



# AGENDA

*Technical Advisory Committee*

## **Committee Members**

|                          |                                       |
|--------------------------|---------------------------------------|
| Jamie Lai, Chair         | <i>City of Yorba Linda</i>            |
| Mark Trestik, Vice Chair | <i>City of Laguna Beach</i>           |
| Shaun Pelletier          | <i>City of Aliso Viejo</i>            |
| Rudy Emami               | <i>City of Anaheim</i>                |
| Michael Ho               | <i>City of Brea</i>                   |
| Mina Mikhael             | <i>City of Buena Park</i>             |
| Raja Sethuraman          | <i>City of Costa Mesa</i>             |
| Doug Dancs               | <i>City of Cypress</i>                |
| Matthew Kunk             | <i>City of Dana Point</i>             |
| Temo Galvez              | <i>City of Fountain Valley</i>        |
| David Grantham           | <i>City of Fullerton</i>              |
| Dan Candelaria           | <i>City of Garden Grove</i>           |
| Chau Vu                  | <i>City of Huntington Beach</i>       |
| Kerwin Lau               | <i>City of Irvine</i>                 |
| Albert Mendoza           | <i>City of La Habra</i>               |
| Andy Ramirez             | <i>City of La Palma</i>               |
| Joe Ames                 | <i>City of Laguna Hills</i>           |
| Jacki Scott              | <i>City of Laguna Niguel</i>          |
| Gerald Tom               | <i>City of Laguna Woods</i>           |
| Doug Erdman              | <i>City of Lake Forest</i>            |
| Chris Kelley             | <i>City of Los Alamitos</i>           |
| Mark Chagnon             | <i>City of Mission Viejo</i>          |
| Jim Houlihan             | <i>City of Newport Beach</i>          |
| Christopher Cash         | <i>City of Orange</i>                 |
| Christopher Tanio        | <i>City of Placentia</i>              |
| Joe Parco                | <i>City of Rancho Santa Margarita</i> |
| David Rebensdorf         | <i>City of San Clemente</i>           |
| Tom Toman                | <i>City of San Juan Capistrano</i>    |
| Nabil Saba               | <i>City of Santa Ana</i>              |
| Iris Lee                 | <i>City of Seal Beach</i>             |
| Cesar Rangel             | <i>City of Stanton</i>                |
| Kenny Nguyen             | <i>City of Tustin</i>                 |
| Mahrooz Ilkhanipour      | <i>City of Villa Park</i>             |
| Jake Ngo                 | <i>City of Westminster</i>            |
| Robert McLean            | <i>County of Orange</i>               |
| Jonathan Lawhead         | <i>Caltrans Ex-Officio</i>            |

Orange County Transportation Authority  
550 South Main Street, Room 08 & 09  
Orange, California  
**October 23, 2024, 1:30 p.m.**

## **Teleconference Site**

*City of Dana Point - Public Works*  
33282 Golden Lantern, Suite 212  
Dana Point, California

*Any person with a disability who requires a modification or accommodation to participate in this meeting should contact the Orange County Transportation Authority (OCTA) Measure M2 Local Programs section, telephone (714) 560-5372, no less than two (2) business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.*



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## **Agenda Descriptions**

*Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.*

## **Public Availability of Agenda Materials**

*All documents relative to the items referenced in this agenda are available for public inspection at [www.octa.net](http://www.octa.net) or through the Clerk of the Board's office at: OCTA Headquarters, 600 South Main Street, Orange, California.*

## **In-Person Comment**

*Members of the public may attend in-person and address the Committee regarding any item within the subject matter jurisdiction of the Orange County Transportation Authority. Speakers will be recognized by the Chair at the time the agenda item is to be considered.*

## **Written Comment**

*Written public comments may also be submitted by emailing them to [kmartinez@octa.net](mailto:kmartinez@octa.net), and must be sent at least 90 minutes prior to the start time of the meeting. If you wish to comment on a specific agenda item, please identify the item number in your email. All public comments that are timely received will be part of the public record and distributed to the Committee. Public comments will be made available to the public upon request.*



## Call to Order

## Self-Introductions

### 1. Approval of Minutes

Approval of Technical Advisory Committee regular meeting minutes from the June 26, 2024 meeting.

## Regular Items

### 2. Comprehensive Transportation Funding Programs Semi-Annual Review – September 2024 – Charvalen Alacar

#### **Overview**

The Orange County Transportation Authority recently completed the September 2024 semi-annual review of projects funded through the Comprehensive Transportation Funding Programs. This process reviews the status of Measure M2 grant-funded projects and provides an opportunity for local agencies to update project information and request project modifications. Recommended project adjustments are presented for review and approval.

#### **Recommendations**

- A. Recommend Board of Directors approval of requested adjustments to proposed Comprehensive Transportation Funding Programs projects.
- B. Authorize the Chief Executive Officer to negotiate and execute cooperative agreement amendments for applicable cooperative agreements.

### 3. 2025 Technical Steering Committee Membership – Charvalen Alacar

#### **Overview**

The Orange County Transportation Authority Technical Advisory Committee provides feedback and input on local streets and roads related items. The Technical Advisory Committee relies on a Technical Steering Committee made up of nine representatives from local agencies to provide guidance on major technical items. Proposed 2025 Technical Steering Committee membership recommendations are presented for review and approval.

#### **Recommendation**

Approve proposed 2025 Technical Steering Committee membership recommendations and further recommend Board of Directors approval.



## Discussion Items

4. **Measure M2 Workshop** – Kia Mortazavi
5. **Measure M2 Ten-Year Comprehensive Review Survey** – Chris Boucly
6. **Correspondence**  
OCTA Board Items of Interest – Please see Attachment A.  
Announcements by Email – Please see Attachment B.
7. **Committee Comments**
8. **Staff Comments**
  - State and Federal Legislative Platforms for 2025-26 – Alexis Carter
  - Local Agencies Pavement Policies and Action Discussion – Charvalen Alacar
  - Local Programs Updates – Charvalen Alacar
9. **Items for Future Agendas**
10. **Caltrans Local Assistance Update**
11. **Public Comments**
12. **Adjournment**

*The Technical Advisory Committee is scheduled to convene on the fourth Wednesday of each month, at 1:30 p.m., at OCTA Headquarters.*



# **June 26, 2024 Minutes**



# AGENDA

Technical Advisory Committee

Item #1

## ***Voting Representatives Present:***

|                     |                                |
|---------------------|--------------------------------|
| Shaun Pelletier     | City of Aliso Viejo            |
| Carlos Castellanos  | City of Anaheim                |
| Mina Mikhael        | City of Buena Park             |
| Raja Sethuraman     | City of Costa Mesa             |
| Matthew Kunk        | City of Dana Point             |
| Temo Galvez         | City of Fountain Valley        |
| David Grantham      | City of Fullerton              |
| Chau Vu             | City of Huntington Beach       |
| Melissa Dugan       | City of Irvine                 |
| Albert Mendoza      | City of La Habra               |
| Mark Trestik        | City of Laguna Beach           |
| Jacki Scott         | City of Laguna Niguel          |
| Doig Erdman         | City of Lake Forest            |
| Chris Kelley        | City of Los Alamitos           |
| Jim Houlihan        | City of Newport Beach          |
| Wilson Leung        | City of Rancho Santa Margarita |
| Zak Ponsen          | City of San Clemente           |
| Tom Toman           | City of San Juan Capistrano    |
| Nabil Saba          | City of Santa Ana              |
| Iris Lee            | City of Seal Beach             |
| Cesar Rangel        | City of Stanton                |
| Mahrooz Ilkhanipour | City of Villa Park             |
| Jamie Lai           | City of Yorba Linda            |
| Robert McLean       | County of Orange               |

## ***Voting Representatives Absent:***

|                   |                       |
|-------------------|-----------------------|
| Michael Ho        | City of Brea          |
| Doug Dancs        | City of Cypress       |
| Dan Candelaria    | City of Garden Grove  |
| Andy Ramirez      | City of La Palma      |
| Joe Ames          | City of Laguna Hills  |
| Gerald Tom        | City of Laguna Woods  |
| Mark Chagnon      | City of Mission Viejo |
| Christopher Cash  | City of Orange        |
| Christopher Tanio | City of Placentia     |
| Eric Johnson      | City of Tustin        |
| Jake Ngo          | City of Westminster   |

Orange County Transportation Authority  
550 S. Main Street, Room 09  
Orange, California  
**June 26, 2024, 1:30 p.m.**

## **Guests Present:**

Ryan Chapman, City of Brea  
Cesar Ortiz, City of Buena Park  
Nichole Squirrell, City of Dana Point  
Jeremy Hohnbaum, City of Laguna Niguel  
Kathy Nguyen, City of Laguna Niguel  
Hamid Torkamanha, City of Laguna Woods  
Michael Vallado, City of Tustin  
Nardy Khan, County of Orange  
Raymond Aludino, Caltrans  
Jonathan Lawhead, Caltrans  
Evan Vonranzow, Caltrans  
Patrick Harper, OCTA Board  
Paul Rodriguez, RCG  
Rachel Om, SCAG

## **Staff Present:**

Kia Mortazavi  
Janet Sutter  
Lance Larson  
Adriann Cardoso  
Charvalen Alacar  
Francesa Ching  
Anup Kulkarni  
Peter Sotherland  
Alicia Yang  
Melanie Masud  
Denise Sifford  
Cynthia Morales  
Stephanie Mooney  
Kristopher Martinez



*This meeting was called to order by Vice Chair Trestik at 1:30pm.*

## **Self-Introductions**

## **Consent Calendar**

### **1. Approval of Minutes**

Mr. Emami motioned to approve the Minutes of the April 24, 2024 Technical Advisory Committee regular meeting.

Ms. Sethuraman seconded the motion.

The Minutes were approved with no further discussion.

## **Special Item**

### **2. Internal Audit Updates – Janet Sutter**

Ms. Sutter provided an update on recent action taken by the OCTA Board of Directors (Board) in response to audit findings related to the Local Fair Share (LFS) and maintenance of effort (MOE) requirements.

Ms. Sutter stated that the Taxpayers Oversight Committee (TOC) selects cities each year to undergo application procedures designed to determine compliance with LFS and Senior Mobility Program (SMP) requirements.

Ms. Sutter clarified that the procedures are performed by an independent audit firm and that in the last several years, auditors have frequently identified indirect cost charges that were not supported by documented cost allocation plans based on a reasonable methodology.

Ms. Sutter explained that in some cases, removal of the disallowed cost has resulted in cities not meeting their minimum MOE requirement, and that in such cases, cities were found ineligible to receive Measure M2 (M2) funds until they could demonstrate compliance with the MOE minimum and make up the shortfall identified by auditors.

Ms. Sutter reported that the ineligible period for these cities has been one year.

Ms. Sutter added that this year, the auditors disallowed indirect costs that were applied to LFS funds, and that in this case, the disallowed costs are considered misspent funds. Per the M2 Ordinance, the funds must be returned and the city would be found ineligible to receive M2 funds for a period of five years.



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Ms. Sutter concluded that to help avoid these findings in the future, OCTA staff sent communications to cities and offered to meet with their management team to discuss requirements and answer any questions.

Mr. Houlihan asked how the MOE is determined for each city.

Ms. Cardoso answered that the MOE was first set back in the 1990s under Measure M1, remaining consistent for the duration of Measure M1.

Ms. Cardoso added that after the first three years of M2, the MOE started increasing based on either the Caltrans California Price Index (CPI) or the local agency's growth in their general fund.

Ms. Cardoso clarified that if cities did not have any growth in their general fund, then their MOE benchmark would not increase.

Ms. Cardoso stated that for a long time, both general funds and the CPI were experiencing growth, in which case the lower value was used to increase the MOE benchmark.

Ms. Lee asked if there were any samples, formats, or contents that the auditors generally like to see as a part of a cost allocation plan.

Ms. Sutter stated that cost allocation plans allocate costs and require a factual basis for doing so. She provided an example to demonstrate that labor can be allocated based on the direct ratio of the direct cost and explained that other allocation bases can be for overhead costs, such as allocating the cost of your accounts payable based on the number of invoices paid or streets and roads versus other areas.

Ms. Sutter stated that some cities utilize a consultant to develop a plan that complies with federal and state requirements and that plans are typically updated every three to five years.

Ms. Sutter added that local agencies can develop plans themselves but need to document the plan, and the basis used for allocating costs needs to be reasonable.

Ms. Sutter explained that it is difficult to develop a template because a template would create limits.





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Ms. Lee asked if a cost allocation plan is needed if the whole LFS allocation is used towards Capital Improvement Plan (CIP) contract consulting costs and not for direct overhead.

Ms. Sutter stated that a cost allocation plan would not be needed and that about two-thirds of the cities do not allocate indirect costs to their LFS fund.

Mr. Mendoza stated that several cities have been selected for audit, La Habra being one of them, and that there are questions about how they do their cost allocation. He asked if there were any resources that could be shared in advance for the cities and if Ms. Sutter could share more information.

Ms. Sutter stated that OCTA had a meeting scheduled with the City of La Habra in the next week.

Ms. Sutter explained that the requirements for costs, whether direct or indirect, follow the gas tax guidelines. She added that the gas tax guidelines are light on direction as far as indirect costs for the very same reason because there are many ways to allocate costs and different methods considered acceptable that examples are not offered.

Ms. Sutter offered to consult with the cities and discuss whether their current methods are acceptable.

Mr. Larson stated that when M2 was passed, the Technical Advisory Committee (TAC), public works directors, and finance directors were all very involved.

Mr. Larson added that over time cities bring in new city managers, public works directors, and finance directors. One thing that OCTA tries to do every year is have a workshop with finance directors.

Mr. Larson shared that one of the reasons staff was contacted was because the TOC selected a certain number of cities that they are going to audit and OCTA wanted to reach out to those cities ahead of time and work through questions before an audit happens.

Mr. Larson added that while it does require effort from the cities to meet, it is valuable to touch base with the cities that use indirect costs, to make sure that all the cities comply and follow the requirements.



## Regular Items

### **3. Measure M2 Comprehensive Transportation Funding Programs (CTFP) – Proposed Guidelines Modifications for the 2025 Call for Project – Charvalen Alacar**

Ms. Alacar stated that OCTA is seeking a recommendation to advance the CTFP guidelines for M2's Regional Capacity Program (Project O) and the Regional Traffic Signal Synchronization Program (Project P) to the OCTA Regional Transportation Planning (RTP) Committee and Board for final review and approval.

Ms. Alacar stated that the proposed revisions, if approved, will be incorporated into the 2025 call for projects (call) which is anticipated to be issued later in the summer with staff targeting a release on August 12, 2024.

Ms. Alacar stated that a summary of the proposed guideline changes is provided in the staff report, as well as in attachments A and B.

Ms. Alacar reported that under Project O, most of the updates occur in Chapter 7, and they primarily relate to the eligibility of pavement rehabilitation and bike facilities that are part of a Master Plan of Arterial Highways (MPAH) improvement project.

Ms. Alacar stated that the proposed changes would allow for more pavement rehabilitation and resurfacing of incidental pavement area within the proposed project limits, up to ten percent (10%) of the M2 construction grant. She explained that this action would expand the eligibility of pavement costs beyond the current allowance that is restricted to either the project improvement area specifically or to improvements that include changes to the grade.

Ms. Alacar added that for bike facilities, eligibility has been expanded to include Class IV improvements in addition to the currently allowed Class II facilities, provided they meet two criteria: the facilities are included in an approved transportation plan or circulation element and the construction of the public bike facilities do not exceed 25 percent (25%) of the M2 construction grant.

Ms. Alacar stated that Class II and Class I improvements may score bonus points up to a maximum of 5 points if applications include additional descriptions on the facilities and provide a quantitative analysis on the benefits.

Ms. Alacar reported that under Project O, Class I bike facilities are identified as not eligible for M2 funding under right of way or construction phases.



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Ms. Alacar clarified that based on comments provided by the TAC Chair and the Vice Chair, as well as comments received during the June TSC meeting, staff is recommending to revise the bikeway related language currently proposed under the ineligible expenditure section.

Ms. Alacar referenced a handout that shows the recent modifications.

Ms. Alacar explained that the Class I facilities are still identified as not eligible; however, it is distinguished as separated Class I bike paths being not eligible unless there is a tie in that connects into the MPAH roadway.

Ms. Alacar stated that Class I bike facilities being ineligible is a current practice for CTFP right of way and construction funding. Additionally, the language that is modified in the handout is under the ineligible expenditures section, thereby reiterating that Class II and Class IV bike facilities are eligible items.

Ms. Alacar stated that for Project P, most updates occur in Chapter 8, and these changes are related to clarifying language and route-type projects.

Ms. Alacar reported that the proposed changes would allow for more than 50 signalized intersections for grid and route projects and would update the application submittal guidance for route projects.

Ms. Alacar specified that the proposed updates would require origin-destination data to demonstrate a prepared route and require submittal of a draft application for OCTA review at least four weeks prior to the application deadline. This ensures enough time for OCTA to vet the projects being proposed are aligned with Project P objectives.

Ms. Alacar explained that under Project P, OCTA is recommending increasing the points awarded for multi-jurisdictional projects to incentivize interagency coordination while also removing the points assigned for completing primary implementation within 12 months since that criteria is rarely utilized in the application process.

Ms. Alacar stated that these changes were approved by the TSC on June 12, 2024, and as part of that approval, the TSC directed staff to reconsider the eligibility of Class I bike paths and continue the discussion.

Ms. Alacar concluded that Class I bikeways are still considered ineligible, however staff has made revisions to the original modifications that were presented to the TSC, which allow for at least the entry points into the MPAH, until the TAC and OCTA can



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agree on what type of data could be provided to show that Class I bike facilities would directly improve the MPAH network.

Mr. Houlihan referenced page 7-3 and asked if the next call would take place in four years as grants are programmed for a three-year period.

Ms. Alacar clarified that calls are held annually, each spanning a three-year grant period.

Mr. Houlihan asked if that was the case with the Community Based Transit Circulators Program (Project V).

Ms. Cardoso clarified that the Project V call does not occur on a set schedule.

Mr. Sethuraman asked for confirmation that Class II and Class IV bikeways are only eligible as part of a capacity widening project.

Ms. Alacar confirmed that Class II and Class IV bikeways are considered eligible as a complementary feature of an MPAH improvement project.

Mr. Sethuraman stated that hopefully in the future OCTA will reconsider this to make Class II and Class IV bikeways eligible as projects on their own.

Mr. Yee asked for clarification on the bike lane language and whether there must be a physical connection between the Class I bike facility and the MPAH network.

Ms. Cardoso stated that the intent of that language is to support. She added, if you have a Class I facility and it comes into an intersection, OCTA wants to be able to help pay for fixing the Class I coming into the intersection.

Mr. Yee asked for confirmation that under the proposed language, only transitional pieces would be funded and not the entirety of the Class I facility.

Ms. Cardoso confirmed.

Mr. Yee stated that there is an equivalent benefit to Class I facilities compared to the benefit of Class II and Class IV facilities.

Mr. Yee asked if it would be possible to consider allowing Class I facilities, given OCTA's desire to study this further, until those studies are performed.



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Ms. Cardoso and Mr. Trestik asked if any members wanted to speak about that.

Ms. Vu asked why Class I facilities were being singled out and stated that whether a bike facility belongs to Class I, II, III, or IV, it is a part of a mobility and serves to encourage people to bike and utilize alternative forms of transportation.

Ms. Cardoso explained that there are other funding programs that help support bike facilities, such as the Orange County complete streets call that Ms. Sifford will be talking about later, and previously the bicycle corridor improvement program which OCTA provided funding for over the last ten to 12 years.

Ms. Cardoso added that under this is [M2] Ordinance funding, and we have to follow the requirements that are outlined in the Ordinance.

Ms. Cardoso clarified that the intent of Project O is to improve the MPAH facilities and specifically improve traffic congestion. She added that at the TSC, potentially including Class I facilities was discussed, but at that point, it could not be confirmed for sure that Class I facilities would improve the traffic conditions of the MPAH.

Ms. Cardoso explained that this is part of the reason OCTA included five bonus points to collect quantitative data on Class II and Class IV facilities to see where the data leads us. In the future, maybe the data leads us to see that a Class I bikeway, perhaps a parallel Class I facility, might provide a benefit to the MPAH, but we are looking to collect data that would make a solid argument so that we do not run afoul of what the Ordinance requires.

Mr. Mortazavi stated that another way to think about it is that Class I bike trails are not part of the MPAH, and this program [Project O] is designed to help build out the MPAH.

Mr. Mortazavi stated that allowing Class IV facilities, which are essentially separated protected bike lanes, as long as the facilities are on the MPAH, is the limit of where we can reach at this point until other things happen such as possibly revising the MPAH, but we have to look at the M2 Ordinance and remain consistent with it.

Mr. Trestik thanked Mr. Mortazavi and asked if there are any other comments specifically related to Class I bike facilities from the TAC before taking other questions.

Ms. Lee asked for clarification regarding where in the guidelines it states that eligible bike facilities need to be part of the MPAH and supported by a transportation plan or circulation element.



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Ms. Cardoso referred Ms. Lee to page 7-24.

Ms. Lee asked if this is a council approved plan

Ms. Alacar confirmed.

Mr. Emami acknowledged OCTA hiring a consultant to address payment issues.

Mr. Emami stated that city staff has already met to review the issues of payments that are far along in the comments. He hopes the issues can be resolved and addressed in this year's amendments, if not next year.

Mr. Emami referred to page 9-1 where it states that cities have a 180-day timeframe to submit their final report or they will be deemed ineligible for funding and pointed out that there is no timeframe that OCTA has to get back to cities by.

Mr. Emami stated that right now cities experience up to 18 months to get responses back on that final report.

Mr. Emami pointed out that on page 9-3 it states that staff may request additional documentation that is not listed on the checklist prior to approving the request. He added that not knowing the requirements and coming up with additional documentation is cumbersome, in addition to then having to wait another 18 months to get a response.

Mr. Emami stated that there is no timeframe in the guidelines to get responses back, and it is creating a challenge for the local agencies.

Mr. Emami referred to page 9-3 where it states that agencies can meet with OCTA staff before a payment request to see what items can be eligible.

Mr. Emami stated that with the current process, local agencies find out that expenses are ineligible very late in the process. He added that this is a problem because at that point, the money has already been spent.

Mr. Emami stated that the cities are responsible for interpreting the guidelines to know what is eligible or not in the guidelines and then are being told, we guessed wrong pretty late in the process.



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Mr. Emami recognized that there is an opportunity to review with OCTA prior to submitting the initial payment request, but at the point, the project has already been bid and the city is committed.

Mr. Emami proposed changing the language to allow cities to meet with OCTA prior to bidding. He acknowledged that these are some of the things trying to be addressed through the process with the consultants.

Mr. Emami stated wanting to better understand and improve the process because there are sometimes large grant amounts at stake. He reiterated that the bigger issue is the current process in place.

Mr. Emami stated that through the TAC and TSC, every year we adjust the guidelines, to address these issues we find but that there is no way to close that loop when there is an issue.

Mr. Emami shared that in the old process, when cities applied for a project, they used to come prepared to defend their project for funding when there was an application process. He added that they would come in and defend what the project was and why they should be eligible for funding or not. In that process, the TSC or the TAC heard out the project, and they signed to approve the project.

Mr. Emami suggested that when there is a disagreement between a city and OCTA regarding eligible or ineligible expenses, to bring that disagreement before a smaller committee such as the TSC in order to give another group the opportunity to engage and bring closure to the issue. He concluded that this would help the city accept that their guess was wrong or help staff identify where the guidelines are being misinterpreted instead of depending on a grey area of back and forth.

Mr. Trestik asked for additional comments.

Mr. Sethuraman added that similarly, he would like to see an additional initial or partial payment. He added that this would prevent funds from being held up when there is a dispute over a small amount.

Ms. Cardoso stated that there is currently a process for a second partial payment; however, OCTA and the city need to be able to verify expenses up to the second partial payment amount to ensure that at the end of the day, cities do not owe OCTA a repayment of funds.



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Ms. Cardoso acknowledged that a second initial or partial payment would require additional time but hopefully less time than would be required for the final payment.

Ms. Cardoso stated that she appreciated Mr. Emami's comment about cities coordinating with OCTA at the time of application submittal, whether that is early in the design or at final design, to go over the cost estimate and identify any areas that could be a problem, so that before a project is being bid, everyone knows what items are clearly eligible and what items are in question.

Ms. Cardoso added that she appreciated all of the other comments as well and suggested waiting until the consultant that is working with OCTA on the payment process, comes back with their recommendations. She added that this could be something they also suggest or recommend.

Mr. Trestik thanked Ms. Cardoso and asked if there is a threshold for that second progress payment.

Ms. Alacar stated that the second partial or initial payment could be disbursed up to 75 percent (75%) of the M2 grant amount for grants less than \$2 million. For grants \$2 million and above, OCTA would disburse up to 90 percent (90%) of the M2 grant amount or \$500,000, whichever is less.

Ms. Alacar added that these initial payment rates were established with a lot of input from both the TAC and OCTA.

Ms. Vu asked why there will not be OCTA-led projects in the upcoming call under Project P. She stated that projects require extensive coordination and communication between agencies and that it would be great to have OCTA-led projects back again.

Ms. Cardoso explained that the same staff that would be leading projects are working on the countywide baseline coordination plan, and so there is an interim break so that OCTA can complete that work. She stated that in future calls, OCTA will be available to lead.

Ms. Vu reiterated that OCTA-led projects are good to have.

Ms. Cardoso agreed.





## Discussion Items

### 4. **Quick Build Projects** – Rachel Om, Southern California Association of Governments (SCAG)

Ms. Om stated that many cities were likely quite busy recently working on Active Transportation Program (ATP) applications and that she would be sharing a related grant opportunity.

Ms. Om clarified that she would be presenting on the SCAG Sustainable Communities Program, specifically the Active Transportation and Safety Call.

Ms. Om reported that SCAG recently adopted Connect SoCal 2024 and the Sustainable Communities Program. She added that the intent of the program is to help implement Connect SoCal.

Ms. Om stated that this call for projects focuses on active transportation safety and aims to build partnerships with cities to help implement mobility goals.

Ms. Om identified the key goals as improving mobility across the region for people who are walking and biking, especially children and older adults who are vulnerable roadway users, and to strategically invest funds in the communities that are most harmed by traffic injuries and fatalities.

Ms. Om shared examples of the mobility goals in action, such as in the City of Calexico where they partnered with SCAG to implement a quick build project. Using a couple barricades, they created a pedestrian plaza just one block of their downtown area, and using additional funding from Bloomberg Institute, they were able to incorporate that asphalt.

Ms. Om shared an example in the City of Long Beach where the city partnered with SCAG and leveraged their resurfacing program to implement a quick build project of a parking protected bike lane. The project also included curb extensions using paint and plastic coats and then upgrading their crosswalks to high visibility. This example used standard materials to implement a safety and bike facility.

Ms. Om shared a third example from the City of El Monte, where the city implemented a quick build roundabout, or traffic circle. What was previously a five-legged intersection was transformed using plastic posts, rubber curbs, signage, and paint. She added that the City of El Monte was going through an evaluation period to identify if the design is working or if they want to explore another design.



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Ms. Om explained that the call for projects presents a funding opportunity for local jurisdictions, local schools, or school districts and tranquil governments focused on improving traffic safety.

Ms. Om stated that the source of this grant program is ATP, so all the eligible applicants of the ATP are the same applicants that are eligible for this call. She added that SCAG also secured Federal Safe Streets and Roads for All (FS4A) funding and that those are the two funding sources backing the call.

Ms. Om reported that there will be \$10.4 million available to fund two project types, quick builds and plans.

Ms. Om clarified that plans would include active transportation plans, bike and pedestrian plans, safe routes to schools, or safe routes for seniors.

Ms. Om shared another example of a quick build project where SCAG partnered with the City of Pasadena, where curb extensions, bike lanes, and other improvements were implemented along Alan Avenue.

Ms. Om reported that the SCAG Regional Council had adopted guidelines for this program but has not opened the call. She explained that the call will open within a few weeks, taking place this summer.

Ms. Om stated that applicants will have a couple of months to assemble their applications, as the call for projects is expected to close in fall 2024.

Ms. Om described the two project types: first, quick builds which implement a near-term safety improvement using materials that are low to medium cost and require minimal.

Ms. Om stated that quick build materials include paint, curbs, rubber curbs, and signage.

Ms. Om added that quick builds are a way to implement a near-term project and engage with the community to obtain their feedback on the design. This also provides the opportunity to think about how to finalize a design and obtain funding for permanent implementation.

Ms. Om reported that in this call, grants will fund engagement, design, and implementation with an award maximum of \$900,000.



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Ms. Om stated that there is no minimum for the project and applicants are welcome to submit multiple applications.

Ms. Om provided an example stating that if an agency has multiple project locations in mind that would cumulatively be eligible for more than \$900,000 in funding, they can be grouped and submitted into multiple applications.

Ms. Om provided examples of quick build projects in Orange County.

Ms. Om clarified that her examples were of projects that have already been funded.

Ms. Om stated that under the Highway Safety Improvement Program (HSIP), the cities of Anaheim and Mission Viejo were awarded funding near schools, parks, and trails for pedestrian safety improvements such as high visibility crosswalks, paint, curb extensions and signage.

Ms. Om reported that the other type of project that will get funding through this call is community or area wide plans.

Ms. Om reiterated that the ATP is one of the funding sources of this call and clarified that one of the requirements is that the plan must benefit a disadvantaged community.

Ms. Om explained that there are multiple ways to define a disadvantaged community, such as by the SCAG Priority Equity Community definition, by the methodology described in Connect SoCal, or as defined by the Healthy Play Index.

Ms. Om encouraged local agencies to investigate if their projects at least partially benefit a disadvantaged community.

Ms. Om reiterated that the award maximum is \$900,000 with no minimum project cost and that local agencies are welcome to submit multiple applications.

Ms. Om briefly described the characteristics of a sustainable community program in terms of equitable assistance, specifying that it is a partnership between SCAG and the awarded agencies, where SCAG is trying to provide technical assistance to help with the administrative elements of a project,

Ms. Om explained that given city staff's many responsibilities, SCAG aims to help by working with project managers to finalize the procurement materials of the scope and the budget based on applications.



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Ms. Om added that going through SCAG's procurement process would procure a design consultant either to conduct engagement and develop a design or to develop an active transportation plan.

Ms. Om stated that SCAG would hold the contract, managing invoices, and confirming with project managers that the consultant is performing work as expected or coordinating on adjustments that may need to be made.

Ms. Om added that SCAG will also be facilitating allocations from Caltrans or from the Federal Highway Administration (FHWA).

Ms. Om stated that the agreements between SCAG and the local agencies will feature a memorandum of understanding (MOU) to address the need for a project manager.

Ms. Om added that in the case of quick build projects, the MOU would provide that agreement of designating a city project manager and serve to pass through funds for implementation.

Ms. Om explained that city staff may utilize their own labor or procure a contractor that follows city processes to implement a quick build project.

Ms. Om provided a reminder that the call has not opened, however the final guidelines are available online.

Ms. Om encouraged interested applicants to get familiar with the project types and additional requirements and to start having discussions regarding potential challenges and projects that may be a good fit.

Ms. Om provided her contact information and invited interested applicants to attend her office hours or schedule a separate time to meet.

Ms. Om promoted two virtual workshops that SCAG will be hosting to go over the application, the evaluation rubric, and tips for how to craft a competitive application.

Ms. Om shared that the workshops will be recorded.

Ms. Om explained that the whole call process follows the ATP cycle so there would likely be a sense of which projects are being awarded by late 2024 or early 2025.

Ms. Om stated that the final project selection would take place in June 2025 when the ATP finalizes its project selection.



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Ms. Om added that looking further ahead and thinking about staff workload and capacity, while that procurement process will go through SCAG, the projects and procurement would start in the summer and fall of 2025.

Ms. Om concluded that the call will follow ATP cycle seven, which allocates funding across four fiscal years.

Mr. Trestik asked for any questions or comments from the TAC.

Ms. Dugan asked if quick build projects would include streets and curbs and whether concrete is an option as opposed to rubber curbs.

Ms. Om responded likely not since with concrete curbs, there would likely be excavation that might be required.

Ms. Om added that typically curb extensions would be the rubber curb, plastic cones, or planters.

Ms. Om stated that if there is a specific design or process in mind, she would be happy to facilitate conversations with Caltrans as they make the determination to what types of projects are eligible under this call.

Mr. Mendoza stated that surface mount curbs do not need excavation.

Ms. Om asked if surface mount curbs are like parking curbs.

Mr. Mendoza explained that surface mount curbs are glue down or held down by rebar.

Ms. Om stated that if there is no excavation, and very minor construction, the project would likely qualify as a quick build.

Ms. Om shared additional examples including pedestrian refuge islands and modular boarding islands.

Mr. Sethuraman asked if projects had to be non-permanent.

Ms. Om clarified that a quick build is not as temporary as maybe the parks demonstration where it is a project that is only out for a few hours. It is instead durable but minor construction.

Mr. Ortiz asked if resources were available with projects and components of projects that have been approved and implemented.



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Mr. Ortiz added that the example projects provided in the presentation looked great and that he would like to see the project specifications and as builds as a means for identifying types of solutions.

Ms. Om stated that Mr. Ortiz made a fantastic suggestion.

Ms. Om reported that Caltrans has created a supplemental guidance document that was released through the ATP and that the guidelines for this program are also available as a starting point.

Ms. Om added that the specifications for the projects provided as examples can be made available on SCAG's website and included as part of the upcoming workshops.

Mr. Galvez stated that he was reiterating a question that has been brought up in the past. He shared that in the past, there have been SCAG grant projects that qualified and went through the whole process of getting near approved, only to find that the projects were in partnership with areas that were leased with SoCal Edison for example. He added that ultimately projects were disqualified because they were requiring long-term leases as opposed to short-term leases.

Mr. Galvez asked if that limitation still holds.

Ms. Om asked for additional clarification.

Mr. Galvez shared that there were bike pathways that were partnering with SoCal Edison on their no longer used Edison roads and being used by the community as pedestrian pathways. He explained that projects were ultimately deemed ineligible because Edison requires five-year lease terms, and the grant requires longer terms.

Ms. Om stated that overall, the eligibility criteria will fall under the ATP.

Ms. Om added that plans will be funded fully by ATP and quick builds will be funded either by ATP funds or FS4A, the federal fund.

Ms. Om stated that she was not familiar with the requirements FS4A may require and added that if there are projects with the leasing issues described by Mr. Galvez, and they were found ineligible under ATP, then SCAG would research if the project could be awarded under FS4A.

Ms. Om explained that if a project did not qualify under either case, it would unfortunately be disqualified as SCAG is not permitted to make special exceptions.



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Ms. Om offered to discuss the situation further if there were any additional questions.

Mr. Galvez reiterated that it would be nice to know if those restrictions have changed.

Ms. Cardoso stated that that may be a more appropriate question for Caltrans when they present later in the meeting.

Ms. Cardoso added that usually federal guidance has a useful life requirement for facilities that are being constructed with federal funds.

Ms. Cardoso reported that the challenge with lease agreements is that they are typically five to six years long even if the facilities will last 12 to 20 years. She added that they want to guarantee that they are putting money into a facility that is going to last that long and that will be available for public use for that period.

Ms. Om stated that ATP cycle seven funds for quick builds are state funding. She added that for quick builds, the minimum requirement that the ATP has is that projects will need to be in the ground for a minimum of six months before conducting an evaluation or making modifications.

Ms. Om concluded that agencies could leave their projects in the ground for as long as they would like, however many quick build materials reach their end of life within a couple of years.

## **5. Correspondence – no comments**

## **6. Committee Comments**

Mr. Trestik reminded the TAC that members are all included in email correspondence regarding the TSC. He added that TAC members are welcome to attend all TSC meetings and are encouraged to provide their input at those meetings.

## **7. Staff Comments**

Ms. Sifford presented the fiscal year (FY) 2024-2025 local streets and roads initial funding update.



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Ms. Sifford shared that California Transportation Commission (CTC) staff reached out with a reminder that the list for initial funding eligibility application closes on July 1, 2024.

Ms. Sifford reported that as of June 12, 2024, the update that was provided showed that 19 agencies had not submitted this request for initial funding eligibility.

Ms. Sifford added that weekly reminders have been sent to each of the jurisdictions about the upcoming deadlines, and if these reminders have not been received, it is possible the agency contact on file is outdated. If this is the case for any local agency, she is be able to forward that notification along with the eligibility checklist.

Ms. Sifford reported that there is also a subsequent deadline for this program on September 30, 2024, which would extend the date that funding is available for this program.

Ms. Sifford explained that if an agency intends to submit as part of that subsequent deadline, they should inform CTC staff to make sure they are up to date on what the agency's plan is.

Ms. Sifford shared that there is training available on the program via YouTube channel.

Ms. Sifford asked for any questions from the TAC and provided her contact information.

Mr. Trestik introduced the update on the Orange County Complete Streets Program (OCCSP).

Ms. Sifford stated that agencies have likely seen the program update letters that were sent out to each jurisdiction on June 13, 2024.

Ms. Sifford added that the letter was provided as a handout for the meeting, and posted on the program webpage, detailing the funding that's been awarded by phase and fiscal year for the projects awarded in February 2024.

Ms. Sifford added that the second set of awards were approved by the SCAG Regional Council on June 6, 2024.





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Ms. Sifford stated that all projects in the first two sets of awards were in the process of being programmed in the Federal Transportation Improvement Program (FTIP), and that FTIP IDs have been provided with the project list for reference.

Ms. Sifford clarified that some projects have been included in a grouped listing and that there will be a backup listing available once the latest amendment has been fully approved.

Ms. Sifford stated that for third set of expected awards, OCTA staff is waiting to hear back on which fiscal years will be available for programming.

Ms. Sifford stated that OCTA will be reaching out to project managers to talk about project schedules within the next two weeks also.

Ms. Sifford explained that in general, the next steps for these projects would be that once they have their programming approved in the FTIP, agencies can start coordinating with Caltrans Local Assistance Area Engineers.

Ms. Sifford added that the following Monday there would be an email reminder for projects that have funding programming in the upcoming fiscal year. OCTA is highly encouraging expedited project delivery and will provide support for advancing obligations where possible.

Ms. Sifford shared that there would be additional information about federal-aid programming support available for awarded agencies.

Ms. Sifford reported that OCTA has contracted with General Technologies and Solutions (GTS) and their subcontractor Avant-Garde to provide review and preparation of programming documentation required for the obligation of funds at no cost to local agencies. Agencies will need to indicate that they are interested in using this service.

Mr. Mortazavi stated that in the table that was presented [via the 2023 OCCSP Update handout], the first group of awarded projects received about \$25 million, and the second group received an additional \$33 million, for a total of almost \$60 million dollars dedicated solely for active transportation.

Mr. Mortazavi stated that OCTA is working on securing another \$26 million and has been looking for other ways of funding complete streets.



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Mr. Mortazavi explained that OCTA will continue to look for opportunities to fund active transportation and hopes the cities will be able to successfully deliver these projects.

Mr. Trestik introduced the update on the Enhanced Mobility for Seniors and Disabled (EMSD) call for projects.

Ms. Sifford reported that the EMSD call officially opened on May 28, 2024, and have an application due date of Thursday June 27, 2024, at 4pm.

Ms. Sifford stated that OCTA has already met with several potential.

Ms. Sifford added that agencies that plan on applying and still have not requested access to the SharePoint for submission should reach out to OCTA staff.

Ms. Sifford shared that the appropriate contact information is on the program webpage.

Ms. Sifford concluded that at this time OCTA is still targeting September for funding recommendations to be presented to the OCTA Board. OCTA will also continue to work on distributing project agreements.

Mr. Trestik introduced the Local Programs updates.

Ms. Alacar stated that regarding the 2024 Environmental Cleanup Program (Project X) call, Tier 1 memos have been sent to the applicants and Tier 2 memos can be expected the following week.

Ms. Alacar encouraged local agencies to be on the lookout and respond as soon as possible. She added that OCTA is still targeting a presentation date to the Environmental Cleanup Allocation Committee (ECAC) in the August time frame for a programming recommendation date in September.

Ms. Alacar stated that OCTA would provide updates to this committee as they arise.

Ms. Alacar reiterated that the recommendations would go through the ECAC and that OCTA would provide an update once the recommendations have advanced.

Ms. Alacar thanked everyone who responded to the qualitative review memos for the 2024 Project V call, as well as those who submitted their payment packets for their active Project V grants. She added that OCTA is still targeting an August award date and that the agencies will be provided with updates as they become available.



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Ms. Alacar stated that regarding the 2024 Project O and P call, projects were awarded in May by the Board and that OCTA is in the process of finalizing letter agreements to the grantees.

Ms. Alacar added that local agencies should expect to have their letter agreements by the end of July, based on the reported status of the pending letter agreements.

Ms. Alacar stated that agencies, who are advancing projects in FY2025 and are pending letter agreements, should contact her so those agreements can be expedited and allow for construction, right of way, or engineering contracts to be awarded.

Mr. Trestik introduced the March 2024 CTFP Semi-Annual Review Update.

Ms. Morales reported that in April, the TAC reviewed a total of 128 project adjustments requested by local agencies. OCTA staff incorporated feedback from the TAC in the final recommendations that were presented to the Board in June. Two project scope changes were also added to the Board recommendations after staff TAC review.

Ms. Morales concluded that ultimately, 130 project adjustments, including the 12-year environmental cleanup program (ECP) in-kind operations and maintenance (O&M) extensions, were presented and approved by the Board on June 10, 2024, and that the local agencies who requested adjustments have been notified through OCFundtracker.

Mr. Trestik introduced the M2 Eligibility Deadlines reminder.

Ms. Mooney reported that Friday, June 28, 2024, is the deadline to submit the phase one eligibility components.

Ms. Mooney stated that the agenda packet contains a schedule identifying the seven components due on June 28<sup>th</sup>: CIP, MOE, No Supplanting Existing Commitments, Pavement Management Plan (PMP), Timely Expenditure of Funds, Traffic Forum Participation, and Transit/Non-Motorized Transportation in General Plan.

Ms. Mooney stated that for the PMP requirement, 21 local agencies are required to submit their PMP this year.

Ms. Mooney concluded that many agencies have already submitted their final eligibility package for phase one of this eligibility cycle.



## 8. Items for Future Agendas – No comment

## 9. Caltrans Local Assistance Update

Mr. Lawhead stated that for fiscal year 2024, the obligations of federal funds, FDA transfers, and E-76s were due Friday, June 21, 2024. However, agencies that are in the process of getting the information to Caltrans are encouraged to continue to work with their area engineers.

Mr. Lawhead stated that Caltrans will work with the agencies to create an action plan and get everything submitted and processed before the end of this fiscal year.

Mr. Lawhead stated that the deadlines to submit allocations and time extensions to District Local Assistance have passed for the August meeting, but are August 19, 2024, for the October 2024 CTC meeting.

Mr. Lawhead stated that the deadline to submit inactive invoices for this quarter is on August 23, 2024, and the new inactive quarter began on July 1, 2024. He added that reminder letters of inactive projects will be sent out once the new quarter begins.

Mr. Lawhead stated that reminders would be sent to agencies with inactive quarters once headquarters provides a new active list and that inactivity may prevent E-76s from being processed. He encouraged local agencies to contact their area engineer or planner with questions or issues submitting invoices.

Mr. Lawhead added that the official inactive list can be viewed at the link provided.

Mr. Lawhead reported that for the ATP, CalSMART reporting requirements are open for reporting starting June 16, 2024, and quarterly progress reports will be due July 15, 2024.

Mr. Lawhead clarified that quarterly progress reports are only required once a project is accepted into ATP. He added that completion reports must be finalized and approved before the district can process the final report of expenditures (FROE), and final delivery reports will only be approved after this FROE has been processed. He directed local agencies to their area engineer or planner with questions.

Mr. Lawhead stated that regarding the HSIP, the cycle 12 call started on May 6, 2024, and the application deadline is September 9, 2024. Cycle 12 funds will be either state or federally funded. Agencies will be notified which type of funding a project gets at a later time.



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Mr. Lawhead stated that the Clean California Local Grant Program (CCLGP), cycle one delivery deadline is June 30, 2024, without an extension. He added that if an extension is required, city staff should reach out to their assigned Local Assistance Area Engineer as soon as possible.

Mr. Lawhead reported that for the Local Transportation Climate Adaption Program (LTCAP), cycle one is in progress, and cycle two will begin this week and last until August 30, 2024.

Mr. Lawhead stated that the Quality Assurance Program (QAP) forms need to be updated and approved every five years as DBE and QAP forms are needed to process E-76s and receive federal funding. He added that annual forms 9A, 9B, 9C will need to be on file and current in order to have requests for authorization processed. He directed local agencies to their area engineer or planner with questions or issues submitting DBE and QAP forms.

Mr. Lawhead stated that there is a new process to request extensions for project end dates (PED). The new process is entirely online and replaces the old E-76 system. He explained that it is important to request a PED extension because work done after a PED cannot be reimbursed.

Mr. Lawhead provided resources containing more information and a report listing upcoming PED expirations.

Mr. Lawhead reminded everyone that any project using federal funds must adhere to Title VI requirements.

Mr. Lawhead presented available training opportunities and materials and recommended local agencies visit the Local Assistance blog

Mr. Lawhead shared the updated Caltrans staffing chart.

**10. Public comments** – None

**11. The meeting was adjourned at 3:04 p.m.**



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## **CTFP Semi-Annual Review – September 2024**



**October 23, 2024**

**To:** Technical Advisory Committee

**From:** Orange County Transportation Authority Staff

**Subject:** Comprehensive Transportation Funding Programs Semi-Annual Review – September 2024

### **Overview**

The Orange County Transportation Authority recently completed the September 2024 semi-annual review of projects funded through the Comprehensive Transportation Funding Programs. This process reviews the status of Measure M2 grant-funded projects and provides an opportunity for local agencies to update project information and request project modifications. Recommended project adjustments are presented for review and approval.

### **Recommendations**

- A. Recommend Board of Directors approval of requested adjustments to proposed Comprehensive Transportation Funding Programs projects.
- B. Recommend Board of Directors approval to authorize the Chief Executive Officer to negotiate and execute cooperative agreement amendments for applicable cooperative agreements.

### **Background**

The Comprehensive Transportation Funding Programs (CTFP) is the mechanism which the Orange County Transportation Authority (OCTA) uses to administer funding for street, road, signal, transit, and water quality projects. The CTFP contains a variety of funding programs and sources, including Measure M2 (M2) revenues and State funding programs. The CTFP provides local agencies with a comprehensive set of guidelines for administration and delivery of various transportation funding grants.

Every six months, OCTA works with representatives from local agencies, as needed, to review the status of projects and proposed project changes. This process is known as the semi-annual review. The goals of the semi-annual review are to review project status, determine the continued viability of projects,

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address local agency concerns, confirm availability of local matching funds, and ensure timely closeout of all projects funded through the CTFP.

***Discussion***

The September 2024 semi-annual review proposed adjustments include one cancellation, five timely use of funds extensions for CTFP projects, two project scope changes, three transfers, and one technical adjustment to a previously approved scope change.

Local agencies identified several reasons for the proposed project adjustments, which included the following:

- Cancellation (project bids significantly higher than cost estimates)
- Extensions (procurement delays, construction delays),
- Scope changes (enhanced project benefits, modification of equipment being installed, location change of equipment), and
- Transfer of funds (project savings)
- Other (technical correction of previously approved scope change).

For detailed descriptions of the project adjustment requests listed above, see Attachments A and B. The reasons identified above for the proposed modifications are consistent with expectations for a September semi-annual review cycle, which is more focused on timely use of funds extensions for CTFP projects and scope changes.

For the September semi-annual review, there were no timely use of funds extension requests for Local Fair Share (LFS) and Senior Mobility Program (SMP). LFS and SMP timely-use of funds extensions will only be processed during the March semi-annual review. Staff recognized that the March semi-annual review is the appropriate time for local jurisdiction to request any timely-use of funds extensions due to the June 30<sup>th</sup> expenditure deadline. With this change, there was a decrease in the number of requests as part of the September semi-annual review.

In order to provide local agencies with the flexibility needed to continue delivering projects within the confines of M2, staff is requesting that the Technical Advisory Committee (TAC) recommend OCTA Board of Directors' (Board) approval of all proposed semi-annual review adjustments. If these recommendations are ultimately approved by the OCTA Board, staff will monitor the implementation of these proposed adjustments through its regular project management efforts and future semi-annual reviews, which are conducted and reported on to the TAC and OCTA Board biannually. Cooperative agreement amendments will also be



processed for the scope change and transfer of savings requests, identified in the attachments, for applicable CTFP projects.

***Summary***

OCTA recently completed review of all September 2024 semi-annual review project adjustment requests, and staff recommends approval of these project adjustments identified in this report. Authorization is also requested for the Chief Executive Officer to negotiate and execute updates to all applicable cooperative agreements.

***Attachments***

- A. Comprehensive Transportation Funding Programs, September 2024  
Semi-Annual Review Adjustment Requests
- B. Comprehensive Transportation Funding Programs, September 2024  
Semi-Annual Review Adjustment Request Descriptions

**Comprehensive Transportation Funding Programs**  
September 2024 Semi-Annual Review Adjustment Requests

**ATTACHMENT A**

| Cancellation Requests                         |             |                               |         |   |       |            |                     |
|---|-------------|-------------------------------|---------|---|-------|------------|---------------------|
| No  | Agency      | Project Number                | Project | Project Title   | Phase | Current FY | Current Grant       |
| 1   | Yorba Linda | 23-YLND-ACE-4046 <sup>1</sup> | O       | Lakeview Avenue Improvements from Bastanchury Road to Oriente Drive | CON   | 25/26      | \$ 1,083,259        |
| <b>Cancellations (1) - Total Phase Grants</b> |             |                               |         |   |       |            | <b>\$ 1,083,259</b> |

**Reasons for Project Adjustments**

- Bid proposals significantly higher than original engineer estimate

**Acronyms**

CON - Construction

FY - Fiscal year

**Comprehensive Transportation Funding Programs**  
September 2024 Semi-Annual Review Adjustment Requests

**ATTACHMENT A**

| Timely Use of Funds Extension Requests - Comprehensive Transportation Funding Programs*                      |                   |                               |         |  |       |            |                     |                         |
|--|-------------------|-------------------------------|---------|--|-------|------------|---------------------|-------------------------|
| No   | Agency            | Project Number                | Project | Project Title  | Phase | Current FY | Current Grant       | Proposed Time Extension |
| 1  | Costa Mesa        | 20-CMSA-TSP-3972 <sup>1</sup> | P       | Baker/Victoria/19th TSSP   | O&M   | 21/22      | \$ 179,712          | 12 Months               |
| 2  | Mission Viejo     | 21-MVJO-ECP-4009 <sup>1</sup> | X       | Mission Viejo Trash and Runoff Abatement Project (TRAP): Lower Curtis Park Bioretention Basin With Trash Capture | CON   | 22/23      | \$ 340,000          | 24 Months               |
| 3  | OCTA <sup>†</sup> | 21-OCTA-TSP-4000 <sup>2</sup> | P       | Alton Parkway RTSSP  | IMP   | 21/22      | \$ 3,290,603        | 24 Months               |
| 4  | OCTA <sup>‡</sup> | 21-OCTA-TSP-4001 <sup>2</sup> | P       | Portola Parkway/Santa Margarita Parkway TSSP   | IMP   | 21/22      | \$ 2,491,864        | 24 Months               |
| 5  | OCTA <sup>‡</sup> | 21-OCTA-TSP-4002 <sup>2</sup> | P       | First Street/ Bolsa Avenue RTSSP   | IMP   | 21/22      | \$ 3,499,050        | 24 Months               |
| <b>Comprehensive Transportation Funding Programs Timely Use of Funds Extensions (5) - Total Phase Grants</b> |                   |                               |         |  |       |            | <b>\$ 9,801,229</b> |                         |

\*Once obligated, Comprehensive Transportation Funding Programs funds expire 36 months from the contract award date. Local agencies may request extension(s) of up to an additional 24 months.

<sup>†</sup> Project led by OCTA as requested by participating agencies: Irvine and Lake Forest for the City of Irvine.

<sup>‡</sup> Project led by OCTA as requested by participating agencies: Lake Forest, Mission Viejo, and Rancho Santa Margarita for the City of Lake Forest.

<sup>‡</sup> Project led by OCTA as requested by participating agencies: Huntington Beach, Santa Ana, Tustin, Westminster, and County of Orange for the City of Santa Ana.

**Reasons for Project Adjustments**

1. Construction related (construction coordinating delays, design modifications, relocation of equipment, equipment changes)
2. Procurement delays (stakeholder coordination, supply chain delays)

**Acronyms**

- CON - Construction
- FY - Fiscal year
- IMP - Implementation
- O&M - Operations and maintenance
- RTSSP - Regional Traffic Signal Synchronization Program
- TSSP - Traffic Signal Synchronization Project
- OCTA - Orange County Transportation Authority

**Comprehensive Transportation Funding Programs**  
September 2024 Semi-Annual Review Adjustment Requests

**ATTACHMENT A**

| Scope Change Requests*                        |                   |                                 |         |   |   |       |            |                      |
|---|-------------------|---------------------------------|---------|---|---|-------|------------|----------------------|
| No  | Agency            | Project Number                  | Project | Project Title   | Summary of Scope Change   | Phase | Current FY | Current Grant        |
| 1   | Brea              | 18-BREA-FAST-3895 <sup>1</sup>  | O       | SR-57 & Lambert Road Interchange Improvements Project Phase 1 | Ability to utilize project savings through Cooperative Agreement No. C-9-1830 to complete necessary pavement rehabilitation improvements within project limits that were omitted from the original Caltrans staging plan. | CON   | 18/19      | \$13,114,578         |
| 2   | OCTA <sup>†</sup> | 19-OCTA-TSP-3940 <sup>2,3</sup> | P       | Lake Forest Drive Traffic Signal Synchronization Project      | Removal of equipment that is no longer necessary due to installation through city-led projects, modifications to improvement locations, and the addition of network operations equipment.                                 | IMP   | 20/21      | \$ 1,395,563         |
| <b>Scope Changes (2) - Total Phase Grants</b> |                   |                                 |         |   |   |       |            | <b>\$ 14,510,141</b> |

\*Agencies may request minor scope changes for Comprehensive Transportation Funding Programs projects so long as the agency can demonstrate substantial consistency and attainment of proposed transportation benefits compared to the original project scope as committed to in the project application. No additional funding is being requested to effectuate the proposed modifications.

<sup>†</sup> Project led by OCTA as requested by participating agencies: Irvine, Laguna Hills, Lake Forest for the City of Lake Forest.

**Reasons for Project Adjustments**

1. Enhanced project benefits
2. Construction related (design modifications, relocation of equipment, equipment changes)
3. Equipment installed as part of another project

**Acronyms**

- CON - Construction
- FY - Fiscal year
- IMP - Implementation
- SR-57 - State Route 57
- OCTA - Orange County Transportation Authority

**Comprehensive Transportation Funding Programs**  
September 2024 Semi-Annual Review Adjustment Requests

**ATTACHMENT A**

| Transfer Requests*                                  |                   |                               |         |   |       |            |                     |                 |                |
|---|-------------------|-------------------------------|---------|---|-------|------------|---------------------|-----------------|----------------|
| No  | Agency            | Project Number                | Project | Project Title   | Phase | Current FY | Current Grant       | Transfer Amount | Proposed Grant |
| 1   | Anaheim           | 15-ANAH-ACE-3761 <sup>1</sup> | O       | Lincoln Avenue Widening (East Street to Evergreen Street) | ENG   | 15/16      | \$ 762,904          | \$ (153,931)    | \$ 608,973     |
|   |                   | 22-ANAH-ACE-4014 <sup>1</sup> |         |   | CON   | 22/23      | \$ 5,341,867        | \$ 153,931      | \$ 5,495,798   |
| 2   | OCTA <sup>†</sup> | 19-OCTA-TSP-3941 <sup>1</sup> | P       | Aliso Creek Road TSSP                                     | IMP   | 20/21      | \$ 1,103,658        | TBD             | TBD            |
|   |                   |                               |         |   | O&M   | 23/24      | \$ 40,320           | TBD             | TBD            |
| 3   | San Clemente      | 20-SCLM-CBT-3963 <sup>1</sup> | V       | San Clemente Downtown Route Continuation                  | O&M   | 23/24M     | \$ 969,536          | TBD             | TBD            |
| <b>Transfer Requests (3) - Total Project Grants</b> |                   |                               |         |   |       |            | <b>\$ 8,218,285</b> |                 |                |

\*An implementing agency may request to transfer 100 percent of savings between subsequent phases (or years) within a project. Funds can only be transferred to a phase that has already been awarded competitive funds. Such requests must be made prior to the acceptance of a final report and submitted as part of a semi-annual review process.

<sup>†</sup> Project led by OCTA as requested by participating agencies: Aliso Viejo, Laguna Niguel, Laguna Woods for the City of Aliso Viejo.

**Reasons for Project Adjustment**

1. Project savings

**Acronyms**

- CON - Construction
- ENG - Engineering
- FY - Fiscal year
- IMP - Implementation
- M - Multiple years
- O&M - Operations and Maintenance
- OCTA - Orange County Transportation Authority
- TBD - To be determined

**Comprehensive Transportation Funding Programs**  
September 2024 Semi-Annual Review Adjustment Requests

**ATTACHMENT A**

| OCTA-Initiated Requests: Technical Correction           |           |                               |         |  |   |       |            |                     |
|---|-----------|-------------------------------|---------|--|---|-------|------------|---------------------|
| No  | Agency    | Project Number                | Project | Project Title                              | Summary of Technical Corrections  | Phase | Current FY | Current Grant       |
| 1   | Santa Ana | 20-SNTA-STS-3978 <sup>1</sup> | W       | Santa Ana Transit Stop Improvements - 2020 | OCTA reported a reduction of 47 to 37, which reflected outdated information. The City of Santa Ana had submitted an updated request, revising the number of reduced bus shelters from 57 to 48. Due to the clerical error, OCTA is requesting a technical correction to confirm the total number of bus shelters is 48. | CON   | 22/23      | \$1,030,000         |
| <b>OCTA-Initiated Requests (1) - Total Phase Grants</b> |           |                               |         |  |   |       |            | <b>\$ 1,030,000</b> |

**Reasons for Project Adjustments**

1. Correction to September 2023 semi-annual review scope change request, approved by the Board on 12/11/2023

**Acronyms**

CON - Construction

FY - Fiscal year

OCTA - Orange County Transportation Authority

**Comprehensive Transportation Funding Programs  
September 2024 Semi-Annual Review Adjustment Request Descriptions**

**Cancellations**

Local agencies may request to cancel Comprehensive Transportation Funding Programs (CTFP) projects at any time for any reason. Cancelled projects are eligible to reapply upon resolution of the issues that led to the original project cancellation. During this semi-annual review cycle, the following cancellation requests were submitted.

The City of Yorba Linda (Yorba Linda) is requesting a cancellation for the construction (CON) phase of the Lakeview Avenue Improvements from Bastanchury Road to Oriente Drive Project (23-YLND-ACE-4046) due to bid proposals received being more than 50 percent higher than original engineer cost estimates.

**CTFP Timely Use of Funds Extensions**

CTFP funds expire 36 months from the contract award date. Local agencies may request an extension(s) of up to 24 months. During this semi-annual review cycle, the following CTFP timely use of funds extension requests were submitted.

The City of Costa Mesa is requesting a 12-month timely use of funds extension for the operations and maintenance (O&M) phase of the Baker/Victoria/19th Traffic Signal Synchronization Project (20-CMSA-TSP-3972) due to additional time needed to complete optimization of signal timing and coordination along the project corridors.

The City of Mission Viejo is requesting a 24-month timely use of funds extension for the CON phase of the Mission Viejo Trash and Runoff Abatement Project (TRAP): Lower Curtis Park Bioretention Basin with Trash Capture Project (21-MVJO-ECP-4009) due to geotechnical issues resulting in unforeseen delays for the completion of construction.

The Orange County Transportation Authority (OCTA), as lead agency, is requesting a 24-month timely use of funds extension for the primary implementation (IMP) phase of the Alton Parkway Regional Traffic Signal Synchronization Project (21-OCTA-TSP-4000) due to unforeseen delays in equipment procurement and contractor availability necessary to complete the project.

OCTA, as lead agency, is requesting a 24-month timely use of funds extension for the IMP phase of the Portola Parkway/Santa Margarita Parkway Traffic Signal Synchronization Project (21-OCTA-TSP-4001) due to unforeseen delays in equipment procurement and contractor availability necessary to complete the project.

OCTA, as lead agency, is requesting a 24-month timely use of funds extension for the IMP phase of the First Street/ Bolsa Avenue Regional Traffic Signal Synchronization



Project (21-OCTA-TSP-4002) due to unforeseen delays in equipment procurement and contractor availability necessary to complete the project.

### **Scope Changes**

Agencies may request scope changes for CTFP projects if they can assure that project benefits as committed to in the initial application can still be delivered. During this semi-annual review cycle, the following scope change requests were submitted.

The City of Brea (Brea) is requesting a scope change for the CON phase of the State Route 57 (SR-57) and Lambert Road Interchange Improvements Project Phase 1 (18-BREA-FAST-3895). Due to the complexity of this project, the overmatch that is being provided, and the overall benefit to both the Lambert Road interchange and SR-57, OCTA administers Measure M2 (M2) funding through a separate cooperative agreement, No. C-9-1830, that simplifies the review and reimbursement process while maintaining transparency and the requirements of M2. The scope change will allow project savings from the utility relocation, mitigation, landscape design, and construction tasks specified in No. C-9-1830 to be utilized Brea towards necessary rehabilitation of existing pavement within the project limits. Pavement rehabilitation on Lambert Road was omitted from the Caltrans staging plan and was to be included in the request for bids as an addendum per the administrative lead and project manager, Caltrans. However, due to anticipated project cost overruns at the time, the pavement addendum was not incorporated. With construction considered substantially complete by Caltrans as of March 2024, project savings are now anticipated as Brea completes the final landscaping phase to complete the project. As such, Brea is requesting to utilize project cost savings towards mitigating the impacts to Lambert Road sustained to deliver the interchange improvements, specifically with pavement rehabilitation within project limits. Approval of this action transfers this work from the base contract with Caltrans to become work that will be carried out directly by Brea.

OCTA, as administrative lead, for the cities of Irvine, Laguna Hills, and Lake Forest, is requesting a scope change for the IMP phase of the Lake Forest Drive Traffic Signal Synchronization Project (19-OCTA-TSP-3940). The scope change includes equipment modifications due to equipment installed as part of another project, removal and/or quantity reductions of communications improvements that are no longer necessary, modifications to improvement locations, and the addition of network operations equipment and traffic control devices at certain locations. These modifications emerged during the design process and are requested in order to facilitate project completion and utilize project cost savings towards enhancing overall project benefits.

Installation of certain new equipment items was determined to be unnecessary due to equipment being installed as part of another project at the following locations: Bake Parkway, Regency Lane, Vista Terrace, Rancho Parkway, from Rockfield Boulevard to Portola Parkway, Aspan Street, Lake Forest Town Center, Muirlands Boulevard, Jeronimo Road, Toledo Way, Serrano Road, Trabuco Road,

Canada Road/Newvale Drive, Pittsford Drive, Vintage Woods, Dimension Drive, and Towne Center Drive.

With the project savings from removal of equipment from the aforementioned locations and the decrease of communications conduit, cable, and wiring quantities at Dimension Drive and from Rockfield Boulevard to Portola Parkway, installation of network operations equipment at Toledo Way and from Rockfield Boulevard to Portola Parkway, an added advanced traffic management system (ATMS) license, and an added battery for uninterruptible power supply will enhance signal synchronization and Traffic Management Center (TMC) operations. Additionally, project savings will also be utilized for bicycle push buttons and conductor signal cable at Moulton Parkway and Del Lago/Research to ensure functionality with new accessible pedestrian push buttons that were installed as part of the project.

### **Transfers**

The CTFP guidelines allow agencies to request to transfer up to 100 percent of savings of funds between subsequent phases or years within a project. Funds can only be transferred to a phase or year that has already been awarded competitive funds. Such requests must be made prior to the acceptance of a final report and submitted as part of the semi-annual review process. During this review cycle, the following transfer requests were submitted due to the need to utilize project savings.

The City of Anaheim is requesting a transfer for Lincoln Avenue Widening (15-ANAH-ACE-3761). The request is to transfer project savings of \$153,931.19 from the ENG phase to the CON phase of the Lincoln Widening Avenue (22-ANAH-ACE-4014).

OCTA, as administrative lead, for the Aliso Creek Road Traffic Signal Synchronization Project (19-OCTA-TSP-3941) is requesting a transfer. The request is to transfer project savings of approximately \$42,000 from the IMP phase to the O&M phase.

The City of San Clemente is requesting a transfer for the San Clemente Downtown Route Continuation (20-SCLM-CBT-3963). The transfer includes savings from fiscal year (FY) 2023-24 and from all fiscal years moving forward from the (O&M) phase in an amount to be determined and is to be distributed to FY 2024-25 or the immediate subsequent year on a go-forward basis.

### **Other/OCTA-Initiated**

Approval of a technical correction is requested for the CON phase of the 2020 Santa Ana Transit Stop Improvements Project (20-SNTA-STS-3978). During the September 2023 semi-annual review, a scope change was approved for this project, reducing the number of bus shelters from 47 to 37. However, the approved scope change reflected outdated information that had since been updated by the City of Santa Ana (Santa Ana) and

submitted to OCTA requesting that the number of bus shelters be reduced from 57 to 48. As such, staff is requesting a technical correction in order to make the modification consistent with Santa Ana's intended scope reduction.



# AGENDA

*Technical Advisory Committee*

*Item #3*

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## **2025 Technical Steering Committee Membership**



**October 23, 2024**

**To:** Technical Advisory Committee  
**From:** Orange County Transportation Authority Staff  
**Subject:** 2025 Technical Steering Committee Membership

**Overview**

The Orange County Transportation Authority Technical Advisory Committee provides feedback and input on local streets and roads related items. The Technical Advisory Committee relies on a Technical Steering Committee made up of nine representatives from local agencies to provide guidance on major technical items. Proposed 2025 Technical Steering Committee membership recommendations are presented for review and approval.

**Recommendation**

Approve proposed 2025 Technical Steering Committee membership recommendations and further recommend Board of Directors' approval.

**Background**

The Orange County Transportation Authority (OCTA) Technical Advisory Committee (TAC) provides input regarding the allocation of Measure M2 competitive grant funds. The TAC also provides technical advice to staff on issues related to streets and roads planning. The TAC is comprised of representatives from all Orange County cities and the County of Orange (County). It also includes non-voting representatives from the California Department of Transportation. The TAC uses a Technical Steering Committee (TSC) to vet, review, and discuss major technical items prior to submittal to the TAC for final review and consideration. The chair and vice chair of the TAC also serve as the chair and vice chair of the TSC.

The TSC consists of a total of nine voting members recommended for approval by the TAC and appointed by the OCTA Board of Directors (Board). There is one position for each of Orange County's five supervisorial districts, two at-large positions, and chair and vice chair positions. The chair and vice chair positions are appointed for one-year terms. All other positions are appointed for two-year terms.

The TSC membership is evaluated as position terms expire, letters of interest from local agencies' TAC representatives are reviewed, and new appointments are recommended by the president of the City Engineers Association of Orange County (CEAOC) and the TAC/TSC chair (with staff support from OCTA) before recommendations are advanced to the full TAC for consideration. In recommending and selecting TSC members, priority is generally given to maintaining a balance between small and large jurisdictions (small jurisdictions are currently defined as those with populations equal to/or less than 61,599). Balance among supervisorial districts and north/south Orange County jurisdictions is also evaluated.

### ***Discussion***

In September 2024, OCTA solicited letters of interest from local jurisdictions to fill TSC vacancies for the 2025 calendar year. At that time, it was noted that six of the nine regular TSC positions were open for consideration and appointment. These positions included the chair, vice chair, Second District, Third District, Fifth District and one at-large position. Letters of interest from eight eligible TAC members were received. In accordance with OCTA procedures for administering the TSC, the president of the CEAOC and the chair of the TSC/TAC reviewed all letters of interest and, with input from OCTA, developed 2025 TSC membership recommendations (see Attachment A).

While past practice has been for the vice chair to be recommended to the role of chair the following year, the 2024 vice chair will be unable to serve on the TSC in 2025. Instead, the representative from the City of Lake Forest, is being recommended for the 2025 chair position. The representative from the City of Seal Beach, who currently serves in the First District position, is being recommended for the 2025 vice chair position. A vacancy was created in the First District by recommending the representative from the City of Seal Beach for the 2025 vice chair position. The First District position is recommended to be filled by the representative from the City of Fountain Valley to complete the resigning representative's current term. The Second District position is recommended to be filled by the representative from Santa Ana. The Third District position is recommended to be filled by the representative from the City of Yorba Linda. The Fifth District position is recommended to be filled by the representative from the City of Laguna Hills. The open at-large position is

recommended for appointment by the representative from the City of Laguna Niguel.

In finalizing these recommendations, the president of the CEAOC and the TSC chair emphasized the need to generally maintain a balance between both small/large and north/south Orange County cities, and their consensus recommendations are now recommended for consideration and approval.

***Summary***

The TSC provides guidance and direction on major technical issues before presentation to the full TAC. Members of the TSC serve two-year terms, with the exception of the chair and vice chair, who serve one-year terms. There are seven regular positions recommended for appointment in the next calendar year. In addition, one out-of-cycle position is recommended for appointment due to the existing representative being recommended for another TSC position. Presented for consideration and approval is a recommended list of 2025 TSC appointments.

***Attachment***

- A. Recommended 2025 Technical Steering Committee Membership List

## Recommended 2025 Technical Steering Committee Membership List<sup>†</sup>

| <b>NAME</b>        | <b>AGENCY</b>          | <b>2024*<br/>POPULATION</b> | <b>MEDIAN<br/>POPULATION<br/>SIZE<sup>^</sup></b> | <b>DISTRICT</b>         | <b>NORTH/<br/>SOUTH</b> | <b>SEAT EXPIRES</b> |
|--------------------|------------------------|-----------------------------|---|-------------------------|-------------------------|---------------------|
| <b>Tom Wheeler</b> | <b>Lake Forest</b>     | 86,917                      | Large   | <b>Chair</b>            | South                   | December 31, 2025   |
| <b>Iris Lee</b>    | <b>Seal Beach</b>      | 24,350                      | Small   | <b>Vice<br/>Chair**</b> | North                   | December 31, 2025   |
| <b>Temo Galvez</b> | <b>Fountain Valley</b> | 56,333                      | Small   | <b>1</b>                | North                   | December 31, 2025   |
| <b>Nabil Saba</b>  | <b>Santa Ana</b>       | 310,797                     | Large   | <b>2</b>                | North                   | December 31, 2026   |
| <b>Jamie Lai</b>   | <b>Yorba Linda</b>     | 66,087                      | Large   | <b>3</b>                | North                   | December 31, 2026   |
| Rudy Emami         | Anaheim                | 340,160                     | Large   | 4                       | North                   | December 31, 2025   |
| <b>Joe Ames</b>    | <b>Laguna Hills</b>    | 30,315                      | Small   | <b>5</b>                | South                   | December 31, 2026   |
| <b>Jacki Scott</b> | <b>Laguna Niguel</b>   | 64,291                      | Large   | <b>At-Large</b>         | South                   | December 31, 2026   |
| Robert McLean      | County of Orange       | 131,335***                  | N/A   | At-Large                | North/<br>South         | December 31, 2025   |

N/A – Not Available

<sup>†</sup> Shading indicates the positions available for the 2025 Technical Steering Committee.

\* State of California, Department of Finance, *E-1 Cities, Counties and the State Population and Housing Estimates with Annual Percentage Change — January 1, 2023 and 2024*. Sacramento, California, May 2024.

\*\* Current District 1 representative has been recommended to serve in the 2025 vice chair position. The vacancy created in District 1 is recommended to be filled with a representative from the City of Fountain Valley to complete the former representative’s current term.

\*\*\* Reflects the population of unincorporated areas in the county, which are represented by the County of Orange. Total countywide population reported as 3,150,835.

<sup>^</sup> Small jurisdictions are defined as those with populations equal to/or less than 61,599.





# AGENDA

*Technical Advisory Committee*

*Item #4*

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## Measure M2 Workshop




# Measure M2 Workshop

 Purpose and Need for Measure M2

 Process to Pass M2

 Promise to Voters

 Protecting the Promise

 Plans for Delivery

 Progress Made to Date

 Performance of Delivery

 Path Forward

## Purpose:

*“To address current and future transportation needs in Orange County and reflect the best efforts to achieve consensus among varied interest and communities throughout the County”*

## Need for renewal of Measure M1:

- Projected Orange County population, job, and travel increase
- Address local needs
- Supplement existing transportation investments
- Leverage external funding sources

# Process to Pass M2



**Built on trust established through delivery of Measure M1 promises**



**Developed a specific expenditure plan with technical support**



**Secured consensus on expenditure priorities**

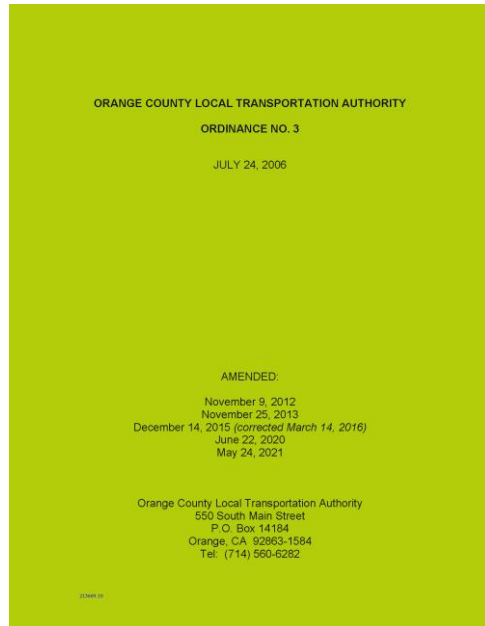


**Expanded strong safeguards**



**Received 69.7 percent voter support in 2006**

## Implementing Ordinance



M2 Ordinance:  
Attachment A – Renewed Measure M Transportation Investment Plan (M2 Plan)  
Attachment B – Allocation of Net Revenues  
Attachment C – Taxpayer Oversight Committee

## Funding Strategy



### ENVIRONMENTAL

- A total of 5% of OC Go Freeway Program funds is allocated to the Freeway Environmental Mitigation Program
- A total of 2% of the overall OC Go Program funds is allocated to the Environmental Cleanup Program

1.5% - California Department of Tax and Fee Administration  
1% - Administrative Costs

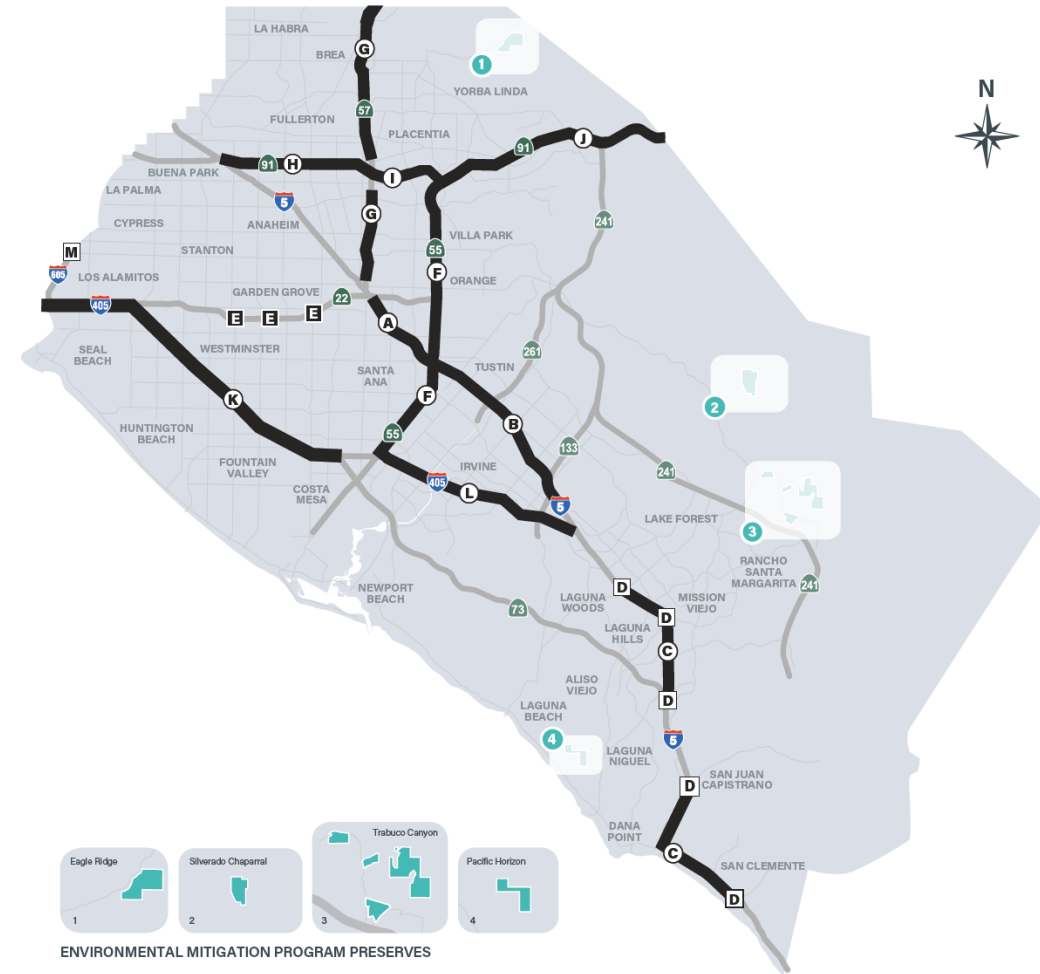
## \$14 Billion Expenditure Plan

| MEASURE M M2 Projects and Programs    |   |       |
|---------------------------------------|---|-------|
| <b>Freeway Projects</b>               |   |       |
| I-5                                   | Santa Ana Freeway Interchange Improvements                        | A     |
| I-5                                   | Santa Ana/San Diego Freeway Improvements                          | B C D |
| SR-22                                 | Garden Grove Freeway Access Improvements                          | E     |
| SR-55                                 | Costa Mesa Freeway Improvements                                   | F     |
| SR-57                                 | Orange Freeway Improvements                                       | G     |
| SR-91                                 | Riverside Freeway Improvements                                    | H I J |
| I-405                                 | San Diego Freeway Improvements                                    | K L   |
| I-605                                 | Freeway Access Improvements                                       | M     |
| All                                   | Freeway Service Patrol  | N     |
| <b>Streets &amp; Roads Projects</b>   |   |       |
|                                       | Regional Capacity Program   | O     |
|                                       | Regional Traffic Signal Synchronization Program                   | P     |
|                                       | Local Fair Share Program  | Q     |
| <b>Transit Projects</b>               |   |       |
|                                       | High Frequency Metrolink Service                                  | R     |
|                                       | Transit Extensions to Metrolink                                   | S     |
|                                       | Metrolink Gateways  | T     |
|                                       | Expand Mobility Choices for Seniors and Persons with Disabilities | U     |
|                                       | Community Based Transit/Circulators                               | V     |
|                                       | Safe Transit Stops  | W     |
| <b>Environmental Cleanup</b>          |   |       |
|                                       | Clean Up Highway and Street Runoff that Pollutes Beaches          | X     |
| <b>Taxpayer Safeguards and Audits</b> |   |       |
|                                       | Collect Sales Taxes (State charges required by law)               |       |
|                                       | Oversight and Annual Audits                                       |       |

I-5 – Interstate 5 / SR-22 – State Route 22 / SR-55 – State Route 55 / SR-57 – State Route 57 / SR-91 – State Route 91 / I-405 Interstate 405 / I-605 – Interstate 605

# M2 Freeway Programs – \$6.0 B (43%)

- 13 freeway projects → 30 projects/segments
  - I-5 Freeway and Interchanges (Projects A-D)
  - SR-22 Freeway Access Improvements (Project E)
  - SR-55 Freeway Improvements (Project F)
  - SR-57 Freeway Improvements (Project G)
  - SR-91 Freeway Improvements (Projects H-J)
  - I-405 Freeway Improvements (Projects K-L)
  - I-605 Freeway Access Improvements (Project M)
- Freeway Service Patrol Enhancements (Project N)
- 5% for Consolidated Freeway Environmental Mitigation Program





## Regional Capacity Program (Project O)

- Improve busy streets and intersections on Orange County's Master Plan of Arterial Highways
- Receives 10% of net revenues (~\$1.4 B)



## Regional Traffic Signal Synchronization Program (Project P)

- Traffic signal synchronization projects across city boundaries to ensure drivers hit the most green lights during peak traffic hours
- Receives 4% of net revenues (~ \$555 M)



## Local Fair Share (Project Q)

- Formula-based funds to preserve existing streets and roads and provide other transportation improvements based on the priorities and needs of local agencies
- Receives 18% of net revenues (~ \$2.5 B)



# M2 Transit Programs – \$3.5 B (25%)



High-Frequency Metrolink Service (Project R)

~\$1.4 B



Transit Extensions to Metrolink (Project S)

~ \$1.2 B



Metrolink Gateways (Project T)

~\$71 M



Expand Mobility Choices for Seniors and Persons with Disabilities (Project U)

~\$482 M



Community-Based Transit/Circulators (Project V)

~\$278 M



Safe Transit Stops (Project W)

~\$31 M

## Environmental Cleanup Program (Project X)

- Receives 2% of gross revenues (~\$281 M)
- Provides competitive funding to improve water quality from transportation-generated pollution
- Advised by Environmental Cleanup Allocation Committee

## Freeway Environmental Mitigation Program

- 5% of the 43% freeway allocation (~\$298 M)
- Provides comprehensive mitigation of environmental impacts
- Streamlined project approvals
- Advised by Environmental Oversight Committee



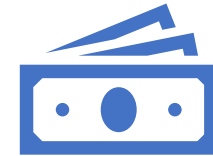
## Foundational Requirements

- ✓ Only approved projects and programs
- ✓ Voters approve major changes
- ✓ Independent Taxpayer Oversight Committee
- ✓ Annual public hearing and certification
- ✓ Regular audits and reviews of expenditures



## Public Reporting Requirements

- ✓ Quarterly reports
- ✓ Annual report
- ✓ Triennial Performance Assessment
- ✓ Ten-Year Review



## Funding Requirements

- ✓ Specific eligibility requirements for local jurisdictions
- ✓ Funds provided shall augment, not replace, existing funds
- ✓ Penalties for misuse of funds
- ✓ Limits on administrative/oversight expenses

# Plans for Delivery

## Board-Adopted M2 Delivery Plans:

- Early Action Plan (2007-2012)
  - M2020 (2012-2016)
  - Next 10 Delivery Plan (2016 – Present)
- Purpose:
    - Validate OCTA's ability to deliver M2
    - Outline near-term workplan
    - Establish common understanding among stakeholders
    - Set baseline upon which future changes are measured
    - Provide basis for preparation of OCTA's annual budgets for capital projects
  - Principles:
    - Confirm promised plan can be delivered
    - Ensure financial sustainability
    - Implement projects and programs expeditiously

Sales Tax  
Revenue  
Forecast



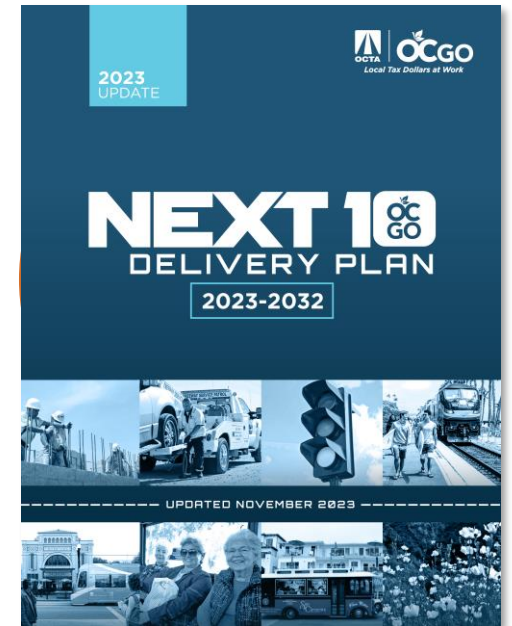
External  
Revenues



Market  
Conditions  
Forecast



Project  
Cost and  
Schedules



# Progress to Date

- Freeways
  - ✓ 14 projects completed
  - ✓ 13 additional projects complete by 2030
  - ✓ 794,000 motorist assists/lane clearances
  - ✓ Acquired 1,300 acres of open space and restoring nearly 350 acres of habitat
  - ✓ Establishing an endowment to protect mitigation properties
- Streets and Roads
  - ✓ 168 street capacity improvement projects
  - ✓ 128 signal synchronization projects
  - ✓ \$736 million in flexible funding distributed
- Transit
  - ✓ Rail station, track, and grade crossing improvements
  - ✓ Expanded Metrolink service
  - ✓ OC Streetcar underway
  - ✓ \$134 million for expanded mobility choices for seniors and persons with disabilities
  - ✓ 23 community-based circulators
  - ✓ 112 transit stop enhancements
- Environmental Cleanup
  - ✓ 226 water quality projects
  - ✓ 69.5 million gallons of trash collected



*Note: Figures reflect only active or completed projects*

## Triennial Performance Assessment

Section 10.6 of the M2 Ordinance: Evaluate the efficiency, effectiveness, economy, and program results of OCTA in satisfying the requirements of M2

## Ten-Year Review

Section 11 of the M2 Ordinance: Comprehensive review of all projects and programs in the M2 Plan to evaluate the performance of the overall program

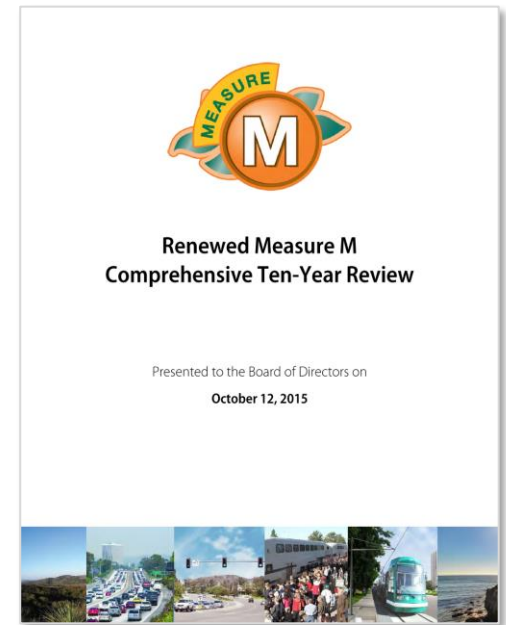
- ✓ Five performance assessments completed
- Sixth performance assessment underway (FY 2021-22 through FY 2023-24)

## Focus Areas:

- Project delivery
- Program management and responsiveness
- Compliance
- Fiscal responsibility
- Transparency and accountability

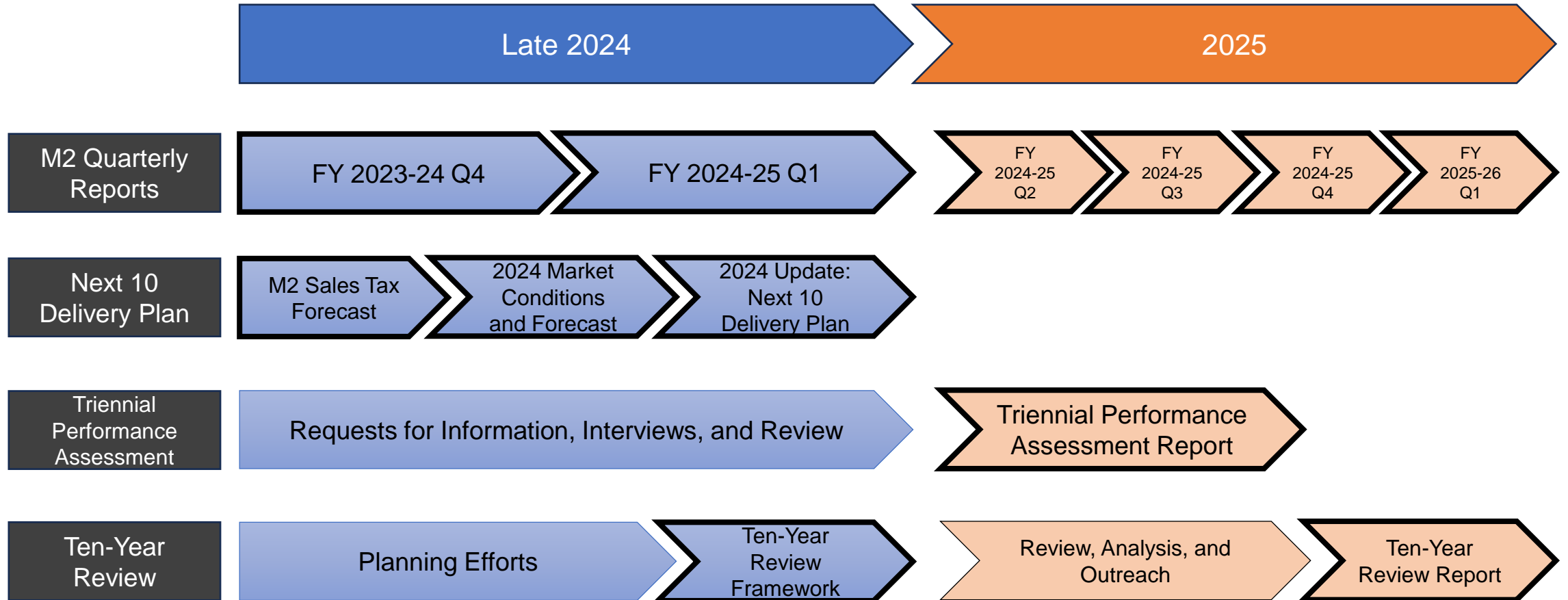


- ✓ Initial review completed in 2015
- Second review underway with target completion in October 2025
- Section 11 of M2 Ordinance - Consideration for changes in:
  - Local, state and federal transportation plans and policies
  - Land use, travel and growth projections
  - Project cost estimates and revenue projections
  - Right-of-way constraints and other project constraints
  - Level of public support for the M2 Plan
  - Progress of OCTA and local jurisdictions in implementing the M2 Plan





# Path Forward



Note: Bolded shapes denote Board items

- M2 is voter-approved and governed by the M2 Ordinance
- Promises made, promises kept is a priority
- M2 continues to provide a reliable, local funding source for transportation improvements in Orange County
- M2 provides for investments to all modes concurrently
- Key M2 reports are underway and will be presented in late 2024 through 2025
- Taxpayer Oversight Committee has determined for 33 years (including 20 years of Measure M1) that Measure M has been delivered as promised to voters
- All M2 documents available on the OCTA website: <https://octa.net/m2documents>





## **AGENDA**

*Technical Advisory Committee*

*Item #5*

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# **Measure M2 Ten-Year Comprehensive Review Survey**

# Measure M2 Ten-Year Comprehensive Review Survey



# Purpose of Study

- Identify how voters assess various aspects of the transportation network in Orange County
- Measure priorities among potential uses of M2\* funds and how priorities may have changed over time
- Gauge awareness and perceptions of the Orange County Transportation Authority (OCTA) and M2\*

\*Measure M2

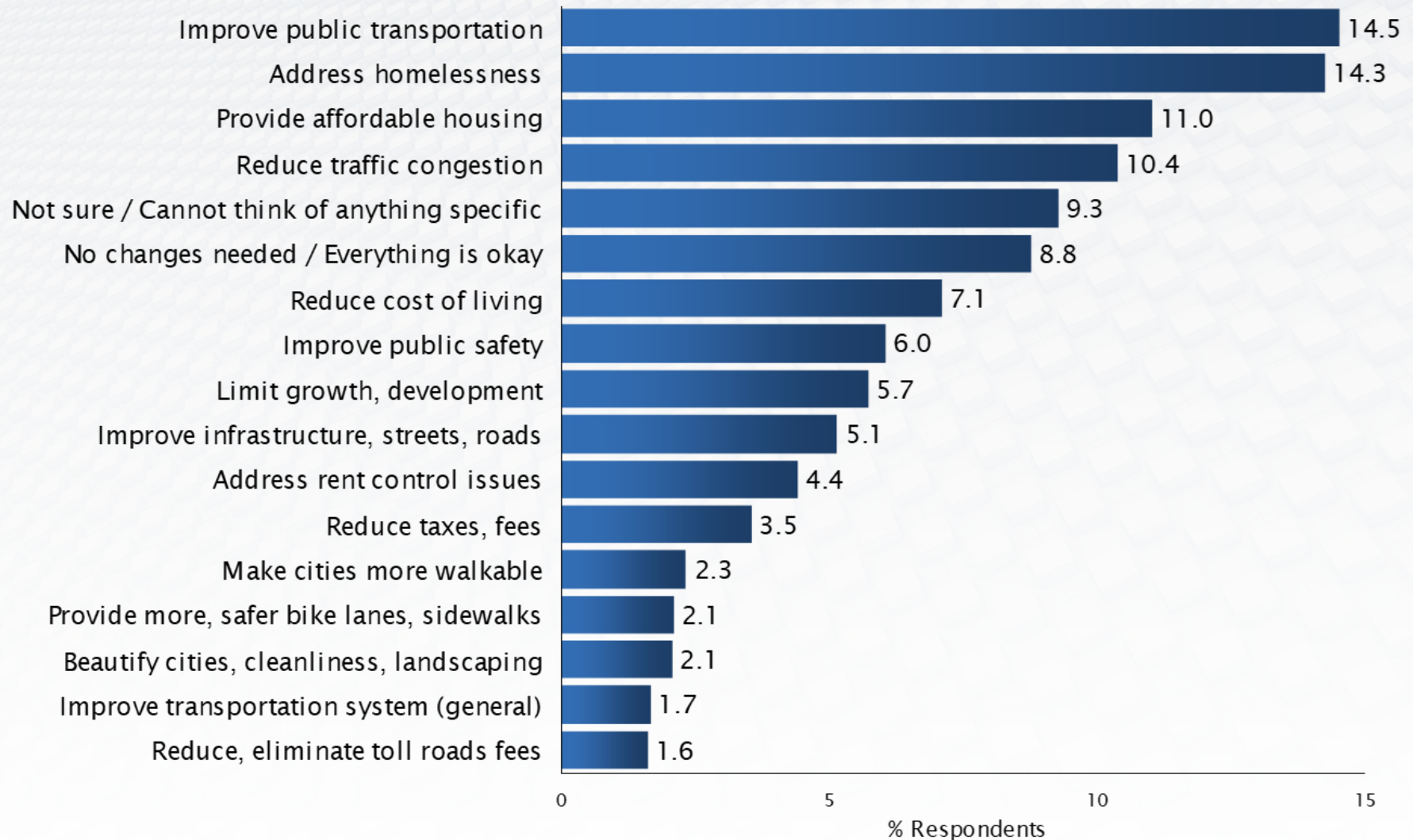
# Methodology of Study

- **How did we select voters to survey?**
  - Stratified & Clustered Random Sample of likely voters (2024) using age, gender, partisanship, household party type, and sub-geographies
  - Ensures balanced, representative sample of likely voters
- **How did we recruit participation?**
  - Personalized email, text, and telephone calls
  - PINs to restrict access and ensure one complete survey per respondent
- **How were voters able to share their opinions?**
  - Online & Telephone (land line or mobile)
  - English, Spanish & Vietnamese
- **What was the sample size?**
  - 1,080 completed surveys; Overall margin of error of  $\pm 3.0\%$  at 95%

# Quality of Life



# Changes to Improve Quality of Life





# Public Transportation Comments

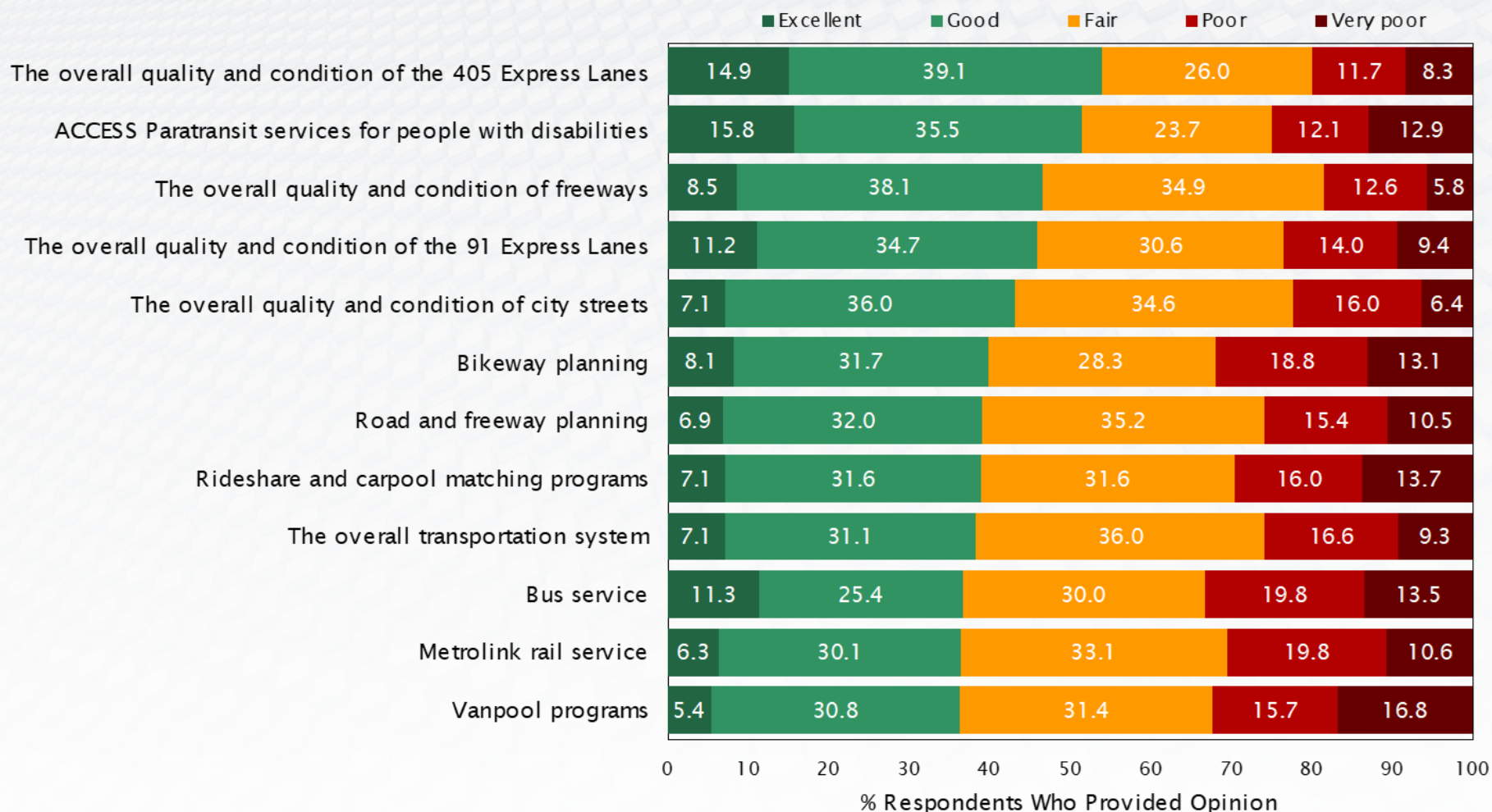
*“We need more public buses and underground metros all over the county to avoid traffic and get to our job and schools in time.”*

*“I wish there was more available and frequent access to public transportation. We are chained to the automobile and this is limiting, dangerous, and unhealthy.”*

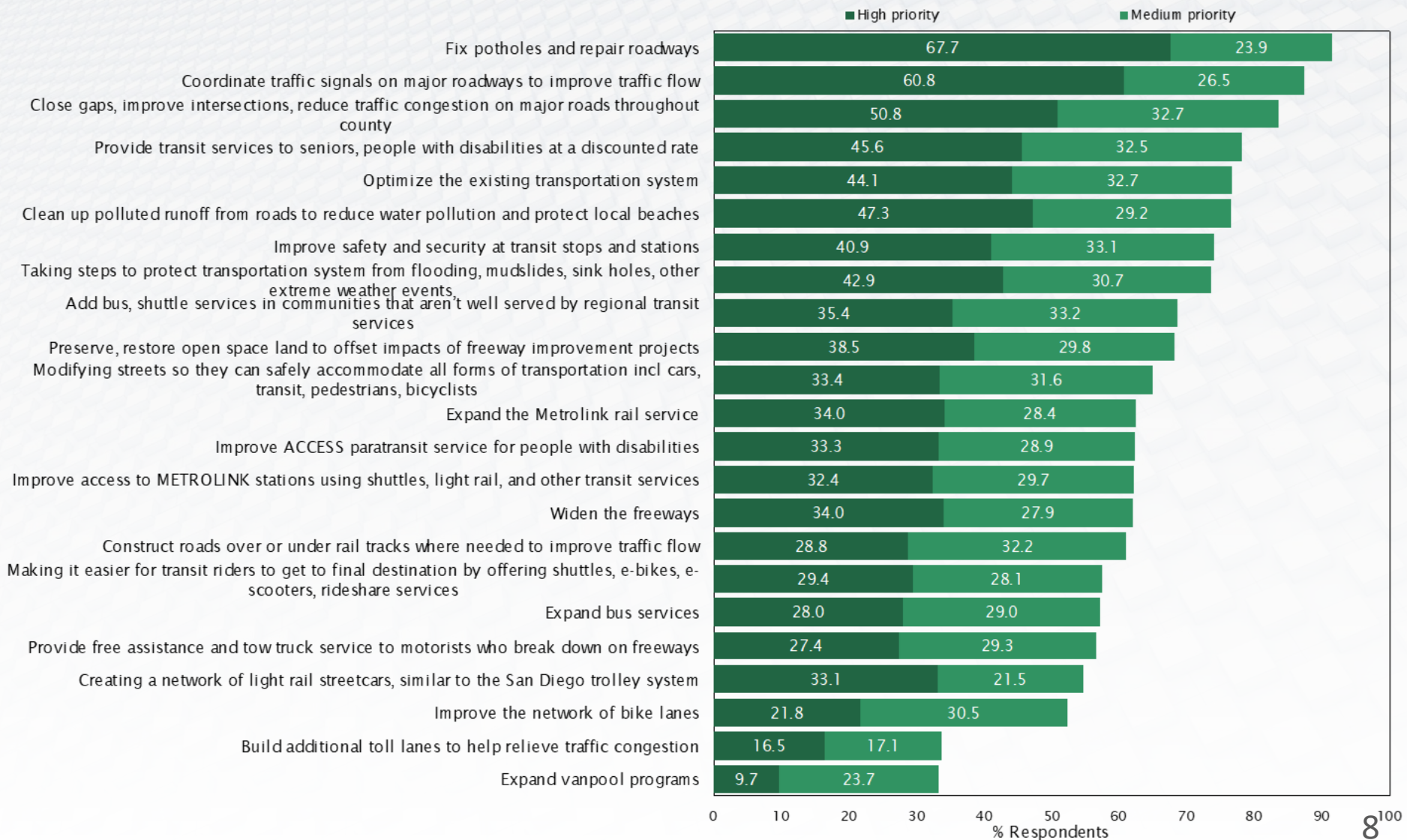
*“Mass transit that's reliable, with frequent pick-up schedules, expansion of routes and programs to encourage ridership.”*

*“Initiate a light rail service which would connect with the Los Angeles system.”*

# Rating Transportation System



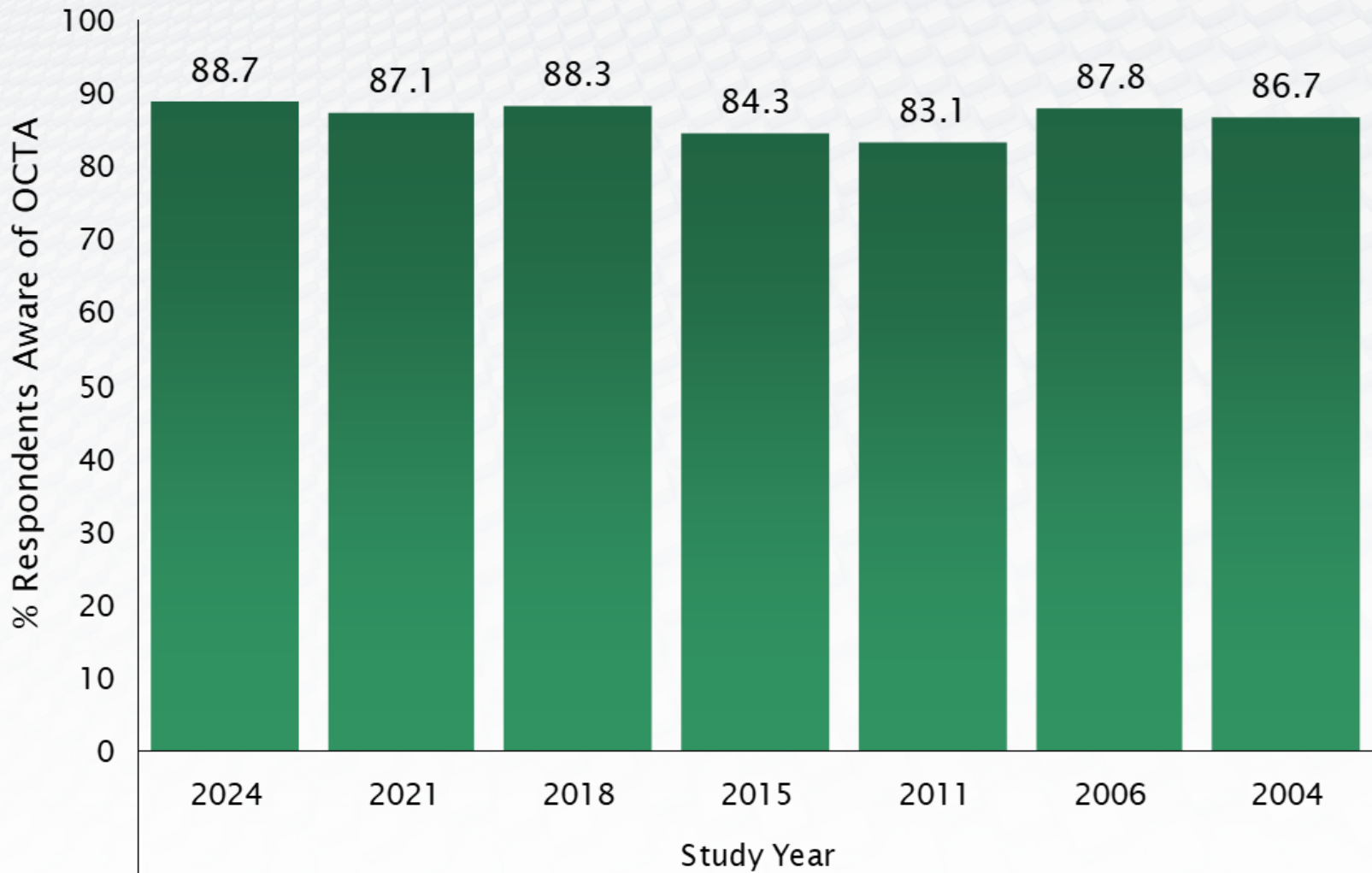
# Funding Priorities



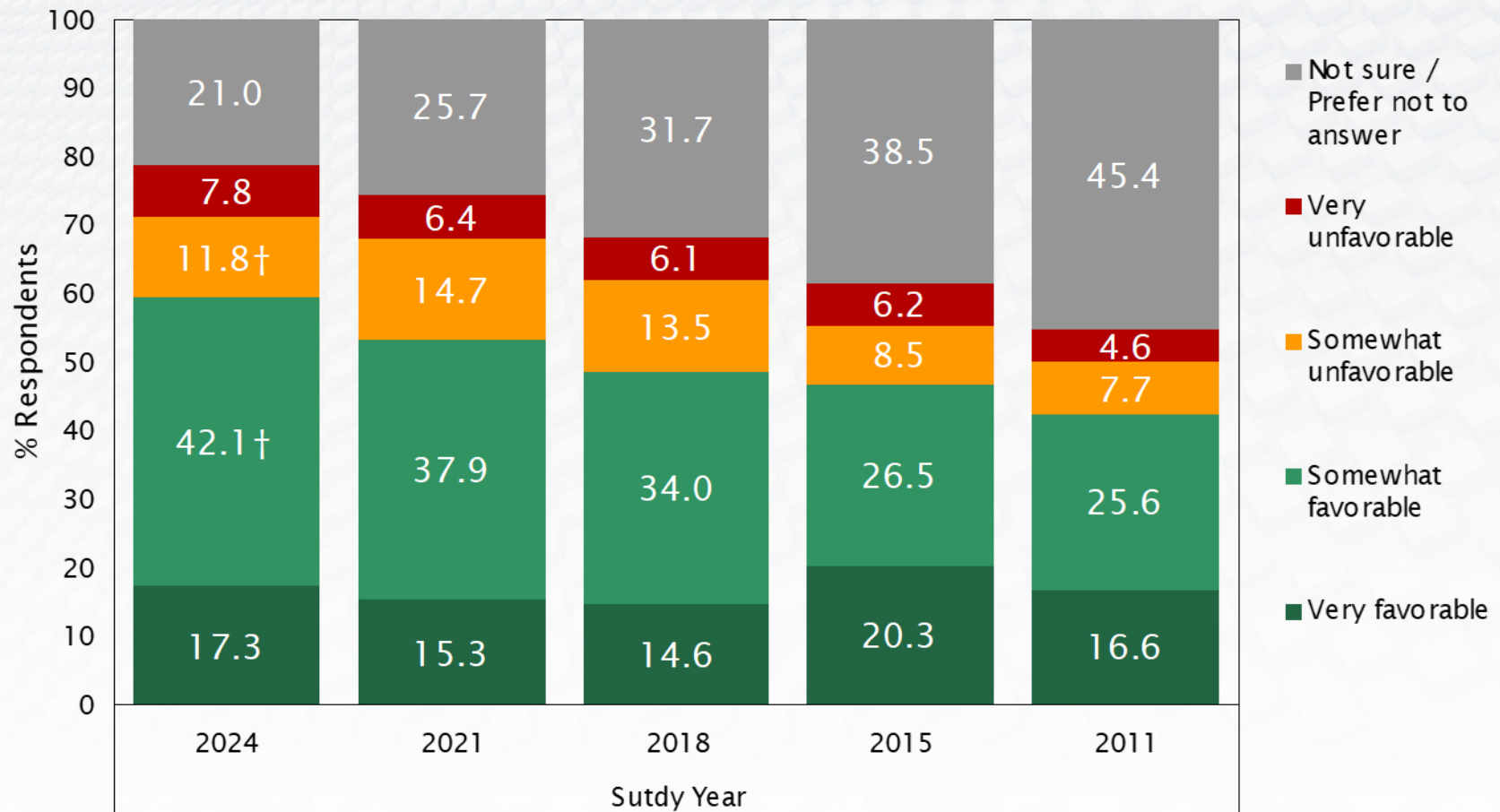
# Ranking of Priorities: 2015-2024

|   | Study Year |      | Position<br>Change based<br>on <b>High</b> Priority |
|---|------------|------|---|
|   | 2024       | 2015 |   |
| Fix potholes and repair roadways  | 1          | 1    | 0   |
| Coordinate traffic signals on major roadways to improve traffic flow            | 2          | 2    | 0   |
| Close gaps, improve intersections, reduce traffic congestion on major roads     | 3          | 4    | +1  |
| Clean up runoff from roads to reduce water pollution, protect beaches           | 4          | 3    | -1  |
| Provide transit services to seniors and the disabled at a discounted rate       | 5          | 5    | 0   |
| Optimize the existing transportation system                                     | 6          | 9    | +3  |
| Improve safety and security at transit stops and stations                       | 7          | 8    | +1  |
| Preserve, restore open space to offset impacts of freeway projects              | 8          | 12   | +4  |
| Add bus, shuttle services in communities that aren't well served by transit     | 9          | 10   | +1  |
| Expand the Metrolink rail service   | 10         | 15   | +5  |
| Widen the freeways  | 11         | 6    | -5  |
| Improve ACCESS paratransit service for people with disabilities                 | 12         | 7    | -5  |
| Improve access to Metrolink stations using shuttles, light rail, other services | 13         | 16   | +3  |
| Construct roads over or under rail tracks where needed to improve traffic flow  | 14         | 13   | -1  |
| Expand bus services   | 15         | 14   | -1  |
| Provide free towing, assistance to motorists who break down on freeways         | 16         | 11   | -5  |
| Improve the network of bike lanes   | 17         | 17   | 0   |
| Build additional toll lanes to help relieve traffic congestion                  | 18         | 18   | 0   |
| Expand vanpool programs   | 19         | 19   | 0   |

# Awareness of OCTA

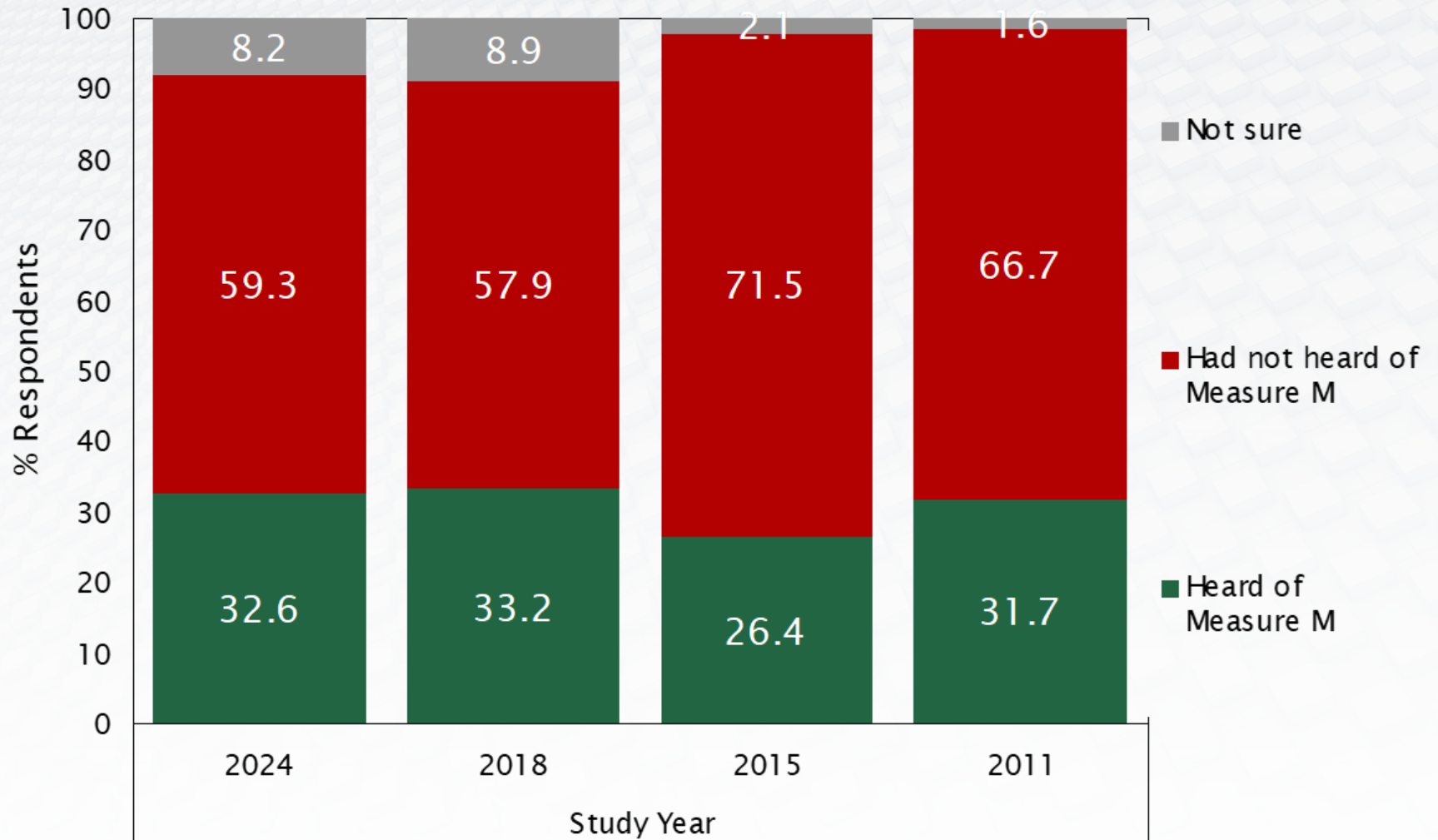


# Overall Opinion of OCTA



† Statistically significant difference ( $p < 0.05$ ) between the 2021 and 2024 studies.

# Awareness of Measure M



# Key Takeaways

## **Top M2\* Funding Priorities Remain the Same**

- Fix potholes/repair roadways
- Coordinate traffic signals to reduce congestion
- Close gaps/improve intersections to improve traffic flow
- Clean-up polluted runoff/protect water quality & beaches
- Provide discounted transit services for seniors/disabled

## **Higher priority when compared to 2015**

- Metrolink services, access to rail, preserving/restoring open space, optimizing the transportation system

## **Lower priority when compared to 2015**

- Widening freeways, freeway towing, ACCESS paratransit



# Key Takeaways

## **Familiarity with OCTA continues to climb**

- Nearly 9-in-10 voters have heard of OCTA
- Percentage with an opinion of OCTA has increased
- Favorable opinions of OCTA have increased

## **Awareness of M2\* remains low**

- Awareness is especially low (less than 20%) among voters under 40 years of age and those who haven't lived in Orange County at least 15 years

## **Public Transportation is a hot topic**

- Improving public transportation was the most frequently mentioned change needed to improve quality of life in Orange County



# Correspondence



## Item 6, Attachment A: OCTA Board Items of Interest

- **Monday, July 8, 2024**

*Item #4:* Measure M2 Ten-Year Comprehensive Review Survey

*Item #9:* 2024 State Transportation Improvement Program Update

*Item #10:* Master Agreement for State-Funded Projects

*Item #11:* 2024 Board of Directors and Chief Executive Officer Initiatives and Action Plan - Mid-Year Report

*Item #15:* Measure M2 Environmental Mitigation Program Update

*Item #16:* Measure M2 Eligibility Review Recommendations for Fiscal Year 2022-23 Expenditure Reports

*Item #18:* Active Transportation Program Biannual Update

- **Monday, August 12, 2024**

*Item #3:* Competitive Grant Programs - Update and Recommendations

*Item #4:* SB 1 (Chapter 5, Statutes of 2017) State of Good Repair Program Recommendations for Fiscal Year 2024-25 and 2025-26

*Item #5:* SB 125 (Chapter 54, Statutes of 2023) Transit Program Approval

*Item #9:* Release 2025 Annual Call for Projects for Measure M2 Comprehensive Transportation Funding Programs

*Item #10:* Measure M2 Community-Based Transit Circulators Program Project V Ridership Report

*Item #11:* South Orange County Transportation Projects Update

- **Monday, September 9, 2024**

*Item #9:* Amendments to the Master Plan of Arterial Highways

*Item #10:* Acceptance of Grant Awards from the United States Environmental Protection Agency and the California Department of Transportation

*Item #11:* Consultant Selection for Preparation of the State Route 73 (Bison Avenue to Interstate 405) Multimodal Corridor Feasibility Study

*Item #12:* Active Transportation Program Regional Project Selection Process - Orange County Project Prioritization Methodology

*Item #14:* 2024 Title VI Service Standards, Policies, and Service Monitoring Program

*Item #19:* A Measure M2 Quarterly Progress Report for the Period of April 2024 through June 2024

*Item #20:* Cooperative Agreement with the City of Santa Ana for the McFadden Avenue Transit Signal Priority Pilot

*Item #21:* Annual Regional Traffic Signal Synchronization Program Update



# AGENDA

Technical Advisory Committee

Item #6

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- **Monday, September 23, 2024**

*Item #14:* 2024 Measure M2 Community-Based Transit Circulators (Project V)  
Call for Projects Programming Recommendations

*Item #15:* Approval to Release Invitation for Bids for Traffic Signal Improvements  
for Regional Traffic Signal Synchronization Program Projects

*Item #19:* Measure M2 Workshop

- **Monday, October 14, 2024**

*Item #9:* Federal Transit Administration Program of Projects for Federal Fiscal  
Year 2023-24

*Item #16:* 2024 Measure M2 Sales Tax Forecast

*Item #18:* Potential Refunding of the Measure M2 Sales Tax Revenue Bonds,  
Series 2010A (Taxable Build America Bonds)

*Item #20:* Comprehensive Transportation Funding Programs - Project X Tier 1  
and Tier 2 2024 Calls for Projects Programming Recommendations

*Item #22:* Measure M2 Ten-Year Review Framework



# AGENDA

Technical Advisory Committee

Item #6

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## **Item 6, Attachment B: Announcements by Email**

- July OCTA Technical Steering Committee & Technical Advisory Committee Meeting Cancellation Notice, *sent 7/3/2024*
- September 2024 Measure M2 CTFP Semi-Annual Review is Now Open, *sent 8/6/2024*
- August 14, 2024 OCTA Technical Steering Committee Meeting Cancellation Notice, *sent 8/8/2024*
- August 28, 2024 OCTA Technical Advisory Committee Meeting Cancellation Notice, *sent 8/23/2024*
- 2025 Call for Projects Now Open: M2 Regional Capacity Program (RCP) and Regional Traffic Signal Synchronization Program (RTSSP), *sent 8/26/2024*
- REMINDER: 2025 Projects O & P Call Workshop Tomorrow, Sept 4th at 2:00pm, *sent 9/3/2024*
- REMINDER: September 2024 Measure M2 CTFP Semi-Annual Review Closes Friday, September 13<sup>th</sup>, *sent 9/5/2024*
- September 11, 2024 OCTA Technical Steering Committee Meeting Cancellation Notice, *sent 9/6/2024*
- 2025 Federal Transportation Improvement Program Website Update and Meetings, *sent 9/9/2024*
- FINAL REMINDER: September 2024 CTFP Semi-Annual Review Closes This Friday, 9/13, *sent 9/11/2024*
- September 25, 2024 OCTA Technical Advisory Committee Meeting Cancellation Notice, *sent 9/19,2024*
- October 9, 2024 OCTA Technical Steering Committee Meeting Cancellation Notice, *sent 10/4/2024*



# AGENDA

*Technical Advisory Committee*

*Item #8*

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## **State and Federal Legislative Platforms for 2025-2026**



**October 17, 2024**

**To:** Legislative and Communications Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Draft 2025-26 State and Federal Legislative Platforms

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the "To:" and "From:" lines of the header.

**Overview**

Every two years, staff conducts a comprehensive review of the Orange County Transportation Authority’s Legislative Platforms to ensure updates are provided on relevant issues that are anticipated to be of discussion for the upcoming legislative sessions. Following extensive stakeholder outreach, initial draft revisions to the Orange County Transportation Authority’s 2025-26 State and Federal Legislative Platforms have been prepared for consideration by the Orange County Transportation Authority Board of Directors. Before a final draft is considered for adoption, these drafts will be revised as a result of feedback from the Orange County Transportation Authority Board of Directors and stakeholder input.

**Recommendation**

Direct staff to move forward with the recommended revisions to the draft 2025-26 Orange County Transportation Authority State and Federal Legislative Platforms and incorporate any feedback from the Orange County Transportation Authority Board of Directors, returning to the Board of Directors for final adoption at a later date.

**Background**

At the beginning of each legislative session, the Orange County Transportation Authority (OCTA) adopts State and Federal Legislative Platforms to guide the agency’s advocacy activities for the upcoming legislative sessions in Sacramento and Washington, D.C., respectively. The most recent versions of the 2023-24 State and Federal Legislative Platforms were approved by the OCTA Board of Directors (Board) on November 27, 2023. Staff has prepared initial drafts of the 2025-26 State and Federal Legislative Platforms for the Board’s consideration. In preparing these drafts, staff solicited feedback and suggestions from the following groups:

- OCTA advisory groups
- OCTA division directors, department managers, and staff
- Orange County legislative delegation
- Cities, chambers of commerce, and the County of Orange
- Orange County community-based organizations and associations
- Private business and industry groups

Staff will continue to consider any additional input received by all stakeholders prior to bringing final drafts back to the Board later this year.

### Draft 2025-26 State Legislative Platform

The initial draft of the 2025-26 State Legislative Platform is outlined below and further detailed in the attachments. Attachment A is a clean version of the initial draft, and Attachment B reflects staff's recommended changes as a strikethrough version, reflected in underlining and strikethrough text. In a few instances, some principles were moved and revised. Those revisions are represented in bold lettering. Language was edited, amended, or removed as necessary to ensure accuracy and grammatical and stylistic integrity.

In order to allow the State Legislative Platform to be a better organized, more readable document, many minor edits were made to move provisions in the platform to more appropriate sections and update wording to better reflect current policy. None of these changes are intended to alter OCTA's advocacy goals. Sections were also rearranged to make more sense in terms of flow of the overall platform. An overview of the recommended changes is outlined below, with all textual references to the strikethrough draft in Attachment B.

### Key Policy Issues

The Key Policy Issues section represents significant transportation issues that are expected to be discussed in the upcoming legislative session and reflect where OCTA's primary focus will be in terms of its advocacy. OCTA will continue to support transportation funding investments and policy flexibility that allow OCTA to make necessary multimodal capital improvements while providing critical transportation services, including transit, managed lanes, and motorist assistance. Another key foundation of advocacy in the coming session will continue to be related to preserving the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor in south Orange County. OCTA will be seeking support from the State in various areas to help work to prevent future service disruptions.

Several principles were moved from other sections to the Key Policy Issues section as OCTA staff notes these will become more prevalent in this next legislative cycle. Specifically, as the date for the Olympics in the City of



Los Angeles nears, staff anticipates discussions will take place on how best to support moving people throughout Southern California during the Olympics. As part of these discussions, it is crucial that Orange County be involved, given the significant impact that rising travel demand will have on its transportation infrastructure. Beyond funding, there may be opportunities related to incentives, project delivery tools, and regulatory relief that may assist in preparing for the Olympics.

Additionally, the State's cap-and-trade program expires in 2030. This program provides funding for transportation projects for which OCTA is a beneficiary. Next year, it is expected that there will be a concerted effort to extend the program to continue this funding source. OCTA staff will be engaged to monitor these efforts, ensuring that funding for regional transportation projects and programs are not impacted.

And finally, OCTA is transitioning its fleet to zero emission to comply with the Innovative Clean Transit Regulation as required by the California Air Resources Board (CARB). Recently, the costs to transition have increased significantly. OCTA will continue to work with the Legislature on ways to support efforts to mitigate costs associated with zero-emission transit buses and infrastructure, which could include alternative electricity rate structures, tax incentives, and other forms of financial assistance. It is important to note that challenges with the transition to zero-emission go beyond funding; reliability and availability of these vehicles has also been a hurdle in ensuring a smooth transition due to the lack of manufacturers in the marketplace and a constrained supply chain. OCTA is also supportive of workforce development efforts related to training for zero-emission vehicles as the technical expertise is vastly different from the traditional vehicle technology.

#### Other Legislative Suggestions

- Subsection (a) of the Section entitled, "Implementation of Environmental Policies" is recommended to be revised to better incorporate all forms of project mitigation requirements as it pertains to reducing greenhouse gas emissions. Vehicle miles traveled reduction has been used as one metric but does not necessarily equate to a reduction in greenhouse gas emissions. Therefore, it makes more sense to broaden this principle to include all types of project mitigation that could occur.
- Subsection (a) of the Section entitled, "Roads & Highways," is recommended to be removed. Several years ago, a proposed conservancy was impacting transportation planning in Orange County. This issue has since been resolved.

- 
- Subsection (h) of the Section entitled, “Roads & Highways,” is recommended to be removed. Fines related to high-occupancy vehicles violations have been in place now for several years and staff do not anticipate legislative discussions about increasing these fines.
  - Subsection (a) of the Section entitled, “Tolled & Managed Lanes,” is recommended to be revised. The intention of revising this principle is to ensure that revenues from toll facilities are only directed by the responsible governing board.
  - Subsection (b) of the Section entitled, “Rail Programs,” is recommended to be removed. This principle related to consolidation of rail oversight is outdated with no current identified need to pursue this policy.
  - Subsection (e) of the Section entitled, “Active Transportation,” is recommended to be removed. OCTA staff have identified that this issue related to lease agreements between project sponsors of active transportation projects has been resolved, and the California Public Utilities Commission has made improvements to simplify the process.
  - Subsection (g) of the Section entitled, “Administration/General” is recommended to be added. Often times legislative bills are duplicative of existing efforts occurring outside of statute. This can create a dynamic where duplicative reporting requirements are created, which can cause an additional burden on agencies with limited resources. OCTA will continue to encourage examining what work is already being done and oppose efforts that duplicate work and unnecessarily strain agency resources.

Other suggestions that were submitted to staff for consideration as part of the solicitation for comments included: supporting funding for rail grade separation projects, assisting agencies related to cost recovery of legal claims, supporting dedicated funding for senior mobility, and general changes to environmental and goods movement principles. In reviewing these suggestions, it was determined that these suggestions were already included under existing platform principles that are retained in the Draft 2025-26 State Legislative Platform. One suggestion was included from the South Coast Air Quality Management District (SCAQMD), to revise subsection (c) of the “Implementation of Environmental Policies” Section. This revision includes collaborating with other stakeholders when working on air quality determinations and ensuring funding is not constrained. Another suggestion included substantive changes to subsection (g) of the “Goods Movement” Section was rejected by staff related to funding for a potential container fee program. Specifically, this suggestion would have changed the funding to only support zero-emission technologies for freight movement. OCTA

believes that any funding from such potential programs should be used toward projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

In the final draft of the State Legislative Platform, staff may propose additional changes that are identified as staff works with the Board, stakeholders, and internal departments. In addition, OCTA often encounters specific legislative issues requiring sponsor legislation, prompting OCTA to take the lead in developing legislative language and securing an author. Staff is currently exploring the need for potential sponsor opportunities and will provide an update to the Board for consideration on such possibilities.

#### Draft 2025-26 Federal Legislative Platform

The initial draft of the 2025-26 Federal Legislative Platform is outlined below and detailed in the attachments. Attachment C is a clean version of the initial draft, and Attachment D reflects staff's recommended changes as a strikethrough version, reflected in underlining and strikethrough text. In a few instances, some principles were moved and revised. Those revisions are represented in bold lettering. Language was edited, amended, or removed as necessary to ensure accuracy and grammatical and stylistic integrity.

Since the previous update to the Federal Legislative Platforms, OCTA has been working with its partners on implementing the Infrastructure Investments and Jobs Act (IIJA). With that well underway, next session, staff anticipates discussion will begin related to the next surface transportation reauthorization as the IIJA expires in 2026. Given that dynamic, the Federal Legislative Platform needed to be reorganized to reflect the transition to dually prioritize implementing the IIJA while looking toward the future of the next iteration of surface transportation. Therefore, to be better organized, many minor edits were made to move provisions in the platform to more appropriate sections, update wording to better reflect current policy, and to eliminate duplicative principles. Additionally, a new section was added entitled, "Transit Programs." Historically, there had not been a transit specific section because many of the transit principles overlay with other sections. However, because of the federal government's further involvement with transit, it is appropriate to add its own section.

An overview of the recommended changes is outlined below, with all textual references to the strikethrough draft in Attachment D.

## Key Policy Issues

The Key Policy Issues Section for the Federal Legislative Platform maintains consistent areas of focus as the State Platform, including an emphasis on funding for a multimodal transportation system, advocating for assistance with the LOSSAN Rail Corridor, and finding solutions to prepare the Southern California region for the Olympics in 2028. As it pertains specifically to the Federal Platform and with a new Administration and Congress being installed next year, OCTA staff have recommended emphasizing its focus on ensuring the funding OCTA receives through the IIJA and the Inflation Reduction Act is maintained and that recissions or other cuts to transportation programs are avoided. OCTA staff also recommends adding a principle to the Key Policy Issues Section related to funding for air quality standards. Specifically, it is important to ensure that Orange County is eligible for such funding included for the South Coast Air Basin. This past year, OCTA and other transportation stakeholders worked with SCAQMD on resolution of a pending decision by the Environmental Protection Agency (EPA) that would have restricted funding for certain highway projects after it determined air quality standards were not met. OCTA will continue to work to ensure that those determinations do not impact the use of transportation funding.

## Other Legislative Suggestions

- Subsection (m) of the Section entitled “Surface Transportation Reauthorization” is recommended to be added. Specifically, this principle ties into discussions related to the next surface transportation reauthorization where OCTA proposes to advocate for funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor. This funding would be targeted at preventing future service disruptions.
- Subsection (c) of the Section entitled, “Transportation & Planning,” related to expedited project delivery, is proposed to be removed. OCTA identified this principle as duplicative and was represented in subsection (e) of the “Environmental & Energy” Section.
- Subsection (g) of the Section entitled, “Transportation & Planning,” related to regional transportation plan amendments, is proposed to be removed. Staff had identified that this principle was necessary when the EPA had a backlog when OCTA was trying to process a Transportation Control Measures replacement. At this time, the issue does not impact OCTA.
- Subsection (e) of the Section entitled, “Fiscal Reforms & Issues” is recommended to be removed. This principle has to do with collection and distribution of sales tax revenue from out of state, online retailers. With

the passage of state legislation, this issue has been implemented and is largely handled at the state level at this time.

- Subsection (e) of the Section entitled, “Rail Programs” is proposed to be added. CARB has approved the In-Use Locomotive Regulation which requires locomotives operating in the State of California to transition to zero emission. In order to implement this rule, CARB must seek approval of a waiver from the EPA due to the impacts this would have on interstate commerce. There have been several hearings and legislative efforts related to this waiver. Staff proposes to monitor this process as it continues.
- Subsection (e) of the Section entitled, “Transit Programs” is proposed to be added. OCTA is required to transition its fleet to zero-emission transit vehicles by 2040. The cost of these vehicles continues to increase. There are also very limited manufacturers, which not only drives up costs further but slows down procurements. It also has an impact on the supply chain of specialized parts. With limited manufacturers, it can take months to a year to get the part necessary to fix a zero-emission transit bus, keeping that bus inoperable in the interim. This principle will support efforts to create a more competitive marketplace for zero-emission transit buses to assist in costs and supply chain constraints.
- Subsection (a) of the Section entitled, “Transportation Security & Emergency Preparedness” is proposed to be revised. These revisions modernize the existing principle and ensure that security efforts support all modes of transportation. This is especially important considering the OC Streetcar when it becomes operational.

In the final draft of the Federal Legislative Platform, staff may propose additional changes that are identified as staff works with the Board, stakeholders, and internal departments. In addition, OCTA staff anticipates further discussions with the Board on further priorities for surface reauthorization legislation and will be bringing principles next year for consideration.

***Summary***

Initial drafts of the 2025-26 State and Federal Legislative Platforms are detailed for the Board's consideration. Upon approval, staff will incorporate any outstanding feedback from the Board and will return later this year for final consideration and adoption.

***Attachments***

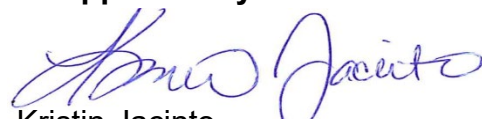
- A. Draft Orange County Transportation Authority 2025-26 State Legislative Platform (clean copy)
- B. Draft Orange County Transportation Authority 2025-26 State Legislative Platform (strikethrough version)
- C. Draft Orange County Transportation Authority 2025-26 Federal Legislative Platform (clean copy)
- D. Draft Orange County Transportation Authority 2025-26 Federal Legislative Platform (strikethrough version)

**Prepared by:**



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**Draft Orange County Transportation Authority 2025-26  
State Legislative Platform**

With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors.

The 2025-26 State Legislative Platform serves as a framework document to guide OCTA's legislative, regulatory, and administrative activities in the coming legislative session. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the upcoming legislative session. The later sections present guiding policy statements for other major issue areas that may arise during the session. Positions on individual items not directly in this document will be brought to the OCTA Board of Directors for formal action.

**Key Policy Issues in 2025-26**

A number of significant transportation issues are expected to be discussed in the 2025-26 legislative session. OCTA will focus its advocacy efforts on the following principles.

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements and services in order to meet the mobility needs of Orange County;
- b) Seek support for adaptation and resiliency efforts related to the environment for critical transportation infrastructure;
- c) Seek funding and other administrative solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- d) Seek support, funding, and streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- e) Encourage State leadership, in conjunction with local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor;
- f) Support efforts to maximize OCTA's share of transportation and transit funding, especially through distribution formulas and more equitable competitive funding processes;

**Draft Orange County Transportation Authority 2025-26  
State Legislative Platform**

- g) Oppose linking, reprioritizing, or aligning local and state transportation funding with policies that could significantly hinder a local agency's ability to deliver transportation programs and projects;
- h) Support efforts to maintain the promises self-help counties have made to taxpayers in the implementation of local sales tax measures and oppose mandating specific uses of future sales tax revenues;
- i) Support workforce development and training policies that allow OCTA to hire and retain personnel ready to implement the next generation of mobility, including training the workforce for zero-emission vehicles;
- j) Oppose policies that would circumvent existing transit operator funding eligibility requirements;
- k) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- l) Inform the State's Transit Transformation Task Force, created pursuant to SB 125 (Chapter 54, Statutes of 2023), in order to seek improvements to the Transportation Development Act and make recommendations related to transit funding, cost drivers, strategies for workforce retention, and ridership;
- m) Protect existing transit operations and capital funding while monitoring the implementation of the accountability provisions associated with the funding and inform clarifying legislation as needed;
- n) Oppose policies that change existing formula funding structures to redistribute funds in a way that would inhibit a local agency from delivering critical transportation projects and programs;
- o) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games are eligible for any related funding assistance, incentives, project delivery tools, and/or regulatory relief;
- p) Monitor efforts related to extending the State's cap-and-trade program while ensuring that funding for regional transportation projects and programs are maintained;
- q) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance.



**Draft Orange County Transportation Authority 2025-26  
State Legislative Platform**

**I. IMPLEMENTATION OF ENVIRONMENTAL POLICIES**

In order to ensure that the State's environmental regulations and cap-and-trade program are implemented in an equitable manner, which will both help to reduce emissions and encourage the development of necessary infrastructure to serve California's growing population, OCTA will:

- a) Support efforts to ensure local flexibility in meeting the State's greenhouse gas emission reduction goals, including project mitigation requirements;
- b) Support streamlined environmental review and permitting processes for transportation projects and programs to avoid potentially duplicative and unnecessary analysis, while still maintaining traditional environmental protections;
- c) Work with air agencies and other stakeholders to ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- d) Monitor the State's transition to zero-emission vehicle technology to ensure that any corresponding policies adequately address the impact to long-term transportation funding stability;
- e) Oppose lengthening the California Environmental Quality Act process in a manner that would delay mobility improvements;
- f) Oppose efforts to restrict road and highway construction by superseding existing broad-based environmental review and mitigation processes;
- g) Oppose policies that would limit lead agency discretion in the management and oversight of lands set aside for environmental mitigation purposes while promoting advance mitigation planning programs;
- h) Monitor efforts to create a statewide model related to vehicle miles traveled in order to ensure that local modeling is taken into account;

**II. TRANSPORTATION FUNDING**

OCTA will monitor the status of transportation funding in California, promoting the continued stability of existing programs and efforts to address future funding deficiencies to meet transportation infrastructure needs. Given that the State is anticipated to experience a continued deficit, OCTA will work to protect funding dedicated for transportation purposes, including appropriations made in the fiscal year 2024-25 Budget Act for transit operations and capital projects.

Furthermore, executive orders continue to impact OCTA's programs and services. Staff closely monitors these efforts to ensure that transportation funds are used for their

**Draft Orange County Transportation Authority 2025-26  
State Legislative Platform**

intended purposes. For example, Executive Order N-19-19 directed the California State Transportation Agency to review requirements for discretionary transportation investments to ensure consistency with state emission reduction goals. As a result, the State developed the Climate Action Plan for Transportation Infrastructure (CAPTI) which detailed recommendations for administering state funds related to transportation in a way that helps the State reach its goals related to climate change. It is anticipated that CAPTI recommendations will be updated in the coming year. Key actions to continue to inform the State's goals include:

- a) Oppose unfunded mandates for transportation agencies, transit providers, and local governments in providing transportation improvements and services;
- b) Oppose cost shifts or changes in responsibility for projects funded by the State to local transportation entities;
- c) Support efforts to treat the property tax of single-county transit districts the same as multi-county districts and correct other Educational Revenue Augmentation Fund inequities between like agencies;
- d) Support the constitutional protection of all transportation funding resources;
- e) Support protecting or expanding local decision-making in programming transportation funds;
- f) Oppose efforts to reduce local prerogative over regional program funds;
- g) Support efforts to involve county transportation commissions in the development and prioritization of State Highway Operation and Protection Program projects;
- h) Oppose redirecting or reclassifying transportation revenue sources, including earned interest, for anything other than their intended purposes;
- i) Support the implementation of federal transportation programs in an equitable manner that promotes traditional funding levels, programming roles, and local discretion in allocation decisions;
- j) Oppose policies that significantly increase costs, threatening OCTA's ability to deliver projects and provide transit service;
- k) Support removing the barriers for funding transportation projects, including allowing local agencies to advance projects with local funds when state funds are unavailable due to budgetary reasons, and allowing regions to pool federal, state, and local funds in order to limit lengthy amendment processes and streamline project delivery time;

**Draft Orange County Transportation Authority 2025-26  
State Legislative Platform**

- l) Support flexibility in the application of “disadvantaged” and “low-income” communities to ensure that transportation funding flows to each region’s most impacted areas, allowing OCTA to best meet the needs of its local communities;
- m) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach.

**III. FISCAL REFORMS & ISSUES**

In recent years, the Legislature and Governor have worked collaboratively during the budget process to pass funding bills in a timely manner. Given that the State continues to report lower revenues than projected, uncertainties over future funding levels remain. Therefore, OCTA will:

- a) Monitor the study and development of alternative transportation funding proposals, including the State’s road charge pilot program and ensure that efforts are made to address concerns related to equity, privacy, and public support of such proposals;
- b) Oppose levying new and/or increase in gasoline taxes or user fees, including revenue increases on fuel consumption categorized as charges, fees, revenue enhancements, or similar classifications. Consideration of such efforts shall occur when a direct nexus is determined to exist between revenues and transportation projects, and additional revenues are to be controlled by the county transportation commission;
- c) Oppose efforts to decrease the voter threshold requirement for local tax measures for transportation purposes;
- d) Oppose increases to administrative fees charged by the California Department of Tax and Fee Administration on the collection of local sales tax measures;
- e) Support policies that ensure all users of the State’s transportation system pay their “fair share” to maintain and improve the system;
- f) Support efforts to restore equitable generation and disbursement of sales tax revenues that support the Local Transportation Fund;
- g) Support the retention of existing and future local revenue sources;
- h) Support an extension of the state sales tax exemption for the purchase of zero-emission buses.

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**IV. STATE TRANSPORTATION IMPROVEMENT PROGRAM**

The State Transportation Improvement Program (STIP), substantially amended by SB 45 (Chapter 622, Statutes of 1997), is a programming document that establishes the funding priorities and project commitments for transportation capital improvements in California. SB 45 placed decision-making authority with the regions by providing project selection for 75 percent of the funding in the Regional Transportation Improvement Program (RTIP). This funding is distributed to counties based on an allocation formula. The remaining 25 percent of the funds are programmed by the California Department of Transportation (Caltrans) in the Interregional Transportation Improvement Program (ITIP). OCTA will seek to ensure that the regional focus of the program is preserved. Key provisions to be sought by OCTA include:

- a) Support maintaining the current STIP formula, which provides 75 percent of STIP funding to the locally-nominated RTIP and 25 percent to the ITIP;
- b) Support equitable allocations of transportation funding, such as the north/south formula distribution of county shares and ITIP allocations;
- c) Support efforts to clarify that programming of current period county shares has priority over advancement of future county shares;
- d) Support a formula-based guaranteed disbursement of the ITIP;
- e) Support efforts to allow a mode-neutral STIP;
- f) Support increased flexibility for the use of STIP funds to support alternative projects, including, but not limited to, transit and goods movement improvement projects.

**V. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. While state transit funding has recently become more stable, future demand increases due to environmental regulations and increased capital and operations costs will put further strain on existing resources. OCTA will make every effort to minimize additional state obligations to transit operations which lack a sufficient and secure revenue source. To that end, OCTA will focus on the following:

- a) Advocate for a continued strong state role in providing funding for transit operations rather than shifting responsibility to local transportation entities. No additional requirements should be created for operation levels beyond existing capacity, unless agreed to by that entity or otherwise appropriately funded;

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- b) Seek additional funding for paratransit operations and transit accessibility capital improvements that support persons with disabilities and senior citizens;
- c) Support efforts to encourage and incentivize the interoperability of transit and rail systems within California;
- d) Support limiting the liability of transit districts for the location of bus stops (*Bonanno v. Central Contra Costa Transit Authority*);
- e) Support incentives for transit-oriented development projects (i.e., authorize extra credit toward housing element requirements for these developments), including incentives for development;
- f) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- g) Monitor and inform the creation of the Zero-Emission Roadmap, which will work to identify actions needed to meet California's zero-emission transit goals with minimal displacement of existing workers.
- h) Encourage policies and guidance that incentivize public transit ridership;

**VI. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. In support of these routes, OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak and managed by the LOSSAN Agency. OCTA has served as the managing agency for the LOSSAN Agency since 2013, providing administrative and management support.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. While the status and future of these programs is uncertain, OCTA will be watchful to ensure that funding for these rail systems does not impact other transportation funding sources. Key advocacy efforts will emphasize the following:

- a) Support policies that encourage commercial, commuter-based development around passenger rail corridors that includes permanent job creation;

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- b) Monitor and evaluate plans and progress of high-speed rail and its funding;
- c) Support efforts to provide resources for safety improvements on the rail network in Southern California, including for the implementation, operation, and maintenance of Positive Train Control safety technology;
- d) Support studying the policies, funding options, and need for rail/highway grade separations, including any impact on existing state highway and transit funding sources;
- e) Support policies that facilitate the development and construction of needed infrastructure projects that support modernization, connectivity, and general system-wide improvements to California's rail network;
- f) Monitor the implementation of the In-Use Locomotive Regulation to ensure the transition to zero-emission locomotives is technically feasible and provides adequate funding.

**VII. ROADS & HIGHWAYS**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors as the ownership of the 91 Express Lanes and the use of design-build authority on the State Route 22 project and Interstate 405 Improvement Project. OCTA will continue to seek new and innovative ways to deliver road and highway projects to the residents of Orange County and, to that end, OCTA will focus on the following:

- a) Support new and existing alternative project delivery methods, such as design-build, public-private partnership authority, construction manager/general contractor authority, and progressive design build, through expanding mode and funding eligibility while also allowing the appropriate balance of partnership between the State and local agencies;
- b) Support authorizing local agencies to advertise, award, and administer contracts for state highway projects;
- c) Oppose duplicative reporting mandates and efforts to impose additional requirements, beyond what is required in statute, on lead agencies awarding contracts using alternative project delivery mechanisms;
- d) Support streamlining of the Caltrans review process for projects without compromising environmental safeguards;

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- e) Support policies that improve signal synchronization programs in order to facilitate street signal coordination, prioritization, and preemption, as well as encouraging the use of intelligent transportation system measures;
- f) Support management and integration of express lanes to promote consistent and seamless user experience;
- g) Support the equitable enforcement of regulations governing transportation network companies;
- h) Support studying the development and safe operation of autonomous vehicles and related technologies;
- i) Support preserving local discretion and flexibility in the development of the congestion management program.

**VIII. TOLLED & MANAGED LANES**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors, including both the ownership of the 91 Express Lanes, a ten-mile toll facility on State Route 91, extending from State Route 55 to the Orange/Riverside County line, and the 405 Express Lanes, which operates two lanes in each direction from State Route 73 to the Interstate 605.

Because many agencies are discussing the increased use of managed lane facilities, there remains a need to advocate for local flexibility and input. To ensure the continued success of the 91 Express Lanes, the 405 Express lanes, and for toll policy moving forward, OCTA will:

- a) Oppose efforts to divert revenues from toll facilities for purposes not directed by the responsible governing board;
- b) Support policies that allow OCTA, and its partners, to efficiently operate and maintain the 91 Express Lanes and the 405 Express Lanes;
- c) Support efforts to preserve local flexibility in the administration of toll lanes and encourage the State to work with OCTA on operating policies to ensure seamless system operation;
- d) Oppose the construction or operation of toll facilities that are inconsistent with local long range transportation plans;
- e) Oppose the construction or operation of toll facilities that fail to respect existing local transportation projects and funding programs;

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- f) Support customer privacy rights while maintaining OCTA's ability to effectively communicate with customers and operate the 91 and 405 Express Lanes;
- g) Support the use of innovative means to enhance toll agency enforcement efforts, including ways to address toll violations due to protected plates;
- h) Support collaborative solutions to address the degradation of HOV lanes that respect local transportation funding sources and programs, have the support of the relevant regional transportation planning agency, do not redirect existing local transportation funding sources, and analyze the effect of single-occupant, low-emission vehicles, including associated federal requirements triggered by their access allowance;
- i) Support efforts to improve the interoperability of the different toll systems across the State in order to ensure fair and efficient toll operations while affirming user privacy protections;
- j) Inform discussions related to revising toll evasion penalties, toll exemptions, and other changes to enforcement strategies and mechanisms in order to maintain local control, opposing efforts that will hinder the ability to meet congestion management and financing requirements;
- k) Support policies that protect the process prescribed in AB 194 (Chapter 687, Statutes of 2015), which authorizes regional transportation agencies to develop and operate toll facilities, and ensure it is maintained in its application on future toll facilities.

**IX. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of the nation's busiest ports, are vital to California's economy and the surrounding region because goods are shipped to and through the surrounding counties. While the State's goods movement system is the most robust in the nation, it is continually challenged by competing goods movement systems in other states. In order to continue to compete and engage in the global marketplace, California must continue to enhance its goods movement system, while at the same time be cognizant of taking the necessary actions to mitigate any negative impacts to local communities. Key positions include:

- a) Support improvements to facilitate the movement of intrastate, interstate, and international trade beneficial to the State and Orange County's economy;
- b) Support policies that will aid in the development, approval, and construction of projects to expand goods movement capacity and reduce congestion;
- c) Ensure that control of goods movement infrastructure projects and funding is retained at the local level;



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- d) Seek mitigation for the impacts of goods movement on local communities;
- e) Pursue ongoing, stable sources of funding for goods movement infrastructure;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure any effort to establish a container fee program dedicates funding to projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

**X. ACTIVE TRANSPORTATION**

Active transportation projects and programs, which encourage greater mobility through walking and bicycling, have grown in popularity due to the environmental, health, and cost savings benefits. OCTA continues to study, plan, and fund active transportation projects and programs as part of its mission to provide Orange County with an efficient and multi-modal transportation system. Key positions include:

- a) Support policies to increase the visibility and safety of users engaged in active transportation;
- b) Support creative use of paths, roads, flood channels, and abandoned rail lines using existing established rights-of-way to promote bicycles trails and pedestrian paths, in coordination with any local agency with jurisdiction over those properties;
- c) Support funding and programs or policies that encourage the safe operation of an integrated multimodal system, which includes the interaction between roadways, rail lines, bikeways, and pedestrian ways, and the users of those facilities;
- d) Support streamlined active transportation funding programs;
- e) Seek funding and support policies and projects to increase safety requirements related to the utilization of electric bicycles.

**XI. ROLES & RESPONSIBILITIES**

In recent years, there have been many efforts to reorganize or restructure transportation programs and local agency responsibilities. OCTA will continue to monitor policies that would significantly affect the way in which it operates, with a focus on maintaining local control and continued partnerships in order to advocate for the following principles:

- a) Support preserving the role of county transportation commissions, as consistent with existing law, in the administration of transportation programs;

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- b) Oppose proposals that reduce the rights and responsibilities of county transportation commissions in planning, funding, and delivering transportation programs;
- c) Oppose policies that unnecessarily subject projects to additional reviews and project selection approvals that could adversely affect delivery timelines and processes;
- d) Support partnerships with alternative mobility providers that allow for adequate information sharing while also respecting the planning efforts of local agencies;
- e) Support efforts to increase the flexibility of funds used for motorist service programs.

**XII. EMPLOYMENT ISSUES**

As a public agency and one of the largest employers in Orange County, OCTA balances its responsibility to the community and the taxpayers to provide safe, reliable, cost-effective service with its responsibility of being a reasonable, responsive employer. Key advocacy positions include:

- a) Oppose efforts to impose state labor laws on currently exempt public agencies;
- b) Oppose policies that circumvent the collective bargaining process;
- c) Oppose policies adversely affecting OCTA's ability to efficiently and effectively deal with labor relations, employee rights, benefits, including pension benefits, the California Family Rights Act, and working conditions, including health, safety, and ergonomic standards for the workplace;
- d) Support efforts to reform and resolve inconsistencies in the workers' compensation and unemployment insurance systems, and labor law requirements that maintain protection for employees and allow businesses to operate efficiently;
- e) Support workforce development policies that facilitate a more efficient talent acquisition process;
- f) Support policies that encourage ridesharing, teleworking, vanpool, and related congestion relief programs for Orange County commuters.

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**XIII. TRANSPORTATION SECURITY & EMERGENCY PREPAREDNESS**

As natural and man-made disasters continue to threaten transportation systems around the world, significant improvements have been, and continue to be, carried out to enhance the safety, security, and resilience of transportation infrastructure in the United States. As Orange County's bus provider and a Metrolink partner, OCTA understands the importance of ensuring the safety and security of our transportation network and protecting our customers. OCTA maintains a partnership with the Orange County Sheriff's Department to provide OCTA Transit Police Services for the bus and train systems in Orange County and continues to be actively involved in a variety of state and regional preparedness exercises in support of first responders. The development of a new Transit Security and Operations Center is also underway to enhance security efforts and further the resiliency of the Orange County transit system.

Additional safety and security measures require additional financial resources. Consequently, OCTA's advocacy positions will highlight:

- a) Support state homeland security and emergency preparedness funding and grant programs to local transportation agencies to alleviate financial burden placed on local entities;
- b) Support policies that balance retention mandates of video surveillance records to reflect current reasonable technological and fiscal capabilities;
- c) Support technological advances in order to increase the safety of public transportation passengers and operators;
- d) Support policies that aim to enhance transit services and the overall safety and security of transit riders, public transit employees, and on-road vehicles while avoiding undue burden on transportation agencies to implement unfunded safety measures.

**XIV. ADMINISTRATION/GENERAL**

General administrative issues arise every session that could impact OCTA's ability to operate efficiently. Key positions include:

- a) Oppose policies adversely affecting OCTA's ability to efficiently and effectively contract for goods and services, conduct business of the agency, and limit or transfer the risk of liability;
- b) Support efforts to provide greater protection of OCTA's computer and information security systems;
- c) Support establishing reasonable liability for non-economic damages in any action for personal injury, property damage, or wrongful death brought against a public entity based on principles of comparative fault;

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- d) Support consistent campaign contribution limits as applied to both elected and appointed bodies;
- e) Monitor proposed changes related to the Ralph M. Brown Act, and other statutes governing public meetings, including the expanded use of technology;
- f) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serve all residents of Orange County;
- g) Oppose policies that create undue burden on transportation procurement practices or restrict ability to maintain local governing board award authority;
- h) Oppose efforts that create duplicative reporting requirements.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors. ~~In addition, Orange County provides highway and rail corridors that facilitate the increasing level of international trade entering the Southern California ports.~~

The 2025~~3~~-26~~4~~ State Legislative Platform serves as a framework document to guide the ~~Orange County Transportation Authority's (OCTA's)~~ legislative, regulatory, and administrative activities in the coming legislative session. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the upcoming legislative session. The later sections present guiding policy statements for other major issue areas that may arise during the session. Positions on individual items not directly in this document will be brought to the OCTA Board of Directors for formal action.

**Key Policy Issues in 2025~~3~~-26~~4~~**

A number of significant transportation issues are expected to be discussed in the 2025~~3~~-26~~4~~ legislative session. OCTA will focus its advocacy efforts on the following principles.

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements and services in order to meet the mobility needs of Orange County;
- ~~b) Encourage policies and guidance that incentivize public transit ridership; (Moved to Section V)~~
- b) Seek support for adaptation and resiliency efforts related to the environment for critical transportation infrastructure;
- c) Seek funding and other administrative solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- d) Seek support, funding, and streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- e) Encourage State leadership, in conjunction with local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail eCorridor;

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- f) Support efforts to maximize OCTA's share of transportation and transit funding, especially through distribution formulas and more equitable competitive funding processes;
- g) Oppose linking, reprioritizing, or aligning local and state transportation funding with policies that could significantly hinder a local agency's ability to deliver transportation programs and projects;
- h) Support efforts to maintain the promises self-help counties have made to taxpayers in the implementation of local sales tax measures and oppose mandating specific uses of future sales tax revenues;
- i) Support workforce development and training policies that allow OCTA to hire and retain personnel ready to implement the next generation of mobility, including training the workforce for zero-emission vehicles;
- ~~j) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach; (Moved to Section II)~~
- k) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- l) Inform the State's Transit Transformation Task Force, created pursuant to SB 125 (Chapter 54, Statutes of 2023), in order to seek improvements to the Transportation Development Act and make recommendations related to transit funding, cost drivers, strategies for workforce retention, and ridership;
- m) Protect existing transit operations and capital funding while monitoring the implementation of the accountability provisions associated with the funding and inform clarifying legislation as needed;
- n) Oppose policies that change existing formula funding structures to redistribute funds in a way that would inhibit a local agency from delivering critical transportation projects and programs;
- o) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games are eligible for any related funding assistance, incentives, and project delivery tools, and/or regulatory relief;

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- p) Monitor efforts related to extending the State's cap-and-trade program while ensuring that funding for regional transportation projects and programs are maintained;
- q) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance. *(Moved from Section V).*

**I. IMPLEMENTATION OF ENVIRONMENTAL POLICIES**

In order to ensure that the State's environmental regulations and cap-and-trade program are implemented in an equitable manner, which will both help to reduce emissions and encourage the development of necessary infrastructure to serve California's growing population, OCTA will:

- a) Support efforts to ensure local flexibility in meeting ~~the goals of the State's greenhouse gas~~ emission reduction goals, including project mitigation requirements and vehicle miles traveled initiatives;
- ~~b) Support formula-based cap and trade programs, including maintaining the prioritization of cap and trade funding for transportation projects; *[Incorporated into subsection (p) of the Key Policy Issues Section]*~~
- b) Support streamlined environmental review and permitting processes for transportation projects and programs to avoid potentially duplicative and unnecessary analysis, while still maintaining traditional environmental protections;
- c) Work with air agencies and other stakeholders to E~~ensure~~ that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- d) Monitor the State's transition to zero-emission vehicle technology to ensure that any corresponding policies adequately address the impact to long-term transportation funding stability;
- e) Oppose lengthening the California Environmental Quality Act process in a manner that would delay mobility improvements;
- f) Oppose efforts to restrict road and highway construction by superseding existing broad-based environmental review and mitigation processes;
- g) Oppose policies that would limit lead agency discretion in the management and oversight of lands set aside for environmental mitigation purposes while promoting advance mitigation planning programs;

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- h) Monitor efforts to create a statewide model related to vehicle miles traveled in order to ensure that local modeling is taken into account.

**II. TRANSPORTATION FUNDING**

OCTA will monitor the status of transportation funding in California, promoting the continued stability of existing programs and efforts to address future funding deficiencies to meet transportation infrastructure needs. Given that ~~future revenues remain unpredictable~~ the State is anticipated to experience a continued deficit, OCTA will also work to protect funding dedicated for transportation purposes, including appropriations made in the fiscal year 2024~~3~~-254 Budget Act for transit operations and capital projects.

Furthermore, ~~there have been two executive orders~~ continue to that will impact OCTA's programs and services, ~~which will be~~ Staff closely monitored these efforts to ensure that transportation funds are used for their intended purposes. For example, First, Executive Order ~~\_\_\_\_\_~~ N-79-20 ~~\_\_\_\_\_~~ requires all passenger vehicles and light trucks sold in California to be zero-emission by 2035, and the same for medium and heavy duty trucks by 2045. And secondly, Executive Order N-19-19, directed the California State Transportation Agency to review requirements for discretionary transportation investments to ensure consistency with state emission reduction goals. As a result, the State developed the Climate Action Plan for Transportation Infrastructure (CAPTI) which detailed recommendations for administering state funds related to transportation in a way that helps the State reach its goals related to climate change. It is anticipated that CAPTI recommendations will be updated in the coming year. Key actions to continue to inform the State's goals include:

- a) Oppose unfunded mandates for transportation agencies, transit providers, and local governments in providing transportation improvements and services;
- b) Oppose cost shifts or changes in responsibility for projects funded by the State to local transportation entities;
- c) Support efforts to treat the property tax of single-county transit districts the same as multi-county districts and correct other Educational Revenue Augmentation Fund inequities between like agencies;
- d) Support the constitutional protection of all transportation funding resources;
- e) Support protecting or expanding local decision-making in programming transportation funds;
- f) Oppose efforts to reduce local prerogative over regional program funds;
- g) Support efforts to involve county transportation commissions in the development and prioritization of State Highway Operation and Protection Program projects;



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- h) Oppose redirecting or reclassifying transportation revenue sources, including earned interest, for anything other than their intended purposes;
- i) Support the implementation of federal transportation programs in an equitable manner that promotes traditional funding levels, programming roles, and local discretion in allocation decisions;
- j) Oppose policies that significantly increase costs, threatening OCTA's ability to deliver projects and provide transit service;
- k) Support removing the barriers for funding transportation projects, including allowing local agencies to advance projects with local funds when state funds are unavailable due to budgetary reasons, and allowing regions to pool federal, state, and local funds in order to limit lengthy amendment processes and streamline project delivery time;
- ~~l) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding incentives and project delivery tools; (Moved to the Key Policy Issues Section and revised)~~
- l) Support flexibility in the application of "disadvantaged" and "low-income" communities to ensure that transportation funding flows to each region's most impacted areas, allowing OCTA to best meet the needs of its local communities;
- m) Support dedicated funding for transit operations, preferably through an ongoing formulaic approach. (Moved from the Key Policy Issues Section)

**III. FISCAL REFORMS AND ISSUES**

In recent years, the Legislature and Governor have worked collaboratively during the budget process to pass funding bills in a timely manner. Given that the State continues to report lower revenues than projected, uncertainties over future funding levels remain. Therefore, OCTA will:

- a) Monitor the study and development of alternative transportation funding proposals, including the State's road charge pilot program and ensure that efforts are made to address concerns related to equity, privacy, and public support of such proposals;
- b) Oppose levying new and/or increase in gasoline taxes or user fees, including revenue increases on fuel consumption categorized as charges, fees, revenue enhancements, or similar classifications. Consideration of such efforts shall occur when a direct nexus is determined to exist between revenues and transportation projects, and additional revenues are to be controlled by the county transportation commission;

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- c) Oppose efforts to decrease the voter threshold requirement for local tax measures for transportation purposes;
- d) Oppose increases to administrative fees charged by the California Department of Tax and Fee Administration on the collection of local sales tax measures;
- e) Support policies that ensure all users of the State's transportation system pay their "fair share" to maintain and improve the system;
- f) Support efforts to restore equitable ~~with regards to the~~ generation and disbursement of sales tax revenues that support the Local Transportation Fund;
- g) Support the retention of existing and future local revenue sources;
- h) Support an extension of the state sales tax exemption for the purchase of zero-emission buses.

**IV. STATE TRANSPORTATION IMPROVEMENT PROGRAM**

The State Transportation Improvement Program (STIP), substantially amended by SB 45 (Chapter 622, Statutes of 1997), is a programming document that establishes the funding priorities and project commitments for transportation capital improvements in California. SB 45 placed decision-making authority with the regions ~~closest to the problem~~ by providing project selection for 75 percent of the funding in the Regional Transportation Improvement Program (RTIP). This funding is distributed to counties based on an allocation formula. The remaining 25 percent of the funds are programmed by the California Department of Transportation (Caltrans) in the Interregional Transportation Improvement Program (ITIP). OCTA will seek to ensure that the regional focus of the program is preserved. Key provisions to be sought by OCTA include:

- a) Support maintaining the current STIP formula, which provides 75 percent of STIP funding to the locally-nominated RTIP and 25 percent to the ITIP;
- b) Support equitable allocations of transportation funding, such as the north/south formula distribution of county shares and ITIP allocations;
- c) Support efforts to clarify that programming of current period county shares has priority over advancement of future county shares;
- d) Support a formula-based guaranteed disbursement of the ITIP;
- e) Support efforts to allow a mode-neutral STIP;

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- f) Support increased flexibility for the use of STIP funds to support alternative projects, including, but not limited to, transit and goods movement improvement projects.

**V. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. While state transit funding has recently become more stable, future demand increases due to environmental regulations and increased capital and operations costs ~~fuel prices may~~ will put further strain on existing resources. OCTA will make every effort to minimize additional state obligations to transit operations which lack a sufficient and secure revenue source. To that end, OCTA will focus on the following:

- a) Advocate for a continued strong state role in providing funding for transit operations rather than shifting responsibility to local transportation entities. No additional requirements should be created for operation levels beyond existing capacity, unless agreed to by that entity or otherwise appropriately funded;
- ~~b) Support efforts to mitigate costs associated with the development, testing, purchase, and operation of zero-emission transit buses, including an alternative electricity rate structure, tax incentives, and other forms of financial assistance; (Moved to the Key Policy Issues Section)~~
- b) Seek additional funding for paratransit operations and transit accessibility capital improvements that support persons with disabilities and senior citizens;
- c) Support efforts to encourage and incentivize the interoperability of transit and rail systems within California;
- d) Support limiting the liability of transit districts for the location of bus stops (*Bonanno v. Central Contra Costa Transit Authority*);
- e) Support ~~the citing of~~ incentives for transit-oriented development projects (i.e., authorize extra credit towards housing element requirements for these developments), including incentives for development;
- f) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- g) Monitor and inform the creation of the Zero-Emission Roadmap, which will work to identify actions needed to meet California's zero-emission transit goals with minimal displacement of existing workers;
- ~~h) Encourage policies and guidance that incentivize public transit ridership. (Moved from the Key Policy Issues Section)~~

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**VII. ROADS AND HIGHWAYS**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors as the ownership of the 91 Express Lanes and the use of design-build authority on the State Route 22 project and Interstate 405 Improvement Project. OCTA will continue to seek new and innovative ways to deliver road and highway projects to the residents of Orange County and, to that end, OCTA will focus on the following:

- ~~a) Oppose the creation of a conservancy that would inhibit the delivery of transportation projects under study or being implemented in the region;~~
- a) Support new and existing alternative project delivery methods, such as design-build, public-private partnership authority, construction manager/general contractor authority, and progressive design build, through expanding mode and funding eligibility while also allowing the appropriate balance of partnership between the State and local agencies;
- b) Support authorizing local agencies to advertise, award, and administer contracts for state highway projects;
- c) Oppose duplicative reporting mandates and efforts to impose additional requirements, beyond what is required in statute, on lead agencies awarding contracts using alternative project delivery mechanisms;
- d) Support streamlining of the Caltrans review process for projects, ~~simplification of processes, and reduction of red tape,~~ without compromising environmental safeguards;
- f) Support policies that improve signal synchronization programs in order to facilitate street signal coordination, prioritization, and preemption, as well as encouraging the use of intelligent transportation system measures;
- g) Support management and integration of express lanes to promote consistent and seamless user experience;
- ~~h) Monitor efforts to increase fines for high occupancy vehicle (HOV) lane violations and, if implemented, ensure fines are dedicated to enforcement purposes;~~
- h) Support the equitable enforcement of regulations governing transportation network companies;
- i) Support studying the development and safe operation of autonomous vehicles and related technologies;
- j) Support preserving local discretion and flexibility in the development of the congestion management program.

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**XIVII. ROLES AND RESPONSIBILITIES**

In recent years, there have been many efforts to reorganize or restructure transportation programs and local agency responsibilities. OCTA will continue to monitor policies that would significantly affect the way in which it operates, with a focus on maintaining local control and continued partnerships in order to advocate for the following principles:

- a) Support preserving the role of county transportation commissions, as consistent with existing law, in the administration of transportation programs;
- b) Oppose proposals that reduce the rights and responsibilities of county transportation commissions in planning, funding, and delivering transportation programs;
- c) Oppose policies that unnecessarily subject projects to additional reviews and project selection approvals that could adversely affect delivery timelines and processes;
- d) Support partnerships with alternative mobility providers that allow for adequate information sharing while also respecting the planning efforts of local agencies;
- e) Support efforts to increase the flexibility of funds used for motorist service programs.

**VIII. TOLLED & MANAGED LANES**

OCTA's commitment to continuously improve mobility in Orange County is reflected through a dynamic involvement in such innovative highway endeavors, including both the ownership of the 91 Express Lanes, a ten-mile toll facility on State Route 91, extending from State Route 55 to the Orange/Riverside County line, and the 405 Express Lanes, which will operate two lanes in each direction from State Route 73 to the Interstate 605.

~~As transportation demands continue to increase, innovative tools must be available to ensure transportation infrastructure projects continue to be built in a reliable, prompt, and efficient manner. OCTA took advantage of one such tool by securing a \$629 million federal loan to supplement state and local funds on the I-405 Improvement Project. The loan, obtained through the Transportation Infrastructure Finance and Innovation Act (TIFIA), will save taxpayers approximately \$300 million in the decades to come.~~

~~As the TIFIA loan and purchase of the 91 Express Lanes in 2003 illustrate, OCTA's leadership in improving mobility for Orange County residents through the use of innovative tools and approaches allow transportation agencies to stretch their dollars further than ever before. Because many agencies are discussing the increased use of managed lane facilities, there remains a need to advocate for local flexibility and input. To ensure the continued success of the 91 Express Lanes, the 405 Express lanes, and for toll policy moving forward, OCTA will:~~

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- a) ~~Ensure that revenues from toll facilities remain within the corridor from which they are generated, Opposing efforts to divert revenues from toll facilities for state purposes not directed by the responsible governing board;~~
- b) Support policies that allow OCTA, and its partners, to efficiently operate and maintain the 91 Express Lanes and the 405 Express Lanes;
- c) Support efforts to preserve local flexibility in the administration of toll lanes and encourage the State to work with OCTA on operating policies to ensure seamless system operation;
- d) Oppose the construction or operation of toll facilities that are inconsistent with local long range transportation plans;
- e) Oppose the construction or operation of toll facilities that fail to respect existing local transportation projects and funding programs;
- f) Support customer privacy rights while maintaining OCTA's ability to effectively communicate with customers and operate the 91 and 405 Express Lanes;
- g) Support the use of innovative means to enhance toll agency enforcement efforts, including ways to address toll violations due to protected plates;
- h) Support collaborative solutions to address the degradation of HOV lanes that respect local transportation funding sources and programs, have the support of the relevant regional transportation planning agency, do not redirect existing local transportation funding sources, and analyze the effect of single-occupant, low-emission vehicles, including associated federal requirements triggered by their access allowance;
- i) Support efforts to improve the interoperability of the different toll systems across the State in order to ensure fair and efficient toll operations while affirming user privacy protections;
- j) Inform discussions related to revising toll evasion penalties, toll exemptions, and other changes to enforcement strategies and mechanisms in order to maintain local control, opposing efforts that will hinder the ability to meet congestion management and financing requirements;
- k) Support policies that protect the process prescribed in AB 194 (Chapter 687, Statutes of 2015), which authorizes regional transportation agencies to develop and operate toll facilities, and ensure it is maintained in its application on future toll facilities;
- ~~l) Oppose policies that interfere with local determination of project impacts on the functionality of the Express Lanes operated and maintained by OCTA. *[Covered by subsection (e) of this Section]*~~

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**VIIX. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. In support of these routes, OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak and managed by the ~~Los Angeles San Diego San Luis Obispo Rail Corridor Agency (LOSSAN Agency)~~. OCTA has served as the managing agency for the LOSSAN Agency since 2013, ~~and assumed full providing administrative and management support responsibility for the Pacific Surfliner service in June 2015 via an interagency transfer agreement with the State. OCTA continues to serve in this capacity, providing all necessary administrative support to the LOSSAN Agency.~~

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. While the status and future of these programs is uncertain, OCTA will be watchful to ensure that funding for these rail systems does not impact other transportation funding sources. Key advocacy efforts will emphasize the following:

- a) Support policies that encourage commercial, commuter-based development around passenger rail corridors that includes permanent job creation;
- ~~b) Support efforts to create additional efficiency in rail program oversight, including consideration of possible program consolidation;~~
- b) Monitor and evaluate plans and progress of high-speed rail and its funding;
- c) Support efforts to provide resources for safety improvements on the rail network in Southern California, including for the implementation, operation, and maintenance of Positive Train Control safety technology;
- d) Support studying the policies, funding options, and need for rail/highway grade separations, including any impact on existing state highway and transit funding sources;
- e) Support policies that facilitate the development and construction of needed infrastructure projects that support modernization, connectivity, and general system-wide improvements to California's rail network;

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- f) Monitor the implementation of the In-Use Locomotive Regulation to ensure the transition to zero-emission locomotives is technically feasible and provides adequate funding.

**IX. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered, ~~the nation's two~~ of the nation's busiest ports, are vital to California's economy and the surrounding region because goods are shipped to and through the surrounding counties. While the State's goods movement system is the most robust in the nation, it is continually challenged by competing goods movement systems in other states. In order to continue to compete and engage in the global marketplace, California must continue to enhance its goods movement system, while at the same time be cognizant of taking the necessary actions to mitigate any negative impacts to local communities. Key positions include:

- a) Support improvements ~~in major trade gateways in California~~ to facilitate the movement of intrastate, interstate, and international trade beneficial to the State's and Orange County's economy;
- b) Support policies that will aid in the development, approval, and construction of projects to expand goods movement capacity and reduce congestion;
- c) Ensure that control of goods movement infrastructure projects and funding is retained at the local level;
- d) Seek mitigation for the impacts of goods movement on local communities;
- e) Pursue ongoing, stable sources of funding for goods movement infrastructure;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure any effort to establish a container fee program dedicates funding to projects that mitigate the impact port activity may have on local communities, informed by input from local and regional agencies.

**XI. ACTIVE TRANSPORTATION**

Active transportation projects and programs, which encourage greater mobility through walking and bicycling, have grown in popularity due to the environmental, health, and cost savings benefits. ~~Through local planning efforts such as Orange County's Regional Bikeways Planning Collaborative, the Pacific Coast Highway Corridor Study, and the development of OCTA's Commuter Bikeways Strategic Plan,~~ OCTA continues to study, plan, and fund active transportation projects and programs as part of its mission to provide



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Orange County with an efficient and multi-modal transportation system. Key positions include:

- a) Support policies to increase the visibility and safety of users engaged in active transportation;
- b) Support creative use of paths, roads, flood channels, and abandoned rail lines using existing established rights-of-way to promote bicycles trails and pedestrian paths, in coordination with any local agency with jurisdiction over those properties;
- c) Support funding and programs or policies that encourage the safe operation of an integrated multimodal system, which includes the interaction between roadways, rail lines, bikeways, and pedestrian ways, and the users of those facilities;
- d) Support streamlined active transportation funding programs;
- ~~e) Support efforts to streamline and simplify the review and approval by the California Public Utilities Commission of lease agreements between sponsors of active transportation projects and public utility companies;~~
- e) Seek funding and support policies and projects to increase safety requirements related to the utilization of electric bicycles.

**XIV~~I~~. ADMINISTRATION/GENERAL**

General administrative issues arise every session that could impact OCTA's ability to operate efficiently. Key positions include:

- a) Oppose policies adversely affecting OCTA's ability to efficiently and effectively contract for goods and services, conduct business of the agency, and limit or transfer the risk of liability;
- b) Support efforts to provide greater protection of OCTA's computer and information security systems;
- c) Support establishing reasonable liability for non-economic damages in any action for personal injury, property damage, or wrongful death brought against a public entity based on principles of comparative fault;
- d) Support consistent campaign contribution limits as applied to both elected and appointed bodies;
- e) Monitor proposed changes related to the Ralph M. Brown Act, and other statutes governing public meetings, including the expanded use of technology;

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- f) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serve all residents of Orange County;
- g) Oppose policies that create undue burden on transportation procurement practices or restrict ability to maintain local governing board award authority;
- h) Oppose efforts that create duplicative reporting requirements.

**XIII. EMPLOYMENT ISSUES**

As a public agency and one of the largest employers in Orange County, OCTA balances its responsibility to the community and the taxpayers to provide safe, reliable, cost-effective service with its responsibility of being a reasonable, responsive employer. Key advocacy positions include:

- a) Oppose efforts to impose state labor laws on currently exempt public agencies;
- b) Oppose policies that circumvent the collective bargaining process;
- c) Oppose policies adversely affecting OCTA's ability to efficiently and effectively deal with labor relations, employee rights, benefits including pension benefits, the California Family Rights Act, and working conditions, including health, safety, and ergonomic standards for the workplace;
- d) Support efforts to reform and resolve inconsistencies in the workers' compensation and unemployment insurance systems, and labor law requirements that maintain protection for employees and allow businesses to operate efficiently;
- e) Support workforce development policies that facilitate a more efficient talent acquisition process;
- f) Support policies that encourage ridesharing, teleworking, vanpool, and related congestion relief programs for Orange County commuters.

**XIIIV. TRANSPORTATION SECURITY AND & EMERGENCY PREPAREDNESS**

As natural and man-made disasters continue to threaten transportation systems around the world, significant improvements have been, and continue to be, carried out to enhance the safety, security, and resilience of transportation infrastructure in the United States. As Orange County's bus provider and a Metrolink partner, OCTA comprehends understands the importance of ensuring the safety and security of our transportation network and protecting our customers. ~~Presently~~, OCTA maintains a partnership with the Orange County Sheriff's Department to provide OCTA Transit Police Services for the bus and train systems in Orange County and continues to be actively involved in a variety of state and regional preparedness exercises in support of first responders. ~~OCTA is also~~

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~~currently working with its community partners on an effort to install video surveillance systems at Metrolink stations and on its fleet of buses and throughout its bus facilities. The development of a new Transit Security and Operations Center is also underway to enhance security efforts and further the resiliency of the Orange County transit system.~~

~~Additional safety and security measures require additional financial resources. Heightened security awareness, an active public safety campaign, and greater surveillance efforts, all require additional financial resources.~~ Consequently, OCTA's advocacy positions will highlight:

- a) Support state homeland security and emergency preparedness funding and grant programs to local transportation agencies to alleviate financial burden placed on local entities;
- b) Support policies that balance retention mandates of video surveillance records to reflect current reasonable technological and fiscal capabilities;
- c) Support ~~the use of new technology~~ technological advances in order to increase the safety of public transportation passengers and operators;
- d) Support policies that aim to enhance transit services and the overall safety and security of transit riders, public transit employees, and on-road vehicles while avoiding undue burden on transportation agencies to implement unfunded safety measures.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors.

The 2025-26 Federal Legislative Platform serves as a framework document to guide OCTA's statutory, regulatory, and administrative goals and objectives in Washington, D.C. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the 119<sup>th</sup> Congress, and the later sections present guiding policy statements for the other major issues that may arise. Positions on individual items not directly addressed in this document will be brought to the OCTA Board of Directors for formal action.

**Key Policy Issues in the 119<sup>th</sup> Congress**

A number of significant transportation issues will be discussed in the 119<sup>th</sup> Congress. OCTA will focus its advocacy efforts on the following principles:

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements, and services in order to meet the mobility needs of Orange County;
- b) Request annual appropriations at least consistent with authorized funding levels and advanced appropriations provided in the Infrastructure Investment and Jobs Act (IIJA) are maintained in order to meet our county's critical infrastructure needs;
- c) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs, ensuring funding OCTA receives from IIJA and the Inflation Reduction Act is maintained;
- d) Oppose rescissions or other arbitrary funding cuts to transportation programs;
- e) Advocate for full funding of transportation programs without placing new limitations or conditions on the distribution of funds that would impede the delivery of infrastructure projects;
- f) Ensure that Highway Trust Fund (HTF) revenues continue to be used for transit expenditures for capital and operations;

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- g) Ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- h) Ensure that Orange County is eligible for funding provided to meet air quality standards for the South Coast Air Basin and oppose efforts that would impact the use of transportation funding;
- i) Seek support for adaptation and resiliency efforts related to environment for critical transportation infrastructure;
- j) Seek funding and other solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- k) Seek support, funding, and project streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- l) Encourage federal leadership, in conjunction with state and local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor;
- m) Support the authority to secure direct funding for Orange County projects;
- n) Support efforts to preserve local flexibility in the administration of toll lanes and use of toll revenues;
- o) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects;
- p) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding assistance or incentives, project delivery tools and/or regulatory relief.

**I. TRANSPORTATION FUNDING**

Current federal law does not require the appropriation of authorized HTF dollars. Therefore, the annual appropriations process will continue to play an important role in funding OCTA's programs and projects. OCTA will continue to advocate for the largest possible amount and share of appropriations funding to ensure adequate resources to meet the infrastructure needs of Orange County.

OCTA will continue to aggressively pursue discretionary funding for transportation projects within the statutory and regulatory requirements of funding programs and the

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current funding status of OCTA's capital program. Other funding priorities for OCTA include:

- a) Support sustainable transportation funding levels that allow OCTA to continue to improve mobility in and around Orange County;
- b) Support funding for the Capital Investment Grants program to allow for an expansion of bus and rail transit projects;
- c) Ensure that federal funding is available for capital purposes to the extent not needed for direct operating costs;
- d) Support funding, with increased flexibility, for safety and security grant programs in order to protect Orange County's transportation system, including highways, transit operations and facilities, rail lines, and related software systems;
- e) Support funding for commuter and intercity passenger rail corridors in Orange County;
- f) Support funding to develop training information programs to instruct on the use of new technology and address workforce needs at transit and transportation agencies;
- g) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act
- h) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services.

**II. SURFACE TRANSPORTATION REAUTHORIZATION**

The IIJA (Pub. L. No. 1147-58) authorized over \$567 billion over five years for programs. With the IIJA as law, OCTA has focused much of its advocacy efforts on implementation efforts that allow state and local government agencies to move forward with a federal partner on critical transportation projects. Now with the IIJA set to expire on September 30, 2026, OCTA will dually prioritize implementation while also advocating for its priorities related to enacting long-term reauthorization legislation. As such, OCTA will advocate for the following policies:

- a) Support the greatest possible share of funding for California and OCTA, focusing on increasing formula funds;
- b) Support increased flexibility in transportation funding programs to promote greater local decision-making in the planning process;

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- c) Ensure a long-term partnership with the federal government that helps OCTA address transit capital and operating revenue needs;
- d) Oppose unfunded federal mandates that further reduce the resources of state and local transportation agencies;
- e) Oppose policies that undermine or limit local control over land use decisions;
- f) Ensure fair suballocations of funding to account for additional costs, increased administrative responsibilities, and the potential for increased liabilities to which the agency may be subject;
- g) Oppose limitations or other arbitrary conditions on discretionary transportation grant programs that prevent an equitable distribution of transportation resources;
- h) Support policies that encourage ridesharing, teleworking, vanpool and related congestion relief programs for Orange County commuters;
- i) Oppose any effort to further reduce transportation funding for OCTA or California, advocating for a fair and equitable share;
- k) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding;
- l) Support funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor to prevent future service disruptions;

**III. TRANSPORTATION PLANNING & PROGRAMMING**

In the 119<sup>th</sup> Congress, OCTA will continue to support the implementation of the IIJA while finding ways to complement the programs and provisions authorized under federal law. During this time, OCTA will advocate for the following issues:

- a) Pursue continued eligibility of Congestion Mitigation Air Quality program funding for operating expenses associated with any fixed-guideway or eligible bus projects;
- b) Support expanded use of alternative delivery methods for federally-funded transportation projects;
- c) Support expedited review and payments to local agencies and their contractors for project development, right-of-way acquisition, and construction activities;
- d) Support efforts to authorize, fund, and streamline the delivery of bicycle and pedestrian projects in Orange County;

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- e) Advocate for policies to encourage, when possible, a “complete streets” approach to multimodal project planning in order to expedite project delivery;
- f) Support flexibility and increased local decision-making authority regarding the operation of high-occupancy vehicle (HOV) lanes in order to reduce or eliminate the unintended consequences resulting from Section 166 of the Federal Highway Act or any similar policy regulating degradation of HOV lanes;
- g) Encourage cooperation between local, state, and federal partners to mitigate or eliminate any policy that places burdensome requirements on operators related to degradation of facilities and performance;
- h) Support streamlining and greater flexibility of Federal Buy America requirements including increased clarification on market availability and technical feasibility of the Build America, Buy America Act requirements created in the IIJA to prevent any unintended disruption to projects and programs;
- i) Support efforts to clarify roles and responsibilities related to toll enforcement policies to allow for interoperability between toll facilities while affirming user privacy;
- j) Encourage policies on the planning, delivery, and operation of tolling projects that are aligned with the flexibility provided in California State law;
- k) Support equitable policies to ensure that inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County;
- l) Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as private sector partners, in the testing, development, demonstration, deployment, and operation of autonomous and connected vehicle technologies, while encouraging policies that ensure their safe implementation.

**IV. FISCAL REFORMS & ISSUES**

Transportation infrastructure projects are critical drivers in job creation and business development. Legislative and regulatory proposals can impact the ability of transportation agencies to deliver these infrastructure projects. Expediting project delivery serves as a key tool for driving economic growth and stimulating activity. Regarding these developments, OCTA will:

- a) Oppose policies that would divert revenues generated by locally-approved sales taxes to programs and projects that are not included in the sales tax ordinance;



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- b) Support removing barriers to the release of transportation funding, including allowing local agencies to advance projects with local funds in order to limit lengthy processes that delay project delivery;
- c) Support expansion, streamlining, and further development of innovative project finance methods, including the Transportation Infrastructure Finance and Innovation Act loan program;
- d) Support fiscally-sound proposals to adequately address the HTF's structural deficit, including initiatives to address the impact of low- and zero-emission vehicles on transportation funding;
- e) Support tax policies that reduce costs or provide additional flexibility in OCTA's financial and operational activities;
- f) Support a stable source of proposed future revenues that provides adequate resources for future transportation needs;
- g) Oppose subjecting public transportation providers to gas tax liability or other fees that increase operating costs;
- h) Support efforts to ensure that all users of the national transportation system pay their "fair share" to maintain and improve the system;
- i) Support additional funding and regulatory flexibility to facilitate the use of alternative mobility providers.

**V. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak. OCTA serves as the managing agency for this service, providing all necessary administrative support to the LOSSAN Agency.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. OCTA will continue to monitor the

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development of additional service to ensure that it does not adversely affect other transportation funding sources. Other rail policy priorities include the following:

- a) Support funding for rail safety programs, including funding for operation and maintenance of Positive Train Control (PTC) safety technology and other safety enhancements;
- b) Support efforts to ensure that any alternative safety technology is interoperable with, and contains the same safety benefits as, the PTC system implemented on passenger rail corridors in Southern California;
- c) Support the availability of technical resources, such as wireless spectrum, to fully implement rail safety technology;
- d) Oppose increasing the current rail passenger liability cap and work with regional partners to ensure that any changes to the cap take into account the limited resources of passenger rail providers;
- e) Monitor the ongoing waiver process in relation to implementing the California Air Resources Board's In-Use Locomotive Regulation.

**VI. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. Federal transit funding is provided on both a formula and competitive basis. Discretionary funding under the IIJA has been highly competitive for transit programs. As future demand for transit funding increases due to environmental regulations and increased capital and operations costs put further strain on existing resources, creating more opportunities for predictable transit funding will continue to be a priority for OCTA. Specifically, OCTA will focus on the following:

- a) Encourage policies and guidance that incentivize public transit ridership;
- b) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates;
- c) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral;
- d) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels;
- e) Support efforts to create a more competitive marketplace for zero-emission transit buses to help drive down costs and create a better supply chain.

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**VII. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of the nation's busiest ports. The maintenance, improvement, and modernization of our region's goods movement infrastructure must continue to be a national priority if our region is to remain competitive with the rest of the world and responsive to the consumer needs of Southern California. Even though the IJA continued to provide funding for goods movement projects and programs, revenue streams remain insufficient to fund the projects needed to offset the costs of moving these goods considering the many years of underinvestment. OCTA's advocacy efforts regarding goods movement will continue to emphasize the following:

- a) Pursue new, stable, dedicated, and secure sources of funding for goods movement infrastructure;
- b) Ensure that the benefits of newly-funded projects also take into account mitigation factors to impacted communities;
- c) Support a collaborative approach, including engaging with private sector partners, in developing and implementing the needed sustainable goods movement infrastructure programs and projects;
- d) Support regionally significant grade separation projects that improve the flow of goods and people throughout Southern California;
- e) Support local control of goods movement infrastructure and freight mobility projects;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure eligibility for funding and programs is available to all transportation modes that benefit regional goods movement.

**VIII. TRANSPORTATION SECURITY AND EMERGENCY PREPAREDNESS**

OCTA continues cooperative efforts with neighboring transit agencies, Urban Area Security Initiative partners, state and federal Homeland Security and Emergency Preparedness grant partners, and local jurisdictions to enhance the security and resiliency of Orange County's transportation system. OCTA will pursue the following priorities to ensure that the agency's safety, security, and emergency preparedness needs are met:

- a) Support increased funding for training, increased security, and emergency preparedness improvements with adequate flexibility to ensure that local

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agencies can effectively use the resources to also support all modes of transportation;

- b) Support a funding distribution that considers all risk threats, including natural disasters, acts of terrorism, and other man-made disasters, as estimated by the Department of Homeland Security, in cooperation with state and local officials;
- c) Support programs that facilitate cooperation with security and emergency preparedness officials to refine and improve information exchange protocols, emergency preparedness systems, and regional data coordination;
- d) Support efforts to provide funding incentives and policy flexibility to facilitate programs to provide safe working conditions for coach operators and transit personnel;
- e) Support efforts to provide sufficient funding for transit agencies to implement physical security, mandated employee screenings, and cybersecurity directives while also incorporating transit agency technical expertise in developing regulatory guidelines and procedures.

**IX. ENVIRONMENTAL & ENERGY ISSUES**

Federal environmental policies affecting OCTA include the National Environmental Protection Act, the Clean Air Act, the Clean Water Act, and the Endangered Species Act. Therefore, policies to further develop environmental and energy-efficient goals will likely have an impact on OCTA's operations. With such proposals in mind, OCTA will:

- a) Seek funding to meet state and local environmental quality requirements, including requirements for zero-emission buses, alternative fueling stations, and future greenhouse gas reduction requirements;
- b) Support expedited review for project development, right-of-way acquisition, and construction activities without impairing substantive environmental requirements;
- c) Ensure adequate funding and flexibility in the application of resiliency, natural infrastructure, or other climate-related policies to the delivery of mobility improvements, as opposed to mandates that would constrain transportation resources.

**IX. REGULATORY REQUIREMENTS**

OCTA must also monitor several other administrative requirements, including new and expanded regulatory definitions that may affect the agency's operations. As such, OCTA will:

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- a) Support expedited and improved federal reporting and monitoring requirements to ensure efficiency and usefulness of data while also eliminating redundant state and federal requirements;
- b) Oppose regulatory proposals that unreasonably subject OCTA to burdensome bureaucratic requirements or increased operational costs, making it harder to deliver projects and improve mobility in Orange County;
- c) Oppose policies adversely affecting the agency's ability to effectively address labor relations, employee rights, benefits, and working conditions, such as health, safety, and ergonomic standards;
- d) Oppose policies that limit state or local pension benefit reforms.

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With over three million residents, Orange County is the third most populous county in California and the sixth most populous county in the nation. Orange County is one of the most densely populated areas in the country and is served by one of the nation's busiest transit systems. The Orange County Transportation Authority (OCTA) serves as the primary agency responsible for transportation planning in Orange County. OCTA manages a multimodal transportation system, overseeing a range of services including buses, Metrolink commuter rail, paratransit, and freeway improvements, as well as bicycle and pedestrian infrastructure, ensuring diverse mobility options for residents and visitors. In addition, Orange County provides highway and rail corridors that facilitate the increasing level of international trade entering the Southern California ports.

The 20253-246 Federal Legislative Platform serves as a framework document to guide ~~the Orange County Transportation Authority's (OCTA's)~~ statutory, regulatory, and administrative goals and objectives in Washington, D.C. The Key Policy Issues section offers guidance on the policy issues that will likely be the focus of the 1198<sup>th</sup> Congress, and the later sections present guiding policy statements for the other major issues that may arise. Positions on individual items not directly addressed in this document will be brought to the OCTA Board of Directors for formal action.

**Key Policy Issues in the 1198<sup>th</sup> Congress**

A number of significant transportation issues will be discussed in the 1198<sup>th</sup> Congress. OCTA will focus its advocacy efforts on the following principles:

- a) Support transportation funding investments and policy flexibilities that allow OCTA to provide essential, multimodal mobility improvements, and services in order to meet the mobility needs of Orange County;
- b) Request annual appropriations at least consistent with authorized funding levels and advanced appropriations provided in the Infrastructure Investment and Jobs Act (IIJA) are maintained in order to meet our county's critical infrastructure needs;
- c) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs, ensuring funding OCTA receives from IIJA and the Inflation Reduction Act is maintained; *(Moved from Section I and revised)*
- d) Oppose rescissions or other arbitrary funding cuts to transportation programs; *(Moved from Section II)*
- e) ~~Encourage policies and guidance that incentivize public transit ridership;~~ *(Moved to Section VI)*

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- ~~d) Support equitable policies to ensure that the inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County; (Moved to Section III)~~
- ~~e) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services; (Moved to Section I)~~
- e) Advocate for full funding of transportation programs without placing new limitations or conditions on the distribution of funds that would impede the delivery of infrastructure projects;
- ~~f) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act; (Moved to Section I)~~
- f) Ensure that Highway Trust Fund (HTF) revenues continue to be used for transit expenditures for capital and operations;
- g) Ensure that air quality determinations and policies do not constrain funding availability or otherwise undermine OCTA's ability to deliver transportation improvements;
- ~~h) Ensure that Orange County is eligible for funding provided to meet air quality standards for the South Coast Air Basin and oppose efforts that would impact the use of transportation funding;~~
- i) Seek support for adaptation and resiliency efforts related to environment for critical transportation infrastructure;
- j) Seek funding and other solutions, such as permit streamlining, to support adaptation and resiliency efforts throughout the rail corridor;
- k) Seek support, funding, and project streamlining to manage and address sea level rise, beach erosion, landslides, and other environmental impacts along the rail corridor;
- l) Encourage federal leadership, in conjunction with state and local collaboration, in developing long-term studies related to potential track relocation in the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor;
- m) Support the authority to secure direct funding for Orange County projects;
- n) Support efforts to preserve local flexibility in the administration of toll lanes and use of toll revenues;
- o) Support efforts to ensure local control is maintained in policy decisions made by local transportation agency boards in delivering, funding, and operating transportation programs and projects.;

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- p) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding assistance or incentives, and project delivery tools and/or regulatory relief.

**I. TRANSPORTATION FUNDING**

Current federal law does not require the appropriation of authorized HTF dollars. Therefore, the annual appropriations process will continue to play an important role in funding OCTA's programs and projects. OCTA will continue to advocate for the largest possible amount and share of appropriations funding to ensure adequate resources to meet the infrastructure needs of Orange County.

OCTA will continue to aggressively pursue discretionary funding for transportation projects within the statutory and regulatory requirements of funding programs and the current funding status of OCTA's capital program. Other funding priorities for OCTA include:

- a) Support sustainable transportation funding levels that allow OCTA to continue to improve mobility in and around Orange County;
- ~~b) Oppose efforts to redirect, reduce, or eliminate existing transportation funding programs; (Moved to Key Policy Issues Section)~~
- b) Support funding for the Capital Investment Grants program to allow for an expansion of bus and rail transit projects;
- c) Ensure that federal funding is available for capital purposes to the extent not needed for direct operating costs;
- d) Support funding, with increased flexibility, for safety and security grant programs in order to protect Orange County's transportation system, including highways, transit operations and facilities, rail lines, and related software systems;
- e) Support funding for regional commuter and intercity passenger rail corridors in Orange County California;
- f) Support funding to develop training information programs to instruct on the use of new technology and address workforce needs at transit and transportation agencies;
- ~~g) Seek to ensure OCTA's projects and programs related to the 2028 Olympic and Paralympic Games in Los Angeles are eligible for any related funding incentives and project delivery tools; (Moved to Key Policy Issues Section and revised)~~



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- ~~i) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding; (Moved to Section II)~~
- ~~j) Support funding and incentives to develop free or reduced fare transit programs without impacting existing programs or creating unfunded mandates. (Moved to Section VI)~~
- g) Advocate for transit and transportation agencies to be eligible for transportation funding programs under the Inflation Reduction Act; (Moved from the Key Policy Issues Section)
- h) Seek responsible revenue solutions to fund future transportation projects without adversely affecting an agency's ability to provide services. (Moved from the Key Policy Issues Section)

**II. ~~IIJA~~ IMPLEMENTATION      SURFACE      TRANSPORTATION  
REAUTHORIZATION**

The IIJA (Pub. L. No. 1147-58) authorized over \$567 billion over five years for programs. With the IIJA as law, OCTA ~~will~~ has focused much of its advocacy efforts ~~in the 118<sup>th</sup> Congress~~ on implementation efforts that allow state and local government agencies to move forward with a federal partner on critical transportation projects. Now with the IIJA set to expire on September 30, 2026, OCTA will dually prioritize implementation while also advocating for its priorities related to enacting long-term reauthorization legislation. As such, OCTA will advocate for the following policies:

- a) Support the greatest possible share of funding for California and OCTA, focusing on increasing formula funds;
- b) Support increased flexibility in transportation funding programs to promote greater local decision-making in the planning process;
- c) Ensure a long-term partnership with the federal government that helps OCTA address transit capital and operating revenue ~~shortfalls~~ needs;
- d) Oppose unfunded federal mandates that further reduce the resources of state and local transportation agencies;
- e) Oppose policies that undermine or limit local control over land use decisions;
- f) Ensure fair suballocations of funding to account for additional costs, increased administrative responsibilities, and the potential for increased liabilities to which the agency may be subject;

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- g) Oppose limitations or other arbitrary conditions on discretionary transportation grant programs that prevent an equitable distribution of transportation resources;
- ~~h) Support policies to encourage the safe development, demonstration, deployment, and operation of connected and automated vehicle technologies; [Moved to Section III and combined with subsection (e) from Section IX]~~
- ~~i) Oppose rescissions or other arbitrary funding cuts to transportation programs; (Moved to the Key Policy Issues Section)~~
- h) Support policies that encourage ridesharing, teleworking, vanpool and related congestion relief programs for Orange County commuters;
- i) Oppose any effort to further reduce transportation funding for OCTA or California, advocating for a fair and equitable share;
- j) Support efforts to reinstate the state suballocation process regarding the distribution of federal formula funding; (Moved from Section I)
- k) Support funding to address the current climate-related vulnerabilities on the LOSSAN Rail Corridor to prevent future service disruptions.

**III. TRANSPORTATION PLANNING AND PROGRAMMING**

In the 119<sup>th</sup> Congress, OCTA will continue to support the implementation of the IIJA while finding ways to complement the programs and provisions authorized under federal law. During this time, OCTA will advocate for the following issues:

- a) Pursue continued eligibility of Congestion Mitigation Air Quality program funding for ~~three to five years~~ of operating expenses associated with any fixed-guideway or eligible bus projects;
- b) Support expanded use of alternative delivery methods for federally-funded transportation projects;
- ~~c) Support environmental process improvements and stewardship efforts by the relevant federal agencies to expedite project delivery and accelerate the creation of jobs;~~
- c) Support expedited review and payments to local agencies and their contractors for project development, right-of-way acquisition, and construction activities;
- d) Support efforts to authorize, fund, and streamline the delivery of bicycle and pedestrian projects in Orange County;

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- e) Advocate for policies to encourage, when possible, a “complete streets” approach to multimodal project planning in order to expedite project delivery;
- ~~g) Support shifting the approval of Regional Transportation Plan amendments involving Transportation Control Measures from the Environmental Protection Agency back to the Federal Highway Administration while allowing for an adequate consultation process;~~
- f) Support flexibility and increased local decision-making authority regarding the operation of high-occupancy vehicle (HOV) lanes in order to reduce or eliminate the unintended consequences resulting from Section 166 of the Federal Highway Act or any similar policy regulating degradation of HOV lanes;
- g) Encourage cooperation between local, state, and federal partners to mitigate or eliminate any policy that places burdensome requirements on operators related to degradation of facilities and performance;
- h) Support streamlining and greater flexibility of Federal Buy America requirements including increased clarification on market availability and technical feasibility of the Build America, Buy America Act requirements created in the IIJA to prevent any unintended disruption to projects and programs;
- i) Support efforts to clarify roles and responsibilities related to toll enforcement policies to allow for interoperability between toll facilities while affirming user privacy;
- j) Encourage policies on the planning, delivery, and operation of tolling projects that are aligned with the flexibility provided in California State law;
- ~~k) Support equitable policies to ensure that inclusive public engagement, planning, and delivery of mobility improvements best serves all the residents of Orange County; (Moved from the Key Policy Issues Section)~~
- ~~l) Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as private sector partners, in the testing, development, demonstration, deployment, and operation of autonomous and connected vehicle technologies, while encouraging policies that ensure their safe implementation. [Moved from Section IX and combined with subsection (h) in Section II]~~

**IV. FISCAL REFORMS ~~&~~ AND ISSUES**

Transportation infrastructure projects are critical drivers in job creation and business development. Several Legislative and regulatory proposals can impact the ability of transportation agencies would have economic impacts, both positive and negative, affecting the delivery of transportation to deliver these infrastructure projects that

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~~create jobs and spur further business development in Orange County. Expediting project delivery serves as a key tool for driving economic growth and stimulating activity.~~ Regarding these developments, OCTA will:

- a) Oppose policies that would divert revenues generated by locally-approved sales taxes to programs and projects that are not included in the sales tax ordinance;
- b) Support removing barriers to the release of transportation funding, including allowing local agencies to advance projects with local funds in order to limit lengthy ~~amendment~~ processes that delay project delivery;
- c) Support expansion, streamlining, and further development of innovative project finance methods, including the Transportation Infrastructure Finance and Innovation Act loan program;
- d) Support fiscally-sound proposals to adequately address the HTF's structural deficit, including initiatives to address the impact of low- and zero-emission vehicles on transportation funding;
- ~~e) Support the equitable collection and distribution of sales tax revenue from out-of-state, online retailers (*South Dakota v. Wayfair, Inc.*);~~
- e) Support tax policies that reduce costs or provide additional flexibility in OCTA's financial and operational activities;
- ~~f) Support policies that expedite the delivery of transportation improvements or the development of business opportunities in order to create jobs and economic activity in Southern California; (*Incorporated into overview paragraph of this Section*)~~
- f) Support a stable source of proposed future revenues that provides adequate resources for future transportation needs;
- g) Oppose subjecting public transportation providers to gas tax liability or other fees that increase operating costs;
- h) Support efforts to ensure that all users of the national transportation system pay their "fair share" to maintain and improve the system;
- i) Support additional funding and regulatory flexibility to facilitate the use of alternative mobility providers.

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**V. RAIL PROGRAMS**

Metrolink is Southern California's commuter rail system that links residential communities to employment and activity centers. Orange County is served by three Metrolink lines: the Orange County Line, the Inland Empire-Orange County Line, and the 91/Perris Valley Line. OCTA owns 48 miles of rail right-of-way in Orange County on which Metrolink operates. OCTA's rail capital budget supports improvements to the regional commuter rail system in Orange County, and under existing policy, OCTA is the primary construction lead on major capital improvements to the regional commuter rail system on its right-of-way.

In addition to Metrolink services, Orange County is also served by the state-supported Pacific Surfliner intercity passenger rail service traveling between San Luis Obispo and San Diego. The Pacific Surfliner is operated by Amtrak, ~~and managed by the Los Angeles San Diego San Luis Obispo Rail Corridor Agency (LOSSAN Agency). OCTA has served as the managing agency for the LOSSAN Agency since 2013 and assumed full administrative and management responsibility for Pacific Surfliner service in June 2015 via an interagency transfer agreement with the State of California~~ OCTA serves as the managing agency for this service, continues to serve in this capacity, providing all necessary administrative support to the LOSSAN Agency.

Other rail systems could also travel through Orange County at some point in the future, including additional intercity rail service. OCTA will continue to monitor the development of additional service to ensure that it does not adversely affect other transportation funding sources. Other rail policy priorities include the following:

- a) Support funding for rail safety programs, including funding for operation and maintenance of Positive Train Control (PTC) safety technology and other safety enhancements;
- b) Support efforts to ensure that any alternative safety technology is interoperable with, and contains the same safety benefits as, the PTC system implemented on passenger rail corridors in Southern California;
- c) Support the availability of technical resources, such as wireless spectrum, to fully implement rail safety technology;
- d) Oppose increasing the current rail passenger liability cap and work with regional partners to ensure that any changes to the cap take into account the limited resources of passenger rail providers;
- e) Monitor the ongoing waiver process in relation to implementing the California Air Resources Board's In-Use Locomotive Regulation.

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**VI. TRANSIT PROGRAMS**

OCTA will continue with its focus on providing safe, reliable, and efficient transit services in Orange County. Federal transit funding is provided on both a formula and competitive basis. Discretionary funding under the IIJA has been highly competitive for transit programs. As future demand for transit funding increases due to environmental regulations and increased capital and operations costs put further strain on existing resources, creating more opportunities for predictable transit funding will continue to be a priority for OCTA. Specifically, OCTA will focus on the following:

- a) Encourage policies and guidance that incentivize public transit ridership; (Moved from the Key Policy Issues Section)
- b) Support funding and incentives to develop free- or reduced-fare transit programs without impacting existing programs or creating unfunded mandates; (Moved from the Key Policy Issues Section)
- c) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral; (Moved from Section IX)
- d) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels; (Moved from Section IX)
- e) Support efforts to create a more competitive marketplace for zero-emission transit buses to help drive down costs and create a better supply chain.

**VII. GOODS MOVEMENT**

The twin Ports of Los Angeles and Long Beach are considered two of “America’s Gateway” and the nation’s busiest ports. The maintenance, improvement, and modernization of our region’s goods movement infrastructure must continue to be a national priority if our region is to remain competitive with the rest of the world and responsive to the consumer needs of Southern California. ~~The need for the Southern California region to remain competitive is further underscored by the expansion and modernization efforts of foreign competitors.~~ Even though the IIJA continued to provide funding for goods movement projects and programs, revenue streams remain insufficient to fund the projects needed to offset the costs of moving these goods considering the many years of underinvestment. OCTA’s advocacy efforts regarding goods movement will continue to emphasize the following:

- a) Pursue new, stable, dedicated, and secure sources of funding for goods movement infrastructure;
- b) Ensure that the benefits of newly-funded projects also take into account mitigation factors to impacted communities;

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- c) Support a collaborative approach, including engaging with private sector partners, in developing and implementing the needed sustainable goods movement infrastructure programs and projects;
- d) Support regionally-significant grade separation projects that improve the flow of goods and people throughout Southern California;
- e) Support local control of goods movement infrastructure and freight mobility projects;
- f) Support additional funding and policy reforms to aid in expediting transportation projects to address supply chain concerns;
- g) Ensure eligibility for funding and programs is available to all transportation modes that benefit regional goods movement.

**VIII. TRANSPORTATION SECURITY AND EMERGENCY PREPAREDNESS**

OCTA continues cooperative efforts with neighboring transit agencies, Urban Area Security Initiative partners, state and federal Homeland Security and Emergency Preparedness grant partners, and local jurisdictions to enhance the security and resiliency of Orange County's transportation system. OCTA will pursue the following priorities to ensure that the agency's safety, security, and emergency preparedness needs are met:

- a) Support increased funding for training, increased ~~surveillance~~security, and emergency preparedness improvements with adequate flexibility to ensure that local agencies can effectively use the resources to ~~also ensure a more resilient transportation system~~ support all modes of transportation;
- b) Support a funding distribution that considers all risk threats, including natural disasters, acts of terrorism, and other man-made disasters, as estimated by the Department of Homeland Security, in cooperation with state and local officials;
- c) Support programs that facilitate cooperation with security and emergency preparedness officials to refine and improve information exchange protocols, emergency preparedness systems, and regional data coordination;
- d) Support efforts to provide funding incentives and policy flexibility to facilitate programs to provide safe working conditions for coach operators and transit personnel;
- e) Support efforts to provide sufficient funding for transit agencies to implement physical security, mandated employee screenings, and cybersecurity directives while also incorporating transit agency technical expertise in developing regulatory guidelines and procedures.

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**IX. ENVIRONMENTAL ~~&AND~~ ENERGY ISSUES**

Federal environmental policies affecting OCTA include the National Environmental Protection Act, the Clean Air Act, the Clean Water Act, and the Endangered Species Act. Therefore, policies to further develop environmental and energy-efficient goals will likely have an impact on OCTA's operations. With such proposals in mind, OCTA will:

- ~~a) Seek opportunities to expedite and improve the efficiency of the environmental process without impairing substantive environmental requirements; *[Incorporated into subsection (e) of this section]*~~
- a) Seek funding to meet state and local environmental quality requirements, including requirements for zero-emission buses, alternative fueling stations, and future greenhouse gas reduction requirements;
- ~~c) Support the continuation and expansion of tax incentives for using compressed natural gas, hydrogen, and other zero-emission transit fuels; *(Moved to Section VI)*~~
- ~~d) Monitor proposals to address the environmental impacts of greenhouse gases to ensure that any new environmental requirements are accompanied by additional funding necessary to implement those requirements; *(Moved to Section VI)*~~
- b) Support expedited review for project development, right-of-way acquisition, and construction activities, without impairing substantive environmental requirements;
- c) Ensure adequate funding and flexibility in the application of resiliency, natural infrastructure, or other climate-related policies to the delivery of mobility improvements, as opposed to mandates that would constrain transportation resources;
- ~~g) Monitor policies regarding zero-emission transit fuels to ensure they remain technology neutral. *(Moved to Section VI)*~~

**IX. REGULATORY REQUIREMENTS**

OCTA must also monitor several other administrative requirements, including new and expanded regulatory definitions that may affect the agency's operations. As such, OCTA will:

- a) Support expedited and improved federal reporting and monitoring requirements to ensure efficiency and usefulness of data while also eliminating redundant state and federal requirements;



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- b) Oppose regulatory proposals that unreasonably subject OCTA to burdensome bureaucratic requirements or increased operational costs, making it harder to deliver projects and improve mobility in Orange County;
- c) Oppose policies adversely affecting the agency's ability to effectively address labor relations, employee rights, benefits, and working conditions, such as health, safety, and ergonomic standards;
- d) Oppose policies that limit state or local pension benefit reforms;
- e) ~~Support a collaborative approach to understanding the capital infrastructure and operational needs of local and state transportation agencies, as well as those of private sector partners, in the testing and deployment of autonomous vehicles and related technologies. (Moved to Section III)~~