requested RIP Amount
OC Loop – Rails to Trails Segment A (La Habra) (CON)	Gap closure with Class I bikeway/multiuse path along an underutilized rail line	\$38,233,000
Orange County Maintenance Facility (Phase 1) (CON)	Construct a maintenance facility to inspect, clean, and maintain locomotives and rail cars	\$20,000,000
OC Connect Santa Ana - Garden Grove Rails to Trails (PS&E)	Gap closure connecting Garden Grove and Santa Ana with Class 1 bikeway	\$3,900,000
I-5 Improvements from I-405 to Yale Avenue (Segment 1) (CON)	Add one mixed flow lane northbound from truck bypass on-ramp to SR 55; add one mixed flow lane southbound from SR 55 to truck bypass	\$95,338,000
SR-74 Gap closure and multimodal improvements Project	Gap closure and Multimodal improvements on State Route 74/Ortega Highway between Calle Entradero and Reata Road	\$24,600,000
SR-57 Truck Climbing Lane Phase II – Lambert Road to County Line (ENV & PS&E)	Construct Truck Climbing Lane from Lambert to LA county line	\$24,500,000
Planning, Programming, and Monitoring	Planning, Programming, and Monitoring	\$7,255,000
I-5 Improvements from SR-73 to El Toro Road (replacement planting/landscaping)	Replacement planting/landscaping	\$6,000,000
Digital Bus Stop Signs	Installation of real time displays and signage at up to 150 bus stops in Orange County	\$2,500,000
Total		\$222,326,000

Section 7. Overview of Other Funding Included with Delivery of Regional Improvement Program (RIP) Projects

The following lists an overview of other funding by source:

- Prior STIP: \$19.313 million
- Federal Surface Transportation Block Grant / Congestion Mitigation and Air Quality: \$72.039 million
- Local: \$66.106 million
- SB-1 Local Partnership Program – Formula Funds: \$11.374 million
- National Highway Performance Program: \$5.421 million
- State Highway Operation and Protection Program: \$0.250 million
- Earmarks: \$4.000 million
- Active Transportation Program: \$3.340 million
- Community Project Funding Earmark: \$0.750 million
- Transit & Intercity Rail Capital Program: \$59.590 million
- Unfunded Need/Future SB 1 and TIRCP: \$43.150 million

Funding Plan for Proposed 2024 STIP														
2024 STIP (In Thousands)							Other Funding					Unfunded Need	Phase Cost	Total Project Cost
	2024-25	2025-26	2026-27	2027-28	2028-29	Total STIP	Prior STIP	STBG / CMAQ	Local	LPP-F	Other ¹			
Proposed New Projects														
OC Loop - Segment A (La Habra) (CON)				38,233		38,233		2,402	5,023		340		45,998	45,998
Orange County Maintenance Facility (Phase 1) (CON)				20,000		20,000					59,590	43,150	129,000	122,740
OC Connect Santa Ana - Garden Grove Rails to Trails (PS&E)		3,900				3,900					3,750		3,900	7,650
Carry Over Projects														
I-5 Improvements from I-405 to Yale Avenue - Segment 1 (CON)		95,338				95,338		47,473	46,188	11,374	5,421		177,030	205,794
SR-74 Gap Closure and Multimodal Improvements (CON)			24,600			24,600	19,313	21,374	9,350		4,250		59,600	78,887
SR-57 Truck Climbing Lane Phase II - Lambert Road to County Line (ENV & PS&E)		6,500			18,000	24,500							24,500	24,500
Planning, Programming, and Monitoring	1,056	1,030	1,030	2,769	1,370	7,255							7,255	7,255
I-5 Improvements from SR-73 to El Toro Road (replacement planting/landscaping)	6,000					6,000		790	5,545				11,545	12,335
Digital Bus Stop Signs 13" Along High-Quality Transit Corridors (143 Sign)		2,500				2,500							2,500	2,500
2024 STIP Subtotal	7,056	109,268	25,630	61,002	19,370	222,326	19,313	72,039	66,106	11,374	73,351	43,150	461,328	507,659

Notes: 1. Other funds include \$5.421 million in National Highway Performance Program, \$0.25 million in SHOPP, \$4.0 million in Earmarks, \$0.34 million in Active Transportation Program (ATP), \$3 million in ATP, \$0.75 million in Community Project Funding Earmark, and \$59.590 million in Transit and Intercity Rail Capital Program, Unfunded need will be provided through future SB 1 and Transit and Intercity Rail Capital Program funds.

Section 8. Interregional Transportation Improvement Program (ITIP) Funding and Needs

The purpose of the Interregional Transportation Improvement Program (ITIP) is to improve interregional mobility for people and goods in the State of California. As an interregional program, the ITIP is focused on increasing the throughput for highway and rail corridors of strategic importance outside the urbanized areas of the state. A sound transportation network between and connecting urbanized areas ports and borders is vital to the state’s economic vitality. The ITIP is prepared in accordance with Government Code Section 14526, Streets and Highways Code Section 164 and the STIP Guidelines. The ITIP is a five-year program managed by Caltrans and funded with 25% of new STIP revenues in each cycle. Developed in cooperation with regional transportation planning agencies to ensure an integrated transportation program, the ITIP promotes the goal of improving interregional mobility and connectivity across California.

Caltrans District 12 and OCTA have met to discuss District 12’s ITIP Submittal and their plan is to submit the I-5 Managed Lane Project from Red Hill Avenue to the Los Angeles County Line Project.

The I-5 corridor continues to be a critical transportation link in Orange County and is the only project being put forth by Caltrans for ITIP funding at this time, and therefore the highest priority ITIP project for Orange County.

Section 9. Projects Planned Within Multi-Modal Corridors

STIP Project	Projects within the Corridor	Status	Notes
OC Loop Segment A	None	N/A	N/A
Orange County Maintenance Facility	None	N/A	N/A
OC Connect Santa Ana Garden Grove Rails to Trails (PS&E)	None	N/A	N/A
I-5 Improvements from I-405 to Yale Avenue (Segment 1) Con Start: 2/26 Con Complete: 10/29	I-5 Yale Ave to SR-55 (Segment 2)	Con Start: 4/26 Con Complete: 10/29	Segment 2 of the project. Construction would be concurrent and coordination is being carried out.
SR-74 Gap closure and multimodal improvements Con Start: 10/25 Con Complete: 11/29	None	N/A	N/A
SR-57 Truck Climbing Lane Phase II Lambert Road to County Line (ENV) Con Start: TBD Con Complete: TBD	SR-57 Truck Climbing Lane Phase I – Lambert Road Interchange	Start Con 1/19 Con Comp 12/23	This is Phase 2 of the Truck Climbing Lane Project.

I-5 Improvements from SR-73 to El Toro Road (replacement Planting/landscaping) Con Start: 12/24 Con Complete: 8/28	I-5 SR-73 to El Toro (Segment 1,2, and 3)	Con Start: 11/19 Con Complete: 5/25	Segment 4 of the project. Construction will start near completion of the highway improvement project.
Digital Bus Stop Signs	Various	Various	Project will modify bus stop signage and won't have a significant impact on streets and road projects

Section 10. Highways to Boulevards Conversion Pilot Program

OCTA has recently completed studies for Pacific Coast Highway, Beach Boulevard, Bristol Street, and Harbor Boulevard which may include potential complete streets and active transportation elements. Full conversion as suggested in highways to boulevards was not studied.

Section 11. Complete Streets Consideration (per Section 26)

OCTA is proposing two new active transportation projects in the STIP. In addition to Class 1 bicycle lanes, these projects include safety crossing improvements for bicycles and pedestrians. Outside of the STIP, OCTA recently issued a call for projects to local agencies to support complete streets projects, the 2023 Orange County Complete Streets Program Call for Projects. Additional information about this call can be found through this link: <https://octa.net/programs-projects/programs/funding-programs/call-for-projects/orange-county-complete-streets-program/>

C. Relationship of RTIP to RTP/SCS/APS and Benefits of RTIP

Section 12. Regional Level Performance Evaluation (per Section 22A of the guidelines)

The Connect SoCal (2020-2045 Regional Transportation Plan/Sustainable Communities Strategy) Goals are as follows:

- a. Encourage regional economic prosperity and global competitiveness.
- b. Improve mobility, accessibility, reliability, and travel safety for people and goods.
- c. Enhance the preservation, security, and resilience of the regional transportation system.
- d. Increase person and goods movement and travel choices within the transportation system.
- e. Reduce greenhouse gas emissions and improve air quality.
- f. Support healthy and equitable communities.

- g. Adapt to a changing climate and support an integrated regional development pattern and transportation network.
- h. Leverage new transportation technologies and data-driven solutions that result in more efficient travel.
- i. Encourage development of diverse housing types in areas that are supported by multiple transportation options.
- j. Promote conservation of natural and agricultural lands and restoration of habitats.

The table below summarizes the consistency between projects in the RTP and the Connect SoCal 2020-2045 RTP/SCS Goals 1 through 8 and 10 (Goal 9 does not apply). The project benefits listed in the table derives from the benefit-cost analysis conducted for the projects. Because the purpose of the table is to demonstrate consistency with the RTP/SCS Goals, not all project benefits are listed in the table.

2024 RTP Projects and RTP/SCS Goals and Performance Outcomes: Consistency by Project							
RTP/SCS Goal Corresponding Performance Measures	I-5 Improvements from I-405 to Yale Avenue (Segment 1)	SR-74 Gap Closure and Multimodal Improvements	SR-57 Truck Climbing Lane Phase II	Digital Bus Stop Signs	Orange County Maintenance Facility (OCMF)	OC Loop Segment A Rails to Trails	Santa Ana – Garden Grove Rails to Trails
Economic Prosperity, Competitiveness, Person/Movement, & Travel Choices <i>To measure progress in meeting RTP/SCS Goal nos. 1 & 4</i>	\$69.8 million Average Annual Travel Time Savings. \$0.5 million Average Annual Vehicle Operating Cost Savings.	\$6.5 million Average Annual Travel Time Savings.	\$37.1 million Average Annual Travel Time Savings. \$3.8 million Average Annual Vehicle Operating Cost Savings.	\$1.7 million Average Annual Travel Time Savings. \$0.3 million Average Annual Vehicle Operating Cost Savings.	\$3.0 million Average Annual Vehicle Operating Cost Savings.	Increases person movement and travel choices.	Increases person movement and travel choices.
Mobility, Accessibility, Reliability, Safety, & Healthy/Equitable Communities <i>To measure progress in meeting RTP/SCS Goal nos. 2 & 6</i>	7,531,569 Average Annual Person-Hours of Time Saved. \$22.5 million Accident Cost Savings over 20 years.	572,887 Average Annual Person Hours of Time Saved.	4,388,149 Average Annual Person Hours of Time Saved. \$10.8 million Accident Cost Savings over 20 years.	92,261 Average Annual Person Hours of Time Saved.	3,682,985 Average Annual Person-Hours of Time Saved. \$13.1 million Accident Cost Savings over 20 years.	\$37.4 million Additional Safety Benefits over 20 years. \$14.2 million in Health Benefits over 20 years.	\$63 million Additional Safety Benefits over 20 years. \$38.2 million in Health Benefits over 20 years.
Greenhouse Gas Emissions & Air Quality <i>To measure progress in meeting RTP/SCS Goal no. 5</i>	674,463 CO2 Emissions (tons) Saved over 20 years.	27,412 CO2 Emissions (tons) Saved over 20 years.	324,033 CO2 Emissions (tons) Saved over 20 years.	5,338 CO2 Emissions (tons) Saved over 20 years.	59,905 CO2 Emissions (tons) Saved over 20 years.	271 CO2 Emissions (tons) Saved over 20 years.	749 CO2 Emissions (tons) Saved over 20 years.
New Transportation Technologies, Adapt to Climate Change, & Integrated Transportation Network <i>To measure progress in meeting RTP/SCS Goal nos. 7 & 8</i>	\$45.5 million in Emission Cost Savings over 20 years.	\$1.8 million in Emission Cost Savings over 20 years. Project includes multimodal improvements.	\$26.6 million in Emission Cost Savings over 20 years.	\$0.3 million in Emission Cost Savings over 20 years. 990,000 Annual Average VMT Reduced.	\$3.0 million in Emission Cost Savings over 20 years.	\$12,000 in Emission Cost Savings over 20 years.	\$33,000 in Emission Cost Savings over 20 years.
Preservation, Security, & Resilience <i>To measure progress in meeting RTP/SCS Goal no. 3.</i>	Project improves an existing facility to improve system performance.	Project improves an existing facility to improve system performance.	Project improves an existing facility to improve system performance.	Project improves an existing facility to improve system performance.	Project improves existing passenger rail system performance.	Project improves a bicycle network.	Project improves a bicycle network.

Section 13. Regional and Statewide Benefits of RTIP

2024 STIP-RTIP SCAG Regional Level Performance Evaluation

Pursuant to the State Transportation Improvement Program (STIP) guidelines recently adopted by the California Transportation Commission (Commission), the Southern California Association of Governments (SCAG) is pleased to submit the requested regional performance evaluation for SCAG region's 2024 STIP.

SCAG is the largest Metropolitan Planning Organization (MPO) in the country and the region is home to approximately 19 million Californians. SCAG region's STIP includes several, often partial projects included in SCAG's 2020 Regional Transportation Plan (RTP)/Sustainable Communities Strategies (SCS). The RTP/SCS meets the GHG targets established by the California Air Resources Board (CARB) pursuant to Senate Bill 375 (SB 375) specific to the SCAG region. Given these projects are drawn from the conforming RTP/SCS, it is reasonable to affirm that these STIP projects move the region towards the successful implementation of the RTP/SCS. Please note the following related to the 2024 STIP-RTIP:

- The STIP-RTIP does not include system wide preservation investments. As such, it does not impact asset conditions on the State Highway System (SHS), local roads, or transit assets. However, life-cycle costs are considered in the analysis for the capital projects proposed by these STIP-RTIP Submittals.
- This STIP-RTIP does not include land use strategies and only modest transit and active transportation investments. Therefore, mode shift impacts are negligible.
- The STIP-RTIP includes several highway projects, several involving pricing on High Occupancy Toll (HOT) lanes. These projects work best in tandem with SCAG's RTP/SCS Travel Demand Management (TDM) strategies. As such, TDM strategies are included in the analysis.
- The STIP-RTIP does not include smart land use strategies or other broad based pricing strategies (mileage based user charges) included in the RTP/SCS. Therefore, impacts on several measures in the STIP guidelines are not considered (e.g., percent of housing and jobs within 0.5 miles of transit stops with frequent transit service).

The STIP guidelines list a number of measures to report, depending on available data and tools. A brief summary of the analysis results for the applicable measures is provided below.

Investment Effectiveness

The 2024 STIP benefit/cost (B/C) analysis for the SCAG region utilizes the Cal-B/C model to calculate regional network benefits. It calculates and aggregates scenario benefits after travel impacts are evaluated using a regional travel demand model. The benefit/cost ratio compares the incremental benefits with the incremental costs of transportation investments. The benefits are divided into several general categories, including:

- Savings resulting from reduced travel delay;
- Accident cost savings;
- Air quality improvements; and
- Reductions in vehicle operating costs

For these categories, the benefits of the 2024 STIP *Build* planning scenario are compared with the *No Build* planning scenario. Most of these benefits are a function of changes in Vehicle Miles Traveled (VMT) and Vehicle Hours Traveled (VHT). Costs included in the analysis reflect estimates of lifecycle costs including capital and ongoing operations and maintenance costs. The 2024 STIP provides a regional network-level benefit/cost ratio of 4.9. Benefits and costs are estimated over the planning period of fifty years.

The benefit/cost ratio does not include the benefits from the purchase of 100 zero-emission buses by the Los Angeles County Metropolitan Transportation Authority that will reduce GHG emissions by an additional 88,350 total metric tons.

3		INVESTMENT ANALYSIS SUMMARY RESULTS																																																																												
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VMT per Capita

Impacts are expected to maintain No Build scenario conditions.

Percent of congested VMT at or below 35 mph

Impacts are projected to reduce congested VMT by 0.1 percent.

Commute mode share (travel to work or school)

Impacts are expected to maintain No Build scenario conditions.

Asset Conditions (State Highway and Local Streets)

Based on the 2022 California Transportation Asset Management Plan, 7.9 percent of National Highway System (NHS) pavement lane miles are in poor conditions. The average Pavement Condition Index (PCI) for the region’s local roads is 69 based on the 2022 Statewide Local Streets and Roads Needs Assessment. The STIP does not impact asset conditions in this cycle.

Percent of transit assets that have surpassed the FTA useful life period

Not applicable.

Highway Buffer Index (the extra time cushion that most travelers add to their average travel time when planning trips to ensure on-time arrival)

The full implementation of the region’s STIP projects will improve travel time reliability since HOT lane implementations, auxiliary lanes, and interchange improvements have been shown to improve overall travel time reliability. However, it is not possible to estimate these impacts with current tools.

Fatalities

Not applicable.

Percent of housing and jobs within 0.5 miles of transit stops with frequent transit service

The full implementation of the region’s STIP projects will maintain the No Build scenario percentage of housing and jobs within 0.5 miles of frequent transit service.

Mean commute travel time (to work or school)

Impacts are projected to maintain No Build scenario conditions.

Change in acres of agricultural land

Not applicable.

GHG Impacts

Impacts are projected to maintain No Build scenario conditions.

The table on the next page summarizes the performance measures results as suggested by the RTP guidelines. Note that the table compares future conditions, as opposed to comparing to current condition, without the STIP-RTIP against future conditions with the STIP-RTIP. This allows for isolating the impacts of the STIP-RTIP without taking credit for other developments, such as improved fuel efficiencies or smart land use strategies.

D. Performance and Effectiveness of RTIP

Section 14. Evaluation of Cost Effectiveness of RTIP (Required per Section 22B)

Evaluation Cost-Effectiveness Indicators and Measures

Goal	Indicator/Measure	Future Level of Performance (No Build planning scenario)		Projected Performance Improvement (205)	
Congestion Reduction	Reduce Vehicle Miles Traveled/capita	20.7		No change in VMT per capita	
	Reduce Percent of congested VMT (at or below 35 mph)	7.9%		Reduction of 0.1%	
	Change in commute mode share (travel to work or school)	Travel to Work	Travel to School	Travel to Work: Maintains No Build scenario conditions.	Travel to School: Maintains No Build scenario conditions.
	Vehicle Trips Drive Alone	66.98%	9.97%		
	Vehicle Trips 2 Person Carpool	9.04%	1.49%		
	Vehicle Trips 3+ Person Carpool	6.53%	0.66%		
	Auto Passenger Trips	7.35%	52.71%		
	Transit Trips	5.94%	10.77%		
Non-Motorized Person Trips	4.16%	24.40%			
Infrastructure Condition	Reduce percent of distressed state highway lane-miles	Not applicable		Not applicable	
	Improve Pavement Condition Index (local streets and roads)	Not applicable		Not applicable	
	Reduce percent of highway bridge lane-miles in need of replacement or rehabilitation (sufficiency rating of 80 or below)	Not applicable		Not applicable	
	Reduce percent of transit assets that have surpassed the FTA useful life period	Not applicable		Not applicable	
System Reliability	Reduce Highway Buffer Index (the time cushion added to the average commute travel times to ensure on-time arrival)	Future conditions cannot be modeled		Improvement cannot be modeled	
Safety	Reduce fatalities and serious injuries per capita (daily)	Not applicable		Not applicable	
	Reduce fatalities and serious injuries per VMT	Not applicable		Not applicable	
Economic Vitality	Increase percent of housing and jobs within 0.5 miles of transit stops with frequent transit service	Household % = 42.90% Jobs % = 51.58%		Household % = No change Jobs % = No change	
	Reduce mean commute travel time (to work or school)	Auto Home Based Work = 27.75 mins Auto School = 10.29 mins Transit Home Based Work = 69.73 mins Transit School = 20.61 mins		Maintains No Build scenario conditions	
Environmental Sustainability	Change in acres of agricultural land	Not applicable		Not applicable	
	CO2 emissions reduction per capita (daily)	10.84 lbs.		Maintains No Build scenario conditions.	

SCAG certifies that the proposed 2024 Regional Transportation Improvement Program is consistent with the current approved Regional Transportation Plan and Sustainable Communities Strategies.

Per Section 22C and Appendix B of the STIP Guidelines, regions may, if appropriate and to the extent necessary data and tools are available, use the benefits or performance improvements in Table B3 below to evaluate the proposed changes to the built environment.

Table B3 Evaluation – Project Changes or Increased Capacity Benefits			
Project Type Or Mode	Changes to Built Environment	Indicator/Measure	Benefits or Performance Improvement at Project Completion
State Highway	New general purpose lane-miles	Miles	10.8 mixed flow lane
	New HOV/HOT lane-miles		
	Lane-miles rehabilitated		
	New or upgrade bicycle lane/sidewalk miles		
	Operational improvements	Miles	2 auxiliary lane
	New or reconstructed interchanges		
	New or reconstructed bridges		
Transit or Intercity Rail	Additional transit service miles		
	Additional transit vehicles		
	New rail track miles		
	Rail crossing improvements		
	Maintenance Facilities	Units	1 new facility
	Station improvements		
Local Streets and Roads	New lane-miles		
	Lane-miles rehabilitated		
	New or upgrade bicycle lane/sidewalk miles	Miles	9.25 class I bike lanes
	Operational improvements	Units	150 new bus stop signs
	New or reconstructed bridges		

Section 15. Project Specific Evaluation (Required per Section 22D)

The table below summarizes the results of the benefit cost analysis (BCA) for the three new projects in the RTIP that require project specific evaluations. OCTA generated the BCA for all projects (Caltrans did not generate a BCA for any of the projects).

Investment Analysis Summary (millions \$)	OC Loop - Segment A (La Habra) (CON)	OC Connect Garden Grove - Santa Ana Rails to Trails	Orange County Maintenance Facility
Life-Cycle Cost	\$ 50.40	\$ 46.60	\$ 254.10
Life-Cycle Benefits	\$ 59.70	\$ 114.40	\$ 874.20
Net Present Value	\$ 9.30	\$ 67.80	\$ 620.00
Benefit/Cost Ratio	1.2	2.5	3.4

E. Detailed Project Information

Section 16. Overview of Projects Programmed with RIP Funding

OC LOOP - Segment A (La Habra) (CON)

OC LOOP Segment A, the La Habra Rails to Trails OC Loop Gap Closure project, will close a 3.1-mile gap in the OC Loop, Orange County's bicycle network, with a Class I bikeway/multi-use path along a currently blighted rail-to-trail. This project completes Segment A of the OC Loop and lies entirely within the boundaries of the City of La Habra. In order to improve the safety and convenience of residents actively commuting and increase the numbers of residents who choose walking and bicycling, this project includes infrastructure improvements such as widening an existing paved pathway in Guadalupe Park, building a Class I bikeway/multi-use path, and enhanced safety features to protect bicyclists and pedestrians.

Orange County Maintenance Facility (Phase 1) (CON)

The Orange County Maintenance Facility (OCMF) is part of the Metrolink Southern California Optimized Rail Expansion (SCORE) program, which is funded through the Transit and Intercity Rail Capital Program (TIRCP). The facility will be located on the 21.3-acre parcel owned by OCTA, adjacent to Marine Way, and located along the Metrolink Orange Subdivision between mileposts 183.5 and 184 in the City of Irvine. The goal of the project is to provide for more efficient rail operations. There is a need to store and service locomotives and rail cars to comply with safety and operations standards and redistribute service loads to another location. The OCMF will provide space and equipment to inspect, clean, and maintain cars and locomotives on a regular and efficient basis. Much of the inspection and maintenance activity is federally mandated and must be performed at specific intervals.

OC Connect Santa Ana - Garden Grove Rails-to-Trails (PS&E)

The project will close a 3.1-mile gap on the Class I trail connecting the cities of Garden Grove and Santa Ana along the Orange County Transportation Authority (OCTA)-owned former Pacific Electric ROW and 0.85-miles along the Wintersburg Channel. The project will add a Class I non-motorized transportation facility and provide safety crossing features at approximately 13 intersections, improving safety for pedestrians and bicyclists. The project would offer a convenient, safe alternative to walking and bicycling adjacent to high-speed multi-lane arterials. This protected corridor would improve non-motorized access and mobility for the adjacent disadvantaged communities away from the dangers of high-speed motorized traffic.

I-5 Improvements from I-405 to Yale Avenue (Segment 1) Construction (CON)

This project will add one general purpose lane in both directions of the I-5 from the I-405 to Yale Avenue. Additional features of the project include improvements to various interchanges and ramp configurations. Auxiliary lanes will be added in some segments and re-established in others

within the project limits. The existing buffer-separated carpool lane will be converted to continuous access lanes. The project length is approximately five miles.

This segment of the I-5 corridor is experiencing congestion and long traffic delays due to demand exceeding capacity, primarily resulting from local, regional, and interregional traffic demand. In addition, local and regional traffic demand is expected to increase by over 10,000 vehicles per day by the year 2040. These improvements are expected to provide safety benefits as well as address current and future traffic demands.

State Route 74 (SR-74) Gap Closure and Multimodal Improvements (CON)

The State Route 74 Gap Closure and Multi Modal project closes a 1.1-mile gap in general purpose lanes and enhances bicycle and pedestrian connectivity on State Route 74 (SR-74) (Ortega Highway), in Orange County, in the City of San Juan Capistrano between Calle Entradero and Reata Road. The project will construct one additional lane in each direction and a five- to eight-foot shoulder on each side to accommodate a total of 2.2-miles of Class II bicycle lanes. It will also construct approximately 850-feet of new sidewalk, reconstruct 1200-feet of existing sidewalk, install a signalized intersection and pedestrian crossing, and construct a 12-foot-wide striped median.

Over the period between July 2017 and December 2020, sixteen total accidents occurred within the project with four being injury accidents. By constructing additional lanes to a full-standard geometric cross section and adding a 12-foot painted median, the project aims to reduce the number of accidents in the corridor.

A new signalized intersection and protected pedestrian crossing near the mid-point of the project will also improve safety. The crossing will feature continental striping and the latest street lighting technology. The intersection also has the added benefit of creating more breaks in traffic, which allows more vehicles to make left-turn ingress and egress at the unsignalized intersections which lead onto local roads. In addition, eleven driveways adjacent to SR-74 would also be modified to maintain or improve sight distance allowing for safe ingress onto the highway.

State Route 57 (SR-57) Truck Climbing Lane Phase II – Lambert Road to County Line

This project will construct a truck climbing lane on the SR-57 from the Lambert Road undercrossing to the Orange County/Los Angeles County Line. A climbing lane would improve truck traffic travel speeds and would increase the throughput of the northbound SR-57. There are an estimated 40,000 daily trucks which makes up 12% to 18% of all traffic, that travel along the corridor and a bottleneck is created due to a long climbing grade. By improving this section of the freeway, mobility will be increased, a potential safety hazard would be removed, and green house gas emissions will be reduced.

Planning, Programming, and Monitoring (PPM)

Orange County is impacted by severe congestion on many regional and interregional facilities. Examination of the problem and potential solutions are necessary for the future construction of improvements. STIP funds will be used to support studies that are directly used in the

development of the Long-Range Transportation Plan and to develop project study reports, thus creating a shelf of projects for the future.

I-5 Improvements from State Route (SR-73) to El Toro Road (Replacement Planting/Landscaping)

This is part of Project C in the Next 10 Plan and is the replacement planting/landscaping component of the three segments of the I-5 Improvement Project from SR-73 to El Toro Road.

Digital Bus Stop Signs/Electronic Message Signs 13" Along High-Quality Transit Corridors (143 Signs)

The project will result in the installation of real-time displays and signage at up to 143 bus stops along Orange County (OC) Bus routes 29, 43, 57, 60, 64, 66, 529, 543, and 560 in Orange County. It will provide real time information on the next bus arriving, identify Orange County's Rapid Bus Service, and provide information regarding connections to Metrolink Stations which provide service into Los Angeles, Riverside, San Bernardino, and Ventura counties, as well as service up to San Luis Obispo. Overall, this improves the passengers bus riding experience and encourages new and continued use of the system.

F. Appendices

Section 17. Projects Programming Request Forms (Provide Cover Sheet) – Regional Agencies will add their PPRs in this section for each project included in the RTIP, whether it is a project reprogrammed from the 2022 STIP, or a new project.

Section 18. Board Resolution or Documentation of 2024 RTIP Approval (Provide Cover Sheet) – Agencies will add their resolution or meeting minutes.

Section 19. Fact Sheet (1-2 pages). (See Section 50). The fact sheet will be posted on the Commission's website and must comply with state and federal web accessibility laws and standards.

Section 20. Documentation on Coordination with Caltrans District (Optional) (With Cover Sheet)

Section 21. Detailed Project Programming Summary Table (Optional)

Section 22. Alternative Delivery Methods (Optional)

Section 23. Additional Appendices (Optional)



Call to Order

The October 9, 2023, regular meeting of the Orange County Transportation Authority (OCTA) Board of Directors and affiliated agencies was called to order by Chairman Hernandez at 9:00 a.m. at the OCTA Headquarters, 550 South Main Street, Orange, California.

Directors Present: Gene Hernandez, Chairman
Tam Nguyen, Vice Chairman
Doug Chaffee
Jose Diaz
Andrew Do
Jon Dumitru
Katrina Foley
Brian Goodell
Michael Hennessey
Fred Jung
Farrah N. Khan
Jessie Lopez
Donald P. Wagner

Directors Absent: Jamey Federico
Patrick Harper
Steve Jones
Vicente Sarmiento

Staff Present: Jennifer L. Bergener, Deputy Chief Executive Officer
Gina Ramirez, Clerk of the Board Specialist, Principal
Allison Cheshire, Clerk of the Board Specialist, Senior
James Donich, General Counsel

Special Calendar

1. Administration of the Oath of Office to Returning Orange County Transportation Authority Board of Directors

James Donich, General Counsel, administered the Oath of Office to returning Board Member Michael Hennessey.

Consent Calendar (Items 2 through 9)

2. Approval of Minutes

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to approve the minutes of the September 25, 2023 Orange County Transportation Authority and affiliated agencies' regular meeting.



3. Investments: Compliance, Controls, and Reporting, January 1 through June 30, 2023, Internal Audit Report No. 24-501

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to direct staff to implement two recommendations provided in Investments: Compliance, Controls, and Reporting, January 1 through June 30, 2023, Internal Audit Report No. 24-501.

4. Amendment to Purchase Order for Microsoft Enterprise Software Licensing

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Purchase Order No. C13676 with Dell, Inc., in the amount of \$527,744, to provide additional Microsoft software licenses and online services. This will increase the maximum cumulative obligation of the purchase order to a total value of \$3,281,993.

5. Regional Planning Update

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to receive and file as an information item.

6. 2024 State Transportation Improvement Program

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to:

- A. Approve the 2024 State Transportation Improvement Program submittal of nine projects for \$222.33 million, from fiscal year 2024-25 through fiscal year 2028-29.
- B. Authorize staff to make all necessary amendments to the State Transportation Improvement Program and the Federal Transportation Improvement Program and execute any necessary agreements to facilitate the recommendations above.

7. Declare Surplus Property for the Interstate 405 Improvement Project Between State Route 73 and Interstate 605

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to:

- A. Declare the property located at 14980 Goldenwest Street, in the City of Westminster, within the Interstate 405 Improvement Project between State Route 73 and Interstate 605, Assessor's Parcel Numbers 096-522-02 and 096-522-04, as surplus land pursuant to the Surplus Land Act (Government Code Section 54221).

- B. Direct staff to seek potential buyers interested in the purchase of the surplus land located within the Interstate 405 Improvement Project between State Route 73 and Interstate 605 in accordance with Surplus Land Act (Government Code Section 54221) and the Real Property Policies and Procedure Manual, dated August 22, 2022. C. Direct staff to negotiate sales terms with potential buyers and return to the Board of Directors to recommend approval of the sale of the surplus land.

8. Amendment to Agreement for Construction Management Support Services for the Interstate 5 Improvement Project from Alicia Parkway to El Toro Road

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 5 to Agreement No. C-9-1605 between the Orange County Transportation Authority and Jacobs Project Management Co., in the amount of \$3,740,000, for additional construction management support services for the Interstate 5 Improvement Project from Alicia Parkway to El Toro Road. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$12,092,394.

9. 2023 Measure M2 Sales Tax Forecast

A motion was made by Director Jung, seconded by Director Wagner, and declared passed by those present, to receive and file as an information item.

Regular Calendar

10. Measure M2 Next 10 Delivery Plan: Market Conditions Key Indicators Analysis and Forecast

Dr. Wallace Walrod, Orange County Business Council, and Dr. Marlon Boarnet, University of Southern California, provided a presentation on this item.

A motion was made by Vice Chairman Nguyen, seconded by Director Foley, declared passed, to continue to monitor market conditions key indicators and provide updates to the Board of Directors as appropriate.

11. Request from the Measure M2 Taxpayer Oversight Committee to Obtain Independent Public Accounting Firm Services to Perform Measure M2 Compliance Audits on an Annual Basis Starting with Fiscal Year 2023

Janet Sutter, Executive Director, Internal Audit, provided a report on this item.

Public comment was heard from Andrew Hamilton, OC Auditor/Controller.

James Donich, General Counsel, provided background on the local legislation.



A motion was made by Director Wagner, seconded by Director Foley, declared passed, to approve the recommendation presented.

- A. Approve a request of the Measure M2 Taxpayer Oversight Committee and authorize the Chief Executive Officer to execute Amendment No. 6 to Agreement No. C-8-1911 between the Orange County Transportation Authority and Crowe LLP, to provide a limited Measure M2 compliance audit for fiscal year 2023, on a time-and-expense basis, not to exceed \$125,000, and to extend the agreement through June 30, 2024. This limited compliance audit excludes testing at the local jurisdiction level. This will increase the maximum obligation of the agreement to a total contract value of \$1,647,505.
- B. Approve a request of the annual Measure M2 Taxpayer Oversight Committee for an annual Measure M2 compliance audit starting with fiscal year 2024. Contained in this request is the ability for the compliance audit to include testing at the local jurisdiction level.
- C. Approve an amendment to the Orange County Transportation Authority's Fiscal Year 2023-24 Budget, Executive Office Division, in the amount of \$965,000, to accommodate the amendment to Agreement No. C-8-1911, and to encumber additional funds for auditing services to be procured for the fiscal years ending 2024, 2025, and 2026. Additional auditing services are to be determined by the Orange County Transportation Authority Board of Directors upon request by the Taxpayer Oversight Committee and not linked to or directed by the Taxpayer Oversight Committee Audit Subcommittee Charter.

Discussion Items

12. Public Comments

Public comment was received from Peter Warner.

13. Chief Executive Officer's Report

Jennifer L. Bergener, Deputy Chief Executive Officer, provided a report on the following:

- Metrolink Student Adventure Pass
- American Public Transportation Association Conference

14. Directors' Reports

Director Foley announced the annual veterans program to be held at the Dana Point Women's Club. She also thanked Deputy Chief Executive Officer Bergener for her help at the District 5 Mayor's roundtable.



15. Adjournment

The meeting adjourned at 9:47 a.m.

The next regularly scheduled meeting of this Board will be held:

9:00 a.m., on Monday, October 23, 2023

OCTA Headquarters
Board Room
550 South Main Street
Orange, California

ATTEST:

Gina Ramirez
Clerk of the Board Specialist, Principal