

OCTA Readiness and Capacity Assessment

PB has completed an engagement with the Orange County Transportation Authority (OCTA) to help determine its readiness and capacity to meet a number of major challenges on the horizon, including delivery of the M2 capital program and implementation of operating efficiencies. The project was divided into two phases:



- **Phase I – Organizational Assessment:** This phase focused on identifying the major, overall organizational issues that OCTA faces in successfully delivering the M2 program. Key activities included a kick-off meeting and confirmation of requirements, document review, executive team meeting and interviews, preliminary SWOT/barriers analysis, and a solutions workshop. Primary deliverables that resulted included a top ten list of organizational issues and SWOT analysis results.
- **Phase II – Program/Project Assessment, Recommendation/Implementation Planning, Coaching:** Phase II focused on assessing OCTA’s program management capability and helping develop recommended plans for ensuring M2 success. This encompassed practices involved with managing the overall program of projects as well as with the related core principles of project management. The customized methodology consisted of reviewing key documents and conducting interviews, performing comprehensive inventory of current practices, comparing performance with established program management practices, assigning capability maturity model ratings, comparing with peer agencies, and considering project management capacity needs. The work generated a number of findings in terms of both organizational readiness and capacity. After identifying several program management models that OCTA could implement to enhance its project delivery capability, PB developed recommendations and a detailed implementation timeline. Many of the recommendations focused upon the M2 program's:
 - Mission
 - Organization
 - Communications
 - Management
 - Project Controls
 - Contract Administration
 - Quality Assurance and Quality Control
 - Document Control
 - Finance / Accounting
 - Risk Management
 - Safety
 - External Relations

