

**EXHIBIT A**

**Orange County Transportation Authority  
Climate Adaptation and Sustainability Plan Follow-Up Activities Implementation  
SCOPE OF WORK**

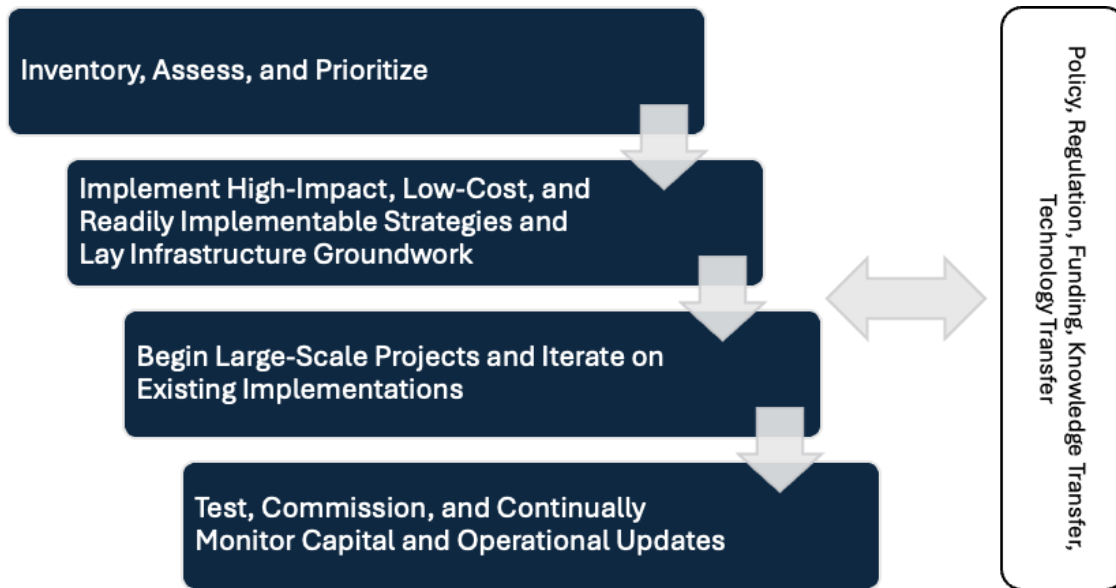
**Background**

As the primary transportation provider in Orange County, the Orange County Transportation Authority (OCTA) plays a critical role in delivering a balanced and sustainable public transit system. To ensure reliable service and protect the health and safety of its riders and workforce, OCTA must proactively address the ongoing impacts of a changing climate, as well as prepare for future conditions. Inaction could lead to more frequent disruptions and higher maintenance and repair costs. OCTA also contributes significantly to regional greenhouse gas (GHG) reduction efforts by offering cleaner mobility alternatives to personal vehicles and promoting multimodal, active transportation options. These efforts provide both environmental and public health benefits.

In 2024, OCTA developed its first Climate Adaptation and Sustainability Plan (CASP). The Final CASP established a strategic, agencywide framework to guide OCTA's climate action by identifying exploratory adaptation and sustainability goals and measures to inform future planning and decision-making and to ensure alignment with applicable state and federal requirements. It also supports related OCTA Board of Directors (Board) and Chief Executive Officer (CEO) Initiatives.

Following the finalization of and building from the CASP, OCTA completed a Climate Adaptation and Sustainability Implementation Plan (Implementation Plan) in 2025. The Implementation Plan identifies ten of OCTA's highest priority CASP measures to focus on in the near term and outlines strategies to effectively implement them. These actions represent impactful, feasible strategies to protect OCTA's infrastructure, operations, and workforce, from climate hazards such as high heat and poor air quality, while addressing energy efficiency and emissions reduction. The proposed actions follow a phased implementation approach (Figure 1).

Figure 1.



The sequential, step-by-step framework provides a guide to support CASP implementation with the first two phases primarily focused on assessing systems and equipment and on low-cost, high-impact actions in the near term (Phases 1 and 2, respectively). These initial levels of implementation will help to lay the groundwork for future medium- and long-term activities in the subsequent phases that may require more time and resources.

OCTA now seeks consultant support to transition these priority strategies from planning to action, focusing on Phase 1 (Inventory, Assess, and Prioritize) and Phase 2 (Implement High-Impact, Low-Cost, and Readily Implementable Strategies and Lay Infrastructure Groundwork). The Consultant shall provide technical, analytical, project management, stakeholder engagement (where appropriate), and implementation support services to facilitate the deployment of these measures.

## Project Goals and Objectives

The overall objectives of this project include:

- Advancing high-priority, near-term CASP strategies highlighted in the Implementation Plan
- Determining if near-term strategies can proceed into the preliminary design/environmental phase (where applicable)
- Strengthening the agency's operational resilience and continuity through measures that safeguard transit operations against relevant climate hazards
- Reducing emissions with efforts that help improve OCTA's energy performance and transition to more renewable energy sources where feasible
- Tracking and responding to evolving regulatory and funding landscapes to better position OCTA for state and federal compliance and relevant grant programs

## **Key Tasks**

### *Preliminary Implementation Review and Internal Coordination*

The Consultant shall:

- Review the proposed CASP strategies in the Implementation Plan and confirm details, such as feasibility, cost, risk reduction potential, and operational impacts.
- Where appropriate, identify enhancements or modifications and align implementation phasing with any ongoing and planned capital projects that may not have been previously considered.
- Help facilitate cross-functional engagement and coordination among relevant department and staff, including but not limited to planning, capital programs, operations, and facilities management, to ensure alignment on implementation goals. This entails assisting with identifying internal leads for priority actions and clarifying roles, responsibilities, and coordination needs.
- Support the creation and facilitation of an internal CASP implementation working group or task team, such as for developing meeting agendas, materials, and minutes.

### *Technical Assessments and Data Analysis (Phase 1)*

The Consultant shall:

- Refer to the Implementation Plan and in coordination with the previously identified lead(s), conduct the appropriate evaluations and/or inventories to identify any necessary or beneficial upgrades to equipment, systems, and procedures to advance climate and sustainability initiatives.
- Consider and prepare for Phase 2 CASP strategies and develop implementation-ready action plans based on the findings and results from Phase 1 activities.

### *Deploy Early Implementations (Phase 2)*

The Consultant shall:

- To the extent feasible, support implementation of near-term, low-cost, and readily implementable actions (i.e., LED lighting upgrades, thermostat and control improvements, employee training enhancements, etc.).
- Assess whether additional strategies not included in the Implementation Plan should be considered for implementation and, where appropriate, develop action plans to advance those strategies.
- To ensure long-term alignment with other agency plans and investments, identify opportunities to integrate CASP strategies into existing and planned capital projects, facility upgrades, fleet investments, and long-range budgeting efforts.
- Provide recommendations for sequencing CASP actions to minimize potential disruptions and maximize cost-effectiveness.

### *Feasibility Support for Medium- and Long-Term Strategies*

The Consultant shall:

- Where not already included in Phase 1 and 2, conduct targeted feasibility assessments, technical analyses, or benefit-cost evaluations for selected medium- and long-term strategies from the Implementation Plan.
- Identify data gaps, permitting considerations, implementation risks, and other factors that may affect future deployment.
- Develop decision-support tools to help inform OCTA's prioritization of future investments.

### *Monitoring, Review, and Progress Tracking*

To support ongoing implementation and remain adaptive amid evolving climate risks, changing policy and regulatory landscapes, and advancements in technology, the Consultant shall:

- Develop a simple, practical progress-tracking framework aligned with CASP performance metrics.
- Support periodic progress reviews to identify challenges, lessons learned, and opportunities for course correction.
- Assist with the preparation of summary updates for internal leadership and decision-makers.

### *Funding Strategy and Grant Application Support*

The Consultant shall:

- Track relevant state, federal, and regional grant programs aligned with CASP priorities and identify potential funding and partnership opportunities.
- Where appropriate, support grant application process, including cost estimates and supporting documentation.
- Coordinate with OCTA staff to align funding pursuits with internal timelines and priorities.

### **General Advisory Support**

The Consultant may be tasked to provide strategic advice to OCTA as it relates to the goals and future direction of the agency in advancing its climate action and sustainability objectives. This may include matters related to the Board and CEO's annual Initiatives and Action Plan, American Public Transportation Association Sustainability Commitment of which OCTA is a signatory, and other agencywide efforts. The Consultant may also be requested to attend and assist with updates and presentations to the OCTA Board, and/or other groups deemed necessary, on this subject.

The Consultant shall stay informed of relevant current and emerging science, technology, policies, and regulations, and keep OCTA apprised of any such information that may impact the agency.

The term of this contract is anticipated to be for 24 months and not to exceed \$200,000.