



Orange County Transportation Authority

Transit Committee Agenda Thursday, May 8, 2025 at 9:00 a.m.

Board Room, 550 South Main Street, Orange, California

Committee Members

Fred Jung, Chair
Vicente Sarmiento, Vice Chair
Valerie Amezcua
Stephanie Klopfenstein
Carlos A. Leon
Janet Nguyen
Tam T. Nguyen

Accessibility

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the Orange County Transportation Authority (OCTA) Clerk of the Board's office at (714) 560-5676, no less than two business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

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 or through the Clerk of the Board's office at the OCTA Headquarters, 600 South Main Street, Orange, California.

Meeting Access and Public Comments on Agenda Items

Members of the public can either attend in-person or access live streaming of the Committee meetings by clicking this link: <https://octa.legistar.com/Calendar.aspx>

In-Person Comment

Members of the public may attend in-person and address the Board regarding any item within the subject matter jurisdiction of OCTA. Please complete a speaker's card and submit it to the Clerk of the Board and notify the Clerk regarding the agenda item number on which you wish to speak. Speakers will be recognized by the Chair at the time of the agenda item is to be considered by the Board. Comments will be limited to three minutes. The Brown Act prohibits the Board from either discussing or taking action on any non-agendized items.

TRANSIT COMMITTEE MEETING AGENDA

Written Comment

Written public comments may also be submitted by emailing them to ClerkOffice@octa.net, and must be sent by 5:00 p.m. the day prior to 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 Board. Public comments will be made available to the public upon request.

Call to Order

Pledge of Allegiance

Director Leon

Closed Session

There are no Closed Session items scheduled.

Special Calendar

There are no Special Calendar matters.

Consent Calendar (Items 1 through 3)

All items on the Consent Calendar are to be approved in one motion unless a Committee Member or a member of the public requests separate action or discussion on a specific item.

1. Approval of Minutes

Clerk of the Board

Recommendation(s)

Approve the minutes of the April 10, 2025, Transit Committee meeting.

Attachments:

[Minutes](#)

2. Contract Change Orders for Construction of the OC Streetcar Project

Jeff Mills/James G. Beil

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar project. Contract change orders are required for utility conflicts, traffic signal interconnect ethernet switches, and communications system software and licenses for the OC Streetcar project.

Recommendation(s)

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 4.5 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, to address utility conflicts.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 71.3 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$200,000, for traffic signal ethernet switches.

TRANSIT COMMITTEE MEETING AGENDA

- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 293 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$900,000, for communication systems and train control software updates and license extensions.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

3. Amendment to Agreement for Mobile Ticketing Services

Isaac Herrera/Andrew Oftelie

Overview

On May 11, 2020, the Board of Directors approved an agreement with Siemens Mobility, Inc. (formerly Bytemark, Inc.) to develop, host, license, and maintain a mobile ticketing application for the Orange County Transportation Authority's OC Bus service. The agreement includes a five-year initial term and two, two-year option terms. Staff is requesting Board of Directors' approval to exercise the first option term to continue providing mobile ticketing services. The initial contract term will expire on June 30, 2025, and an amendment is needed to exercise the first option term for service continuity.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 4 to Agreement No. C-0-2067 between the Orange County Transportation Authority and Siemens Mobility, Inc. in the amount of \$207,621, to exercise the first option term for licensing, maintenance, and commission fees of the mobile ticketing application effective through June 30, 2027. This will increase the maximum cumulative payment obligation to a total contract value of \$1,333,049.

Attachments:

[Staff Report](#)

[Attachment A](#)

Regular Calendar

4. Consultant Selection for On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects

George Olivo/James G. Beil

Overview

On January 13, 2025, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals to retain consultants to provide on-call architectural and engineering design and construction support services for transit facility projects. Board of Directors' approval is requested to select the firms to perform the required work.

TRANSIT COMMITTEE MEETING AGENDA

Recommendation(s)

- A. Approve the selection of Stantec Architecture Inc., M. Arthur Gensler, Jr. & Associates, Inc., Anil Verma Associates, Inc., STV Incorporated, Dahl, Taylor & Associates, Inc., and IDS Group, Inc., in the aggregate amount of \$3,000,000, as the firms to provide on-call architectural and engineering design and construction support services for transit facility projects.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2610 between the Orange County Transportation Authority and Stantec Architecture Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- C. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4060 between the Orange County Transportation Authority and M. Arthur Gensler, Jr. & Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- D. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4061 between the Orange County Transportation Authority and Anil Verma Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- E. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4062 between the Orange County Transportation Authority and STV Incorporated, to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- F. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4063 between the Orange County Transportation Authority and Dahl, Taylor & Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- G. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4064 between the Orange County Transportation Authority and IDS Group, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

TRANSIT COMMITTEE MEETING AGENDA

5. OC Streetcar Project Quarterly Update

Jeff Mills/James G. Beil

Overview

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar project activities from January 2025 through April 2025.

Recommendation(s)

Receive and file as an information item.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Presentation](#)

6. Amendment to Agreement for the Operations and Maintenance Services for the OC Streetcar Project

Cleve Cleveland/Johnny Dunning, Jr.

Overview

On February 24, 2025, the Orange County Transportation Authority Board of Directors approved the updated funding and schedule for the OC Streetcar project. As a result of these changes and the projected revenue service date in spring 2026, an amendment to the operations and maintenance agreement with Herzog Transit Services, Inc. is required to align the operations and maintenance services with the revised project timeline.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 1 to Agreement No. C-8-2039 between the Orange County Transportation Authority and Herzog Transit Services, Inc. in the amount of \$5,938,341, and modify the initial agreement term through March 31, 2031, to align the revenue service contract years with the revised project timeline for operations and maintenance services for the OC Streetcar project. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$59,003,931.

Attachments:

[Staff Report](#)

[Attachment A](#)

TRANSIT COMMITTEE MEETING AGENDA

7. **Proposed New Fare Media**

Sam Kaur/Andrew Oftelie

Overview

The Orange County Transportation Authority is proposing new fare media as part of the implementation of the new Rider Validation System scheduled for rollout in October 2025. The proposed fare media, branded as the Wave card, is a contactless smart card that would replace legacy magnetic stripe passes and broaden access to features such as fare capping, contactless payments, and free two-hour transfers. In order to implement the new fare media, the Orange County Transportation Authority must conduct outreach and a Title VI analysis to ensure that low income and minority riders are not negatively impacted by the proposed fare media. The outreach and Title VI analysis has been completed, and staff is recommending approval of the new proposed fare media.

Recommendation(s)

- A. Receive and file the final Public Involvement Plan Report.
- B. Direct staff to implement the new fare media with the launch of the Rider Validation system.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Presentation](#)

Discussion Items

8. **Bimonthly Transit Performance Report**

Kim Tucker/Johnny Dunning, Jr.

Overview

Staff will provide an update on the OC Bus, OC ACCESS, and OC Flex Services.

Attachments:

[Presentation](#)

9. **Public Comments**

10. **Chief Executive Officer's Report**

11. **Committee Members' Reports**

12. **Adjournment**

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

9:00 a.m. on Thursday, June 12, 2025

OCTA Headquarters

550 South Main Street, Orange, California



MINUTES

Transit Committee Meeting

Committee Members Present

Fred Jung, Chair
Vicente Sarmiento, Vice Chair
Valerie Amezcua
Carlos A. Leon
Janet Nguyen
Tam T. Nguyen

Staff Present

Jennifer L. Bergener, Deputy Chief Executive Officer
Allison Cheshire, Clerk of the Board Specialist, Senior
Sahara Meisenheimer, Clerk of the Board Specialist
James Donich, General Counsel
OCTA Staff

Committee Members Absent

Stephanie Klopfenstein

Call to Order

The April 10, 2025, regular meeting of the Transit Committee was called to order by Committee Chair Jung at 9:01 a.m.

Consent Calendar

1. Approval of Minutes

A motion was made by Director Janet Nguyen, seconded by Director Amezcua, and passed by those present to approve the minutes of the March 13, 2025, Transit Committee meeting.

Director Leon was not present to vote on this item.

2. Low Carbon Transit Operations Program Recommendations for OC Bus Transit Projects

A motion was made by Director Janet Nguyen, seconded by Director Amezcua, and passed by those present to:

- A. Approve Resolution No. 2025-015 to authorize the use of \$10,144,185 in fiscal year 2024-25 Low Carbon Transit Operations Program funds for the Youth Ride Free Program.
- B. Authorize staff to request the California Department of Transportation to approve a Letter of No Prejudice for use of local funds until the Low Carbon Transit Operations Program funds are awarded, currently expected to be December 1, 2025.
- C. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program as well as negotiate and execute any necessary agreements and/or amendments to agreements with regional, state, or federal agencies to facilitate the recommendations above.

Director Leon was not present to vote on this item.



Regular Calendar

3. Agreement for Replacement of Mechanical Units at the Santa Ana Bus Base

George Olivo, Program Manager, Facilities Engineering, provided a report.

A motion was made by Committee Vice Chair Sarmiento, seconded by Director Amezcua, and passed by those present to:

- A. Find ACCO Engineered Systems, Inc., doing business as ACCO Engineered Systems, the apparent low bidder, as non-responsive due to failure to provide complete information on the superintendent and experience for the past three years as required by the bid documents on the Information Required of Bidder form.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2550 between the Orange County Transportation Authority and NKS Mechanical Contracting, Inc., the lowest responsive, responsible bidder, in the amount of \$4,593,000, for the replacement of mechanical units at the Santa Ana Bus Base.

Discussion Items

4. OC Bus Ridership Growth Trends

Rose Casey, Executive Director, and Eric Hoch, Senior Transportation Analyst, Planning, provided a presentation.

No action was taken on this item.

5. Public Comments

No public comments were received.

6. Chief Executive Officer's Report

Jennifer L. Bergener, Deputy Chief Executive Officer, reported OCTA received a Certificate of Merit from APTA as part of its 2025 Bus Safety, Security and Emergency Management Awards.

7. Committee Members' Reports

There were no Committee Member's reports.



8. Adjournment

The meeting adjourned at 9:34 a.m.

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

9:00 a.m. on Thursday, May 8, 2025

OCTA Headquarters

550 South Main Street

Orange, California



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Contract Change Orders for Construction of the OC Streetcar Project

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar project. Contract change orders are required for utility conflicts, traffic signal interconnect ethernet switches, and communications system software and licenses for the OC Streetcar project.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 4.5 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$250,000, to address utility conflicts.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 71.3 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$200,000, for traffic signal ethernet switches.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 293 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$900,000, for communication systems and train control software updates and license extensions.

Discussion

On September 24, 2018, the Orange County Transportation Authority (OCTA) Board of Directors (Board) awarded the contract to construct the OC Streetcar project (Project) to Walsh Construction Company II, LLC (Walsh). The Notice to Proceed with construction was issued to Walsh on March 4, 2019. The construction of the Project is nearing 95 percent complete. The project alignment is referenced in Attachment A.

Staff is requesting Board authorization of the following contract change orders (CCO).

Utility Conflicts

Utility conflicts were discovered during construction within city streets. The utility conflicts were more complex than anticipated, requiring significant time and effort to excavate and investigate, resulting in either removal or relocation of utilities or redesign of conflicting project elements. The resulting additional construction efforts include demobilization as time is required to address the utility conflicts, field meetings, and remobilization after solutions are determined. As a result, CCO nos. 4, 4.1, 4.2, 4.3, and 4.4 were issued to address utility conflicts. Since the effort to address the numerous utility conflicts was extensive and involved Walsh and its subcontractors, it was difficult to track and document time and materials (T&M) work timely. The construction management team has reviewed T&M work bills and additional supporting information provided by Walsh and recently found merit to those costs. Proposed CCO No. 4.5, in the amount of \$250,000, is required to provide compensation for utility conflicts for the Project.

Traffic Signal Interconnect Ethernet Switches

During development of the operations plan, it was determined that providing traffic signal priority on the route would improve travel time. The City agreed that green lights could be extended by up to 20 seconds to enhance the flow of traffic and add operational improvements to reduce wait time for the streetcar. It was determined after the Project was bid, that for traffic signal priority to function effectively, it was necessary to replace older fiber optic cables and install additional fiber optic connections between traffic signals. This would facilitate the coordination of traffic signal timing along the streetcar route. As a result, CCO nos. 71, 71.1, and 71.2 were issued for the installation and testing of fiber optics connections between traffic signals. Proposed CCO No. 71.3, in the amount of \$200,000, is required to provide compensation to perform additional investigation for a blockage found within an existing traffic signal conduit, and to

procure and install fiber optics ethernet switches hardware required within the traffic control cabinets.

Communications System and Supervisory Control and Data Acquisition (SCADA) System Software

Communications systems include the public announcement audio and passenger information visual displays at all passenger stations, operational telecommunication, closed-circuit televisions, and the network cloud data required for connecting these systems together to support communications for all areas of the Project. The train control SCADA system enables remote monitoring and control of the streetcar system. Software for the communications systems and train control SCADA system are preloaded by the equipment manufacturers and activated at the time of equipment delivery to the Project. Software for the Project's visual displays and the integrated data feeds to the passenger information system are no longer supported by the manufacturer. Based on the updated schedule, software for communications system equipment, and train control SCADA, which was previously purchased, needs to be updated to their current versions, and license subscriptions and warranties need to be extended to allow for system implementation and testing to be consistent with the current project completion date. Proposed CCO No. 293, in the amount of \$900,000, will provide compensation for communication systems and train control SCADA software updates and corresponding license extensions.

The cost of the work associated with these CCOs will be funded from the project budget as previously approved by the Board on February 24, 2025.

Procurement Approach

The initial procurement was handled in accordance with OCTA's Board-approved procedures for public works projects. These procedures, which conform to both federal and state requirements, require that contracts are awarded to the lowest responsive, responsible bidder after a sealed bidding process. On September 24, 2018, the Board authorized Agreement No. C-7-1904 with Walsh, in the amount of \$220,538,649, for construction of the Project.

Proposed CCO nos. 4.5, 71.3, and 293, in the cumulative amount of \$1,350,000, will increase the cumulative value of the contract to \$348,841,289, as shown in Attachment B. Board approval is required for CCO nos. 4.5, 71.3, and 293 pursuant to the State of California Public Contracting Code Section 20142. The CCOs will be issued with a reservation of rights to advance the Project, pending

resolution of disputes between OCTA and Walsh. The statements in this report are made in the context of, and subject to, OCTA's reservation of rights.

Fiscal Impact

Funding for these changes was included in the revised OC Streetcar Federal Transit Administration Full Funding Grant Agreement approved by the Board on February 24, 2025, and is included in OCTA's Fiscal Year 2024-25 Budget and Proposed Fiscal Year 2025-26 Budget, Capital Programs Division, account nos. 0051-TS010-9017-Z42 (CCO No. 4.5), 0051-TS010-9017-Z52 (CCO No. 71.3), and 0051-TS010-9017-Z55 (CCO No. 293) and is funded with Federal Transit Administration Section 5309 New Starts grant funds and local Measure M2 funds.

Summary

Staff recommends the Board authorize the Chief Executive Officer to negotiate and execute CCO No. 4.5, in the amount of \$250,000, for utility conflicts, CCO No. 71.3, in the amount of \$200,000, for traffic signal ethernet switches, and CCO No. 293, in the amount of \$900,000, for communication systems and train control SCADA software updates and license extensions to Agreement No. C-7-1904 between OCTA and Walsh for the construction of the Project.

Attachments

- A. Project Alignment
- B. Walsh Construction Company II, LLC, Agreement No. C-7-1904, Contract Change Order (CCO) Log

Prepared by:



Jeff Mills, P.E.
Director, Capital Project Delivery
(714) 560-5925



Pia Veasapen
Director, Contracts Administration and
Materials Management
(714) 560-5619

Approved by:

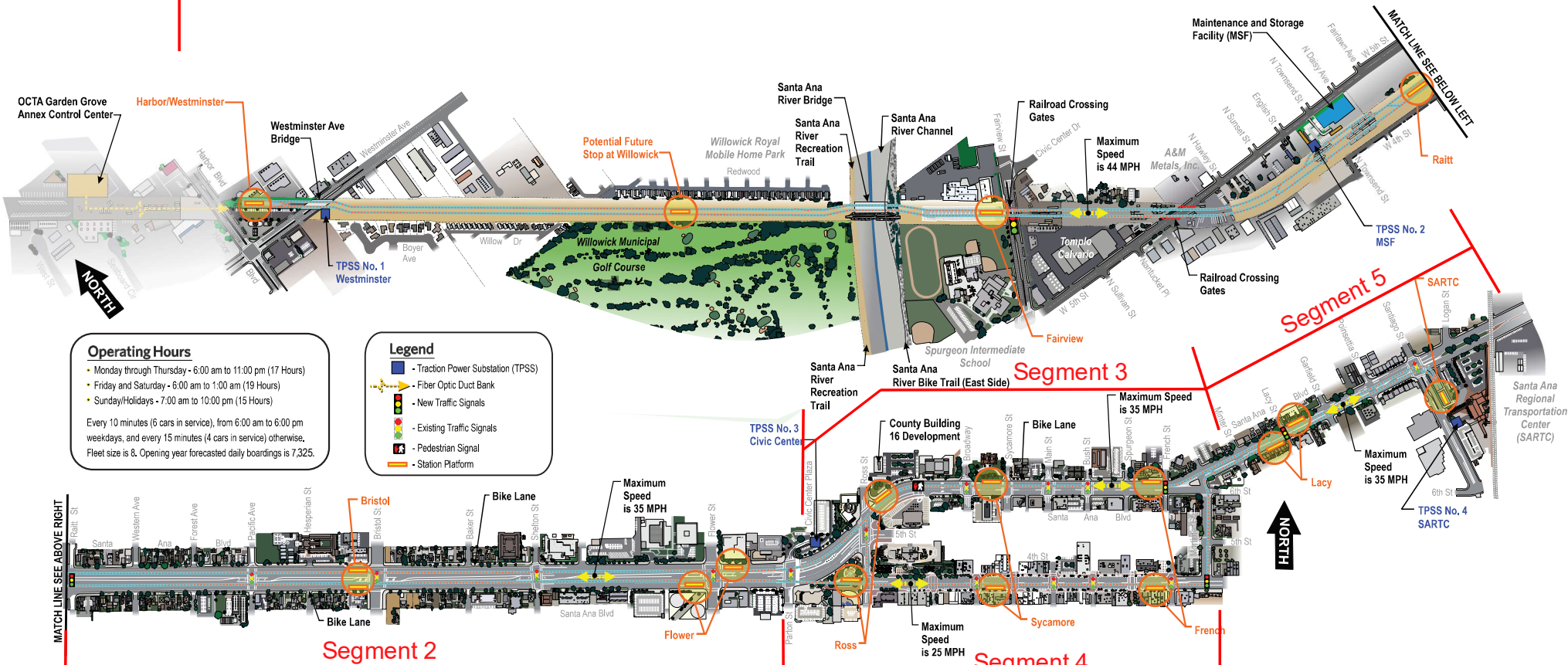


James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646

Project Alignment



Segment 1



**Walsh Construction Company II, LLC
Agreement No. C-7-1904
Contract Change Order (CCO) Log**

CCO No.	Title	Status	Date Executed	Cost
1	Maintenance and Storage Facility (MSF) Removals	Approved	6/20/2019	\$199,749.00
1.1	MSF Removals Additional Funding	Approved	6/25/2019	\$113,884.77
1.2	Time Impact Evaluation (TIE) 01 - Schedule Impacts Associated with Change Directive (CD)-001 and CD-003	Approved	6/17/2020	\$0.00
1.3	Schedule Impacts Associated with TIE 01	Approved	10/17/2022	\$2,100,000.00
2	MSF Removal of Additional Hazardous Materials	Approved	6/25/2019	\$200,000.00
2.1	MSF Removal of Additional Hazardous Materials Additional Funding	Approved	8/15/2019	\$160,000.00
3	Removal and Disposal of Contaminated Materials within the Orange County Transit District (OCTD)-Owned Pacific Electric Right-of-Way (PEROW)	Approved	9/12/2019	\$1,600,000.00
3.1	Removal and Disposal of Contaminated Materials Additional Funding	Approved	2/25/2020	\$7,278,795.00
3.2	Removal and Disposal of Contaminated Materials Additional Funding	Approved	10/18/2021	\$1,100,000.00
3.3	Removal and Disposal of Contaminated Materials Additional Funding	Approved	4/18/2023	\$1,500,000.00
3.4	Removal and Disposal of Contaminated Materials Additional Funding	Pending		\$657,000.00
4	Work Related to Existing Utility Conflicts	Approved	8/27/2019	\$200,000.00
4.1	Work Related to Existing Utility Conflicts Additional Funding	Approved	2/25/2020	\$833,300.00
4.2	Work Related to Existing Utility Conflicts Additional Funding	Approved	6/9/2020	\$2,426,000.00
4.3	Work Related to Existing Utility Conflicts Additional Funding	Approved	6/21/2021	\$2,000,000.00
4.4	Work Related to Existing Utility Conflicts Additional Funding	Approved	11/19/2021	\$3,500,000.00
4.5	Work Related to Existing Utility Conflicts Additional Funding	Pending		\$250,000.00
5	Tree Trimming and Removal	Approved	6/9/2020	\$129,215.52
5.1	Tree Trimming and Removal Additional Funding	Approved	12/29/2023	\$300,000.00
7	Orange County Sanitation District Specifications Revisions	Approved	6/9/2020	\$82,445.00
8	Orange County Flood Control District Maintenance Path Profile Revisions	Approved	6/9/2020	\$6,055.00
9	MSF Vapor Barrier	Approved	12/22/2020	\$395,717.00
10	112 Tram Rail Ultrasonic Testing	Approved	6/10/2020	\$0.00
11	GPS Priority Control System	Approved	6/9/2020	\$40,120.00
12	Santa Ana River Bridge (SARB) Precast Girders	Approved	8/27/2020	\$88,877.00
13	Retaining Wall 544 Reinforcing Steel	Approved	9/3/2020	\$2,321.30
14	Retaining Wall 508	Approved	12/14/2020	\$125,341.00
15	Utility Relocations for Overhead Contact System (OCS) Pole Foundations and Traffic Signal Pole Foundations	Approved	6/17/2020	\$195,723.00
16	OCS and Traffic Signal Pole Foundations Hand Excavation and Survey	Approved	6/23/2020	\$198,808.00
16.1	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	6/26/2020	\$1,400,000.00
16.2	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	4/15/2021	\$1,400,000.00
16.3	OCS, Traffic Signal, and Streetlight Foundation Hand Excavation, Layout and Survey Additional Funding	Approved	5/1/2023	\$250,000.00
17	Westminster Bridge OCS Diaphragm	Approved	10/30/2020	\$1,682.00
18	Remove Buried Man-Made Objects	Approved	11/23/2020	\$300,000.00
18.1	Remove Buried Man-Made Objects Additional Funding	Approved	10/25/2021	\$300,000.00
18.2	Remove Buried Man-Made Objects Additional Funding	Approved	5/1/2023	\$600,000.00
19	Removal of Boulders	Approved	11/17/2020	\$160,000.00
20	Removal of Chain Link Fence	Approved	3/9/2021	\$7,316.90
21	Changes to Turnout Geometry	Approved	10/5/2020	\$0.00
22	Railroad Crossing Gate Bells	Approved	10/5/2020	\$0.00
23	SARB, OCS Pole, and OCS Down Guy Diaphragms	Approved	1/19/2021	\$7,419.00
24	OCS Sectionalization – Siemens Portion	Approved	10/5/2020	\$158,941.01
24.1	OCS Sectionalization Additional Funding	Approved	4/27/2021	\$722,253.92
26	Revisions to Station Color Schedule, Glass, and Pylon	Approved	4/19/2021	\$176,419.84
27	Street Lighting	Approved	11/19/2020	\$12,347.91
28	Schedule Impacts Associated with TIE 04 and 07	Approved	12/8/2020	\$0.00
28.1	Schedule Impacts Associated with TIE 07	Approved	10/17/2022	\$1,300,000.00
28.2	Schedule Impacts Associated with TIE 07	Approved	1/17/2024	\$0.00
28.3	Schedule Impacts Associated with TIE 07	Approved	6/4/2024	\$1,425,000.00
29	Revision to MSF, Traction Power Substation (TPSS), and OCS Siemens Portion	Approved	11/19/2020	\$34,216.80
29.1	Revision to MSF, TPSS, and OCS Siemens Portion	Approved	6/22/2023	\$175,730.75
30	SARB Pile, Westminster Bridge, and Demonstration Section Electrical Continuity Testing	Approved	2/1/2021	\$23,928.10
30.1	Electrical Continuity Testing Additional Funding	Approved	3/16/2021	\$320,164.40
31	MSF Building and Southern California Edison (SCE) Design Revisions	Approved	1/17/2022	\$207,367.00
32	Asbestos Survey	Approved	2/1/2021	\$25,000.00
34	OCS Spanwire Modifications	Approved	5/8/2024	\$10,901.00
35	No Sunshade for Variable Message Sign	Approved	12/22/2020	\$0.00
37	Station Platform Power	Approved	5/18/2021	\$58,414.15
38	Modify OCS Foundation Schedule	Approved	6/15/2021	\$32,733.04

CCO No.	Title	Status	Date Executed	Cost
39	OCS Revisions Based on Field Walks	Approved	6/17/2021	\$28,088.32
39.1	Additional Revisions to OCS Hardware	Approved	6/26/2023	\$180,709.28
40	MSF Remote Yard Gates	Approved	11/3/2021	\$32,307.66
40.1	MSF Remote Yard Gates	Approved	5/29/2024	\$67,819.03
41	Auxiliary Feeder Pullbox Sizes- Segment 3A	Approved	11/23/2021	\$61,041.24
42	Department Acceptance Testing for Gamma-Gamma Logging of Cast-In-Drilled-Hole (CIDH) Piles	Approved	10/22/2021	\$35,138.00
43	End of Life Communication Equipment	Approved	5/3/2021	\$372,136.38
44	Design of Temporary Traffic Signals Segment 2A - Stages 1 and 2	Approved	4/26/2021	\$41,967.00
44.1	Design of Temporary Traffic Signals Segment 3A	Approved	11/24/2021	\$50,813.00
44.2	Design of Temporary Traffic Signals and Video Detections	Approved	10/4/2022	\$907,220.00
45	Thickened Asphalt Concrete (AC) Pavement	Approved	1/19/2021	\$60,000.00
46	MSF Video Servers from Garden Grove Bus Annex to MSF	Approved	10/13/2021	\$40,267.30
47	Archaeological Security and Data Recovery at MSF	Approved	1/19/2021	\$110,000.00
47.1	Archaeological Security and Data Recovery at MSF Additional Funding	Approved	5/8/2023	\$98,000.00
48	Thickened AC Pavement	Approved	4/27/2021	\$1,177,362.00
49	Retaining Wall 501 Encroachment	Approved	6/17/2021	\$181,802.77
50	MSF Street and Yard Utility Conflicts	Approved	5/25/2021	\$200,000.00
51	MSF Yard Light Connection Details	Approved	2/17/2023	\$193,803.00
52	Over Excavation of Unsuitable Soils	Approved	6/21/2021	\$209,500.00
52.1	Over Excavation of Unsuitable Soils Additional Funding	Approved	6/21/2021	\$540,000.00
53	SARB Bridge Decking	Approved	6/17/2021	\$9,002.94
54	Revisions to the Traction and Power Substation Site Plan	Approved	5/18/2022	\$1,200,000.00
55	Bid Item 24 - Earthwork Credit	Approved	5/3/2022	(\$659,666.73)
56	Exploratory Potholing Allowance	Approved	4/26/2021	\$200,000.00
56.1	Exploratory Potholing Allowance	Approved	9/8/2021	\$1,100,000.00
56.2	Exploratory Potholing Allowance	Approved	5/8/2023	\$500,000.00
58	Vehicle Platform Tolerances	Approved	12/6/2021	\$0.00
59	Direct Fixation Fasteners	Approved	6/7/2021	\$0.00
60	Base Contract Utility Credits	Approved	5/25/2021	(\$1,842,680.00)
61	Loop Relocation and Block Out	Approved	10/25/2021	\$80,000.00
61.1	Train-to-Wayside Communications Loop Installation in Embedded Track	Pending		\$300,000.00
62	Backfill of OCS Foundations	Approved	11/8/2021	\$200,000.00
63	Graffiti Removal	Approved	5/18/2021	\$100,000.00
64	SCE Meter Switchgear Engineering and Submittal Costs	Approved	5/18/2021	\$17,618.00
64.1	SCE Meter Switchgear Additional Funding	Approved	10/13/2021	\$191,950.00
64.2	SCE Meter Switchgear Additional Funding	Approved	1/19/2022	\$669,573.00
65	Additional Environmental Soil Investigation on West Santa Ana Boulevard/ Bristol Street Station Stop (Stage 1)	Approved	5/18/2021	\$9,840.60
66	Ground Penetrating Radar Investigation	Approved	9/1/2021	\$208,000.00
67	City of Garden Grove Driveway Standard Update	Approved	11/24/2021	\$20,637.83
68	Ross Intersection Traffic Signal Conduit Installation	Approved	6/7/2021	\$18,000.00
69	Optical Backbone Network System Redundancy	Approved	2/25/2022	\$520,582.00
71	Traffic Signal Interconnect	Approved	4/12/2022	\$208,000.00
71.1	Traffic Signal Interconnect Additional Funding	Approved	5/31/2022	\$500,000.00
71.2	Traffic Signal Interconnect Additional Funding	Approved	3/4/2025	\$200,000.00
71.3	Traffic Signal Interconnect - Ethernet Switches	Pending		\$200,000.00
72	Cathodic Protection at MSF and Car Wash	Approved	11/30/2023	\$292,745.56
77	Pavement Modification at Street Intersections	Approved	12/28/2021	\$208,000.00
77.1	Pavement Modifications Along Embedded Tracks and Grade Crossings	Approved	5/3/2022	\$400,000.00
77.2	Pavement Modifications Along Embedded Tracks and Grade Crossings	Approved	9/22/2023	\$480,000.00
77.3	Pavement Modifications and Restoration Along Embedded Tracks and Grade Crossings	Approved	6/7/2023	\$1,300,000.00
77.4	Pavement Modifications and Restoration Additional Funding	Pending		\$350,000.00
79	MSF Permit Drawings and Revisions	Approved	6/24/2022	\$3,000,000.00
80	Contract Language Modifications Escrow Documents	Approved	4/12/2022	\$0.00
82	Third-Party Utility Work - Southern California Gas: Expose Abandoned Gas Lines	Approved	6/9/2022	\$100,000.00
82.1	Third-Party Utility Work - AT&T	Approved	6/21/2022	\$108,000.00
83	Additional Storage of Four TPSS Units at Factory	Approved	6/21/2022	\$208,000.00
86	OCS Pole Grounding Conduit Routing at PEROW	Approved	5/24/2022	\$200,000.00
86.1	OCS and Platform Grounding Conduit Additional Funding	Approved	4/18/2023	\$300,000.00
88	Traction Power Sub-Station Grounding Revisions	Approved	6/6/2022	\$209,839.49
89	Equipment and Security Upgrades	Approved	6/22/2022	\$2,200,000.00
89.1	Additional Security Modifications	Pending		\$750,000.00
90	Contract Language Modifications - Electronic Compliance Auditing Tool Disadvantaged Business Enterprise Reporting	Approved	11/17/2022	\$0.00
91	Customer Information Center Enclosure and Component Modifications	Approved	6/20/2022	\$1,650,000.00
91.1	Additional Customer Information Center Enclosure and Component Modifications	Pending		\$1,000,000.00
92	Changes to Platform SCE Meter Pedestals	Approved	6/28/2023	\$208,613.05
93	Wheel Turing Pit Modifications	Approved	2/2/2024	\$318,486.42
94	Traffic Signal Pole Modifications	Approved	6/22/2022	\$800,000.00

CCO No.	Title	Status	Date Executed	Cost
96	Relocate Bumping Posts and Train Signal Cabinet at Harbor Station	Approved	6/22/2022	\$400,000.00
105	Modifications to the Track Slab Detail to Clear Utility Conflicts	Approved	5/18/2023	\$3,500,000.00
108	Traffic Signal and Pedestrian Crossing Equipment Modifications	Approved	9/17/2024	\$253,851.23
110	Malcom and Spectrum Utility Concurrent Impacts (Claim 09)	Approved	12/30/2021	\$123,714.20
117	Manual Train Control Override	Approved	4/29/2022	\$208,000.00
117.1	Manual Train Control Override Additional Funding	Approved	6/9/2022	\$700,000.00
118	Added Pedestrian Crossing and Updated City Standard Signage	Approved	6/6/2024	\$64,411.79
130	Drainage and Traction Power Underground Conflicts	Approved	10/11/2023	\$138,724.00
133	MSF Western Concrete Masonry Unit Wall Modifications	Approved	1/27/2023	\$208,000.00
139	Soundwall #2 CIDH Foundation Adjustments	Approved	7/24/2023	\$29,570.95
140	TPSS Additional Rear Doors	Approved	9/28/2023	\$64,275.10
145	Structural Steel Quality Control Inspection and Testing	Approved	5/31/2022	\$350,000.00
146	Train Signal Modifications	Approved	6/14/2022	\$850,000.00
148	Emergency Communication Devices	Approved	2/17/2023	\$195,000.00
150	Fourth Street Extended Work Hours and Public Safety	Approved	9/28/2022	\$500,000.00
150.1	Fourth Street Extended Work Hours and Public Safety Additional Funding	Approved	12/15/2022	\$800,000.00
150.2	Fourth Street Extended Work Hours Additional Funding	Approved	6/18/2024	\$250,000.00
157	Traffic Control Allowance Extension (Bid Item 33)	Approved	2/6/2023	\$208,000.00
157.1	Traffic Control Allowance Extension (Bid Item 33)	Approved	9/21/2023	\$300,000.00
158	Station Canopy Glass Price Escalation	Approved	10/17/2022	\$72,607.09
161	Contract Language Modification - Article 9 - Notices	Approved	11/17/2022	\$0.00
164	Station Platform, Parking Lot, and Sasser Park Lights	Approved	5/18/2023	\$300,000.00
169	Traffic Signal Systems Spare Equipment for City of Santa Ana	Approved	3/28/2025	\$56,626.20
170	Station Spare Parts	Approved	1/2/2025	\$518,592.05
173	Buried OCS Pole Grounding	Approved	8/22/2024	\$209,500.00
173.1	Buried OCS Pole Grounding	Approved	8/27/2024	\$123,643.00
177	Traffic Signal Plan Revisions: Utilizing Different Anchor Bolt Patterns	Approved	1/27/2023	\$208,000.00
177.1	Traffic Signal Pole Revisions Additional Funding	Pending		\$100,000.00
178	Station Standby Lighting	Approved	12/16/2024	\$127,795.00
182	Homeless Security and Cleanup	Approved	2/16/2023	\$208,000.00
183	Track Switch Indication Lights	Approved	2/28/2023	\$480,000.00
184	Santa Ana Boulevard Extended Hours	Approved	12/14/2022	\$208,000.00
185	Additional Builder Risk Insurance	Approved	2/8/2023	\$550,000.00
186	MSF Catenary Interlock System	Approved	2/17/2023	\$208,000.00
186.1	MSF Interlock System Additional Funding	Approved	12/27/2024	\$781,619.17
187	Schedule Impacts Associated with TIE 08	Approved	10/24/2022	\$0.00
187.1	Schedule Impacts Associated with TIE 08	Approved	6/22/2023	\$2,847,000.00
188	Relocation of the Traction Power Track Connection Boxes in Segment 4	Approved	5/23/2024	(\$102,757.22)
189	MSF Grounding Additions	Pending		\$178,283.21
190	Track Bumping Post Modifications	Approved	6/13/2024	\$206,920.32
191	Four-Fold and Coiling Doors at the MSF	Approved	6/20/2023	\$300,902.44
193	Embedded Track Transition to Paved Ballasted Track	Approved	2/20/2024	\$182,498.67
194	Malcom's Differing Site Condition Impacts for CIDH Pile Installation (Claim 10)	Approved	3/16/2023	\$209,999.00
195	Schedule Impacts Associated with TIE 12	Approved	3/27/2023	\$0.00
195.1	Schedule Impacts Associated with TIE 12	Approved	6/20/2023	\$1,249,403.38
195.2	Schedule Impacts Associated with TIE 12	Approved	5/3/2024	\$245,501.00
195.3	Schedule Impacts Associated with TIE 12	Approved	5/6/2024	\$940,580.78
196	Shore Power at the MSF	Approved	8/13/2024	\$363,651.56
197	OCS Pole and Foundation Revisions	Approved	6/19/2023	\$128,706.34
198	Fourth Street Planter Lighting, Irrigation Wiring, and Power Modifications	Approved	9/16/2024	\$85,247.00
199	Improvements at Civic Center Plaza	Approved	3/16/2023	\$208,000.00
200	Infrastructure for Electric Vehicle Charger at Santa Ana Regional Transportation Center	Approved	8/21/2023	\$25,000.00
201	Intumescent Fireproof Coating on Structural Steel at the MSF	Approved	12/29/2023	\$450,000.00
201.1	Intumescent Fireproof Coating on Structural Steel at the MSF	Approved	5/29/2024	\$123,039.00
203	Sidewalk Paver Material and Labor Escalation	Approved	6/19/2023	\$209,730.72
204	MSF Pedestal Track Spacing M1-M2	Approved	12/28/2023	\$20,325.88
206	Track Isolation at end of Embedded Track	Approved	6/6/2024	\$119,790.41
207	Sewer Ejector Changes at MSF	Approved	2/1/2024	\$208,221.98
208	Ultrasonic Cleaner Model Changes	Approved	6/7/2024	\$44,401.70
209	Harbor OCS Modifications	Approved	2/4/2025	\$205,657.98
210	MSF Extended Work Hours	Approved	1/3/2024	\$209,500.00
211	OCS Pole Re-Raking and Adjustment	Approved	6/4/2024	\$208,000.00
212	Restraining Rail Conflicts at M1, M2, M3 and Y1 Tracks	Approved	5/8/2024	\$35,426.59
213	Various Sidewalk and Brick Restoration Work	Approved	8/12/2024	\$209,500.00
214	SCE Switchgear Breaker Setting and Commissioning	Approved	4/30/2024	\$143,986.69
215	Emergency Walkway Track Crossing at Raitt and Fairview Platform	Approved	12/28/2023	\$113,812.10
217	Improvements at Sasser Park	Approved	5/8/2024	\$209,298.00
220	Ross Street Intersection Modifications	Approved	8/30/2024	\$140,421.07
221	Electrical Modifications at Sasser Park	Approved	8/30/2024	\$128,045.06
222	SCE Electrical and Service Connections at Various Intersections	Approved	12/27/2024	\$368,980.95
225	Train Control Battery Backup	Approved	9/17/2024	\$349,848.89

CCO No.	Title	Status	Date Executed	Cost
226	Traffic Signal Pole and Mast Arm Adjustments at Santiago, Shelton and Bristol	Approved	9/26/2024	\$52,702.00
227	Traffic Signal and Striping Modifications Due to the City of Santa Ana Bike Lane Project	Approved	8/30/2024	\$45,088.00
228	OCS Feeder Cable Theft Protection	Approved	10/14/2024	\$243,904.68
230	Traffic Signal Cabinet Relocation Sycamore Street and Santa Ana Boulevard	Approved	9/16/2024	\$93,878.89
231	Bid Item 61 (Utility Service Fee) Extension	Approved	6/7/2024	\$185,000.00
232	Platform Modifications	Approved	11/13/2024	\$70,648.35
233	MSF Information Technology Room and Data Port and Communication Device Changes	Approved	11/18/2024	\$1,519,579.00
234	Schedule Impacts Associated with TIE 18	Approved	5/8/2024	\$0.00
235	Diesel Particulate Filter	Approved	10/11/2024	\$77,050.69
237	Garfield & Sycamore SCE Services Pedestals and Foundation Changes	Approved	9/30/2024	\$56,300.78
239	TPSS #01 Alternative Installation Method	Approved	12/12/2024	\$40,000.00
241	Modifications to the East and West Gates at MSF	Pending		\$425,000.00
242	OCS Pole Ground Repair in PE ROW	Approved	2/4/2025	\$148,044.06
243	Overhead Utility Conflicts at Mortimer and SAB - Traffic Signal Pole No.'s 02 and 03	Approved	12/12/2024	\$38,498.93
245	Parton-Santa Ana Blvd Sidewalk Restoration	Approved	11/14/2024	\$22,763.02
246	Modifications to Signage, Push Buttons and Signal Heads	Approved	11/13/2024	\$76,618.35
250	Modify Pumps in the Wheel Truing and Service and Inspection Pit	Pending		\$325,000.00
251	Accelerated Schedule Agreement	Approved	9/30/2024	\$40,338,054.00
252	Public Conveyance and Safety Enhancements	Approved	2/12/2025	\$150,000.00
253	SCE Invoices for Relocations due to GO 95 Conflicts	Approved	2/4/2025	\$150,000.00
254	Fairview Crossing Traffic Signal Poles Conflict with Overhead SCE Lines	Approved	2/4/2025	\$21,225.37
255	OCS Modifications	Approved	1/21/2025	\$200,000.00
258	Harbor Station Adjustments	Pending		\$200,000.00
260	MSF Finishes	Approved	3/13/2025	\$200,000.00
261	OCS Cross Contact Assemblies on Hand	Approved	3/4/2025	\$200,000.00
263	CIC Battery Replacement	Pending		\$202,329.50
266	MSF Systems	Approved	3/14/2025	\$200,000.00
267	Wheel Truing Machine Testing	Approved	3/28/2025	\$92,397.00
275	Overhead Contact System Pole Twist and Arm Capacity	Pending		\$750,000.00
293	Communications Systems Software and SCADA	Pending		\$900,000.00

Subtotal Executed CCOs \$121,715,027.74

Subtotal Pending CCOs \$6,587,612.71

TOTAL CCOs \$128,302,640.45

ORIGINAL VALUE \$220,538,649.00

PROPOSED REVISED VALUE \$348,841,289.45



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Mobile Ticketing Services

Overview

On May 11, 2020, the Board of Directors approved an agreement with Siemens Mobility, Inc. (formerly Bytemark, Inc.) to develop, host, license, and maintain a mobile ticketing application for the Orange County Transportation Authority's OC Bus service. The agreement includes a five-year initial term and two, two-year option terms. Staff is requesting Board of Directors' approval to exercise the first option term to continue providing mobile ticketing services. The initial contract term will expire on June 30, 2025, and an amendment is needed to exercise the first option term for service continuity.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 4 to Agreement No. C-0-2067 between the Orange County Transportation Authority and Siemens Mobility, Inc. in the amount of \$207,621, to exercise the first option term for licensing, maintenance, and commission fees of the mobile ticketing application effective through June 30, 2027. This will increase the maximum cumulative payment obligation to a total contract value of \$1,333,049.

Background

Agreement No. C-0-2067 was executed with Bytemark, Inc. on June 30, 2020. On August 1, 2023, Siemens Mobility, Inc. assumed all contractual obligations following a corporate merger. Since implementation, the mobile ticketing platform has supported multilingual functionality, college pass distribution, and validator integration. Amendments have included license fee reductions, Vietnamese language support, loyalty platform application programming interfaces integration, and increased commission authority. Mobile ticketing fare revenue represents 16 percent of total fare revenue collected and remains an

important payment method for mobile fare users, including students in the College Pass Program.

Discussion

The proposed amendment exercises the first two-year option term for licensing, maintenance, and commission costs for the mobile application and ensures uninterrupted service and a seamless transition to the new Rider Validation System (RVS). The RVS is anticipated to launch in late 2025 and will introduce new fare media, including the Wave Card, an enhanced mobile application, and support the use of credit/debit card payments. In order to facilitate a smooth transition between the existing mobile application and the new mobile application, continued access to the existing application is needed. While sales of new fare media will cease on the current platform following the RVS launch, backend support will remain available to honor previously purchased passes throughout the transition. Staff will decommission the existing application once customers are fully transitioned to the new application, which is planned for spring 2026. Once riders are fully transitioned to the new application and the existing application is decommissioned, OCTA will no longer pay any fees associated with the existing application.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board of Directors (Board)-approved policies and procedures for professional and technical services. On May 11, 2020, the Board approved the award of the agreement with Siemens Mobility, Inc. to develop, host, license, and maintain a mobile ticketing application. The original agreement was awarded on a competitive basis and includes a five-year initial term in the amount of \$1,101,058 and two, two-year option terms. The agreement has been previously amended as described in Attachment A.

The proposed Amendment No. 4 is to exercise the first option term of the agreement through June 30, 2027, consistent with the rates negotiated in the original agreement. Amending this agreement will increase the maximum cumulative payment obligation by \$207,621 to continue providing mobile ticketing services, bringing the total contract value to \$1,333,049.

Fiscal Impact

Funding for this amendment is included in OCTA's Fiscal Year 2024-25 Budget, Finance and Administration Division, account nos. 1261-9028-D3131-THK and 1288-7669-D3131-THK.


Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Amendment No. 4 to Agreement C-0-2067 with Siemens Mobility, Inc, in the amount of \$207,621, for hosting, licensing, maintenance, and commission services providing the Orange County Transportation Authority the ability to administer mobile ticketing passes through the OC Bus Mobile Ticketing application, bringing the total contract amount to \$1,333,049.

Attachment

- A. Siemens Mobility, Inc. (Formerly Bytemark, Inc.) Agreement No. C-0-2067 Fact Sheet

Prepared by:

A handwritten signature in black ink, appearing to read 'ISAH'.

Isaac Herrera
Section Manager II,
Revenue and Grants Administration
714-560-5870

Approved by:

A handwritten signature in blue ink, appearing to read 'A. Oftelie'.

Andrew Oftelie
Chief Financial Officer
Finance and Administration
714-560-5649

A handwritten signature in blue ink, appearing to read 'Pia Veasapen'.

Pia Veasapen
Director
Contracts Administration and
Materials Management
714-560-5619

**Siemens Mobility, Inc. (Formerly Bytemark, Inc.)
Agreement No. C-0-2067
Fact Sheet**

1. May 11, 2020, Agreement No. C-0-2067, \$1,101,058, approved by the Board of Directors (Board).
 - Agreement to develop, host, license, and maintain a mobile ticketing application.
 - Five-year initial term effective through June 30, 2025, with two, two-year option terms.
2. July 6, 2022, Amendment No. 1 to Agreement No. C-0-2067, (\$85,000), approved by Contracts Administration and Materials Management Department (CAMM).
 - Reduced the license and maintenance fees for year one and year two in the amount of \$90,000.
 - Added Vietnamese language to application at an increase of \$5,000.
3. June 30, 2023, Amendment No. 2 to Agreement No. C-0-2067, \$17,370, approved by CAMM.
 - Amendment to amend the scope of work to allow integration with Brandmovers for the distribution of tickets and passes to rider accounts within the OC Bus mobile application.
4. August 1, 2023, Assignment & Assumption Agreement, \$0, approved by CAMM.
 - Siemens Mobility, Inc. assumed all contractual obligations following a corporate merger.
5. January 23, 2025, Amendment No. 3 to Agreement No. C-0-2067, \$92,000, approved by CAMM.
 - Amendment for ongoing commission payment obligations.
6. May 12, 2025, Amendment No. 4 to Agreement No. C-0-2067, \$207,621, pending approval by the Board.
 - Exercise the first option term of the agreement and effective July 1, 2025 through June 30, 2027.

Total committed to Siemens Mobility, Inc., Agreement No. C-0-2067: \$1,333,049.



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects

Overview

On January 13, 2025, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals to retain consultants to provide on-call architectural and engineering design and construction support services for transit facility projects. Board of Directors' approval is requested to select the firms to perform the required work.

Recommendations

- A. Approve the selection of Stantec Architecture Inc., M. Arthur Gensler, Jr. & Associates, Inc., Anil Verma Associates, Inc., STV Incorporated, Dahl, Taylor & Associates, Inc., and IDS Group, Inc., in the aggregate amount of \$3,000,000, as the firms to provide on-call architectural and engineering design and construction support services for transit facility projects.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2610 between the Orange County Transportation Authority and Stantec Architecture Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- C. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4060 between the Orange County Transportation Authority and M. Arthur Gensler, Jr. & Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.

- D. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4061 between the Orange County Transportation Authority and Anil Verma Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- E. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4062 between the Orange County Transportation Authority and STV Incorporated, to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- F. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4063 between the Orange County Transportation Authority and Dahl, Taylor & Associates, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.
- G. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-4064 between the Orange County Transportation Authority and IDS Group, Inc., to provide on-call architectural and engineering services for a three-year initial term, and one, two-year option term.

Discussion

The Orange County Transportation Authority (OCTA) owns, operates, and maintains five maintenance and operations bus bases, two park-and-ride facilities, and five transportation centers. The facilities are comprised of 56 buildings and structures totaling over 400,000 square feet. The structures are situated on approximately 89 acres of property throughout Orange County.

Architectural and engineering (A&E) design and construction support services for capital improvements, maintenance projects, facility modifications, and other projects as requested by OCTA, will be necessary to maintain OCTA's transit facilities in a state of good repair. Typical facility projects include repair and/or installation of bus hoists, elevators, heating ventilation and air conditioning systems, parking lot concrete and asphalt pavement and striping, roof replacements, zero-emission bus fueling systems, and facility modifications for compliance with the Americans with Disabilities Act.

The current bench of five on-call consultant agreements was established in 2020, and the agreements are scheduled to expire starting August 31, 2025. The new on-call list of firms will replace the existing bench. Services provided under this new on-call bench of agreements will be requested on an as-needed basis and authorized through the issuance of contract task orders (CTO). Each CTO will include a site-specific statement of work to establish the project duration, document the agreed-upon price, and provide any other information that may be required to perform the services.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for A&E services that conform to both federal and state laws. Proposals are evaluated and ranked in accordance with the qualifications of the firm, staffing and project organization, as well as work plan. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. Evaluation of the proposals was conducted based on overall qualifications to develop a competitive range of offerors. The recommended firms are requested to submit cost proposals, and the final agreements are negotiated. The contracts awarded will have a three-year initial term, and one, two-year option term.

On January 13, 2025, the Board authorized the release of Request for Proposals (RFP) 4-2610, which was electronically issued on CAMM NET. The Project was advertised in a newspaper of general circulation on January 13 and January 20, 2025. A pre-proposal conference was held on January 21, 2025, with 25 attendees representing 17 firms. Three addenda were issued to provide a copy of the pre-proposal conference registration sheets and presentation, provide responses to questions received, and handle administrative issues related to the RFP.

On February 12, 2025, seven proposals were received. An evaluation committee consisting of staff from the Contracts Administration and Materials Management, Facilities Engineering, Health, Safety, and Environmental Compliance, Capital Project Delivery, and Maintenance-Administration departments met to review the proposals received. The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

- Qualifications of the Firm 35 percent
- Staffing and Project Organization 40 percent
- Work Plan 25 percent

In developing the criteria weightings, several factors were considered. The qualifications of the firm was assigned a high level of importance since firms with a variety of design and project experience are advantageous to the project. The greatest importance was assigned to staffing and project organization, as the qualifications of the project manager and task leaders are critical to successful completion of the individual CTO. The firms' work plan has the lowest weighting and will broadly evaluate the proposed project management approach and processes necessary for effective execution of the CTOs. As this is an A&E procurement, price was not an evaluation criterion pursuant to state and federal laws.

The procurement sought to establish a pool of qualified firms to perform the required services. Once the pool of qualified firms is established, specific work assignments will be made via the issuance of CTOs on a rotational basis, in accordance with OCTA's procurement policies and procedures.

The evaluation committee reviewed and discussed all responsive proposals based on the evaluation criteria and found six firms most-qualified to perform the required services. The most qualified firms are listed below in alphabetical order:

Firm and Location

Anil Verma Associates, Inc. (AVA)
Headquarters: Los Angeles, California
Project Office: Los Angeles, California

Dahl, Taylor & Associates, Inc. (DTA)
Headquarters: Santa Ana, California
Project Office: Santa Ana, California

IDS Group, Inc. (IDS)
Headquarters: Irvine, California
Project Office: Irvine, California

M. Arthur Gensler, Jr. & Associates, Inc. (Gensler)
Headquarters: Newport Beach, California
Project Office: Los Angeles, California

Stantec Architecture Inc. (Stantec)
Headquarters: Edmonton, Alberta, Canada
Project Office: Los Angeles, California

STV Incorporated (STV)
Headquarters: New York, New York
Project Office: Irvine, California

On March 24, 2025, the evaluation committee interviewed the six short-listed firms. The interviews consisted of a presentation allowing each team to discuss its qualifications, highlight its personnel, and respond to the evaluation committee's questions. Questions were asked relative to each team's role on transit facility projects similar those identified in the RFP scope of work, the responsibilities of the proposed project manager during the CTO, experience working with proposed subconsultants, and the strategy for ensuring health, safety, and environmental compliance across multiple project sites. Each firm was also asked specific clarification questions related to its proposal and/or interview responses.

Based on the final scores, as well as the evaluation of written proposals and information obtained from the interviews, the evaluation committee recommends all six firms for award. Each of the six firms demonstrated qualifications and experience successfully delivering projects of the same and/or similar nature for transit facilities with public agencies. The firms demonstrated a sound and thorough understanding of the scope of work, the various project types, and the ability to meet OCTA's needs. Brief summaries of the evaluation results of the recommended firms follow.

Qualifications of the Firm

All six recommended firms demonstrated substantial and directly relevant experience successfully providing design and construction support services on similar transit facility projects. These firms demonstrated expertise in civil, mechanical, electrical, and structural design, as well as zero-emission fueling technology and other required technical specialties.

These multidisciplinary firms demonstrated robust capabilities in both design and construction support for a wide range of transit facility design projects. All recommended firms have successfully provided similar services for OCTA and/or other public agencies, having delivered hundreds of transit facility projects for public agencies such as the Los Angeles County Metropolitan Transportation Authority, Bay Area Rapid Transit, San Diego Metropolitan Transit System, City of Los Angeles Department of Transportation, and Santa Barbara Metropolitan Transit District.

Staffing and Project Organization

All firms have adequate staff resources to support on-call services. The recommended firms proposed experienced teams that represent various disciplines to support OCTA's broad range of projects for the next three years. The staff of each firm was familiar with the local agencies that have jurisdiction over OCTA's projects and the local permitting processes. Interviews with the firms validated staff credentials and ability to support OCTA's anticipated projects.

The project managers and key personnel proposed by the recommended firms, along with the subconsultant teams, are all qualified and demonstrate extensive knowledge of transit facility projects. All recommended firms proposed experienced and qualified project managers and other key personnel, as well as supporting technical personnel, to serve and assist OCTA in facility modification projects and provide the required support services during construction. The proposed availability of each team's key personnel met OCTA's anticipated projects.

Work Plan

The work plans submitted by the recommended firms fully align with the scope of work outlined in the RFP. Each firm demonstrated a comprehensive understanding of the on-call process by outlining a complete and logical methodology for executing each CTO. The proposals effectively addressed critical elements such as project scheduling, communication protocols, quality assurance/quality control, safety measures, and budget management. Additionally, the firms exhibited a strong commitment to designing projects that meet anticipated project needs while staying within budget.

Procurement Summary

Based on the evaluation of the written proposals, and information obtained during the interviews, the evaluation committee recommends award of contracts to Stantec Architecture Inc., M. Arthur Gensler, Jr. & Associates, Inc., Anil Verma Associates, Inc., STV Incorporated, Dahl, Taylor & Associates, Inc., and IDS Group, Inc. All six recommended firms proposed highly qualified personnel, demonstrated relevant and recent experience in transit facility modification projects, and a sound and thorough understanding of the scope of work. All six firms conducted interviews that demonstrated an understanding of the overall requirements of the RFP.

Fiscal Impact

Funding for this project is included in the OCTA Proposed Fiscal Year 2025-26 Budget, Capital Programs Division, Account No. 1722-7629-D3107-2BT, and will be funded through local transportation funds.

Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute agreements with Stantec Architecture Inc., M. Arthur Gensler, Jr. & Associates, Inc., Anil Verma Associates, Inc., STV Incorporated, Dahl, Taylor & Associates, Inc., and IDS Group, Inc., in the aggregate amount of \$3,000,000, as the firms to provide on-call architectural and engineering design and construction support services for transit facility projects for a three-year term with one, two-year option term.

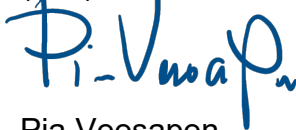
Attachments

- A. Review of Proposals - RFP 4-2610 On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects
- B. Proposal Evaluation Criteria Matrix (Short-Listed) - RFP 4-2610 On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects
- C. Contract History for the Past Two Years - RFP 4-2610: On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects

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Approved by:



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Review of Proposals
RFP 4-2610 On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects
Presented to Transit Committee - May 8, 2025

7 proposals were received, 6 firms were interviewed, 6 firms are being recommended.

Overall Ranking	Overall Score	Firm & Location	Subcontractors	Evaluation Committee Comments
1	91	Stantec Architecture Inc. Los Angeles, California	Diaz Yourman & Associates Dokken Engineering Jacobus & Yuang, Inc.	Highest-ranked overall proposal. Recent and relevant experience as a prime consultant with transit facility projects at Orange County Transportation Authority (OCTA) and other transit agencies. Prime consultant is a multi-disciplined firm. Proposed retaining the same project manager and numerous other supporting personnel from the current agreement, all of whom are experienced and well qualified. Demonstrated a comprehensive understanding of the work plan by initially conducting in-depth interviews to assess project needs, followed by a detailed discussion outlining the sequence of tasks. Interview clarified which personnel were designated as key personnel. Very good references.
2	87	M. Arthur Gensler, Jr. & Associates, Los Angeles, California	Cornerstone Solutions, Inc. Cumming Management Group, Inc. Group Delta Consultants, Inc. Horton Lees Brogden Lighting Design, Inc. Jensen Hughes, Inc. Kittleson & Associates, Inc. KPFF, Inc. PBS Engineers, Inc.	Second-ranked proposal. Recent and relevant experience as a prime consultant for similar transit facility projects. Prime consultant is a multi-disciplined firm. Proposed personnel are experienced and well qualified. Work plan demonstrated the firm's approach to thoroughly assessing project needs and designing for usability for all users and sustainability. Interview clarified the key role each proposed key personnel played on cited projects. Very good references.
3	85	Anil Verma Associates, Inc. Los Angeles, California	Coffman Engineers, Inc. ENGEO RSE Corporation Systra Consulting, Inc.	Third-ranked proposal. Recent and relevant experience as a prime consultant for similar transit facility projects. Prime consultant is a multi-disciplined firm. Proposed personnel are experienced and well qualified. Work plan included the personnel responsible for each activity. Interview clarified that the prime consultant was the prime consultant on all cited projects. Very good references.
4	83	STV Incorporated Irvine, California	Coast Surveying, Inc. Diaz Yourman & Associates Jacobus & Yuang, Inc.	Fourth-ranked proposal. Relevant experience as a prime consultant with transit facility projects with other transit agencies and previously for OCTA. Prime consultant is a multi-disciplined firm. Proposed retaining some of the same personnel with experience on OCTA projects, all of whom are experienced and well qualified. Workplan emphasized understanding the project needs as the first step to completing each project. Interview clarified which personnel were proposed as key personnel. Firm provided services to OCTA on the previous on-call A&E facility design project agreement. Very good references.
5	81	Dahl, Taylor and Associates, Inc. Santa Ana, California	House of Engineers, Inc. Huitt-Zollars, Inc. Lynn Capouya, Inc. Stern Architects, Inc.	Fifth-ranked proposal. Recent and relevant experience as prime consultant with transit facility projects at OCTA and other public agency projects. Prime consultant is a multi-disciplined firm. Proposed retaining the same project manager and many other supporting personnel from the current agreement who are experienced and well qualified. Workplan included quality control plan with multiple levels of review and involves the principal. Detailed responses to interview questions, including clarification of key personnel. Interview emphasized the firm's speed of responsiveness and attention to detail. Very good references.

Review of Proposals
RFP 4-2610 On-Call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects
Presented to Transit Committee - May 8, 2025

7 proposals were received, 6 firms were interviewed, 6 firms are being recommended.

Overall Ranking	Overall Score	Firm & Location	Subcontractors	Evaluation Committee Comments
6	80	IDS Group, Inc. Irvine, California	Associated Soils Engineering, Inc. BOCA Group International, Inc. C Below Subsurface Imaging Group Delta Consultants, Inc. SCDS Consulting Design Veneklasen Associates, Inc.	Sixth-ranked proposal. Recent and relevant experience as a prime consultant with transit facility projects at OCTA and other transit agencies. Prime consultant is a multi-disciplined firm. Proposed retaining the same project manager and numerous other supporting personnel from the current agreement, all of whom are experienced and well qualified. Work plan addressed all required tasks and outlined potential corrective actions for issues that could delay the schedule. Interview clarified that the prime consultant was the prime consultant on all cited projects. Very good references.

Evaluation Panel (5 members)

Contracts Administration and Materials Management (1)
Facilities Engineering (1)
Health, Safety, and Environmental Compliance (1)
Capital Project Delivery (1)
Maintenance-Administration (1)

Evaluation Criteria

Qualifications of the Firm
Staffing and Project Organization
Work Plan

Weight Factors

35 percent
40 percent
25 percent

PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed)
RFP 4-2610 On-Call Architectural and Engineering Design and
Construction Support Services for Transit Facility Projects

Stantec Architecture Inc.

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.5	4.5	4.5	4.5	5.0	7	32.2
Staffing/Project Organization	4.5	4.5	4.5	4.5	4.5	8	36.0
Work Plan	4.5	4.5	4.5	4.5	4.5	5	22.5
Overall Score	90	90	90	90	94		91

M. Arthur Gensler, Jr. & Associates, Inc.

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.5	4.5	4.5	4.5	4.5	7	31.5
Staffing/Project Organization	4.0	4.5	4.5	4.0	4.5	8	34.4
Work Plan	4.5	4.0	4.0	4.5	4.5	5	21.5
Overall Score	86	88	88	86	90		87

Anil Verma Associates, Inc.

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.5	4.5	4.5	4.0	4.5	7	30.8
Staffing/Project Organization	4.5	4.0	4.0	4.5	4.5	8	34.4
Work Plan	4.0	4.0	4.0	4.0	4.0	5	20.0
Overall Score	88	84	84	84	88		85

STV Incorporated

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.5	4.0	4.0	4.5	4.5	7	30.1
Staffing/Project Organization	4.0	4.5	4.5	4.0	4.0	8	33.6
Work Plan	3.5	4.0	4.0	4.0	3.5	5	19.0
Overall Score	81	84	84	84	81		83

Dahl, Taylor and Associates, Inc.

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.5	4.0	4.0	4.0	4.5	7	29.4
Staffing/Project Organization	4.0	4.0	4.0	4.0	4.5	8	32.8
Work Plan	4.0	4.0	4.0	3.5	3.5	5	19.0
Overall Score	84	80	80	78	85		81

IDS Group, Inc.

Evaluator Number	1	2	3	4	5	Weights	Criteria Score
Qualifications of Firm	4.0	4.0	4.0	4.0	4.5	7	28.7
Staffing/Project Organization	4.0	4.0	4.0	4.0	4.0	8	32.0
Work Plan	4.0	3.5	3.5	4.0	4.0	5	19.0
Overall Score	80	78	78	80	84		80

The score for the non-short-listed firm was 65.

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 4-2610: On-call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
STANTEC ARCHITECTURE INC.						
Contract Type: Contract Task Order	A53595	Replacement of Mechanical Units at Santa Ana Bus Base	March 20, 2023	August 31, 2025		\$ 412,085
Subconsultants:						
Jacobus & Yuang, Inc.					\$ 20,246	
Contract Type: Time and Expense	C-2-3003	405 Express Lanes Traffic and Revenue Analysis	April 19, 2023	March 31, 2026		\$ 300,000
Subconsultants:						
AimTD, LLC						
Tippecanoe Works						
Transportation Studies, Inc.						
Wiltec, Inc.						
Contract Type: Contract Task Order	A48539	Building Repairs at Irvine Construction Circle Bus Base	August 16, 2021	July 31, 2023		\$ 87,157
Subconsultants:						
Jacobus & Yuang, Inc.					\$ 10,866	
Contract Type: Firm Fixed Price	C-9-0965	Design Services for Orange County Transportation Authority Transit Security and Operations Center	June 1, 2020	December 31, 2027		\$ 5,893,495
Subconsultants:						
Coast Surveying, Inc.					\$ 22,521	
Diaz Yourman & Associates					\$ 238,575	
Fuel Solutions, Inc.					\$ 16,248	
Jacobus & Yuang, Inc.					\$ 108,941	
Lynn Capouya, Inc.					\$ 104,361	
Miyamoto International, Inc.					\$ 331,642	
PacRim Engineering, Inc.					\$ 781,950	
Stantec Consulting Services, Inc.					\$ 2,144,193	
Total						\$ 6,692,737
M. ARTHUR GENSLER, JR. & ASSOCIATES						
Contract Type: Firm Fixed Price	C-3-2367	Newport Transportation Center Improvement Study	June 5, 2023	December 31, 2024		\$ 198,704
Subconsultants:						
KPJ Consulting					\$ 8,300	
Kittelson & Associates, Inc.					\$ 53,840	
Contract Type: Firm Fixed Price	C-3-3003	Fullerton Park-and-Ride Joint Use Master Plan	May 30, 2024	January 31, 2026		\$ 474,575
Subconsultants:						
De Novo Planning Group					\$ 43,050	
Kittelson & Associates, Inc.					\$ 14,000	
KPJ Consulting					\$ 72,850	
Total						\$ 673,279
ANIL VERMA ASSOCIATES, INC.						
Contract Type:	None					N/A
Subconsultants:						
Total						\$0

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 4-2610: On-call Architectural and Engineering Design and Construction Support Services for Transit Facility Projects

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
STV INCORPORATED						
Contract Type: Firm Fixed Price	C-2-2657	Regional Rail Planning Inventory	August 16, 2022	May 31, 2023		\$ 49,990
Subconsultants:						
None						
Total						\$ 49,990
DAHL, TAYLOR & ASSOCIATES, INC.						
Contract Type: Contract Task Order	A47554	Replacement of Fire Alarm Control Panels at Santa Ana Bus Base	April 30, 2021	November 30, 2025		\$ 133,366
Subconsultants:						
None						
Contract Type: Contract Task Order	A52846	Metered (Southern California Edison) Electrical Switchgear and Standby Generator for Electric Vehicle Chargers at Garden Grove and Santa Ana Bus Bases	November 2, 2022	November 30, 2025		\$ 484,003
Subconsultants:						
None						
Contract Type: Contract Task Order	A57720	Preliminary Project Documents and Estimate for Design-Build Hydrogen Storage and Fueling Facilities at Garden Grove Bus Base	June 12, 2024	June 12, 2024		\$ 539,111
Subconsultants:						
Huitt-Zollars, Inc.					\$ 14,816	
NMG Geotechnical, Inc.					\$ 36,700	
Total						\$ 1,156,480
IDS GROUP, INC.						
Contract Type: Contract Task Order	A52472	Building Repairs at Santa Ana Bus Base	November 21, 2022	November 3, 2025		\$ 160,343
Subconsultants:						
Group Delta Consultants, Inc.					\$ 60,553	
Contract Type: Contract Task Order	A49176	Environmental Studies in Support of Interstate 5 and State Route 55	December 3, 2021	September 30, 2023		\$ 193,715
Subconsultants:						
Group Delta Consultants, Inc.					\$ 161,715	
Total						\$ 354,058



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: OC Streetcar Project Quarterly Update

Overview

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar project activities from January 2025 through April 2025.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA), in cooperation with the cities of Santa Ana and Garden Grove, is implementing a modern streetcar running between the Santa Ana Regional Transportation Center in the City of Santa Ana (City) and the intersection of Harbor Boulevard and Westminster Avenue in the City of Garden Grove. The OC Streetcar project (Project) will improve transit connectivity and accessibility, increase transit options, relieve congestion, and provide benefits to the community and traveling public. The Project is being implemented as part of Measure M2 Project S – Transit Extensions to Metrolink, approved by Orange County voters in November 2006.

Construction of the 4.15-mile alignment involves complex and specialized work, including the installation of embedded track in existing streets, an overhead contact system (OCS) to supply power to the vehicles, new traffic signals and transit signal priority at intersections, stops with canopies, bridges, and a maintenance and storage facility (MSF). A map of the alignment is included in Attachment A.

The Project includes ten streetcar stops in each direction (four shared center platforms and six side platforms in each direction, for a total of 16 platforms). Each stop includes a canopy, benches, leaning rails, trash cans, lighting, variable message signs, video cameras, a public address system, and ticket vending machines. Platforms will be 14 inches high to enable level boarding to streetcar vehicles.

The MSF can accommodate up to 15 modern streetcar vehicles, as well as all necessary administration, operations, vehicle maintenance, parts storage, and maintenance-of-way needs for the Project. The MSF will also include secured exterior vehicle storage, a wye track for turning vehicles end-for-end, a free-standing vehicle wash, employee parking, and fire department/delivery access.

On March 26, 2018, the OCTA Board of Directors (Board) awarded a contract to Siemens Industries, Inc. (Siemens) for the manufacturing and delivery of eight modern streetcar vehicles, spare parts, and special tools. On September 24, 2018, the Board awarded the construction contract for the Project to Walsh Construction Company II, LLC (Walsh). On November 30, 2018, the Federal Transit Administration (FTA) executed the Full Funding Grant Agreement (FFGA), securing \$149 million in federal New Starts discretionary funding for the Project. In February 2019, the FFGA was funded through the FTA Transit Award Management System, which was the last step necessary to begin the drawdown of federal funding. As of 2025, \$136.6 million has been drawn from the FFGA. On May 22, 2020, the Board awarded a contract to Herzog Transit Services, Inc. (Herzog), to provide operations and maintenance services for the initial start-up and pre-revenue period, and a five-year revenue term.

Discussion

The following is the status of completed milestones and ongoing project activities related to construction, vehicle manufacturing, operations, and public outreach.

Construction

Significant progress continues to be made on project construction in preparation for the upcoming delivery of OC Streetcar vehicles. The bridges over the Santa Ana River and Westminster Avenue are complete, all tracks and OCS poles have been installed, three of the four traction power substations have been installed and energized, and station platforms and major amenities have been installed.

During the reporting period, several significant project milestones were achieved. The construction milestone related readiness of the MSF to receive vehicles was achieved on February 28, 2025, and a temporary certificate of occupancy for the MSF was issued by the City on March 20, 2025. These milestones were significant accomplishments related to advancing the overall project schedule.

Other construction activities that are complete or ongoing this quarter include:

Pacific Electric Right-of-Way (PE ROW)

- Overhead wire installation on OCS poles is over 90 percent complete
- Train warning and gate systems installation at the Fairview Street, Fifth Street, and Raitt Street at-grade crossings are over 90 percent complete
- Final train signal control programming is ongoing

MSF

- Installation of underground water lines, landscaping, doors, sidewalk along Fifth Street, Information Technology room, heating, ventilation, air conditioning, drywall, plumbing, and electrical work is complete
- Furniture delivered for a majority of the offices and bathroom plumbing, carpeting, and indoor signage is complete
- Asphalt concrete is complete in the yard track area and the car wash structure is complete
- Installation of the wheel truing machine used for maintenance of the streetcar vehicles is complete

City Streets

- Reconstruction of sidewalks, driveways, and curb and gutter are complete throughout the Project
- Landscaping is over 90 percent complete
- Work at Sasscer Park is complete
- Minor paving activities and striping continue

Streetcar Vehicles

With the temporary certificate of occupancy, OCTA can commence vehicle delivery. In preparation for this milestone, the Siemens commissioning team was deployed to the MSF to set up all requisite resources. In early April 2025, the first set of vehicle special tools and test equipment was delivered to the MSF.

A significant project milestone transpired at the end of April with the delivery of the first streetcar vehicle to the MSF. The remaining vehicles are currently at the Siemens facility in the City of Sacramento and are being prepared for shipment.

Negotiations are progressing with Siemens Mobility, Inc. (SMI) regarding long-term storage and other related items. Staff anticipates returning to the Board in the summer for a potential amendment to the SMI contract.

Operations

The following is a status of key operations activities:

- Herzog continues to mobilize their forces and hire for operators and technicians
- Training has begun on switch maintenance, transfer switches, emergency generators, and lighting control systems. Training activities are expected to increase as MSF occupancy progresses and Herzog and Siemens staff are present on-site
- Final preparations for the Roadway Worker Protection (RWP) training program in compliance with California Public Utilities Commission (CPUC) General Order 175-A are in progress, and staff anticipates that Herzog will begin scheduling training sessions for RWP certification by May 2025
- In April 2025, OCTA staff joined the CPUC for a site inspection of the project alignment to assess progress, identify safety concerns, and ensure compliance
- Negotiations are ongoing with the City of Garden Grove for the operations and maintenance agreement

Public Outreach

The following is a status of key public outreach activities:

- Monthly construction activity email ongoing
- Distribution of bilingual notifications for targeted construction activities, including various lane closures. Preparation for vehicle delivery later this month
- Safety education presentations to Artesia Pilar Neighborhood Association and Santa Ana Collaborative meetings
- Safety education materials distributed at Tet Festival, Carver Elementary School Read Across America Booth, Romero/Cruz Open House, Magnolia Science Academy Health Fair, Garfield Elementary Open House, and Lydia Romero School

Cost and Schedule

In February 2025, the Board approved a revised project budget of \$649 million and a revised revenue service date of March 2026. Staff continues to track project expenditures and schedule accordingly.

Next Steps

OCTA staff will continue to work closely with Walsh to complete the MSF for vehicle testing activities. As the first streetcar vehicle has been delivered, testing will commence late this spring in the PE ROW and then later this summer in the in the City streets. The outreach team will continue to provide oversight of construction activities, as well as ongoing project education and safety messaging at community events.

Summary

An OC Streetcar project update covering January 2025 through April 2025 is provided for the Orange County Transportation Authority Board of Directors' review.

Attachment

A. Project Alignment

Prepared by:

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Director, Capital Project Delivery
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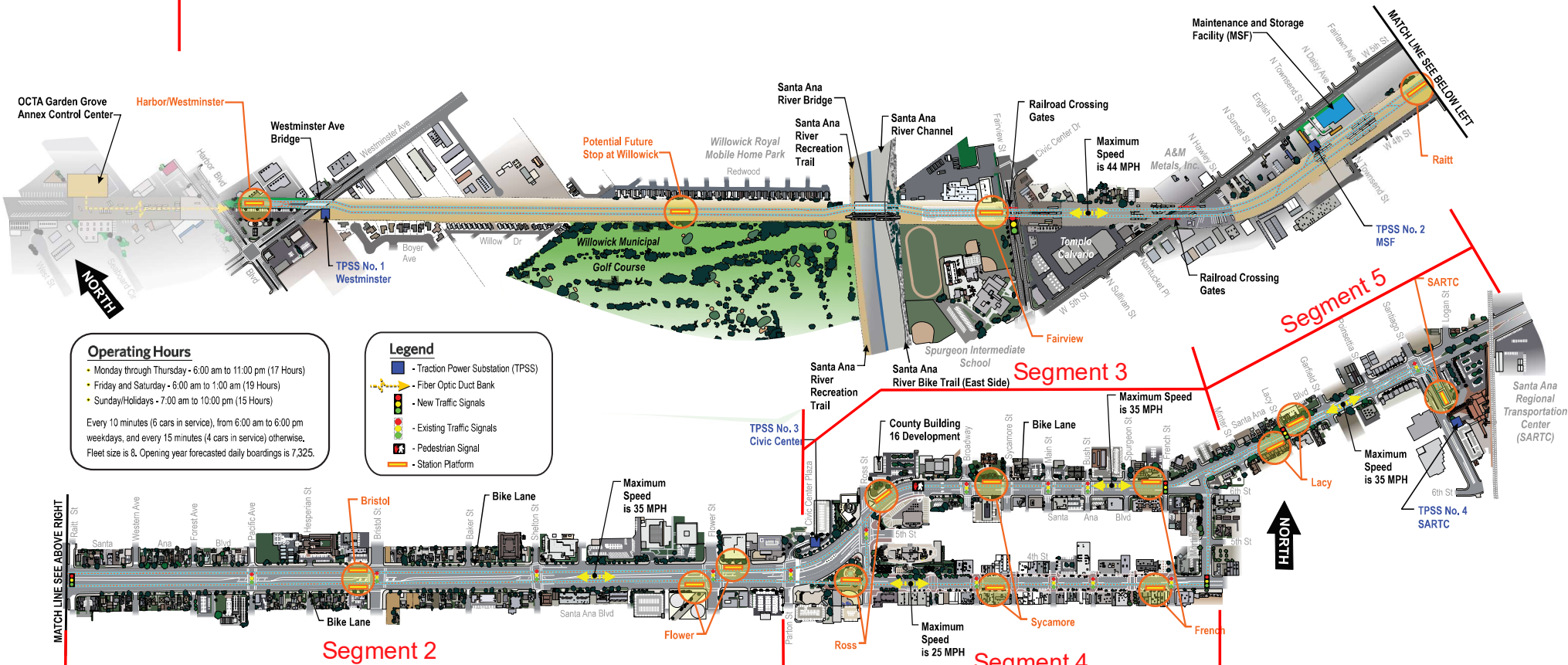
Approved by:

James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646

Project Alignment



Segment 1



OC Streetcar Project Quarterly Update

Project Location and Key Features



LEGEND

Streetcar Route

Operations and Maintenance Facility

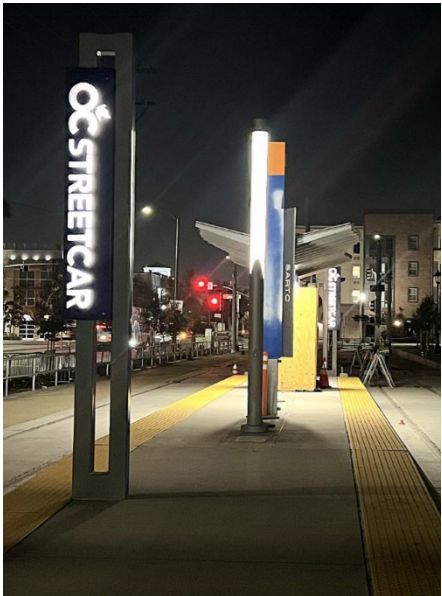
LOSSAN Rail Corridor

Santa Ana Regional Transportation Center

Proposed Stop

1 Santa Ana Regional Transportation Center	4 Sycamore Street	7 Bristol Street	10 Harbor Boulevard
2 Lacy Street	5 Ross Street	8 Ralitt Street	
3 French Street	6 Flower Street	9 Fairview Street	

NORTH



Construction Progress in Pacific Electric Right-of-Way



Fairview Street crossing signal and train control installation



Overhead contact system work at Westminster Avenue bridge

Construction Progress at Maintenance and Storage Facility (MSF)

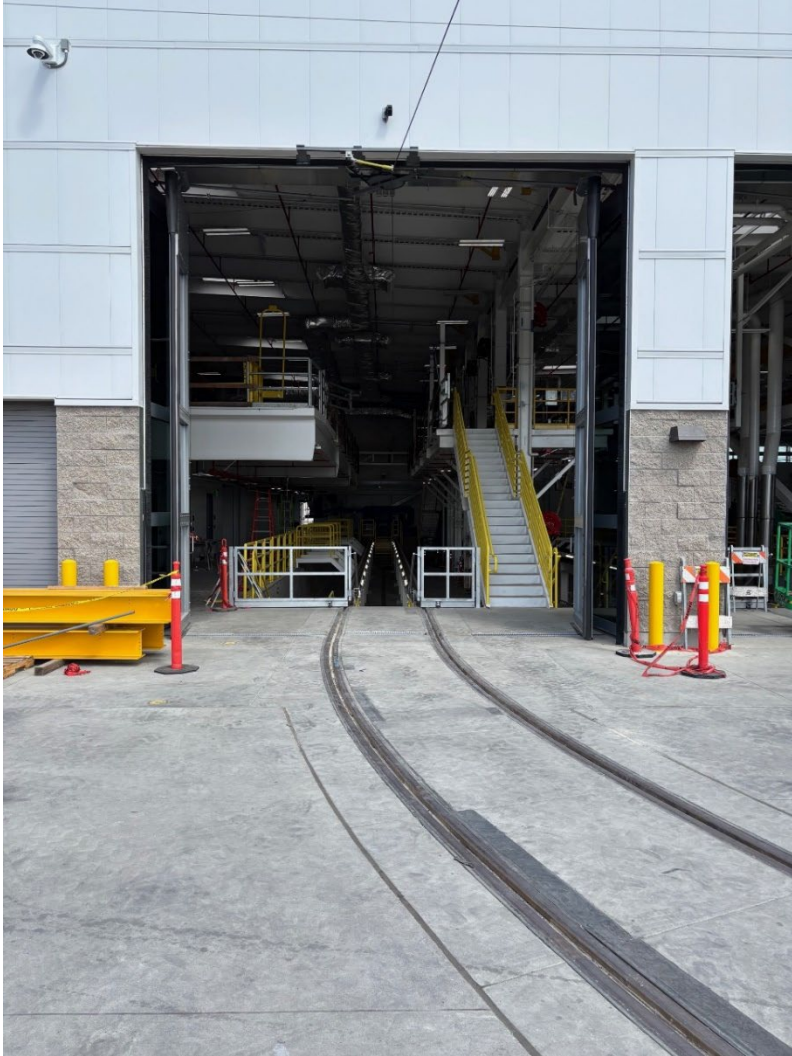


Exterior building signage



Wheel truing machine

Construction Progress at MSF (cont.)



Entrance leading to Bay 1



Interior Bay 1

Construction Progress in City Streets



Paving at Fourth Street and Mortimer Street



Santa Ana Regional Transportation Center platform

Vehicle

- All eight vehicles complete and undergoing testing and pre-delivery preparations
- Seimens commissioning team deployed at MSF in April 2025
- Special tools and test equipment delivered in April 2025
- First streetcar vehicle delivered in late April 2025 and subsequent vehicles to be shipped in two-week increments



Vehicle Delivery

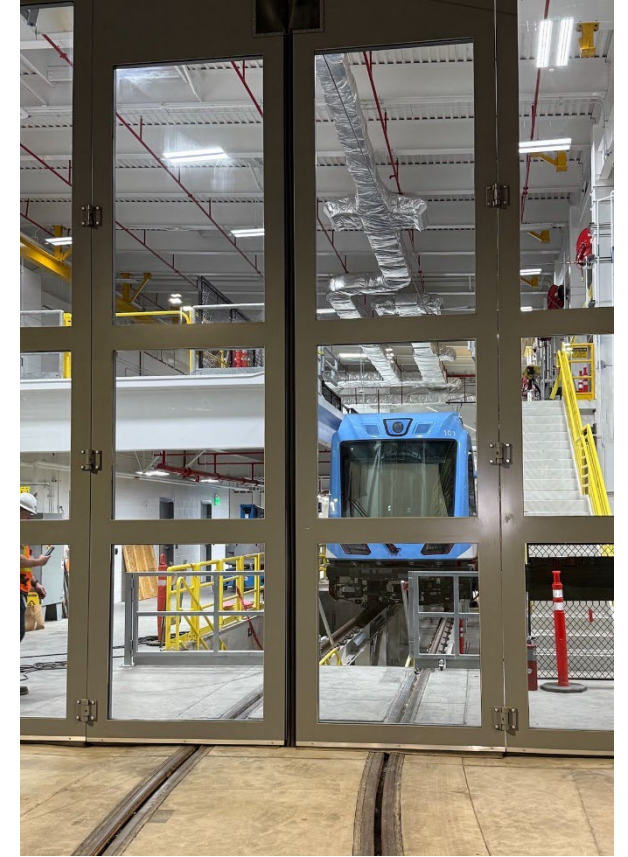


Vehicle on transport truck



Vehicle being unloaded from truck to rail

Vehicle Delivery (cont.)



Vehicle being moved from Raitt Street to MSF

Testing and Pre-Revenue Operations

- Testing initiated and efforts were completed on switch maintenance, transfer switches, emergency generators, and lighting control systems
- In April 2025, staff joined the California Public Utilities Commission for a site inspection of the OC Streetcar alignment to assess progress, identify safety concerns, and ensure compliance



Public Outreach

- Provide bilingual notifications for targeted construction activities
- Ongoing safety education and public awareness campaign underway at schools, community and civic organizations and other stakeholders
- Recent events:
 - Carver Elementary Literacy Event
 - Santa Ana Collaborative Meeting
 - Artesia Pilar Neighborhood Association
 - Romero/Cruz Back-to-School
 - Garfield Elementary Back-to-School
 - Magnolia Science Academy Health Fair
- Upcoming events:
 - OCTA Community Meetings
 - Tustin-Santa Ana Rotary Club



Next Steps

Milestone Description	Schedule
Vehicle delivery and assembly begins and testing is initiated in the Pacific Electric Right-of-Way	Spring 2025
Initiation of testing in city streets	Late Summer 2025
Contractor completes all work	Late 2025/Early 2026
Revenue service date (streetcars operational)	Spring 2026



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for the Operations and Maintenance Services for the OC Streetcar Project

Overview

On February 24, 2025, the Orange County Transportation Authority Board of Directors approved the updated funding and schedule for the OC Streetcar project. As a result of these changes and the projected revenue service date in spring 2026, an amendment to the operations and maintenance agreement with Herzog Transit Services, Inc. is required to align the operations and maintenance services with the revised project timeline.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 1 to Agreement No. C-8-2039 between the Orange County Transportation Authority and Herzog Transit Services, Inc. in the amount of \$5,938,341, and modify the initial agreement term through March 31, 2031, to align the revenue service contract years with the revised project timeline for operations and maintenance services for the OC Streetcar project. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$59,003,931.

Discussion

The OC Streetcar project (Project) is anticipated to be completed and operational for revenue service by spring 2026 as a result of the revised funding plan and schedule update approved by the Board of Directors (Board). This reflects an approximately 18-month delay compared to the previously assumed revenue service start date. At the time of the execution of the agreement with Herzog Transit Services, Inc. (Herzog), the project schedule anticipated revenue service beginning in November 2024 with the initial term of the current operations and maintenance (O&M) contract set to expire on October 31, 2029.

Due to the updated project schedule, an amendment to the O&M contract is necessary to modify the initial term of the agreement through March 31, 2031. This action will align the revenue service contract years with the revised project schedule as approved by the Board. Staff has analyzed the impacts of the revised schedule on the current contract value of \$53,065,590 approved by the Board in April 2023. Results of this analysis indicate that an additional \$5,938,341 is needed to cover costs associated with an extended start-up phase, escalation costs for the revised revenue service term, and costs associated with additional spare parts that were not assumed in the original contract.

The construction delay and associated extended start-up phase has given Herzog's key staff valuable time to clearly define and organize all required protocols, procedures, and guidelines, enhancing coordination and ensuring a smoother transition into the testing phase which will begin in spring 2025. Additionally, Orange County Transportation Authority (OCTA) staff has proactively addressed regulatory requirements in advance of the testing and commissioning phase of the project, thereby mitigating the risk of compliance issues that may occur. Herzog provided subject matter expertise in the preparation of documentation required by the California Public Utilities Commission (CPUC) for safety certification. Additionally, Herzog collaborated with OCTA staff to develop the Public Transportation Agency Safety Plan in accordance with the Federal Transit Administration requirements and prepared essential policy and procedure documents, including the Standard Operating Procedures and Operating Rule Book. Further contributions during the extended start-up phase include:

- Participating in Rail Activation and Systems Integration Testing Committees to develop required plans, test procedures, and supporting documentation
- Developing the Roadway Worker Protection Plan and training program, a critical plan required by the CPUC to energize the first streetcar to begin testing and commissioning
- Attending factory acceptance tests and contractor training for newly constructed systems and equipment
- Supporting vehicle inspection and acceptance of eight streetcar vehicles in the City of Sacramento
- Coordinating with CPUC during site walks, document reviews, and project meetings
- Initiating mobilization activities including furniture and equipment procurement, staffing plans, and supporting vehicle delivery readiness

Given that the end of the five year revenue service term has been revised from October 31, 2029 to March 31, 2031, there are associated escalation costs for labor, materials, and equipment. However, the escalation rates applied remain consistent with those in the original contract and did not increase. Additionally, the costs associated with streetcar vehicle spare parts are now included in the revised contract total. Spare parts are treated as pass-through costs under the contract and are reimbursed by OCTA at actual cost, with no markup or profit. These costs were not included in the original contract agreement because the designs for key components, such as the bumpers, emergency battery, and flange lubrication systems, were not finalized at that time.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. In addition to cost, other factors are considered in an award for professional and technical services. On May 22, 2020, the Board approved an agreement with Herzog in the amount of \$45,065,590. The agreement has also been previously amended as shown in Attachment A.

Staff requested a cost proposal from Herzog to account for the extended duration of construction and the updated revenue service date. Staff and Herzog have agreed upon the cost and schedule. Staff found Herzog's cost proposal to be fair and reasonable and consistent with the independent cost estimate prepared by OCTA's project management team. The proposed increase in value to the initial term of Agreement No. C-8-2039 will increase the total contract value to \$59,003,931.

Fiscal Impact

Funding for portions of the contract amendment is included in OCTA's Fiscal Year 2024-25 Budget, Capital Programs Division, Account No. 0051-7370-TS010-Z88, and the remaining portions of the contract agreement will be requested in future fiscal year budgets.

For revenue service, OCTA intends to leverage state and federal funds including federal Congestion Mitigation and Air Quality Improvement Program funds and State of California Low Carbon Transit Operations Program funds to support revenue service operations in addition to fares, Measure M2 Project S, and contributions from the cities of Garden Grove and Santa Ana.

Summary

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 1 to Agreement No. C-8-2039 between the Orange County Transportation Authority and Herzog Transit Services, Inc., in the amount of \$5,938,341 for the continuation of OC Streetcar operations and maintenance services and modify the initial term of the agreement through March 31, 2031. This will increase the maximum obligation of the agreement to a total contract value of \$59,003,931.

Attachment

- A. Herzog Transit Services, Inc., Agreement No. C-8-2039 Fact Sheet

Prepared by:



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Approved by:



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Director, Contracts Administration and
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**Herzog Transit Services, Inc.
Agreement No. C-8-2039 Fact Sheet**

1. May 22, 2020, Agreement No. C-8-2039, in the amount of \$45,065,590, approved by the Board of Directors (Board).
 - The agreement was awarded to provide operations and maintenance services for the OC Streetcar project.
 - The agreement included an initial 17-month start-up and pre-revenue period, a five-year revenue term with two, two-year option terms.
2. May 3, 2021, a Limited Notice to Proceed (LNTTP) C-8-2039, \$246,773, approved by the Contracts Administration and Materials Management (CAMM) Department.
 - Initiate the scope of work for the development of policies and procedures for start-up and pre-revenue tasks.
3. May 4, 2022, Revision No. 1 to LNTTP C-8-2039, \$149,709, approved by the CAMM Department.
 - Increased the maximum obligation to \$396,482.
 - Extended the LNTTP period through November 30, 2022.
 - Continued scope of services and additional specified tasks for the start-up and pre-revenue phases.
4. December 1, 2022, Revision No. 2 to LNTTP C-8-2039, \$85,548, approved by the CAMM Department.
 - Increased the maximum obligation to \$482,029.
 - Extended the LNTTP period through March 31, 2023.
 - Continued scope of services and additional specified tasks for the start-up and pre-revenue phases.
5. April 1, 2023, Revision No. 3 to LNTTP C-8-2039, \$21,387 approved by the CAMM Department.
 - Increased the maximum obligation to \$503,416.
 - Extended the LNTTP period through April 30, 2023.
 - Continued scope of services and additional specified tasks for the start-up and pre-revenue phases.


6. April 24, 2023, Agreement No. C-8-2039, in the amended amount of \$53,065,590 approved by the Board.
 - Increase of up to \$8 million over the original award amount on May 22, 2020, for the initial term to align with the updated project schedule.
 - The agreement was executed on June 22, 2023, in the amount of \$53,065,590 with a term through October 31, 2029, to include start-up and pre-revenue periods, and an initial term of five years, with two, two-year option terms.
7. May 12, 2025, Amendment No. 1 to Agreement No. C-8-2039, \$5,938,341, pending approval by the Board.
 - For continued operations and maintenance services for the OC Streetcar project through March 31, 2031, to align the pre-revenue and revenue operations base contract years and option term years with updated project schedule.

Total funds committed to Herzog Transit Services, Inc. after approval of Amendment No. 1 to Agreement No. C-8-2039: \$59,003,931.



May 8, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Proposed New Fare Media

Overview

The Orange County Transportation Authority is proposing new fare media as part of the implementation of the new Rider Validation System scheduled for rollout in October 2025. The proposed fare media, branded as the Wave card, is a contactless smart card that would replace legacy magnetic stripe passes and broaden access to features such as fare capping, contactless payments, and free two-hour transfers. In order to implement the new fare media, the Orange County Transportation Authority must conduct outreach and a Title VI analysis to ensure that low income and minority riders are not negatively impacted by the proposed fare media. The required outreach and Title VI analysis has been completed, and staff is recommending approval of the new proposed fare media.

Recommendations

- A. Receive and file the final Public Involvement Plan Report.
- B. Direct staff to implement the new fare media with the launch of the Rider Validation System.

Background

Orange County Transportation Authority (OCTA) has been actively working to modernize its fare collection methods making it easier for rider to use the OC Bus system and allowing more flexibility in fare policies. In 2018, OCTA took a major step towards this modernization effort by installing mobile ticketing validators across its fixed-route bus fleet, enabling mobile ticket validation and laying the groundwork for further advancements. This initial investment set the stage for the development of the Rider Validation System (RVS), which aims to significantly improve the fare payment experience, enhance rider validation, and offer greater flexibility in fare policy.

The OCTA Board of Directors (Board) approved a contract with Innovations in Transportation (INIT) on October 23, 2023, to allow implementation of the RVS to modernize the existing fare collection methods with a more equitable and adaptable system that includes features like fare capping, mobile payment options, and open payments. On November 25, 2024, the Board approved amendments to OCTA's Fare Policy including the implementation of fare capping and a free two-hour transfer period. A proposed new fare media, which facilitates these fare policy changes and allows for overall greater flexibility for other fare payment options, was presented to the Board in January 2025. The public outreach process required to introduce the new fare media began following Board approval on January 13, 2025, and concluded with a public hearing on March 24, 2025.

Discussion

The new RVS will greatly improve the rider experience by introducing smart cards which are plastic cards embedded with a chip. Unlike the current paper passes with magnetic stripes, smart cards are more durable and offer several added benefits. Smart cards will allow riders to store fare value in an online account linked to the card, enabling features like automatic fare loading, balance protection in case the card is lost, fare capping, and account management through an online portal. Additionally, riders will have the option to use virtual smart cards within the new mobile application on their smartphones, making it even easier to pay for rides without needing a physical card.

To ensure accessibility, OCTA will continue to offer cash and credit card payment options for fare purchases and reloads, available on a wide retail network. This retail network, expanded as part of the RVS, will include OCTA-branded smart cards sold alongside popular gift cards like Amazon and Starbucks, making fare media more accessible to all riders, including those without bank accounts. In addition, OCTA-branded smart cards will be available for purchase at the OCTA store and online from the OCTA website.

Public Involvement Plan (PIP)

In accordance with the Federal Transit Administration (FTA) Title VI guidelines, any significant change to fare media must be preceded by a PIP featuring proactive community outreach and a formal public hearing to ensure that low income and minority riders are not negatively impacted by the proposed fare media before Board approval. On January 13, 2025, the Board directed staff to launch a ten-week, multilingual outreach campaign – culminating in a public hearing on March 24, 2025 – to meet these requirements. The PIP utilized a multifaceted outreach strategy to maximize awareness and solicit feedback across diverse populations before the Board considers adoption of the new fare media. The outreach demonstrated widespread awareness and strong support for the new fare media, with 83 percent of survey respondents expressing approval.

Further information regarding the outreach methods and results can be found in the final Proposed New Fare Media PIP Report under Attachment A.

Title VI Fare Equity Analysis Synopsis

To comply with FTA Circular 4702.1B and Title VI of the Civil Rights Act of 1964, OCTA conducted a comprehensive Fare Equity Analysis for the RVS. This evaluation examined the proposed fare media changes including the introduction of the Wave card, implementation of fare capping, new two-hour transfer policy, and the expansion of a retail vendor network to assess their potential impacts on minority and low-income riders.

Key Findings

According to the 2024 Origin-Destination survey, 86.9 percent of OCTA riders are minorities and 94.5 percent are low-income. This significant representation underscores the need for policies that ensure fairness for these populations.

Elimination of Onboard Day Passes: The removal of magnetic stripe day pass sales onboard buses was identified as a potential adverse impact. However, since the burden borne by minority and low-income riders (87 percent and 97.4 percent, respectively) was proportionate to their overall share of ridership, this change did not trigger a finding of disparate impact or disproportionate burden.

Fare Reductions and Capping: The reduction of the day pass price from \$5.00 to \$4.50 (and from \$1.50 to \$1.35 for reduced fare) benefits all rider categories equally. Fare capping allows for the accumulation of daily and monthly rides to certain limits, after which riders travel free. This structure benefits riders, particularly low-income users, who cannot afford upfront purchases of long-term passes. Analysis showed that these benefits accrue equitably across demographic groups.

Two-Hour Transfers: This policy offers additional financial relief, particularly for users of single-ride fares. Savings from this feature were consistent across minority and non-minority as well as low-income and non-low-income groups.

Retail Access: The expansion of the retail vendor network from 118 to 478 locations significantly improved access in minority and low-income populations. The percentage of locations in minority block groups rose from 47 percent to 57 percent, and in low-income block groups from 45 percent to 48 percent.

All proposed fare media changes under the RVS were found to comply with Title VI requirements. No element of the new fare system was shown to impose a disparate impact on minority riders or a disproportionate burden on low-income populations. OCTA's updated fare structure including smart cards, digital fare tools, and account-based features was designed to enhance accessibility,

streamline transactions, and ensure all riders pay the lowest possible fare. The analysis validates the fairness of this transition and provides data-driven justification for systemwide implementation.

Summary

A comprehensive Public Involvement Plan supported the new Wave card fare media rollout, focusing on fairness and inclusion. The ten-week outreach campaign reached over 32,000 people and collected more than 8,000 surveys, showing strong support (83 percent) for the new fare media. A Title VI Fare Equity Analysis confirmed that the proposed changes including smart cards, fare capping, and expanded retail access benefit all riders equitably and do not disproportionately impact minority or low-income populations. OCTA staff recommends approval of the proposed fare media.

Attachment

- A. Proposed New Fare Media Public Involvement Plan

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Approved by:

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Proposed New Fare Media Public Involvement Plan

Final Outreach Report, May 2025



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Introduction

The proposed new fare media system is a new system that will modernize fare payments for OC Bus and other Orange County Transportation Authority (OCTA) transit services, including OC Streetcar. The new system includes the implementation of a new smart card (“Wave card”), a new mobile application (Wave mobile app), contactless payments (digital wallets), fare capping, and other features. The Federal Transit Administration (FTA) requires transit agencies to gather public feedback for any major changes to fare payments, which led to the OCTA implementing a Public Involvement Plan (PIP) for the proposed new fare media system in early 2025.

The OCTA Board of Directors (Board) directed OCTA staff to initiate the PIP on January 13, 2025. The plan included a ten-week comprehensive community outreach and public feedback campaign, with a multilingual online and print survey, community meetings, and other outreach opportunities. The PIP concluded on March 24, 2025, with a public hearing held during the Board meeting and a report on preliminary findings.

This final report summarizes the public feedback gathered from the survey, community meetings, and other outreach engagements from January 13 to March 24, 2025. Topics covered in this report include interest in the new fare media, potential usage of specific new fare media (including the Wave card), and positive feedback, concerns, and common questions about the proposed new fare media.

Executive Summary

The PIP was implemented to fulfill Title VI requirements by gathering public feedback when proposing new fare media. The PIP included extensive public outreach including a multilingual online and print survey, virtual and in-person community meetings, community outreach events, bus ride-alongs, social media, and email updates.

During the outreach period from January 13 to March 25, 2025, OCTA received many customer comments and public engagements about the proposed new fare media, including 8,256 online and print survey responses, 13,768 community event engagements, and 596 engagements at staff bus ride-alongs.

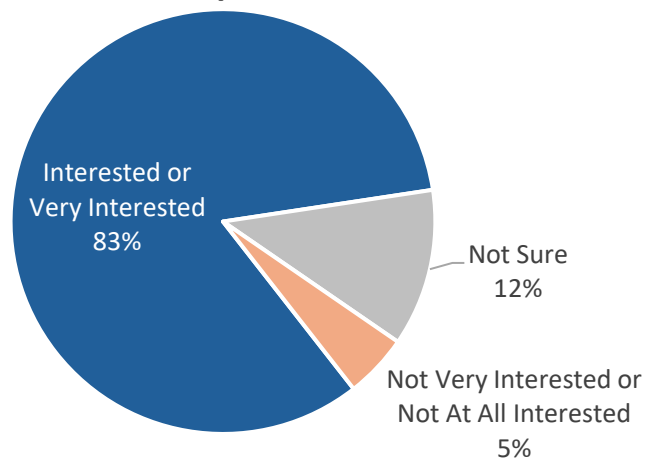
Several key themes have emerged during the PIP.

There Is High Interest in New Fare Options

More than 80 percent of respondents said they are interested or very interested in OCTA enhancing new fare options. A percentage of respondents said they are not sure (12 percent), and a small percentage do not show interest (five percent).

Feedback from open-ended comments, community meetings, and outreach events mentioned the flexibility of the new fare options and the environmental benefit of a reusable Wave card.

Interest in OCTA Providing New Fare Options



n = 6,570 respondents

The Wave card and the Wave Mobile App Attracted the Most Interest

Fare Option	% Responses
Wave card	30%
Wave Mobile App	27%
Cash	15%
Contactless payments	14%
Credit / Debit Card	13%

*n = 13,587 responses from 6,309
unique respondents (multiple
selections available)*

Respondents indicated which future fare options they would use, with the Wave card (30 percent of responses) and the Wave mobile app (27 percent) being the most popular choices.

Interest in contactless payments, cash, and credit/debit cards was lower and more evenly distributed. Cash stood out due to mentions in open-ended comments and outreach feedback. All selected options are proposed to be available on OC Bus, with most options (aside from cash) planned for the future OC Streetcar service.

Due to rounding, some percentages may not add up to 100 percent.

Key Themes from Written Comments

In addition to the high interest in the proposed new fare media from the survey, some respondents composed open-ended responses that provided some additional context. Those comments covered the following themes:

- **Approximately 15 percent of open-ended comments showed support for the proposed new fare media. Positive responses** to the proposed new fare media **noted familiarity and/or experiences with similar systems from other agencies**, highlighted how the Wave card **added flexibility** to the fare system as a new fare option, and an **environmental benefit**.
- While there was not a significant amount of negative feedback (three percent of comments), there were some requests for **keeping cash as a fare option, continuing onboard day passes, and keeping discounted fares for senior, disabled, youth, and college riders**.
- Frequently asked questions from the feedback included **smart card interoperability with other transit agencies – such as OC Streetcar – and external transit agencies** and further clarification on fare capping and the **two-hour transfer period**.

Background

Proposed New Fare Media

The current OC Bus farebox system has been operating for over two decades. Historically, options for paying fares were limited to using cash onboard and magnetic stripe physical passes. A mobile app and mobile ticketing validators were implemented in 2018 as an initial step to modernizing the farebox system.

To keep up with modern public transportation trends and meet customers' needs, OCTA is exploring new fare media. The proposed new fare media aims to improve the fare payment experience, enhance rider validation, and offer greater fare flexibility. Included in this new system is a new functionality known as "fare capping," the contactless, reloadable Wave card, and a new Wave mobile app. All current fares, including specialty or discounted, will remain the same. The proposed new fare media will apply to OC Bus and the upcoming OC Streetcar.

Title VI

The FTA guidelines require transit agencies to evaluate new fare media implementations for potential impacts to people of minority and/or low-income populations. As part of this evaluation process, OCTA implemented a PIP that will gather community feedback about the upcoming changes to the fare media. There is also a requirement to conduct a Title VI equity analysis to ensure that the proposed new fare media will cause no disparate impacts, which is a separate study from the PIP and is not included in this document.

The PIP utilized a broad range of print and digital media, along with various outreach and communication methods, to reach a wide audience and gather feedback from the community, including individuals from low-income and minority communities, as well as those with limited English proficiency. The survey, website, and other communications channels provided information about the proposed new fare media in multiple languages. In-person and virtual opportunities for direct feedback were held at no cost, with interpreters available for non-English-speaking participants.

Public Involvement Plan (PIP)

The PIP was a multifaceted and extensive ten-week campaign from January 13 to March 24, 2025, that implemented broad community outreach. The outreach effort was equitable, inclusive, and accessible to the needs of diverse stakeholder populations and adhered to guidelines required to meet FTA public hearing and Title VI mandates. The campaign also gathered feedback about potential barriers or areas of confusion to help OCTA understand and address those concerns.

The Board approved an updated fare policy (that allowed for future fare capping and free two-hour transfers) on November 25, 2024. The Board then directed OCTA staff to start the PIP on January 13, 2025. The PIP concluded on March 24, 2025, with a public hearing. This final report details outreach tactics and what OCTA has heard about the proposed new fare media from the public, current and potential transit customers, and other stakeholders.

Public Information and Outreach Program

On January 13, 2025, the Board received the Proposed New Fare Media plan and directed staff to implement a public outreach program to solicit feedback.

The outreach program included a broad range of media and communication methods to reach a wide audience, provide information, solicit participation and input, and allow ongoing feedback and input. Outreach efforts were also made to diverse communities to ensure their feedback was gathered and addressed, which would meet the Title VI guidelines mandated by the FTA.

Tactics

The following tactics and activities have been completed in this phase. Unless noted, all communications were in English, Spanish, and Vietnamese.

Bus Advertisements and Collateral

- 50,000 multilingual brochures were distributed on all buses. Each brochure included a mail-back survey with pre-paid postage
- Interior bus cards (550 each language for a total of 1,650)

Print Advertisements

- Six newspaper ads, including OC Register, La Opinión, El Clasificado, Người Việt, Việt Báo, and Viet Dong

Digital Information

- Dedicated website with 53,647 visits from 32,294 users, including an online survey
- Email blasts regarding the proposed new fare media and in-person/virtual community meetings which reached 85,336 people
- “On the Move” e-Newsletter (English)
- “NextStop” e-Newsletter (English)
- Public information and ads on Facebook, Instagram, X, and Nextdoor
- OC Bus and Transit mobile app notification
- Digital stop signage alert

In-Person Rider Outreach

- Bus ride-alongs on 11 routes in core service areas matched real riders with multilingual outreach staff in English, Spanish, and Vietnamese.
- Five pop-up events at transportation centers, including the Santa Ana Regional Transit Center (SARTC) within the future OC Streetcar alignment, staffed with English/Spanish speaking staff.

School Outreach

Communications toolkits were provided to all 28 Orange County K-12 school districts and all nine community colleges to share with students, parents, and staff.

An email to K-12 school staff shared resources and encouraged sharing the proposed new fare media materials via parent communications, newsletters, and social media as well as with relevant groups, including parent teacher associations and district English learner advisory committees (DELAC).

The proposed new fare media was presented at a roundtable that invited all community colleges, which participate in OCTA's Community College Pass program. School representatives received a presentation of the proposed new fare media and were able to provide feedback on behalf of their respective constituencies.

Employer Outreach

Communications toolkits were sent to 178 Orange County large employers for distribution to their employees.

Community Events & Organizations

- Twenty-eight community and ethnic events, staffed with English, Spanish, and Vietnamese speaking staff.
- Communications to ethnic chambers of commerce, business organizations, and community organizations, including Wellness Centers via Santa Ana Unified School District, Santa Ana Active Streets, Costa Mesa Alliance for Better Streets, and local social service agencies.
- A presentation and discussion held at a Senior Mobility Program (SMP) roundtable of staff and representatives for the program from throughout Orange County.

In-person/Virtual Community Meetings

Several meetings took place in person and virtually where customers and the public had the opportunity to discuss the proposed new fare media and provide input. Spanish and Vietnamese interpreters were accessible as needed for attendees.

- February 4, 2025 - Virtual English Zoom Meeting
- February 5, 2025 - Virtual Spanish Zoom Meeting
- February 11, 2025 - Norman Hertzog Community Center (Costa Mesa)
- February 12, 2025 - Virtual Vietnamese Zoom Meeting
- February 12, 2025 - Laguna Hills Community Center
- February 13, 2025 - Fullerton Community Center
- February 20, 2025 - Santa Ana College

Local Jurisdiction Communication

The public information officers and communication staff from 34 cities and the County of Orange were notified of the service change information and were provided with a digital toolkit to disseminate information via city communication channels.

Public Comments – Email, Phone Calls, and Social Media

Public comments were collected from multiple channels, including phone calls to the Customer Information Center, emails, and social media comments to OCTA Customer Relations. Public social media discussion was also considered as a source of public comments.

Local News Media

A press release was issued to local media notifying the community about the proposed new fare media and PIP.

OCTA Advisory Committees

The proposed new fare media was presented at the following OCTA advisory committee meetings. Committee members received a presentation of the proposed new fare media and were able to provide feedback on behalf of their respective constituencies.

- January 21, 2025 - Citizen Advisory Committee Meeting
- January 28, 2025 - Accessible Transit Advisory Committee
- February 18, 2025 - Diverse Community Leaders Meeting
- February 18, 2025 - Teen Council

What We Heard

Following extensive public outreach, many comments have been received on the proposed new fare media through in-person and virtual community meetings, events, online, print surveys, email, and by phone. In addition to capturing public feedback using these channels, participants were provided an opportunity to complete a multi-lingual survey, either electronically or in print.

Channel	Count
Webpage Unique Visitors	32,294
Community Event Engagements	16,377
People Reached with Organic Social Media Messages	12,168
Online and Print Surveys	8,256
Onboard Ride-Along and Transit Center Engagements	709
In-person and Virtual Community Meeting Attendees	205
Customer Relations Calls, Emails, and Social Media	175
OCTA Public & Advisory Committees Attendees	70

Online and Print Survey

Methodology

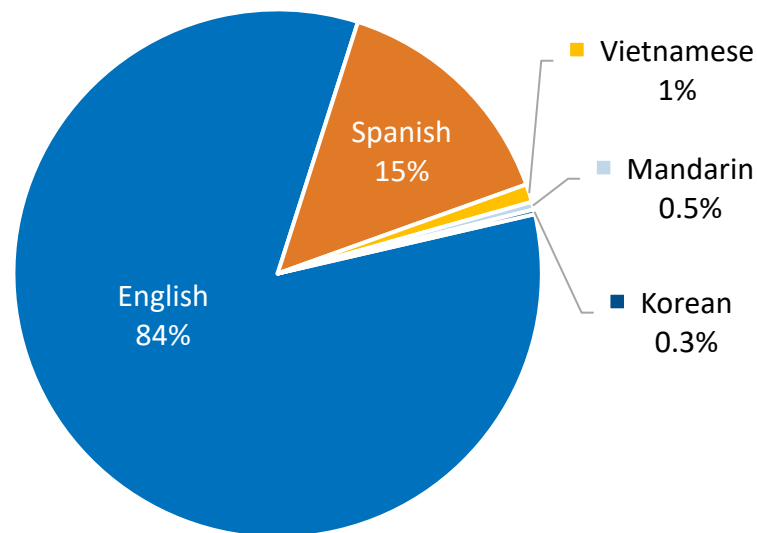
The online survey was released on January 13, 2025, and ended on March 24, 2025. A total of 8,256 surveys were collected over the course of the PIP.

The print surveys were distributed through brochures that include pre-paid postage for easy return, as well as printed surveys distributed at community outreach events for participants to complete and return on-site.

Both the online and print surveys were initially available in English, Spanish, and Vietnamese. Following the launch of the PIP, a request was made to offer surveys in Mandarin and Korean, which were implemented and incorporated into PIP efforts, including key outreach events. The survey was offered in multiple languages to guarantee a varied cross-section of Orange County transit riders, including at community engagements and diverse outreach events.

Approximately 84 percent of respondents completed the survey in English, 15 percent in Spanish, one percent in Vietnamese, less than one percent in Mandarin, and less than one percent in Korean. These are conservative estimates as the respondent language for the PIP was determined by two methods: the language respondents elected to take the survey in (online surveys) and the language used in open-ended comments (print surveys). It is possible that some respondents spoke a non-English language at home and elected to take the survey in English.

Respondent Language by Survey Completion



n = 8,256 respondents

The percentages for Vietnamese, Mandarin, and Korean are similar to the percentages for the same languages in a recent OC Bus customer satisfaction survey from the American Bus Benchmarking Group (ABBG) — one percent Vietnamese, two percent Mandarin, and less than one percent Korean. Although the ABBG survey was primarily an online survey and had a smaller sample size, the comparison to the ABBG survey shows that the PIP was consistent in collecting representative samples from populations with limited English proficiency.

The survey prioritized gathering feedback from current and former OC Bus riders, as well as those who are considering using OC Bus in the future. Additionally, respondents could indicate they were a non-rider who were not interested in using OC Bus in the future. These non-prospective riders were excluded from later analysis.

The resulting sample of current, former, or potential OC Bus riders included more than 6,900 respondents by the end of the PIP.

Trip Frequency	% Respondents
Daily	46%
Weekly	19%
Monthly	9%
Less than once a month	8%
I used to ride OC Bus, but haven't used it in the last six months	10%
I've never used OC Bus, but I may in the future	9%
Total Respondents	6,951

To determine if the PIP reached a representative sample of active OC Bus riders, respondents' trip frequencies (not including former and potential riders who completed the survey) were compared to the trip frequency distribution from the recent ABBG customer satisfaction survey. Both surveys have similar distributions.

Trip Frequency (Proposed New Fare Media PIP)	% Respondents	Trip Frequency (ABBG 2024)	% Respondents
Daily	56%	Very Often	54%
Weekly	23%	Often	27%
Monthly	11%	Sometimes	11%
Less than once a month	10%	Rarely or Very Rarely	8%
Total Respondents	5,645	Total Respondents	1,118

This suggests that the PIP obtained a good sample of bus riders that is reflective of the current ridership and consistent with ridership trends seen in previous surveys.

The PIP survey results are considered informal and qualitative rather than statistically significant, as the sample size is small relative to the overall Orange County population, and participants were self-selected. Informal research such as this survey is useful to explore a group's opinions and views, allowing for the collection of rich and verifiable data. This data can reveal information that may warrant further study and is often a cornerstone for developing new ideas.

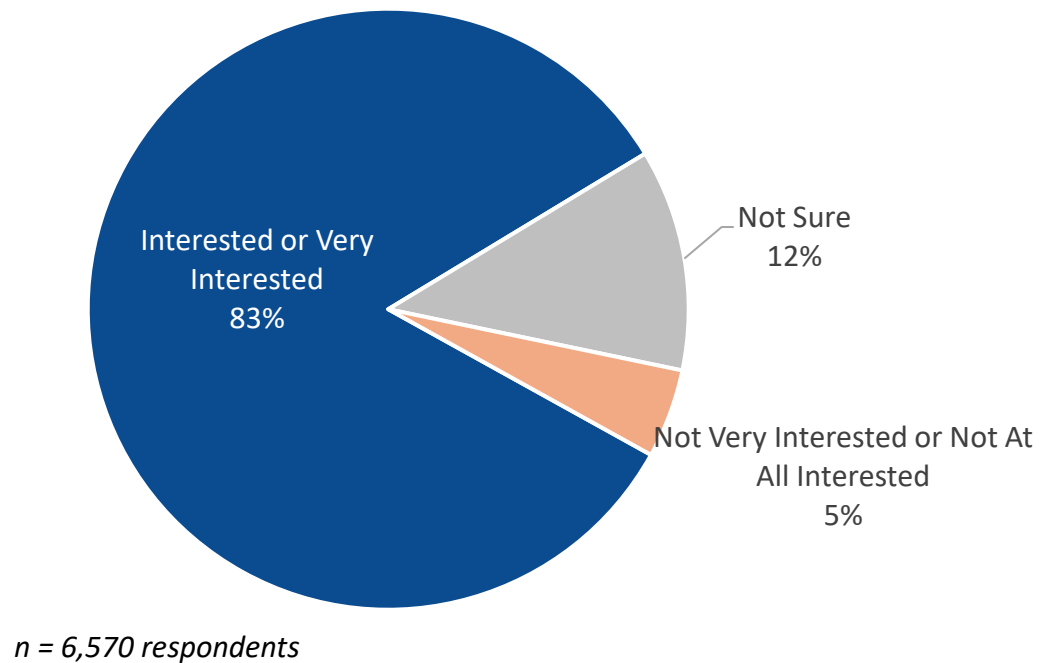
Key Findings / Results

Interest in OCTA Providing New Fare Options

Respondents who are current, former, or potential OC Bus riders were asked about their interest in OCTA making changes to its fare system, specifically enhancing the system with new fare options. A majority of respondents (83 percent) said they are interested or very interested in OCTA providing enhanced new fare options. There seems to be high support for OCTA providing additional fare options, including adopting new technologies.

More than ten percent of respondents were not sure if they were interested, and five percent were not very interested or not at all interested. These respondents show a potential opportunity for additional outreach or better clarification of why some bus riders may oppose the new fare media.

How interested are you in OCTA providing enhanced new fare options?



Further analysis is being conducted to see if the varying interest in OCTA providing new fare options is based on the existing fare options OC Bus riders are using or have used in the past. All fare options have consistent use from respondents who were interested, with no specific fare option being prominent. The variance between the options is small, with a difference of three percent between the least and most picked options. Overall, it seems likely that the current fare options have no effect on interest in OCTA providing new fare options.

Note that the use of current fare options was self-reported in the survey, so responses may not reflect actual numbers found in bus ridership or pass sales data. Due to rounding, some percentages may not add up to 100 percent.

Interest in OCTA Providing New Fare Options				
Current Fare Media	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Responses
Mobile app	90%	7%	3%	2,818
Cash (single trips)	87%	9%	4%	2,696
Paper (pre-paid) passes	88%	7%	5%	2,510
Purchased on-board day passes	87%	9%	4%	2,269
Passes from other agencies	88%	9%	4%	781
Grand Total	88%	8%	4%	11,074

n = 11,074 responses from 5,952 unique respondents (respondents can make multiple selections)

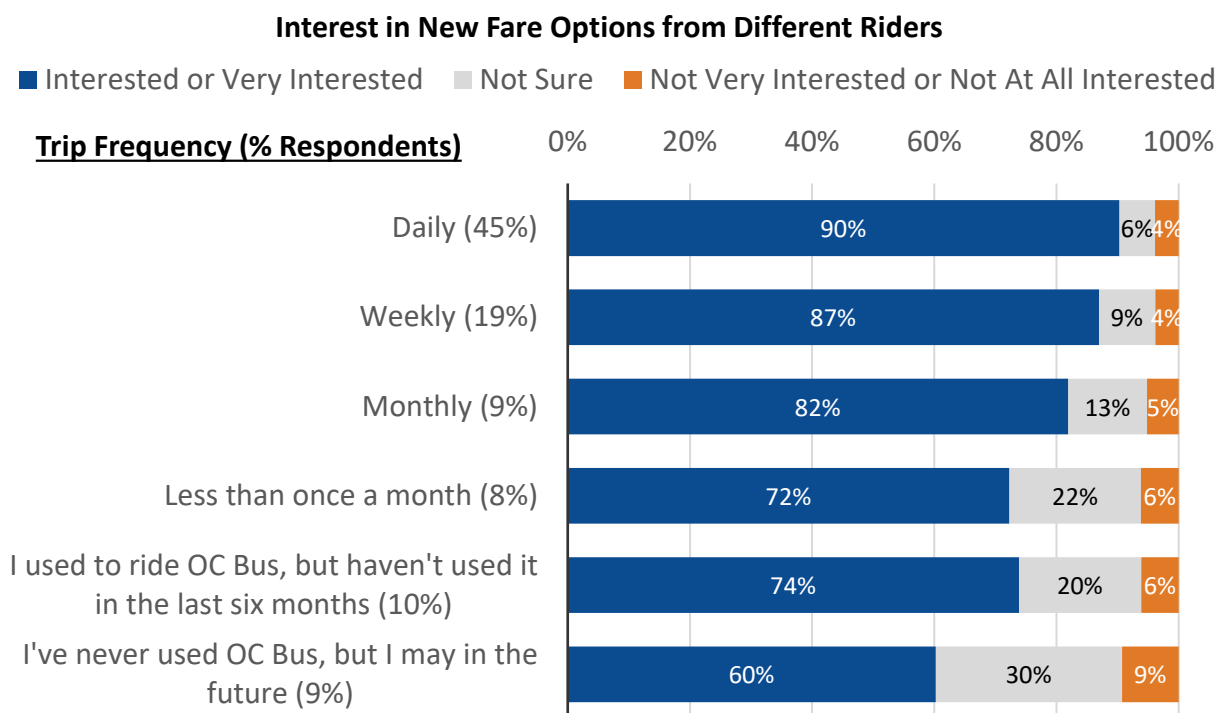
Interest also varied among different types of riders. Frequent riders (those who ride daily or weekly) had the highest levels of interest in the new fare options, with 91 percent of daily riders and 87 percent of weekly riders. A total of 82 percent of monthly riders were also interested in the new fare options.

One likely reason is that frequent riders have familiarity with the current fare media, so they may be curious to see how the new fare options, including the Wave card, will perform compared to the other options.

Interest is relatively lower among riders who ride less than once a month (72 percent being interested or very interested) and former riders (74 percent being interested or very interested). Potential riders who are considering using OC Bus in the future only have 60 percent of respondents interested or very interested in the new fare options.

There is a substantial amount of uncertainty among riders who ride less than once a month (22 percent), former riders (20 percent), and potential riders (30 percent). One reason may be due to lack of familiarity with OC Bus and the different fare options.

Interest in the new fare options is very high for frequent riders, but interest decreases as trip frequency decreases, with the lowest interest coming from potential OC Bus riders who have never used OC Bus before.



n = 6,570 respondents

Interest in OCTA providing new fare options varied by respondent language. More than 95 percent of Spanish respondents say they are interested in OCTA providing new fare options. English, Vietnamese, and Korean respondents show similar levels of interest (between 81 and 85 percent of respondents for each language). Mandarin respondents have the lowest level of high interest (76 percent). The higher interest from Spanish respondents show that the new fare options are appealing to bus riders from communities with limited English proficiency.

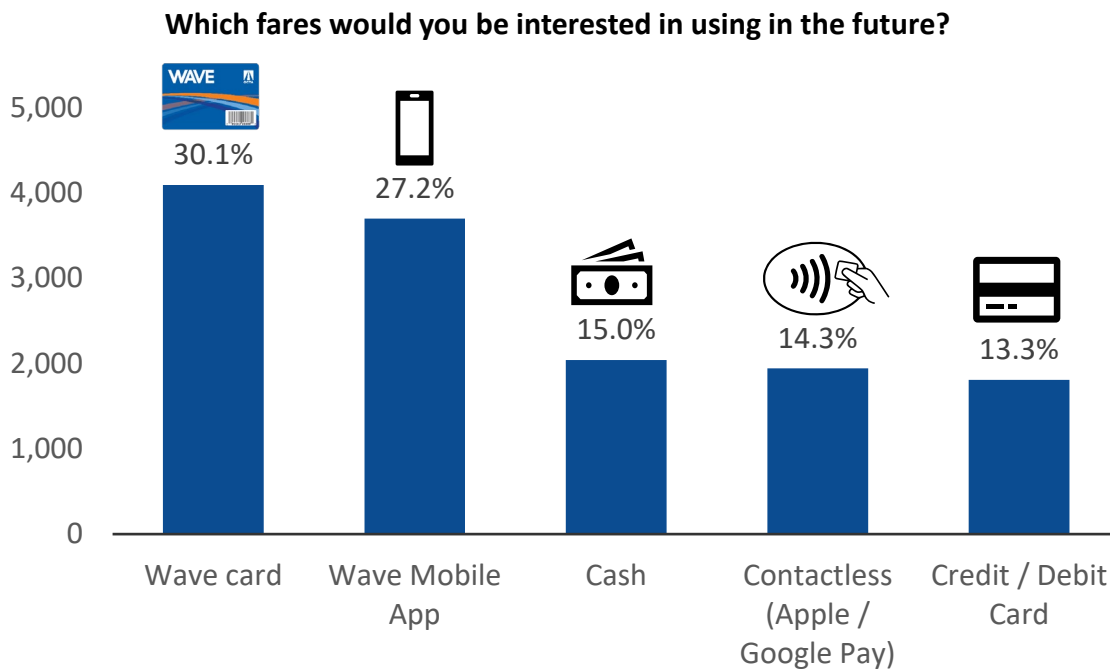
Interest in OCTA Providing New Fare Options				
Respondent Language	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Respondents
English	81%	14%	5%	5,362
Spanish	95%	3%	2%	1,078
Vietnamese	85%	10%	5%	78
Mandarin	76%	17%	7%	29
Korean	83%	9%	9%	23
Grand Total	85%	10%	5%	6,570

Interest in the Wave Card and Other Potential New Fare Options

Respondents were asked which fare media they want to use after the proposed new fare media is implemented. New options included the Wave card, the Wave mobile app, contactless payments (tap-to-pay using Apple Pay or Google Pay), and the option to tap a credit or debit card directly. Cash was an existing fare option that is available for respondents to pick.

Respondents are interested in using the Wave card (30 percent) and the Wave mobile app (27 percent) in the future. These new fare options receive a lot of feedback, especially from respondents who have used similar systems from other agencies before.

Interest in contactless payments, cash, and credit / debit cards options is lower and more consistent. Cash continues to generate some interest even among the newer fare options. This suggests that even with the interest in new fare options, there remains a sustained demand for paying fare with cash.



n = 13,587 responses from 6,309 unique respondents (respondents can make multiple selections)

Further analysis shows that respondents who are interested in OCTA providing new fare options are further interested in specific options, particularly the Wave card and contactless payments. Both options have more than 90 percent of responses each. Cash has the least interest from interested respondents, although interest is still more than 80 percent. Note that OC Streetcar will not have an option to use cash or purchase single ride passes onboard the vehicle, although there will be options available at the service's ticket vending machines (TVM).

Interest in OCTA Providing New Fare Options				
Future Fare Media	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Responses
Wave card	92%	6%	2%	4,070
Wave Mobile App	88%	10%	3%	3,687
Cash for single trip	82%	12%	7%	2,030
Contactless (Apple / Google Pay)	91%	6%	3%	1,938
Credit / debit card	87%	10%	3%	1,798
Grand Total	88%	8%	3%	13,523

n = 13,523 responses from 6,266 unique respondents (respondents can make multiple selections)

The distribution of responses suggests that most respondents are both interested in new fare options (generally) and the specific new fare options that were noted in the survey.

Respondents were asked in separate questions which current fares they use and which of the specific proposed new fare options they would be interested in using. Interestingly, while it was shown earlier that overall interest in “new fare options” was consistently high across all current fare types, respondents’ interest in specific future options was more varied. The comparison indicates that interest in specific new fare media may be influenced by the specific fares respondents currently use.

In particular, current users of the OC Bus mobile app demonstrated a high interest in using the future Wave mobile app (82 percent of respondents that use the mobile app).

Notably, respondents that currently use cash, paper (pre-paid) passes, or onboard day passes express strong interest in the physical Wave card option (71 percent for cash users and 78 percent respectively for pre-paid / onboard day passes).

Future Fare Media						
Current Fare Media	Credit / debit card	Contactless (Apple / Google Pay)	Cash for single trip	Wave Mobile App	Wave card	Total Respondents
Mobile app	35%	44%	31%	82%	71%	2,788
Cash (single trips)	36%	39%	51%	62%	71%	2,626
Paper (pre-paid) passes	32%	35%	40%	56%	78%	2,423
Purchased onboard day passes	32%	35%	40%	56%	78%	2,228
Total Respondents	1,583	1,726	1,883	3,313	3,719	5,574

n = 5,574 unique respondents (respondents can make multiple selections)

Although there is interest in the Wave card and the Wave mobile app from cash users, they also reported having high interest in continuing to use cash in the future (51 percent).

Note that respondents could pick multiple selections for both current fare media and current fare media and percentages (which are based on the current fare media selected by survey respondents) can add up to more than 100 percent. Passes from other agencies were not

considered for this analysis since the sample size is small compared to the other current fare media options.

Interest was also gauged among different types of OC Bus riders to see if trip frequency affects interest in specific future fare options. OC Bus riders were split into the following categories:

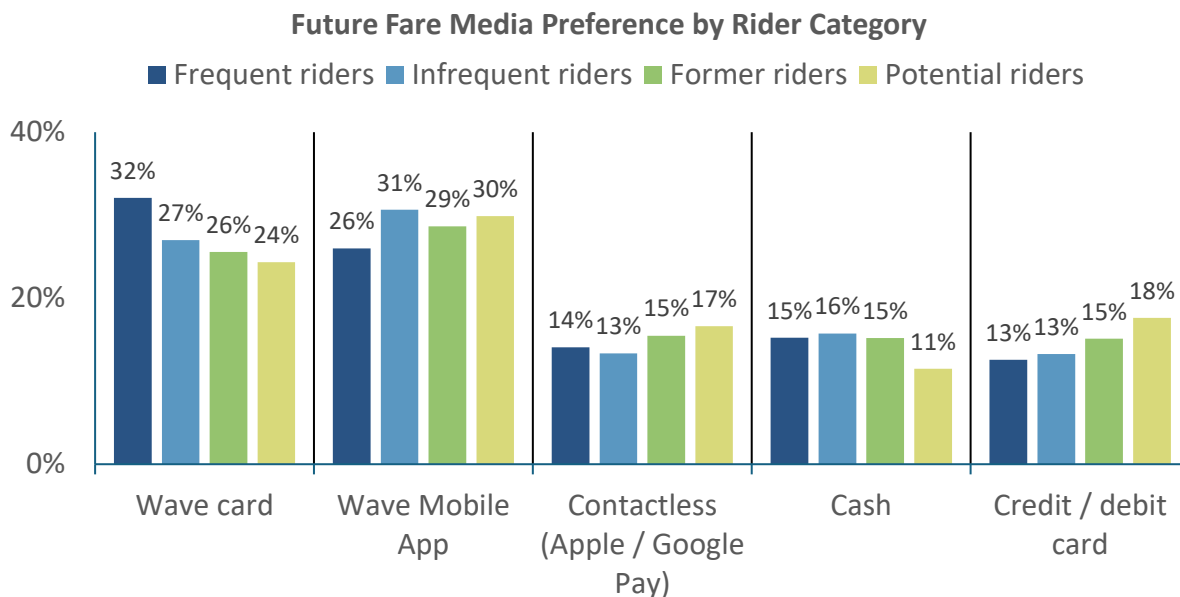
- Frequent riders = riders who ride daily or weekly
- Infrequent riders = riders who ride monthly or less than once a month
- Former riders = riders who used to ride OC Bus, but have not in the last six months
- Potential riders = respondents who have not ridden OC Bus, but may ride in the future

Frequent riders have a very similar distribution of interest in future fare options to the overall survey distribution. A total of 32 percent of responses express interest in using the Wave card, and 26 percent express interest in the new Wave mobile app.

The other groups (infrequent, former, and potential riders) have relatively higher percentages of interest in the Wave mobile app compared to the Wave card. All groups besides frequent riders have between 29 to 31 percent of responses interested in the Wave mobile app, in contrast to 24 to 27 percent for the Wave card.

Potential riders show a comparatively low amount of interest in using cash in the future (11 percent) compared to other future fare media.

Overall, frequent riders seem to have a slight preference for the Wave card, while other groups of riders prefer the Wave mobile app more.



n = 13,587 responses from 6,309 unique respondents (respondents can make multiple selections)

Interest in specific future fare options vary by respondent language. All respondent languages indicate substantial interest in the Wave card – with the Wave card being the most frequently selected option across all language group respondents – although the distribution of interest among the different languages varied. Respondents were able to pick as many proposed future fare media options as they wanted.

In terms of interest in the Wave card, Korean language respondents show the highest percentage of respondents, although it should be noted that the number of Korean language respondents was limited. Interest from Vietnamese language responses is the next highest with 43 percent interested in the Wave card.

Interest in the Wave card from respondents of remaining languages is closer in distribution, from Spanish (36 percent), Mandarin (33 percent) and English (29 percent).

Respondent Language	Future Fare Media					Total Responses
	Wave card	Wave Mobile App	Cash for single trip	Contactless (Apple / Google Pay)	Credit / debit card	
English	29%	28%	15%	15%	14%	11,068
Spanish	36%	23%	18%	12%	11%	2,315
Vietnamese	43%	21%	14%	13%	10%	143
Mandarin	33%	31%	13%	15%	8%	39
Korean	68%	5%	9%	0%	18%	22
Grand Total	33%	31%	13%	15%	8%	13,587

n = 13,587 responses from 6,309 unique respondents (respondents can make multiple selections)

Korean language respondents have the lowest level of interest in the Wave mobile app (five percent) and contactless payments (zero percent), particularly compared with other language groups.

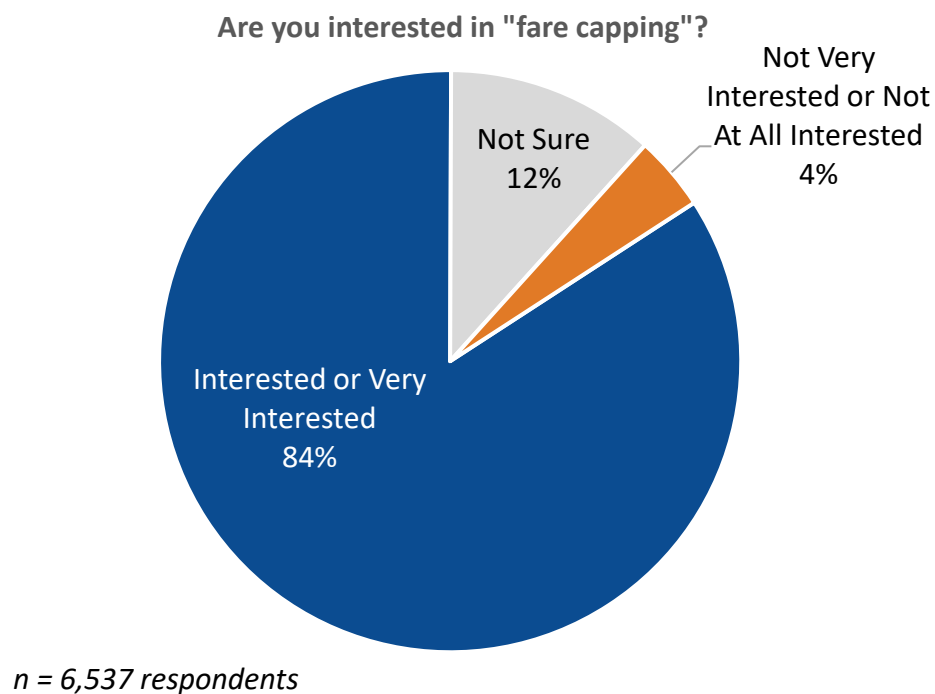
Biggest Changes to Fare System

Fare Capping

"Fare capping" was explained in the survey for respondents who were not familiar with the concept. Respondents were then asked if they are interested in fare capping.

A majority of respondents (84 percent) say they are interested or very interested in fare capping. Some respondents indicate in their open-ended responses that they are familiar with fare capping and describe their own experience in how fare capping was a benefit.

More than ten percent of respondents say they were not sure if they were interested, and four percent of respondents say they were not very interested or not at all interested.



Usage of current fare options seems to have little to no effect on respondents' interest in fare capping. Interest is consistent across all existing fare options with little variance (between 87 and 90 percent of responses for all options).

Interest in Fare Capping				
Current Fare Media	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Responses
Mobile app	90%	8%	2%	2,811
Cash (single trips)	87%	10%	3%	2,686
Paper (pre-paid) passes	88%	8%	4%	2,494
Purchased onboard day passes	87%	9%	4%	2,254
Passes from other agencies	87%	9%	4%	780
Grand Total	88%	9%	3%	11,025

n = 11,025 responses from 5,920 unique respondents (respondents can make multiple selections)

Interest in fare capping seems to affect respondents' interest in specific future fare media. Respondents interested in fare capping may be more likely to use the Wave card compared to uninterested respondents.

There were more responses from interested respondents for the Wave card (31 percent of responses) and the Wave mobile app (27 percent) compared to the other options.

In contrast, uninterested respondents show interest in cash (27 percent) and the Wave mobile app (25 percent) but have low interest in the Wave card (16 percent). Respondents who were unsure about fare capping appear to be a middle ground between the two groups, with the Wave mobile app as their most picked option (29 percent).

Interest in Fare Capping	Future Fare Media					Total Responses
	Wave card	Wave Mobile App	Cash for single trip	Contactless (Apple / Google Pay)	Credit / debit card	
Interested / Very Interested	31%	27%	14%	14%	13%	12,022
Not Sure	25%	29%	20%	12%	14%	1,130
Not Very Interested / Not At All Interested	16%	25%	27%	16%	15%	352
Grand Total	30%	27%	15%	14%	13%	13,504

n = 13,504 responses from 6,254 unique respondents (respondents can make multiple selections)

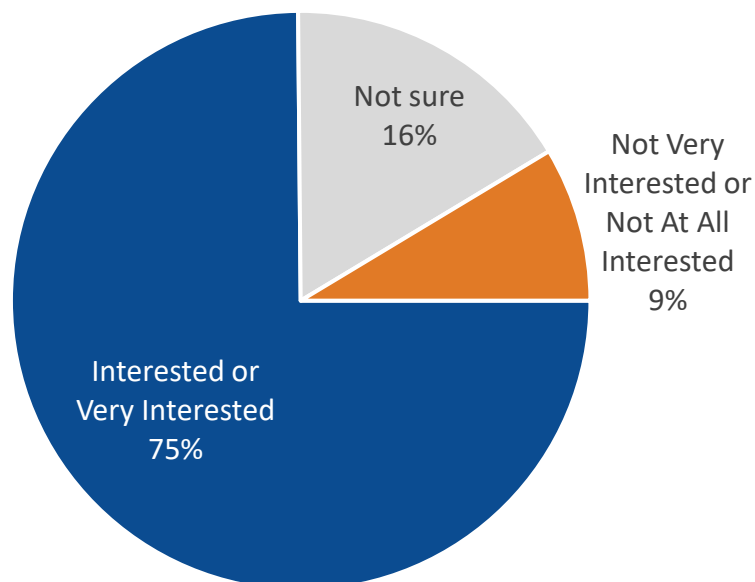
One-Time Purchase of Wave Cards

Respondents were asked if they are interested in purchasing the Wave card (paying a one-time fee to obtain a Wave card before officially using it). There is general interest in the one-time purchase fee, although there is some uncertainty. Three-quarters of respondents (75 percent) say they are interested in purchasing the Wave card. A total of 16 percent of respondents say they are unsure, and approximately nine percent say they were not very interested or not at all interested.

A likely reason for higher percentages of respondents being unsure or not interested is because of the one-time purchase fee being an additional cost on top of the usual bus fare. However, Wave card users do not have to pay the fee again once the card is used.

Some respondents are interested in the Wave card because of its environmental benefits, such as its reusability. Others say they appreciate having the card as a back-up option, in case their phones or cash are not available.

Are you interested in purchasing the Wave card?



n = 6,531 respondents

Those that indicated an interest in purchasing a Wave card also reflected this interest when asked about their future fare usage. A crosstabulation of responses to those that plan to use a Wave card (future fare media) and those interested in purchasing the Wave card shows a strong plurality of 88 percent. Respondents who indicated that they planned to use other fare media (that does not require a physical Wave card or a one-time fee) showed slightly less interest in purchasing a Wave card but still demonstrated interest.

Interest in Purchasing Smart Card				
Future Fare Media	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Responses
Wave card	88%	9%	2%	4,061
Wave Mobile App	77%	15%	8%	3,682
Cash for single trip	73%	16%	10%	2,024
Contactless (Apple / Google Pay)	79%	13%	9%	1,935
Credit / debit card	78%	16%	7%	1,796
Grand Total	80%	13%	6%	13,498

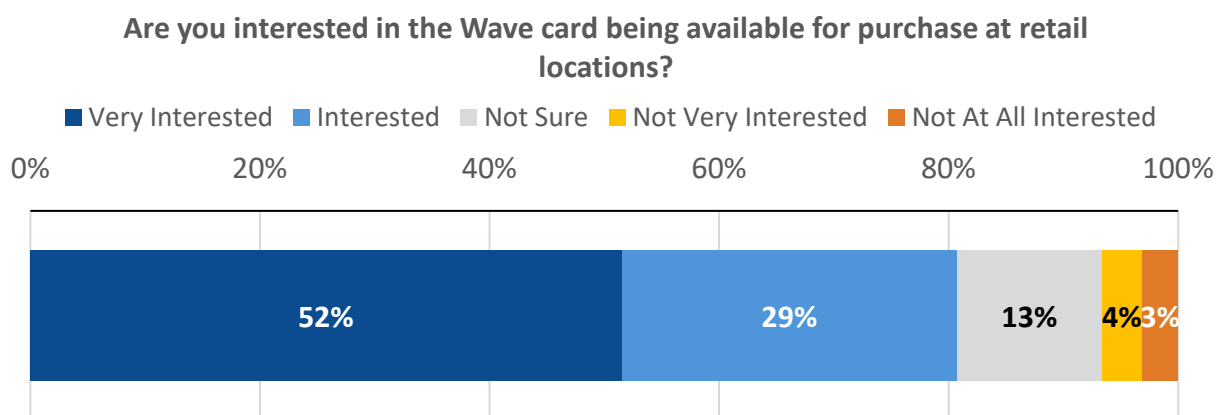
n = 13,498 responses from 6,246 unique respondents (respondents can make multiple selections)

Purchasing / Reloading Wave Cards at Retail Vendors

One change as a part of the proposed new fare media is an expanded retail vendor network. Respondents were asked if they were interested in visiting retail vendors as a first point of purchase for the Wave card. Approximately 81 percent of respondents are interested in purchasing new Wave cards at retail locations.

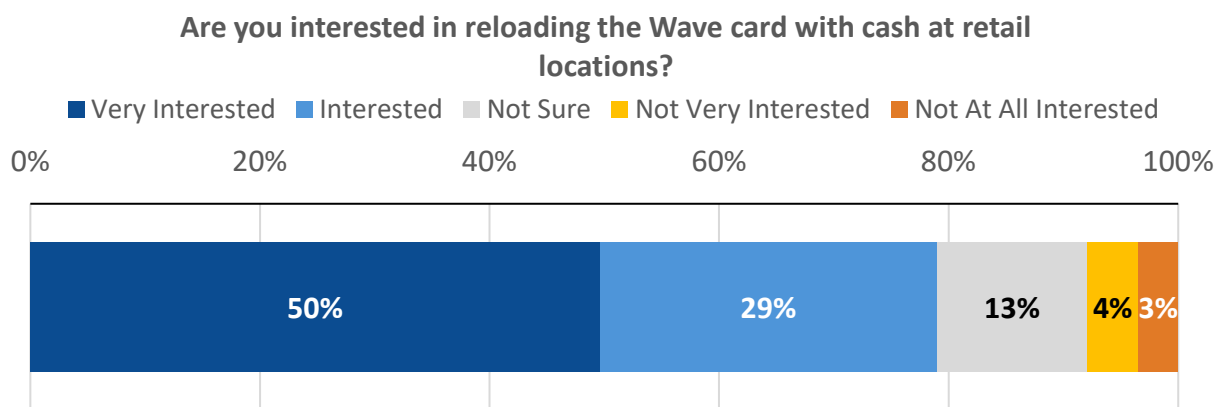
Open-ended comments from customers included requests to allow customers to purchase and reload physical Wave cards at transit centers, Metrolink stations and OC Streetcar stop TVMs. Currently, OC Streetcar TVMs will allow a customer to reload a physical pass, but not to initially purchase a physical Wave card (other options are available as an alternative).

Due to rounding, some percentages may not add up to 100 percent.



n = 6,395 respondents

Next, respondents were asked if they were interested in visiting these retail vendors again for reloading the Wave card. More than three-quarters (79 percent) of respondents are interested in reloading at retail locations.



n = 6,398 respondents

There is some correlation between purchasing and reloading at retail locations. More than 90 percent of respondents interested in purchasing the Wave card at retail locations are also interested in reloading their cards at retail locations.

More than 70 percent of respondents who are not interested in purchasing at retail locations say they are also not interested in reloading. Approximately 63 percent of respondents who are unsure about purchasing at retail locations are also unsure about reloading.

Interest in Reloading at Retail Locations				
Interest in Purchasing at Retail Locations	Interested / Very Interested	Not Sure	Not Very Interested / Not At All Interested	Total Respondents
Interested / Very Interested	92%	6%	2%	5,133
Not Sure	29%	63%	9%	796
Not Very Interested / Not At All Interested	15%	10%	74%	422
Grand Total	79%	13%	8%	6,351

Key Feedback Themes from Open-Ended Comments

Respondents were able to provide open-ended responses about the proposed new fare media at the end of the survey. These comments were reviewed and categorized by theme to get a sense of what respondents thought about the proposed new fare media. A comment may contain multiple themes.

By the end of the PIP, there were a total of 2,054 individual categorized comments received from surveys.

Positive Feedback About Proposed New Fare Media

There were respondents who were excited about the proposed new fare media in the open-ended comments. Approximately 15 percent of comments are generally supportive of the proposed new fare media. Twelve percent of comments include thanks or compliments to OC Bus.

Many comments noted positive experiences with similar systems at other agencies (five percent), citing examples such as Los Angeles, San Diego, Chicago, and New York. International cities such as London and Tokyo also appear as examples in the comments. These experiences help those respondents understand how these systems operate and how they can benefit OC Bus.

Other comments expressed excitement to use the Wave card (four percent) as an alternative to cash or a mobile app. These comments appreciate OCTA's efforts in modernizing the fare system and enhancing fare payment flexibility.

The environmental benefit of the Wave card was also a recurring theme in the open-ended comments (one percent). Some comments value the Wave card's reusability, noting that it offers a more sustainable option by reducing paper waste from physical passes.

Concerns About Proposed New Fare Media

There are a low number of comments (three percent) that opposed the proposed new fare media for various reasons.

Elimination of Onboard Day Pass Sales

Some open-ended comments expressed concerns about the impact of the proposed new fare media on current fare media. There are some concerns over the onboard day passes being phased out (three percent) and requests to keep them as a fare option.

Approximately three percent of comments requested to keep cash as a payment option, especially as an option for low-income riders or those who do not wish to use the other fare options. The plan under the proposed new fare media is for OC Bus to continue accepting cash as a fare option for single trips.

Fares for Senior and Disabled Riders

A significant theme that appeared in open-ended comments is the accessibility of the Wave card to senior riders. Approximately three percent of comments are requests to keep the existing discounted fares for senior or disabled riders. The discounted senior and disabled fares will continue under the proposed new fare media system.

Another set of comments conveyed concerns that the Wave cards and the proposed system may be too confusing for senior riders or tech-adverse riders (three percent). Some of these comments recommend providing video tutorials or additional outreach to help these groups better understand how to use the Wave card.

Fares for Youth and Community College Students

Approximately two percent of comments were requests to keep the existing discounted fares for college and youth riders. These concerns are to be expected as the current Youth Ride Free pass and some College Passes are physical paper passes. Some comments were received from schools and districts, asking about how the new youth passes would be distributed with the proposed new fare media. Youth Ride Free and College Pass will continue under the proposed new fare media system.

Common Questions

Approximately three percent of comments were curious whether the Wave card would work with other transit agencies. The TAP card from the Los Angeles County Metropolitan Transportation Authority (LA Metro) and the PRONTO card from San Diego Metropolitan Transit System (San Diego MTS) were frequently mentioned examples. Some comments express concern about managing an additional transit card. Due to current technological limitations and different fare systems from other agencies, interoperability with other agencies is unlikely to happen in the near future, although OCTA staff may look into potential opportunities.

Other comments expressed interest in using the Wave card and new fare media options with the future OC Streetcar service. Most feedback, specifically on OC Streetcar, asked if the proposed new fare media will be directly compatible with the OC Streetcar. The proposed new fare media is planned to be operable with the OC Streetcar. Comments note the benefits of interoperability with OC Streetcar as an incentive for transit riders and highlight how it would encourage attracting new riders across respective transit services.

A small percentage of comments were questions about the status of the existing fare media and the existing mobile app (two percent). Some comments mentioned technical issues with the current mobile app. The proposed new fare media will include the new Wave mobile app that will be different from the current mobile app.

Another three percent of comments requested additional details about the proposed new fare media. Specifically, one percent of comments asked for more information about fare capping, while 0.3 percent of comments requested clarification on the two-hour transfer period.

Public Comments

In-Person/Virtual Community Meetings

OC Bus riders and the public had the opportunity to discuss the proposed new fare media and provide feedback. There were four in-person and three virtual community meetings. A total of 92 customers participated in the community meetings. Spanish and Vietnamese speaking interpreters were available for language assistance as needed for meetings.

Virtual Community Meetings (all conducted on Zoom)

- February 4, 2025 - English – 46 attendees
- February 5, 2025 - Spanish – 15 attendees
- February 12, 2025 - Vietnamese – 19 attendees

In-Person Community Meetings

- February 11, 2025 - Norma Hertzog Community Center – 4 attendees
- February 12, 2025 - Laguna Hills Community Center – 1 attendee
- February 13, 2025 - Fullerton Community Center – 5 attendees
- February 20, 2025 - Santa Ana College – 2 attendees

A summary of public comments received from the community meetings is listed below. During the meetings, customers noted that they appreciated the opportunity to provide feedback about the proposed new fare media.

Community Meeting Feedback Summary

Attendees expressed enthusiasm for the initiative and progress on “something new.” In addition to thanking staff for the information provided, attendees said they liked a lot of the changes and were excited to use the new smart card – particularly to have a mobile option. Attendees asked for more details about when the Wave card would be available and were also interested in how long existing paper passes would continue to be accepted.

There were several questions and comments related to the interoperability of the Wave card, both on other OCTA systems, as well as other external agencies. These included if the Wave card would be usable on OC Flex or the OC Streetcar system. There were several questions whether the Wave card system would include OC ACCESS, along with inquiries if there would be discounted fares for OC ACCESS riders using OC Bus.

Several attendees noted similarities to other local transit agency smart cards, including Los Angeles Metro and Long Beach Transit’s TAP cards and San Diego MTS’s PRONTO card. Several attendees asked if the Wave card would work with other local transit agencies, including LA Metro, Long Beach Transit, and San Diego MTS. One attendee was also interested if other

agencies would accept the Wave card as a transfer, asking if the card would need to be tapped, or merely shown to the transferring coach operator.

There were several questions about the specific details of the free two-hour transfer period, including questions about when the two-hour period started, if there was any need to “reset” the transfer period, and how the two-hour period would work on longer routes with more infrequent transfer times. In one meeting, an attendee asked if there were any limits on the two-hour transfer, such as direction of travel or the same route.

There were several questions about existing specialty and discount passes and if they would continue to be available and if there would be any changes to the cost or availability of these passes. Passes discussed included senior and disabled fares, Youth Ride Free passes, and community college passes. It was shared that these existing passes would continue and there would be no change to the cost of the passes.

There was some feedback about the cost of the physical Wave card, with one attendee noting that the fares weren’t changing, but now they had to pay the cost to purchase a Wave card. It was asked if there would be a promotional period when the Wave cards are offered free to riders. It was noted that OCTA intends to provide a Wave card to replace the existing Reduced Fare Identification Card used by senior and disabled riders.

One attendee asked how the Perk Pass (Employer Pass) would work with the proposed Wave card system. They asked if the physical Wave cards would include an identification or serial number that could be used to assign to employees.

Additionally, one attendee asked if OCTA would be creating a low-income pass as part of the proposed new fare system.

Community meeting attendees also asked a few technical questions about the proposed new fare system, which included whether the use of a mobile phone used or required Near Field Communication in order to operate.

There were several attendees concerned if it was a requirement to create an account in order to use the Wave card. These concerns were mostly noted that the process may be confusing for the elderly or those less experienced with computers and mobile devices. One attendee wanted to clarify that account creation did not have citizenship or other legal requirements.

The overall tone of the feedback from community meetings was largely positive, particularly once questions about the continuation of existing fares were addressed. Multiple attendees expressed that OCTA should ensure that riders are notified of the new fare media system to avoid confusion. Others asked if OCTA had information or a program to help seniors or unfamiliar riders with how to use the Wave card system and to load funds onto the card.

Public Comments — Email, Phone Calls, and Social Media

Customers were able to provide feedback on the Plan by calling or emailing the Customer Information Center and sending comments to OCTA Customer Relations. A total of 13 comments, most of which were critical of proposed new fare media, have been received and summarized below.

Customer Relations comments received included:

- Requests to keep cash payments or preferences for cash payments
- Concerns about the one-time purchase fee of the Wave card
- Questions and concerns about the logistics of the proposed new fare media for other agencies or charities who currently distribute bus passes
- One email that was received for the public hearing expressed concerns about privacy, possible impacts on intra-agency transfers, and the one-time purchase fee of the Wave card

Public social media discussion was also considered for feedback on the PIP. There were 162 comments received on social media. Approximately 22 percent of comments were supportive of the proposed new fare media, while three percent opposed the new fare media. Some social media comments asked for more information about the new fare media (three percent).

Community Events and Organizations

To meet with the public in person and ensure participation across all communities, staff participated in several community events and celebrations, completed ride-alongs and staffed transit centers, and visited popular destinations including:

- Little Saigon Television (LSTV) Little Saigon Pre-Tet Event (January 19, 2025)
- City of Santa Ana Tet Festival (January 25, 2025)
- Orangewood Foundation Transit Training (January 28, 2025)
- Little Saigon Lunar New Year's Eve Event (January 28, 2025)
- Union of Vietnamese Student Association (UVSA) Tet Festival (January 31 to February 2, 2025)
- O.C. Black History Month Parade and Unity Festival (February 1, 2025)
- Golden West College Welcome Back Event (February 3-4, 2025)
- City of Stanton Food Distribution (February 4, 2025)
- Santiago Canyon College Welcome Back Event (February 10, 2025)
- Fullerton College Club Kick-Off (February 19, 2025)
- Downtown Senior Center Community Event (February 19, 2025)
- Santa Ana Unified School District Wellness Fair (February 21, 2025)
- Kid's Pet Parade (February 22, 2025)

- Santa Ana Senior Center Community Event (February 24, 2025)
- Southwest Senior Center Community Event (February 25, 2025)
- Cypress College Back to School Event (February 26, 2025)
- Goldenwest Transportation Center (February 26, 2025)
- Fullerton Park and Ride (February 26, 2025)
- Laguna Hills Transportation Center (February 27, 2025)
- Newport Transportation Center (February 28, 2025)
- Garden Grove Unified School District Community Resource Fair (March 1, 2025)
- Northgate Market ethnic markets outreach (March 2-3, 2025)
- Family and Community Engagement (FACE) Liaison Meeting, Santa Ana Unified School District (March 4, 2025)
- Nowruz Spring Festival and Market (March 9, 2025)
- Golden West College: Goldchella (March 13, 2025)
- Southwest Senior Center St. Patrick's Day Senior Event (March 19, 2025)
- Fullerton Community Center Senior Food Distribution (March 20, 2025)
- Vietnamese Friendship Artists Group Community Event (March 23, 2025)

A brief summary of public comments received from community events is listed below. While customers supported the proposed new fare media, some voiced concerns or questions. Some attendees provided comments unrelated to the proposed new fare media, such as general appreciation for OC Bus or questions relating to technical issues with the current mobile app.

Comments heard included:

- Questions about distribution of the proposed new fare media and account management
- Questions relating to vendor locations, such as which vendors are or are not included in the proposed retail network
- Questions about free ride programs such as Youth Ride Free being included in the proposed new fare media
- Requests from senior or non-English speakers for additional print outreach materials providing more details about the proposed new fare media; requests for additional communications in advance of / during the launch of the proposed new fare media

OCTA Advisory Committees

Citizens Advisory Committee

January 21, 2025 – OCTA Headquarters (16 Attendees)

Committee members provided comments and questions following a presentation by staff on the proposed new fare media. There was interest in when the Wave card option would become available and when existing paper fare media would no longer be available. In response to a

committee member's question, staff noted that the Wave card would be available for OC Bus and the future OC Streetcar.

Summary minutes from this item are attached within the appendix.

Accessible Transit Advisory Committee

January 28, 2025 – OCTA Headquarters (11 Attendees)

Committee members discussed and shared feedback on the proposed new fare media. Members provided feedback that the design and presentation of the Wave card would be important, both for identification of the card for senior and other discounted fares, as well as differentiating the Wave card from unrelated gift cards sold by retailers. A committee member requested that additional research and consideration be performed regarding the Wave card with regard to the disabled population. They expressed concern about discounted fares not being available when using credit or debit cards. Staff noted that this was a system limitation based on credit card information, but that there were other media options (including cash and Wave cards) that continued to provide discounted fares and noted they would look into additional options.

Summary minutes from this item are attached within the appendix.

Diverse Community Leaders Meeting

February 18, 2025 – Virtual Meeting via Microsoft Teams (24 Attendees)

The PIP was also presented at the Diversity Community Leaders Quarterly Meeting on February 18, 2025. While there was no feedback specific on the proposed new fare media, the participating diversity community leaders agreed to distribute the information to their communities.

Teen Council

February 18, 2025 – OCTA Headquarters (19 Attendees)

The PIP was presented at the Teen Council Meeting on February 18, 2025. While there were no discussions about the proposed new fare media, questions were asked about the current Youth Ride Free passes, the Wave mobile app, and interoperability with other agencies, such as Metrolink or LA Metro. A majority of attendees supported the proposed new fare media and noted they prefer digital (mobile) passes.

Meeting with Social Service Agencies

March 18, 2025 – Virtual Meeting (27 Attendees)

A roundtable meeting with representatives from Orange County social services agencies provided feedback on the proposed new fare media. Attendees were interested in how the new Wave card and account-based management would provide new administration options for providing transit benefits to their clients, such as fare capping and automatic balance top offs for clients. OCTA staff noted that they would return to provide a preview of the institutional management website and provide training to interested agencies prior to the launch of the Wave card system.

Summary minutes from this item are attached within the appendix.

Public Hearing

March 24, 2025 – OCTA Headquarters (Three Public Speakers)

As part of the public hearing on March 24, there were comments received from public speakers. One speaker expressed concerns about the privacy of his transit usage of the proposed new fare media and requested that the benefits of the Wave card be available to those that do not wish to register an account or use the mobile app. Another speaker noted concerns that the move away from paper passes would impact those that receive passes through a social service agency.

The required court stenographer transcript of the public hearing, including public comments, is included in the appendix.

Next Steps

OCTA is proposing new fare media as part of the RVS scheduled to launch in late summer 2025. Through the comprehensive PIP, OCTA has gathered community feedback that shows strong interest in these new payment options, as well as limited concerns and questions.

The multifaceted and multilingual outreach program concluded with a public hearing on March 24, 2025. By the end of the program, responses from 8,256 surveys were collected. More than 6,900 current, former, and potential OC Bus riders have provided valuable feedback on the proposed RVS.

All the feedback received will help shape and inform the final proposed new fare media to be presented to the Board on May 27, 2025. Subject to the approval of the Board, OCTA will implement a comprehensive Awareness and Education Campaign to increase public awareness of the new fare media as well as proactively responding to feedback received during the PIP.

Appendix

A. Survey Question by Question Summary

All PIP data is reported as of March 24, 2025, the close of the PIP.

1. How often do you use OC Bus?

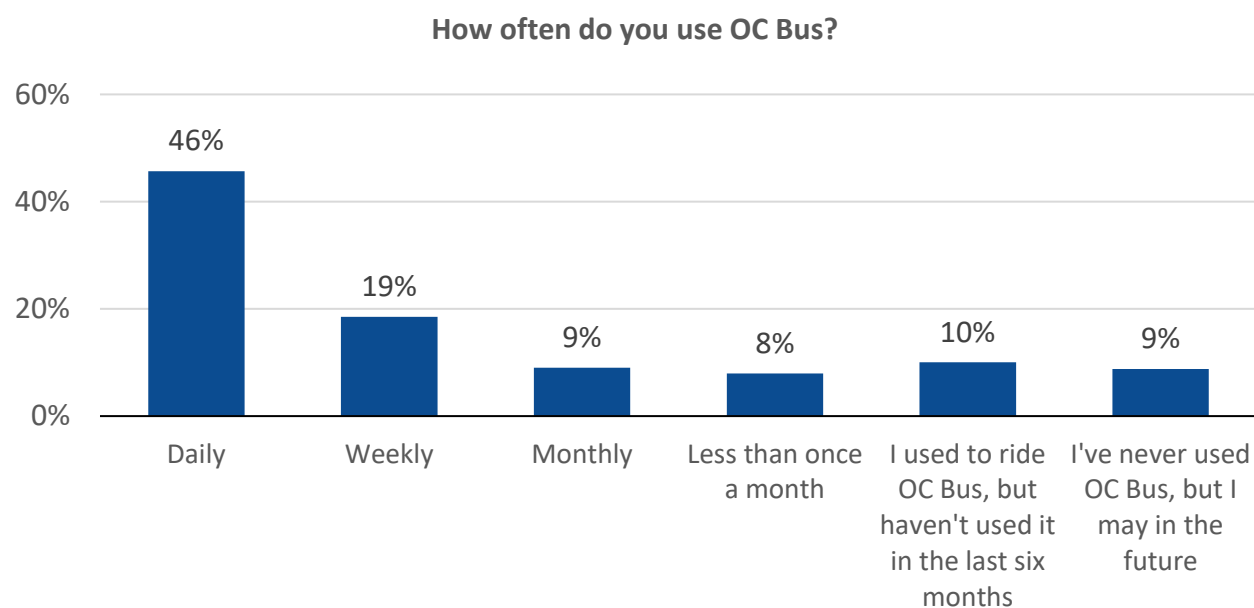
Approximately 64 percent of respondents say they use OC Bus daily or weekly, with more than 45 percent of respondents riding daily and 19 percent of respondents riding weekly. These respondents are considered frequent riders, and they currently make up the majority of respondents.

Approximately nine percent of respondents say they use OC Bus monthly, while eight percent say they use OC Bus less than once a month. These respondents are considered infrequent riders.

Some respondents say that they used OC Bus in the past, but they have not ridden the bus in the past six months (ten percent). These respondents are considered former riders.

Other respondents say that they have never used OC Bus before, but they may consider using it in the future (nine percent). These respondents are considered potential riders. Although potential riders are not currently using the bus, they may still provide valuable feedback.

The PIP prioritized receiving feedback from current and former riders of OC Bus. Respondents who picked “I don’t ride OC Bus” were not qualified to take the survey, although they were given the option to provide feedback in the open-ended comments.

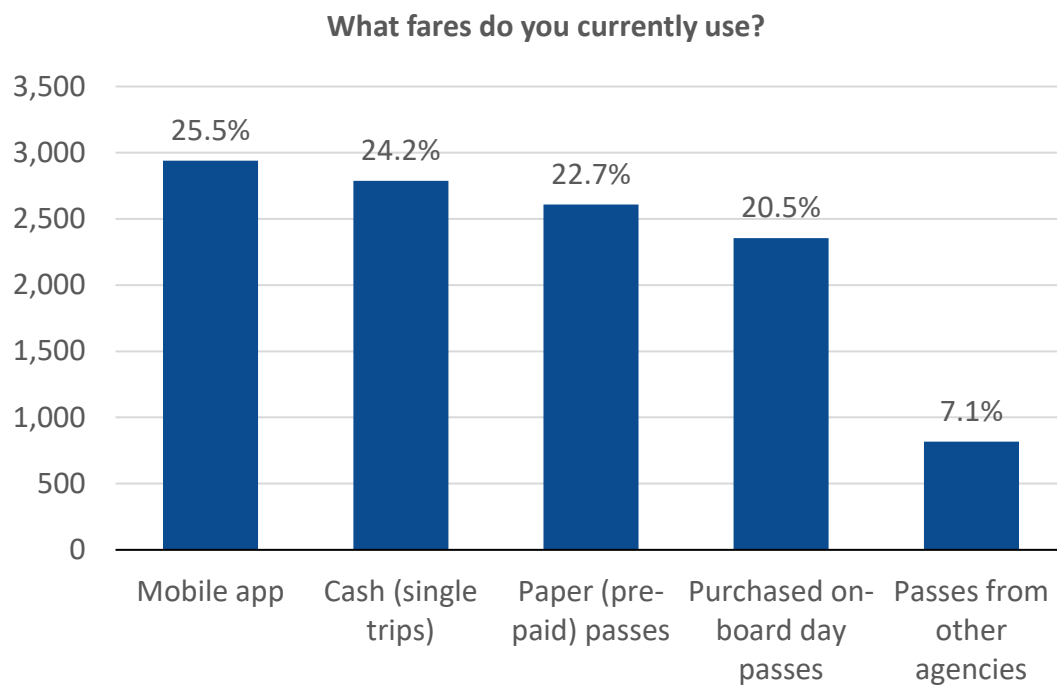


n = 6,951 respondents

2. What types of fare media have you ever used for OC Bus? (Check all that apply)

Respondents reported using most current fare options consistently (respondents could select more than one option), with the exception of usage of other transit agency passes. The mobile app has a slight lead over the rest of the options (26 percent) besides the passes from other agencies. Cash (24 percent) is the next selected option, followed by pre-paid paper passes (23 percent) and onboard day passes (21 percent). A smaller percentage of respondents report using passes from other agencies (i.e., Metrolink, Amtrak, etc.).

Respondents who say they have never used OC Bus but may in the future (potential riders) did not answer this question, but they could answer the rest of the survey.



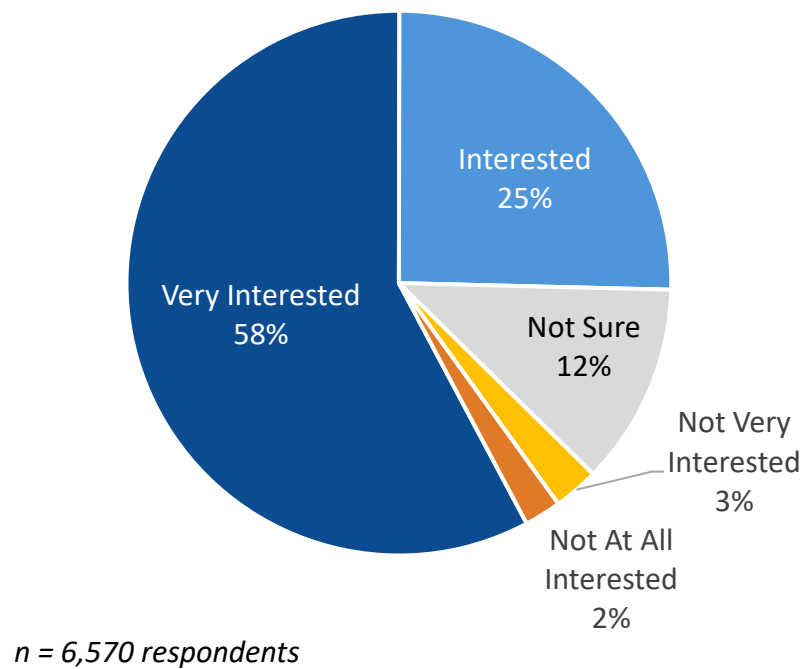
n = 11,511 responses from 6,214 respondents (respondents can make multiple selections)

3. How interested are you in OCTA providing enhanced new fare options?

A majority of respondents (83 percent) were interested or very interested in OCTA providing new fare options. The high interest shows that respondents are supportive of OCTA taking steps to modernize its fare system.

Approximately 12 percent of respondents say they were not sure, while five percent say they were not very interested or not at all interested.

How interested are you in OCTA providing enhanced new fare options?

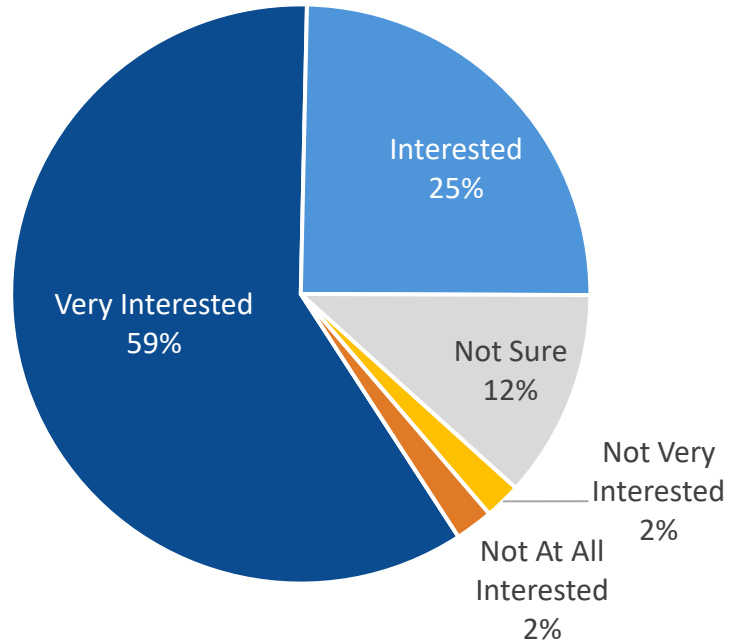


4. Are you interested in "fare capping," which ensures you're always paying the best fare when using OC Bus?

A majority of respondents (84 percent) were interested or very interested in fare capping. Those expressly noted that they are very interested (59 percent) were the majority of the responses received. Based on write-in comments, some respondents note positive experiences with fare capping in other transit systems, leading to an understanding of how fare capping works.

Other respondents express confusion or concern over fare capping in the open-ended comments, although the percentages for those categories are small (12 percent not sure and four percent not very or at all interested).

Are you interested in "fare capping"?



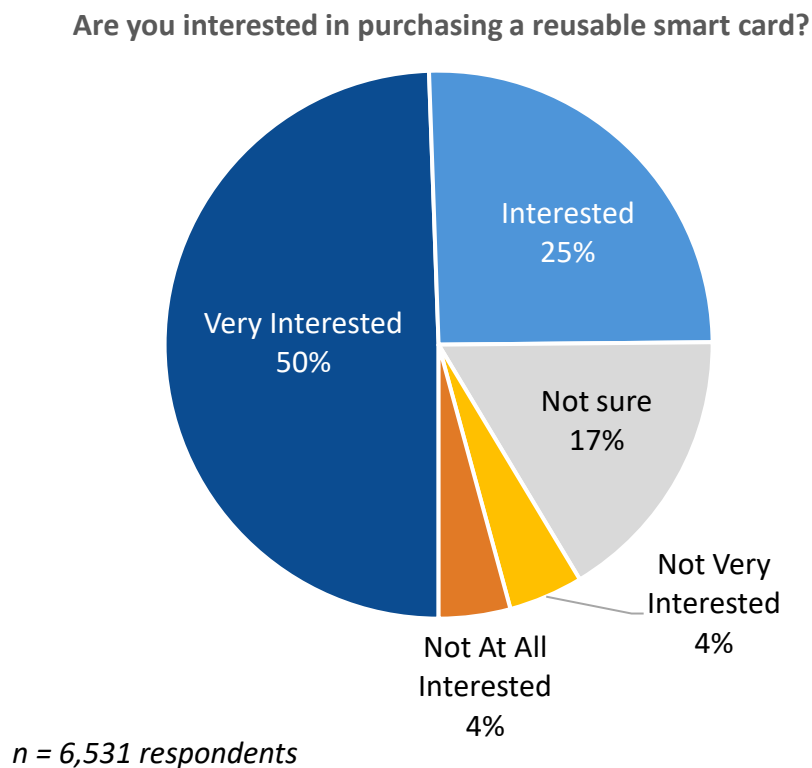
n = 6,537 respondents

5. Are you interested in purchasing a reusable smart card?

Respondents were asked whether they would be interested in purchasing a reusable smart card or pay a one-time fee to get a new card. Three-quarters of respondents (75 percent) expressed interest in purchasing a reusable smart card.

Approximately 17 percent of respondents say they were not sure about purchasing the smart card. Some of the uncertainty about this fee can also be found in the open-ended comments.

For similar reasons, eight percent of respondents said they were not interested in purchasing the smart card.

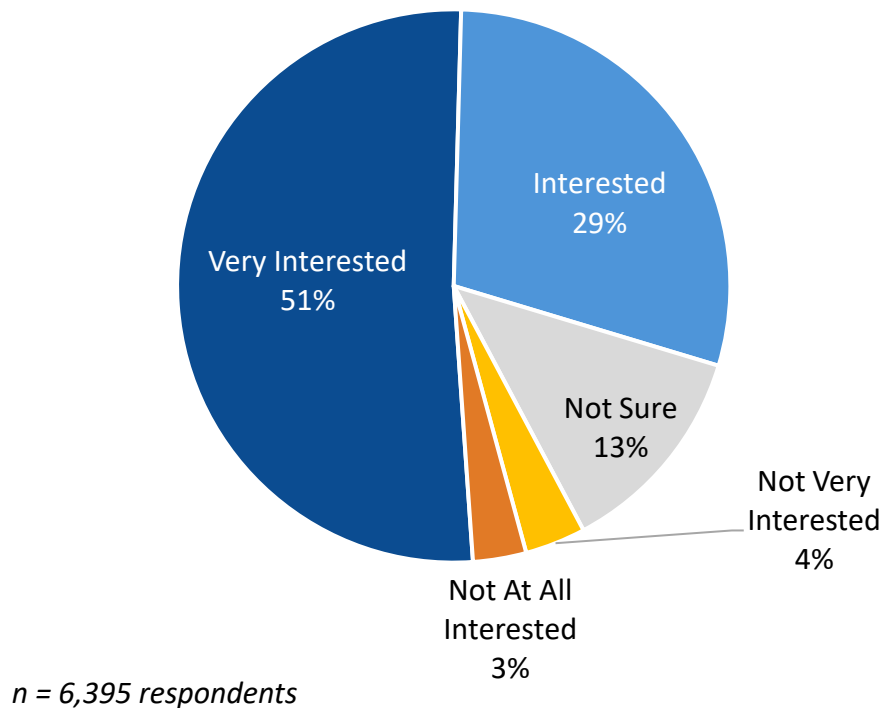


6. Are you interested in smart cards being available for purchase at retail locations?

A majority of respondents (80 percent) are interested or very interested in smart cards being available at retail locations. Respondents being open to retail vendors show that purchasing the physical fare media (Wave card) at retail locations does not pose an obstacle for obtaining smart cards or paying fare.

Approximately 13 percent of respondents say they are not sure about smart cards being available at retail locations, and seven percent of respondents say they are not very or at all interested.

Are you interested in purchasing smart cards at retail locations?

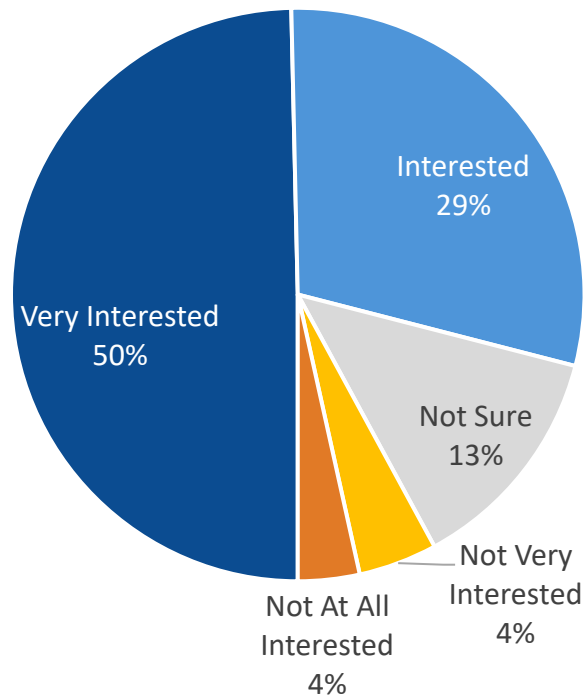


7. Are you interested in being able to reload the smart card with cash at retail locations?

A majority of respondents (79 percent) are interested or very interested in being able to reload the smart card with cash at retail locations.

Approximately 13 percent say they are not sure about reloading the smart card at retail locations, and eight percent say they are not very or at all interested. Note that reloading value to the smart card could also be done using a credit or debit card via the mobile app, or at an OC Streetcar TVM.

Are you interested in reloading the smart card at retail locations?



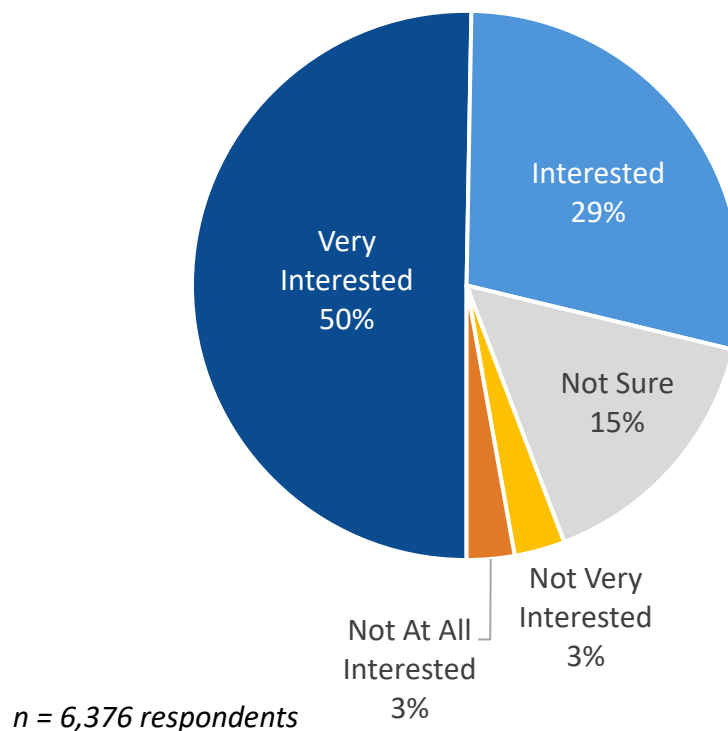
n = 6,398 respondents

8. Would you be interested in using the new fare media (with a best fare guarantee), instead of a day pass purchased onboard?

A majority of respondents (79 percent) are interested or very interested in using the new fare media, which includes the smart card.

Approximately 15 percent say they are uncertain about using the new fare media, while six percent say they are not very or at all interested. A few respondents expressed concern in open-ended responses about the discontinuation of onboard day pass sales.

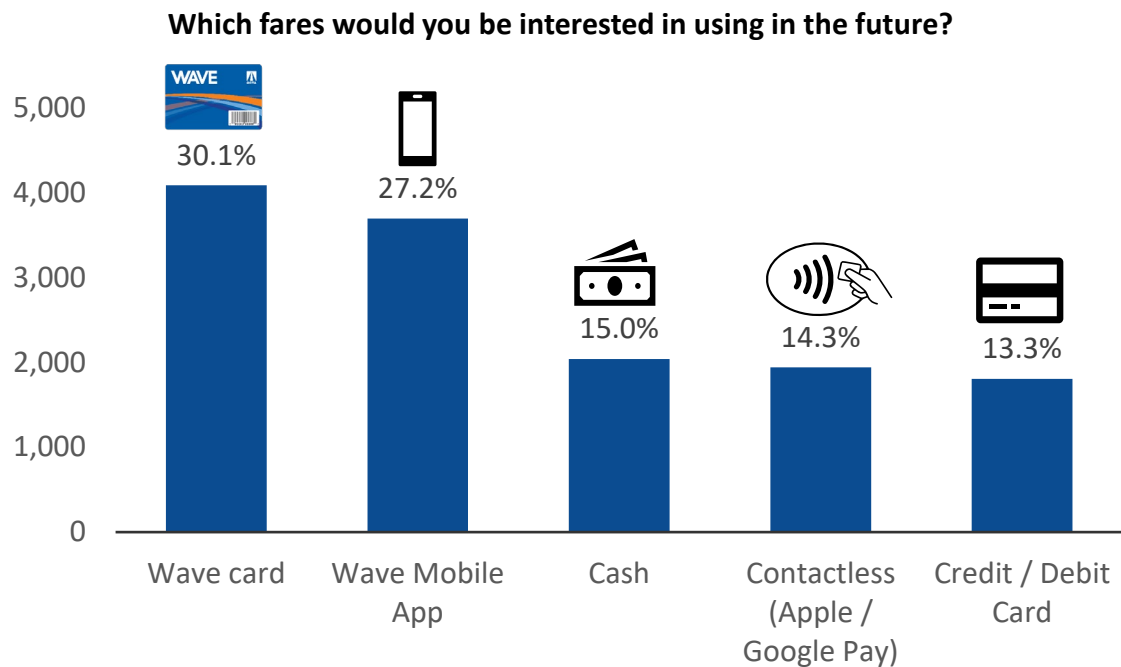
Would you be interested in using the new fare media?



9. Which types of fare would you be interested in using in the future? (Check all that apply)

A majority of respondents are interested in using a smart card such as the Wave card (30 percent) and the new Wave mobile app (27 percent) in the future. Both new fare options have the highest interest based on frequency of responses.

Interest in contactless payments, cash, and credit / debit cards options is lower and more consistent across selections.



n = 13,587 responses from 6,309 unique respondents (respondents can make multiple selections)

B. Brochure / survey instrument

[illegible]

The image shows the back of a business reply mail envelope. At the top, there is a return address: "Newman Co., Inc., and parent has placed this mailing by first-class mail, return postage guaranteed". Below this is a large rectangular area for the business reply mail, which is divided into two sections. The left section is labeled "BUSINESS REPLY MAIL" and contains the text "FIRST CLASS MAIL" and "PERMIT NO. 7384 ORANGE, CA". The right section is labeled "NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES" and contains a series of horizontal bars. At the bottom of the envelope, there is a series of vertical bars and a series of horizontal bars.

[illegible][illegible][illegible]

MAIL IN ENQUIRY
ENCUESTA POR CORREO

1. How often do you use OC Bus?

A qué frecuencia lo usa usted? (En Español)

☐ Daily *Diariamente*
☐ Weekly *Semanalmente*
☐ Monthly *Mensualmente*
☐ More often *Con más frecuencia*
☐ Less than once a month *Menos de una vez al mes*
☐ I used to use OC Bus, but haven't used it in the last 6 months *Usaba el OC Bus, pero no lo he usado en los últimos 6 meses*
☐ I've never used OC Bus, but I may in the future *Nunca he usado el OC Bus, pero tal vez lo use en el futuro*
☐ I never used OC Bus, even though I live in the area *Nunca he usado el OC Bus, aunque vivo en el área*
☐ I don't use OC Bus
☐ No Use OC Bus

2. What types of fare have you ever used for OC Bus? Check all that apply. *¿Qué tipos de tarifas ha usado usted en el OC Bus? Marque todas las que apliquen.*

☐ Paper fare only *pasajes papeles*
☐ Transfer from other transit agency *transferencia de otra agencia de tránsito*
☐ Purchased on board day passes *comprados a bordo de pasajes diarios*
☐ Passes for other transit agency *pasajes de otra agencia de tránsito*
☐ OC Single trip *pasaje de un solo viaje*
☐ Cash Single trip *pasaje de un solo viaje en efectivo*
☐ Passes from other agencies *pasajes de otras agencias*
☐ All other *todos los demás*

[illegible]

Proposed New Fare Media PIP Survey Open-Ended Comments

C. Survey comments feedback for Proposed New Fare Media

www.OCTA.net/ProposedNewFareMediaSurveyComments

In-Person / Virtual Community Meetings

D. Customer Comments from Community Meetings

www.OCTA.net/ProposedNewFareMediaCommunityMeetingsSummary

Individual community meeting summaries for:

- Virtual English Zoom Meeting (2/4/2025)
- Virtual Spanish Zoom Meeting (2/5/2025)
- Norman Hertzog Community Center (Costa Mesa) (2/11/2025)
- Virtual Vietnamese Zoom Meeting (2/12/2025)
- Laguna Hills Community Center (2/12/2025)
- Fullerton Community Center (2/13/2025)
- Santa Ana College (2/20/2025)

Public / Customer Comments

E. Public Hearing Comments (March 24, 2025)

www.OCTA.net/ProposedNewFareMediaPublicComments

F. Customer Comments Received (Email, Phone, Social Media)

www.OCTA.net/ProposedNewFareMediaCustomerComments

G. Customer Roundtable (March 4, 2025)

www.OCTA.net/ProposedNewFareMediaCustomerRoundtable

H. Social Service Agency Roundtable (March 18, 2025)

www.OCTA.net/ProposedNewFareMediaSSARoundtable

OCTA Advisory Committees

I. Citizen Advisory Committee Meeting (January 21, 2025)

www.OCTA.net/ProposedNewFareMediaCACMeetingMins

J. Accessible Transit Advisory Committee Meeting (January 28, 2025)

www.OCTA.net/ProposedNewFareMediaATACMeetingMins



Proposed New Fare Media





Background

- In October 2023, the Board approved the implementation of a new rider validation system (RVS)
 - RVS proposes the implementation of contactless smart cards
- In order to implement contactless smart cards, OCTA is required by the FTA to conduct a Title VI analysis
 - Title VI analysis ensures low income and minority riders are not negatively impacted by the change in fare media
- In January 2025, OCTA kicked off the Title VI analysis and public involvement process for implementation of the proposed fare media

Wave Card Features

- New Wave Card replaces magnetic stripe paper passes*
 - Upfront Cost - \$2.00 - \$4.00
 - Available at OCTA Store and Retail Network
- Virtual card option via mobile application
- Fare Capping functionality
 - Pay-per-ride – Always pay the lowest fare
 - No upfront cost for monthly passes
- Free two-hour transfers
- Balance protection and auto-reload



*

OCTA will continue to offer cash and credit card payment options for fare purchases and reloads.



Title VI Compliance

- Title VI of the Civil Rights Act of 1964 prohibits discrimination based on race, color, or national origin
- FTA requires an equity analysis for major fare/service changes to avoid disparate impacts or disproportionate burdens
- FTA Circular 4702.1B guides how OCTA evaluates impacts on minority and low-income populations
- OCTA Fare Policy: impacts must be less than ten percent compared to counterparts
- Requires public outreach including a public involvement plan and public hearing
- All changes reviewed under Title VI equity analysis

Public Involvement Highlights



Goodbye, Paper Passes. Get Ready for Wave Card!

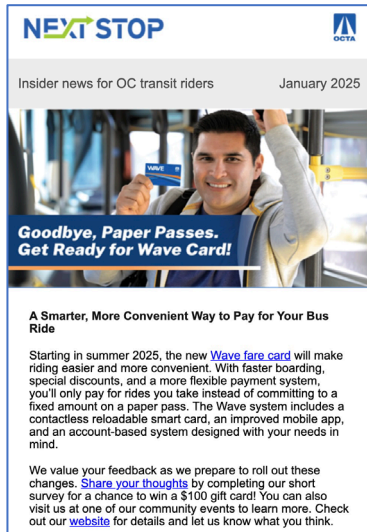
Adiós a los pases de papel. ¡Prepárate para la tarjeta Wave!

PARTICIPATE FOR A CHANCE TO WIN \$100

PARTICIPE PARA TENER LA POSIBILIDAD DE GANAR \$100

Give us your feedback for a chance to win a \$100 VISA gift card

Ayúdanos a mejorar el OC Bus para la oportunidad de ganar una tarjeta VISA de \$100

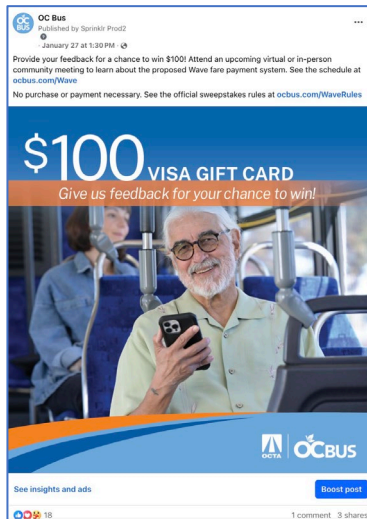


Goodbye, Paper Passes. Get Ready for Wave Card!

A Smarter, More Convenient Way to Pay for Your Bus Ride

Starting in summer 2025, the new **Wave fare card** will make riding easier and more convenient. With faster boarding, special discounts, and a more flexible payment system, you'll only pay for rides you take instead of committing to a fixed amount on a paper pass. The Wave system includes a contactless reloadable smart card, an improved mobile app, and an account-based system designed with your needs in mind.

We value your feedback as we prepare to roll out these changes. **Share your thoughts** by completing our short survey for a chance to win a \$100 gift card! You can also visit us at one of our community events to learn more. Check out our [website](https://ocbus.com/Wave) for details and let us know what you think.



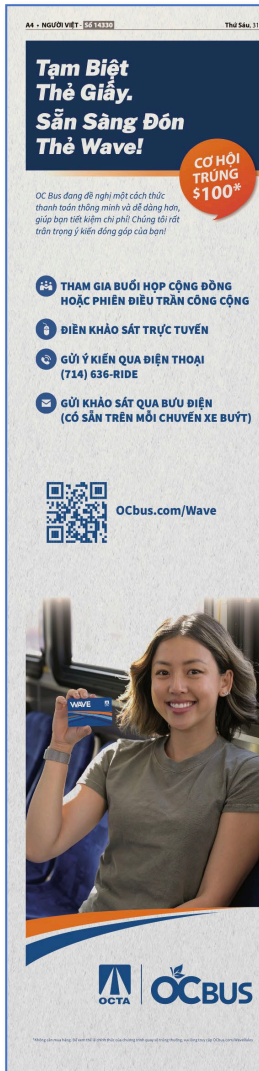
\$100 VISA GIFT CARD

Give us feedback for your chance to win!

See insights and ads

Boost post

18 1 comment 3 shares



Tạm Biệt Thẻ Giấy. Sẵn Sàng Đón Thẻ Wave!

CƠ HỘI TRÚNG \$100*

OC Bus đang đề nghị một cách thức thanh toán thông minh và dễ dàng hơn, giúp bạn tiết kiệm chi phí! Chúng tôi rất trân trọng ý kiến đóng góp của bạn!

THAM GIA BUỔI HỌP CỘNG ĐỒNG HOẶC PHIÊN ĐIỀU TRẦN CÔNG CỘNG

ĐIỀN KHẢO SÁT TRỰC TUYẾN (714) 636-RIDE

GỬI Ý KIẾN QUA ĐIỆN THOẠI (CÓ SẴN TRÊN MỖI CHUYẾN XE BUÝT)

GỬI KHẢO SÁT QUA BƯU ĐIỆN (CÓ SẴN TRÊN MỖI CHUYẾN XE BUÝT)

[OCbus.com/Wave](https://ocbus.com/Wave)



ON THE MOVE

OCTA Newsletter | January 27, 2025

On Transit Equity Day, Feb. 4, OCTA will offer free OC Bus rides to commemorate the historic efforts of Rosa Parks to keep public transportation affordable and accessible to everyone. Every day OCTA is committed to offering equitable, reliable and balanced transportation for all, through programs including the Youth Ride Free and Community College programs.

Darrell E. Johnson
Chief Executive Officer

[Find recent Board Actions here](#)

New OC Bus Fare Payment System Will Launch in Summer Following Public Feedback

Called Wave, it will include a new account-based system, reloadable smart card and new mobile app.



Adiós, pases de papel. ¡Prepárate para la tarjeta Wave!

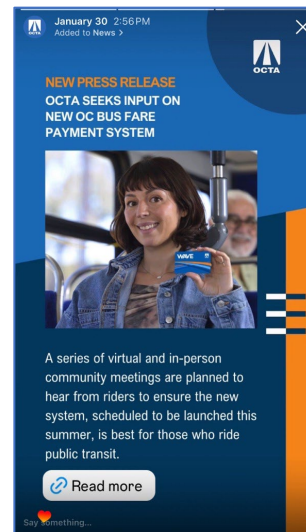
Denos su opinión y podrá ganar \$100!

Reuniones virtuales

5 de febrero

Particpe en una de las próximas reuniones comunitarias virtuales para informarse sobre el sistema de pago de tarifas Wave propuesta. Consulte el calendario completo y confirme su participación

ocbus.com/Wave



NEW PRESS RELEASE

OCTA SEEKS INPUT ON NEW OC BUS FARE PAYMENT SYSTEM

A series of virtual and in-person community meetings are planned to hear from riders to ensure the new system, scheduled to be launched this summer, is best for those who ride public transit.

Read more



OC Bus Sponsored · 1

Quý vị hãy góp ý để có cơ hội trúng thưởng \$100. Hãy tham gia buổi họp cộng đồng trực tuyến để tìm hiểu và đề xuất hệ thống giá vé Wave.

Buổi họp trực tuyến ngày 12 Tháng Hai

*Không cần mua hàng. Để xem thể lệ chính thức của chương trình quay số trúng thưởng, vui lòng truy cập [OCbus.com/WaveRules](https://ocbus.com/WaveRules)

Tạm Biệt Thẻ Giấy. Sẵn Sàng Đón Thẻ Wave!

Chia sẻ ý kiến để có cơ hội thắng \$100!

ocbus.com/wave

Hãy chuẩn bị cho tương lai cùng OC Bus

Learn more

59 1 comment 1 share

- Ten-week, outreach Campaign
- March 24, 2025, Public Hearing
- Multilingual Outreach approach: English, Spanish, Vietnamese, Korean, Mandarin
- 83 percent of respondents expressed strong support for Wave card



Title VI Analysis Conclusion

- No disparate or disproportionate impacts found
- Fare capping provides lower prices for everyone
- Retail network expanded to 400+ retail locations (compared with 100+ currently)
- Better coverage in minority and low-income areas
 - From 45 percent → 48 percent in low-income areas
 - From 47 percent → 57 percent in minority areas
- Helps offset any inconvenience from removing on board day pass sales
- Wave card confirmed as equitable and accessible



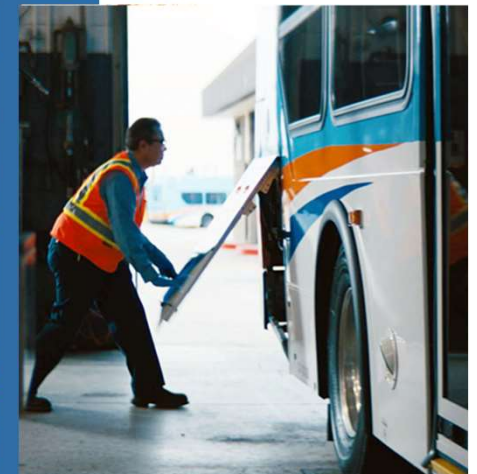
Next Steps

- Functional Integrated Testing (May – August 2025)
 - New Mobile Application
 - Institutional and Customer Websites
 - Revenue Management System and Customer Relations Module
 - Retail Network
- Public Awareness Campaign and Education (May – September 2025)
- Pilot Testing (August – September 2025)
- System Launch (October 2025)



Bimonthly Transit Performance Report

May 2025



What do we measure?



Service Demand

Measures boarding activity on OC Bus, OC Access, and OC Flex.



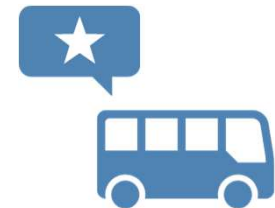
Reliability

Measures the reliability of the service in terms of schedule adherence on-time performance (OTP) and miles between road calls (MBRC).



Safety

Measures the safety of the service in terms of preventable collisions normalized by miles traveled.



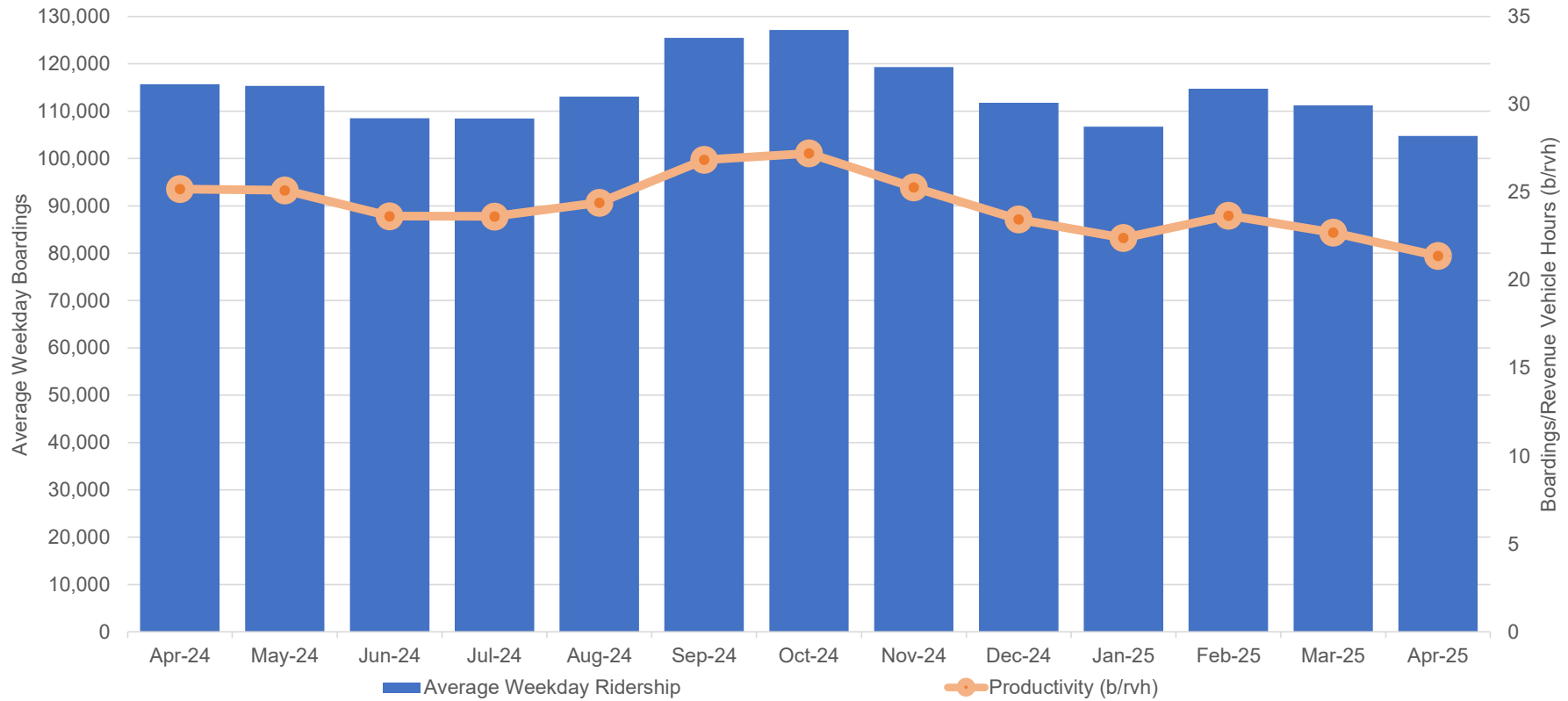
Courtesy

Measures customer feedback and is typically normalized by boardings.

OC Bus



Service Demand - Ridership Snapshot

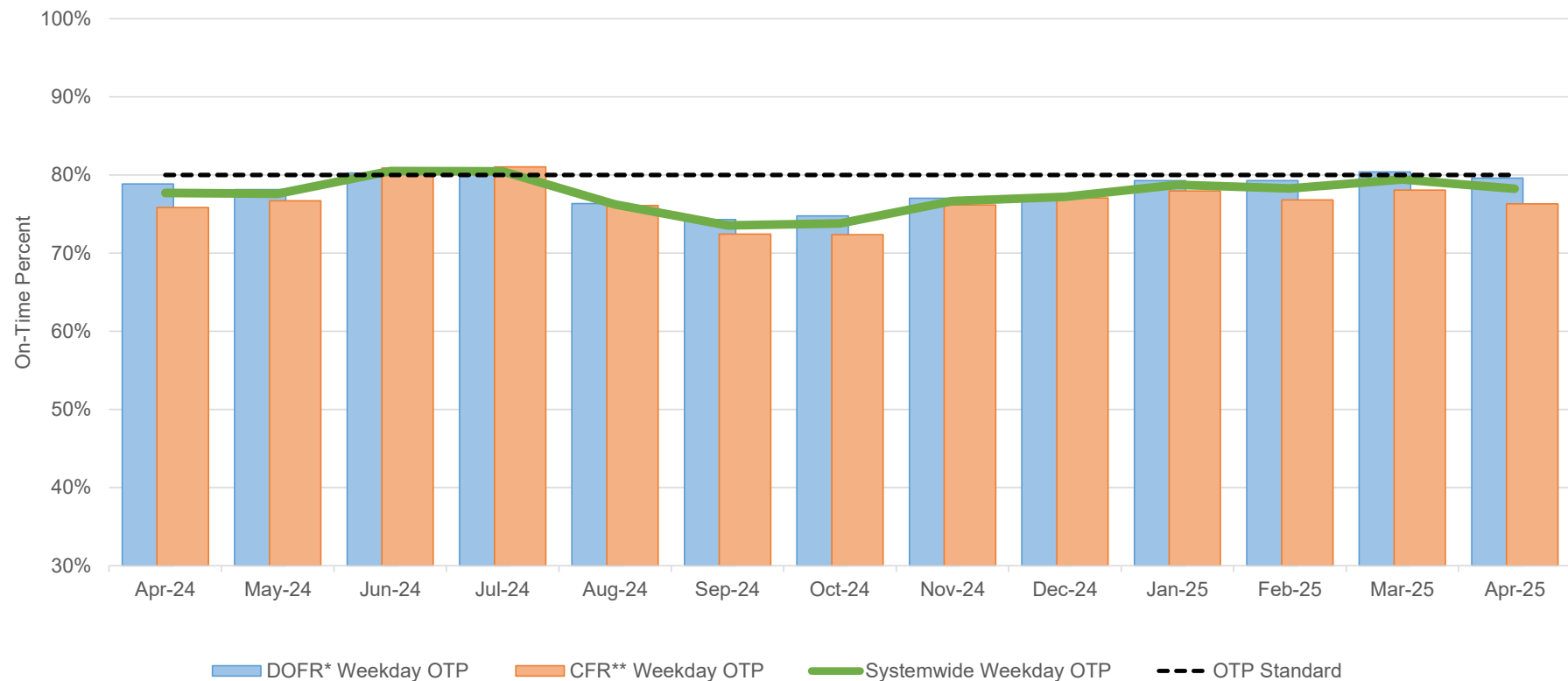


Service Demand: Ridership (or boardings) is the number of rides passengers take using public transit. The average weekday boarding activity is used to measure OC Bus service demand. Productivity is an industry measure that counts the average number of boardings for each revenue vehicle hour (RVH) that is operated.

OC Bus Performance



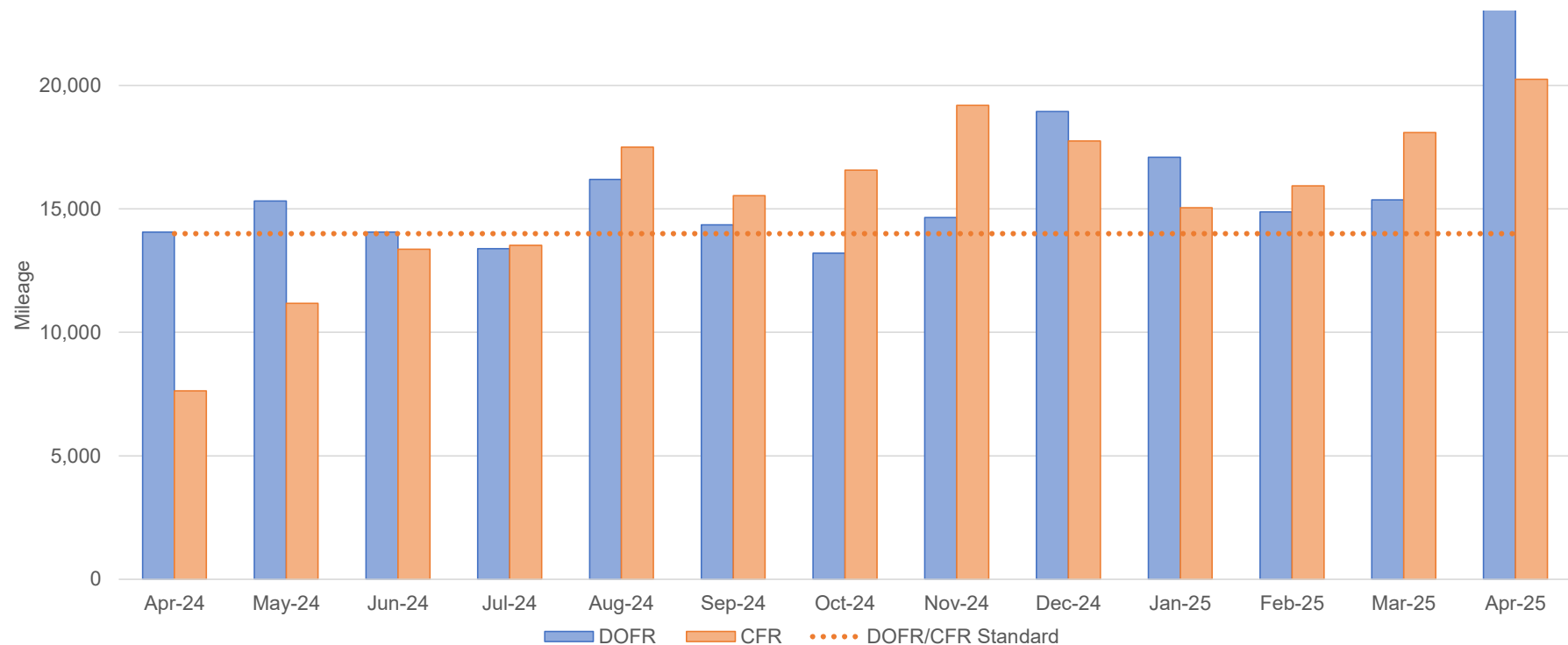
Service Reliability – On-Time Performance (OTP)



On-time Performance (OTP): Measures how well OCTA vehicles adhere to the schedule, and it is calculated by dividing the count of vehicle timepoint departures that are on time (within five minutes late or zero minutes early of the scheduled arrival time) by the number of total departures, reported system-wide. The systemwide OTP standard is 80%.

OC Bus

Service Reliability – Vehicle Performance

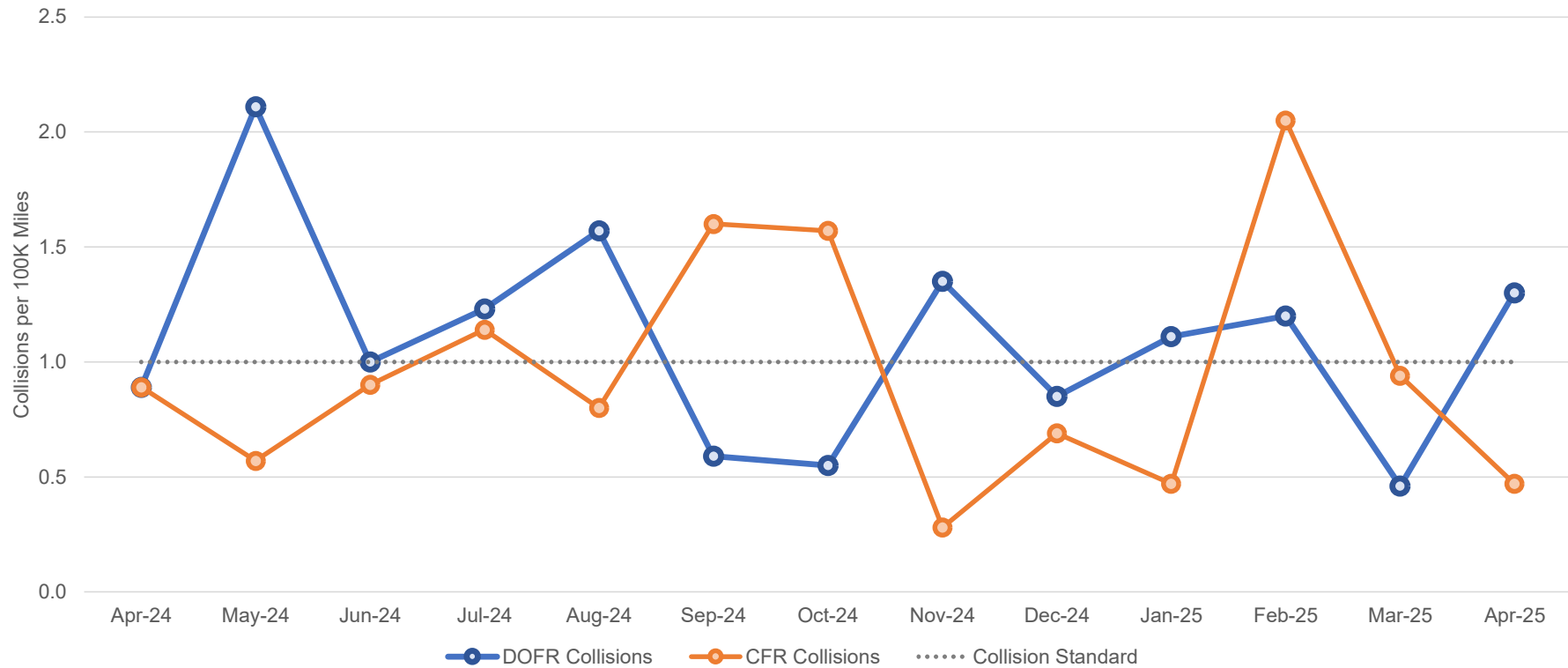


Miles Between Road Calls: MBRC is determined by the total vehicle mileage divided by the total road calls or disruptions due to mechanical failures in revenue service. The MBRC standard for DOFR and CFR is 14,000 miles.

OC Bus



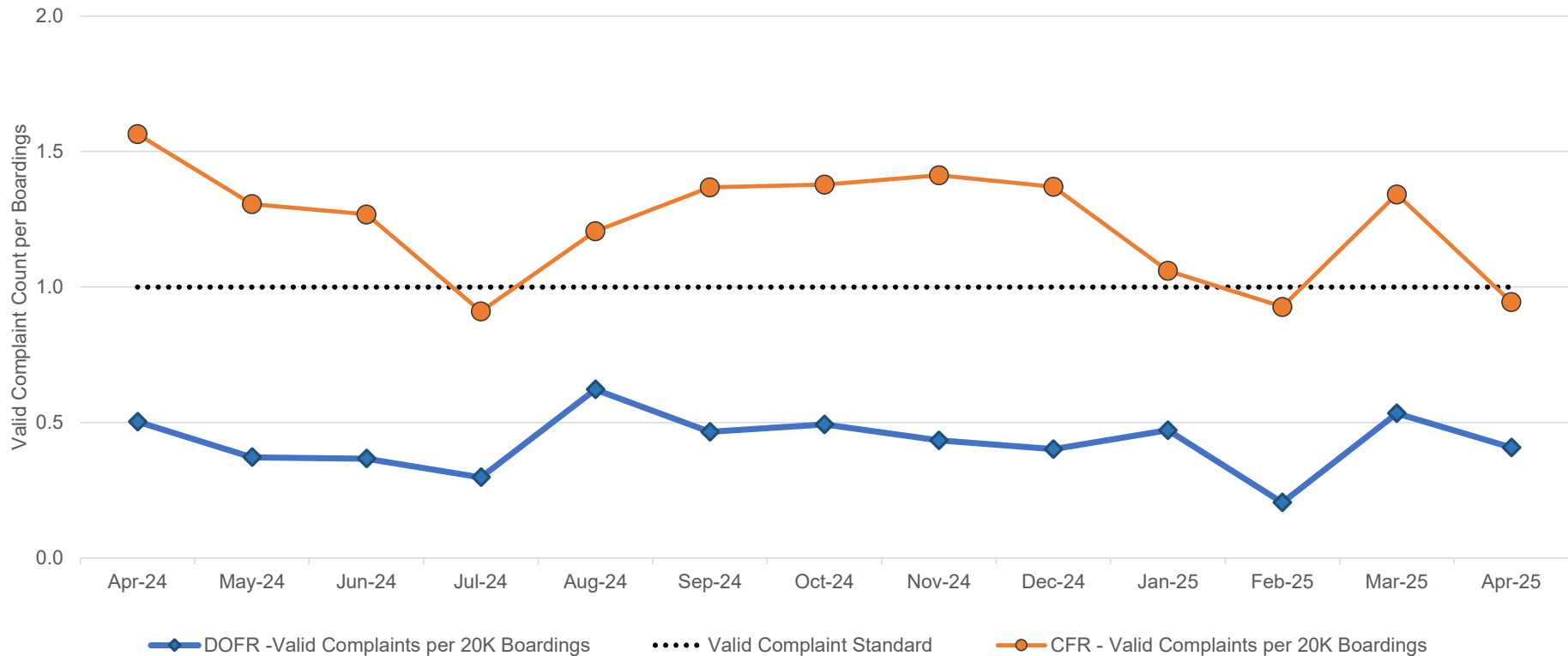
Safety – Preventable Collisions



Preventable Collisions: Preventable vehicle accidents are defined as incidents when physical contact occurs between vehicles used for public transit and other vehicles, objects, or pedestrians and where a coach operator failed reasonably to prevent the accident. The performance standard is no more than one vehicle accident per 100,000 miles.

OC Bus

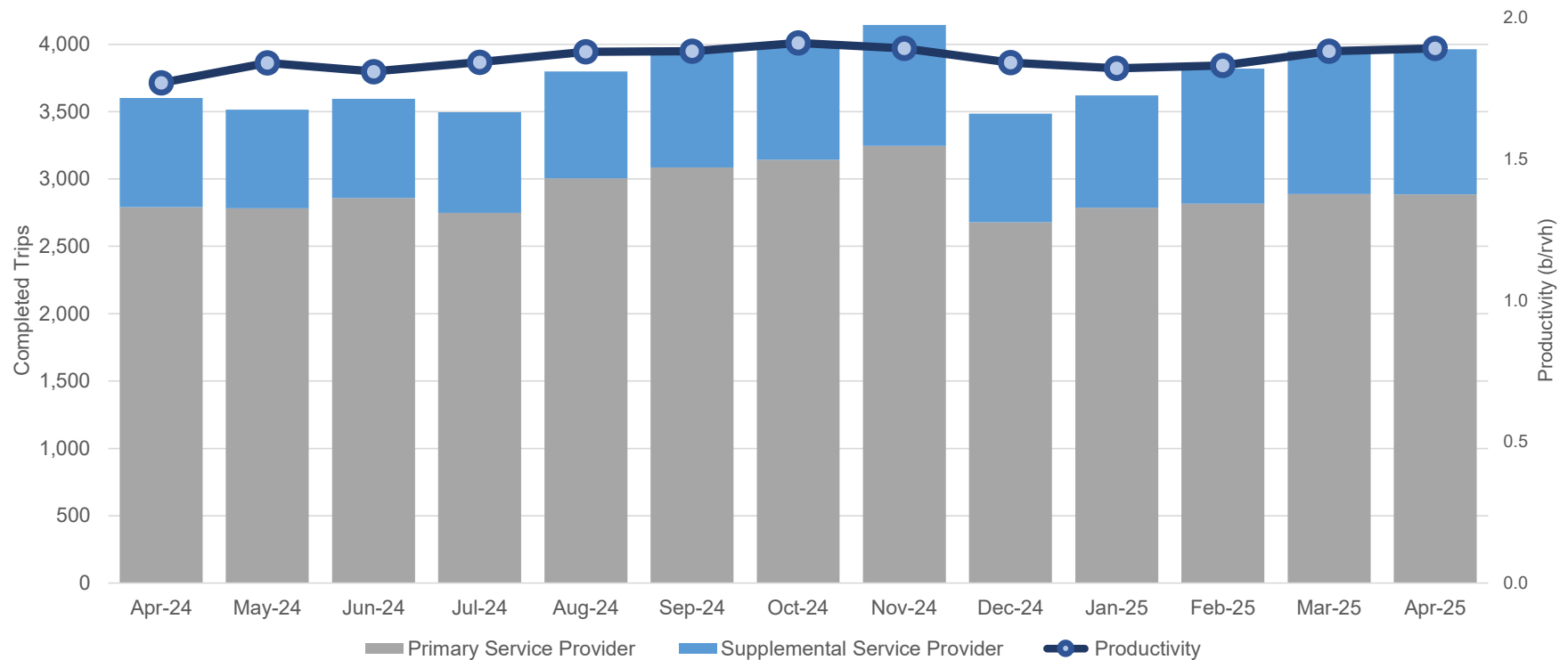
Service Quality – Customer Complaints



Customer Satisfaction: The performance standard for customer satisfaction is courtesy, measured by the number of valid complaints received. Customer complaints are the count of incidents when a rider reports dissatisfaction with service. The standard adopted by OCTA for OC Bus is no more than one valid customer complaint per 20,000 boardings.

OC ACCESS

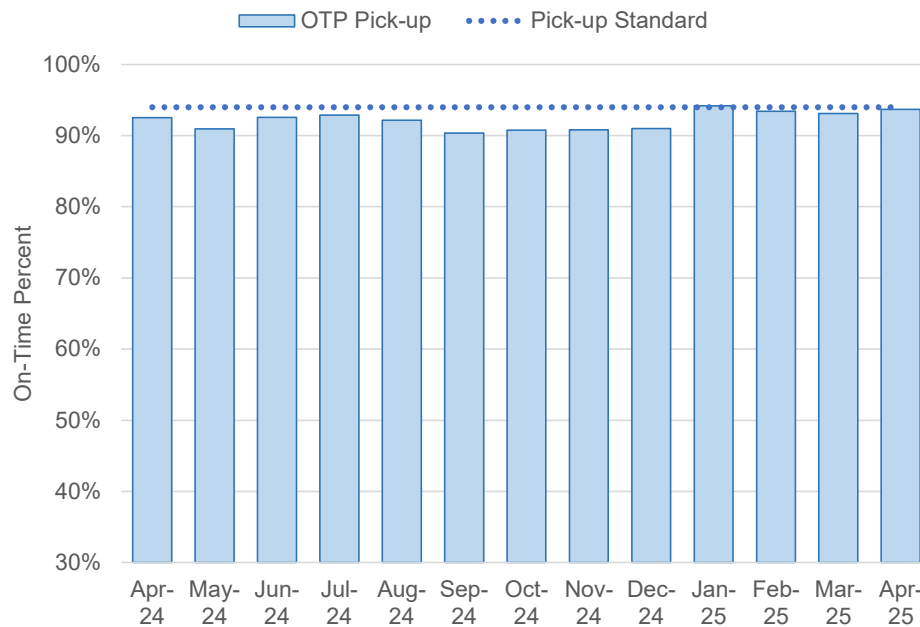
Service Demand – Ridership Snapshot



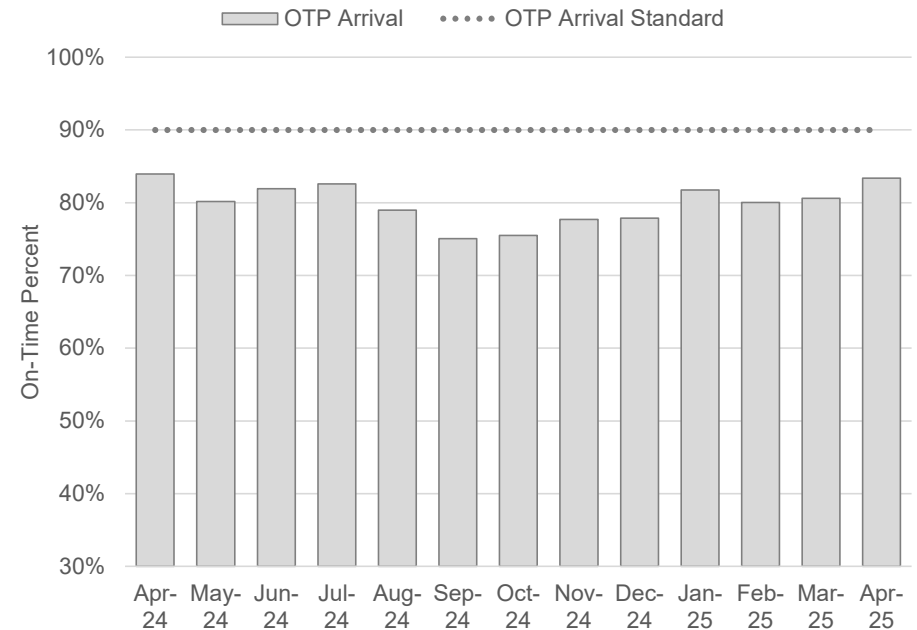
Service Provider Demand: OCTA has a primary service provider, First Transit, Inc., and supplemental providers which are contracted to meet demand on the network.

OC ACCESS

Service Reliability – On-Time Performance (OTP)



Pick-up OTP: The percentage of trips when the driver arrives within the 30-minute on-time window for scheduled pick-up trips.

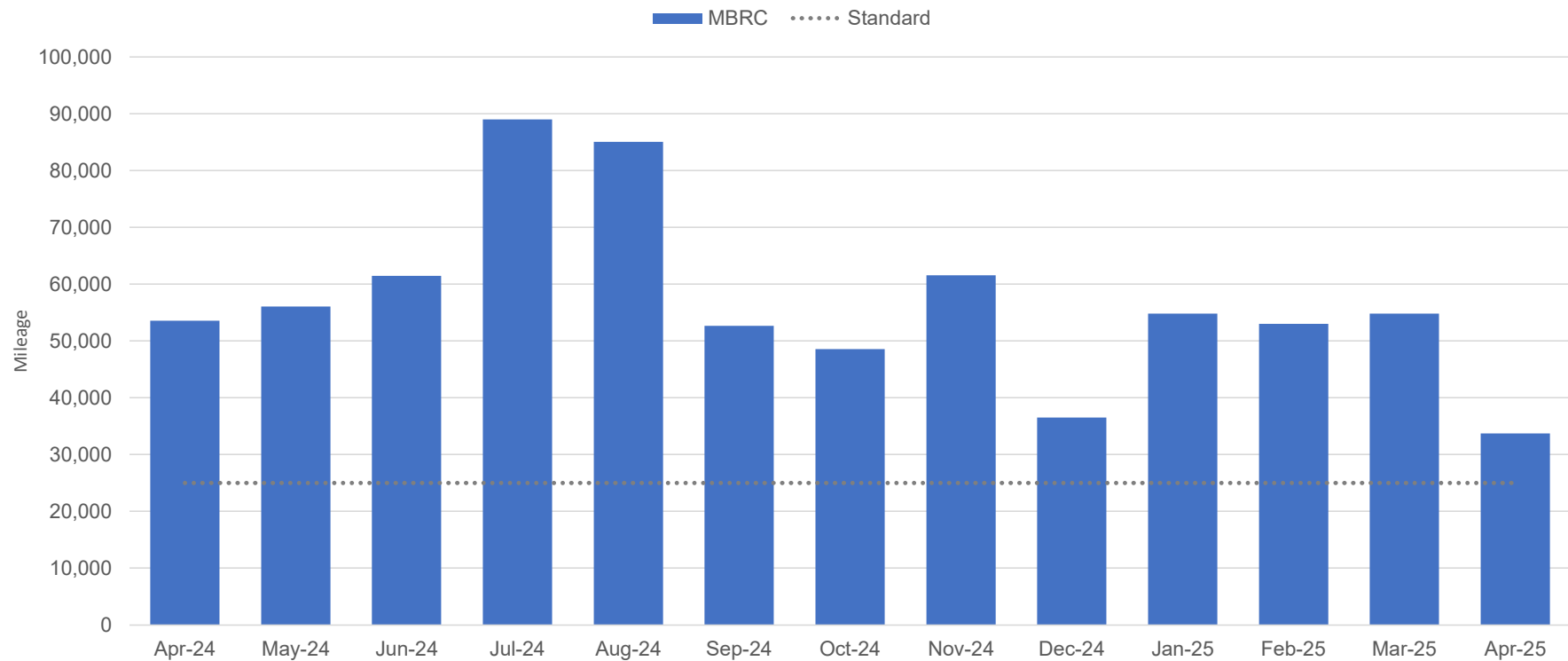


Arrival OTP: The percentage of trips when the passenger arrived at their destination by or before the scheduled arrival time.

OC ACCESS



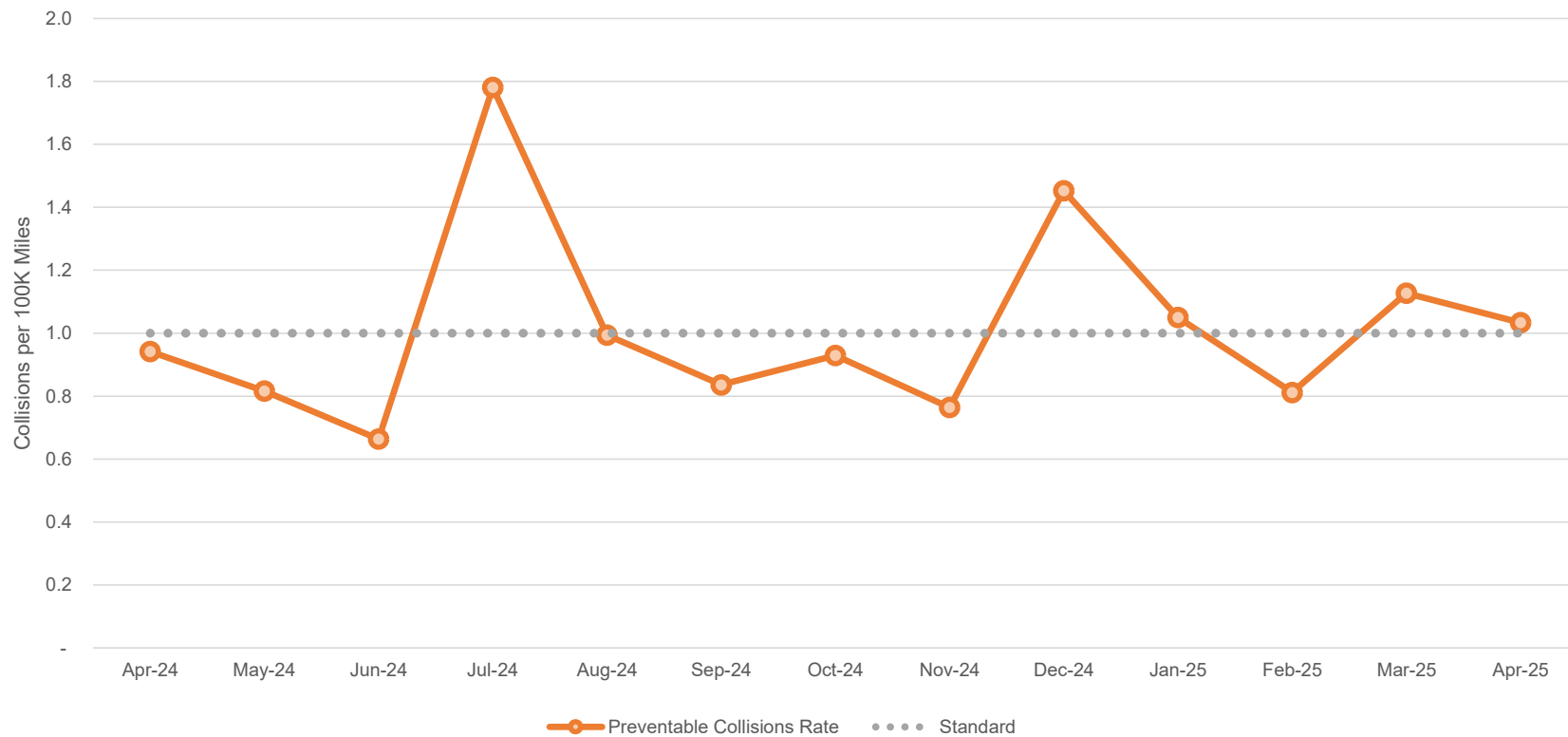
Service Reliability – Miles Between Road Calls (MBRC)



MBRC: MBRC is calculated by dividing the total miles traveled by all OC ACCESS vehicles over the calendar month by the total number of road calls or disruptions due to mechanical failures in revenue service during the same period. The MBRC standard for OC ACCESS is 25,000 miles.

OC ACCESS

Safety – Preventable Collisions

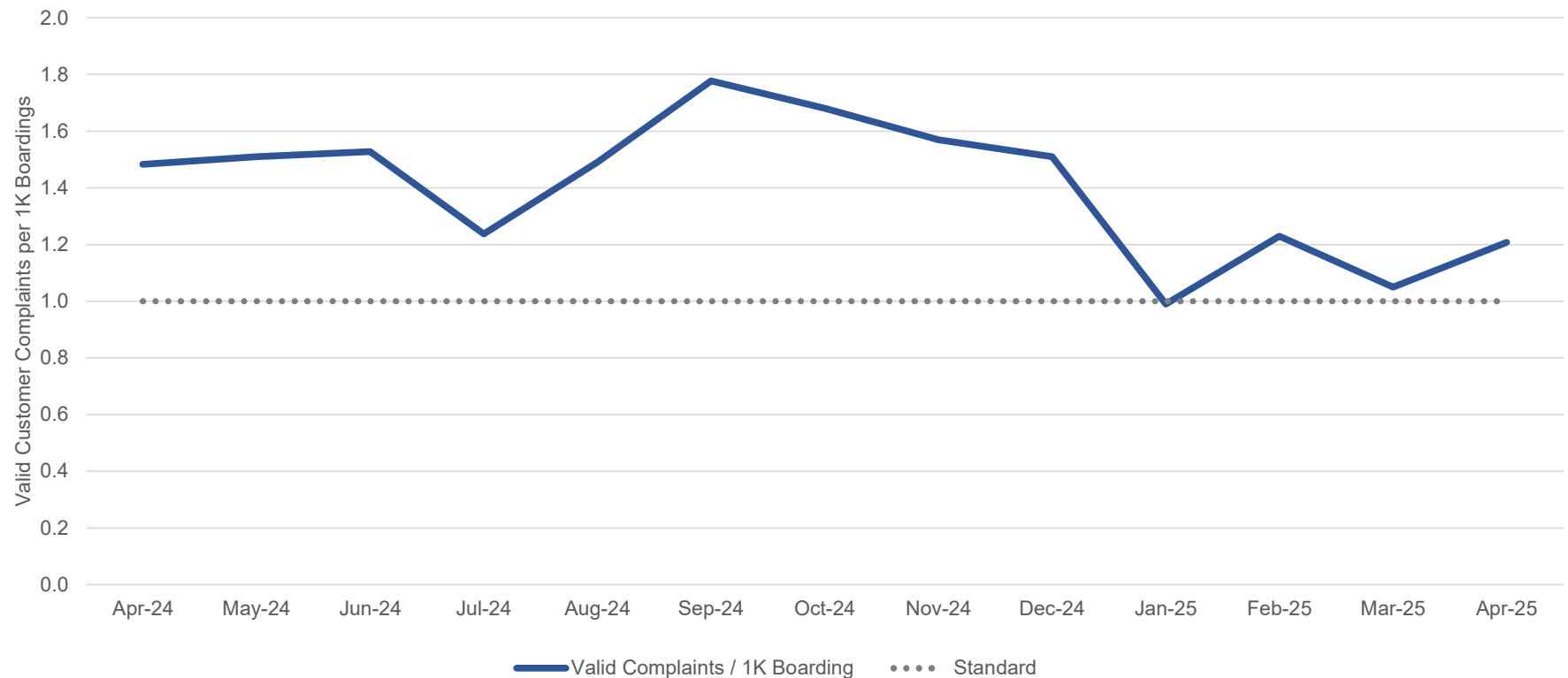


Preventable Collisions: A preventable collision is defined as an event where a driver providing revenue service could have been reasonably avoided by the driver. The performance standard is no more than one vehicle accident per 100,000 miles.

OC ACCESS



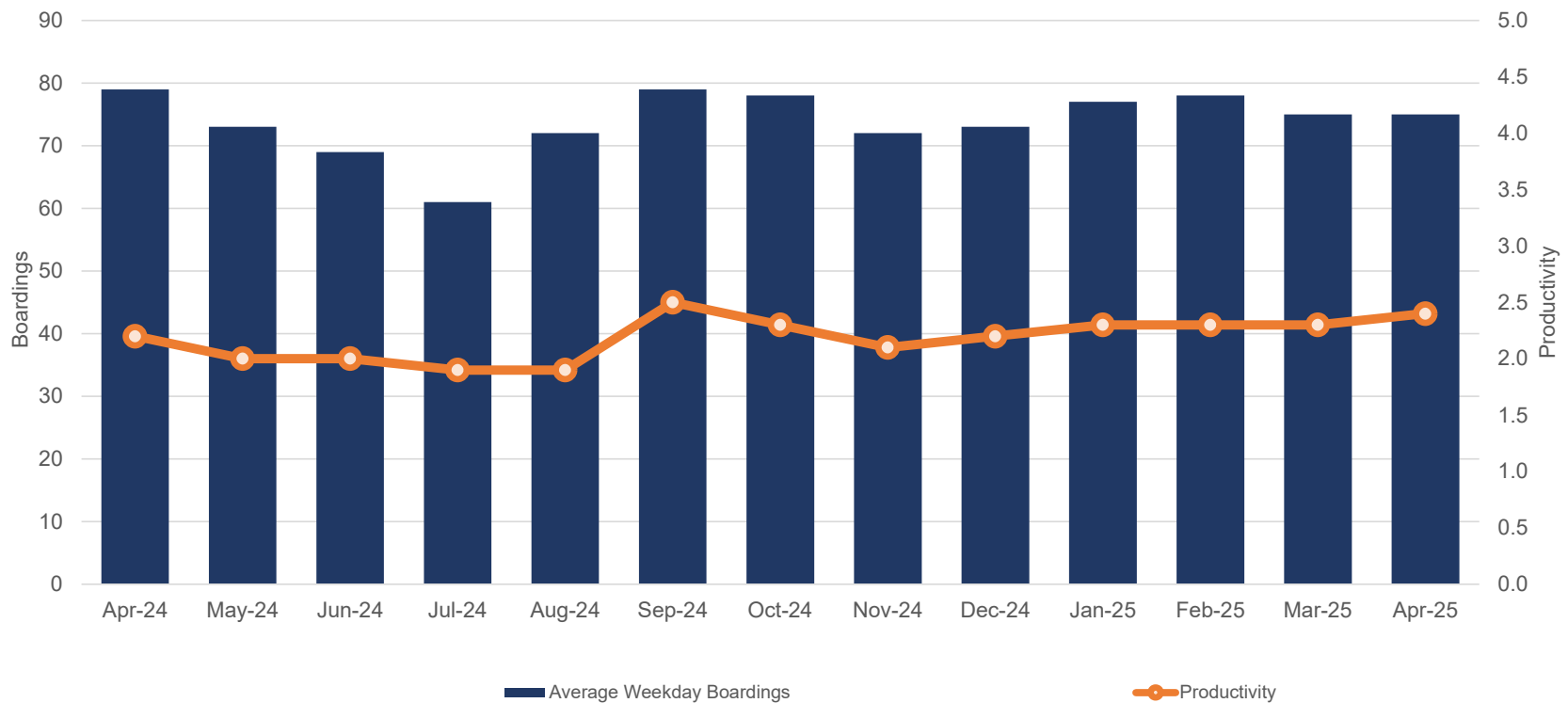
Service Quality – Customer Complaints



Customer Satisfaction: The performance standard for customer satisfaction is courtesy, measured by the number of valid complaints received. The contractual standard for OC ACCESS is no more than one valid complaint per 1,000 boardings.

OC Flex

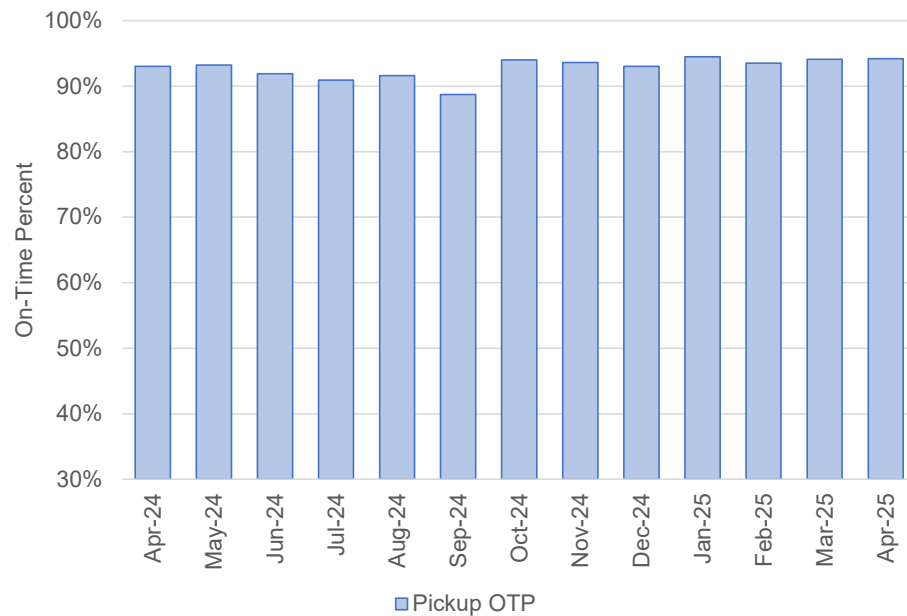
Service Demand – Ridership Snapshot



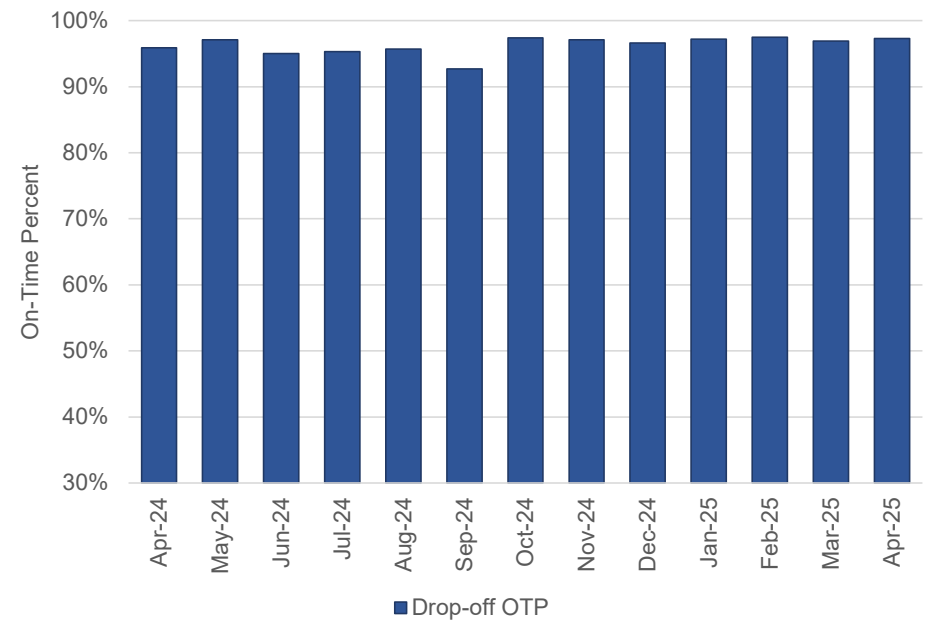
Service Demand: The sum of completed passenger boardings on average per weekday within the existing service area.

OC Flex

Service Reliability – On-Time Performance (OTP)



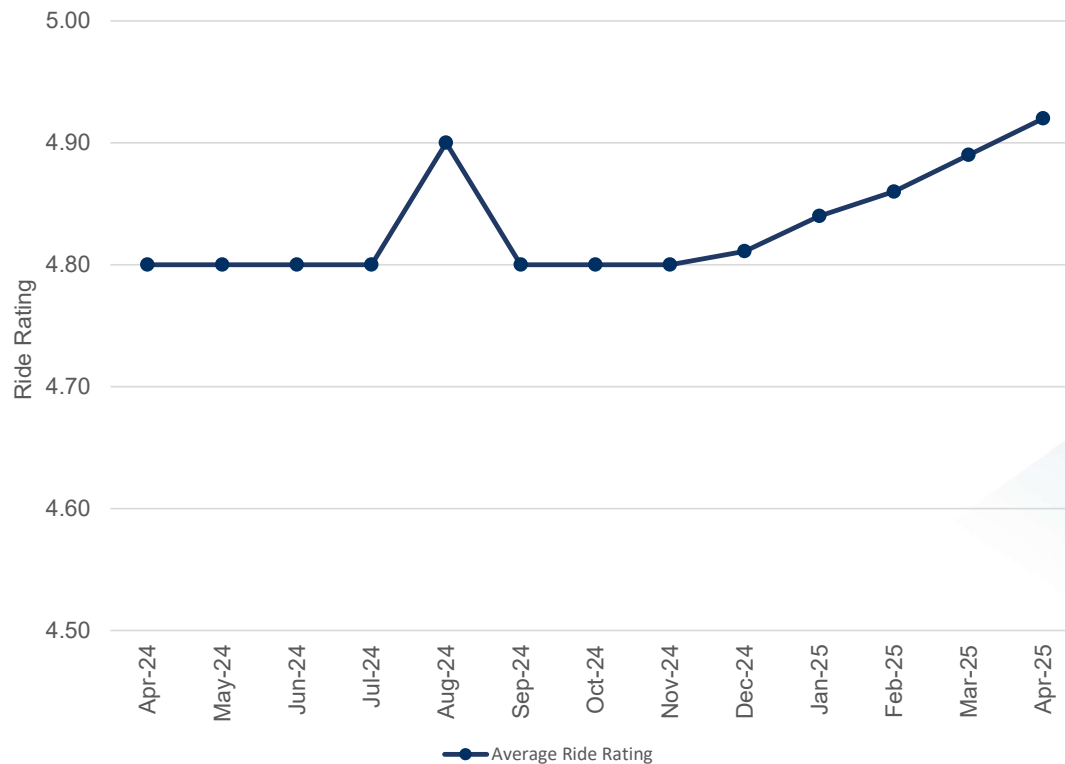
Pick-up OTP: The percentage of completed rides in which the rider was picked up within the ten-minute pick-up window that was provided at booking.



Drop-off OTP: The percentage of completed rides in which the rider was dropped off within the ten-minute drop-off window that was provided at booking.

OC Flex

Service Quality – Average Ride Rating



Average Ride Rating: Passengers can rate their overall experience after each ride. The average ride rating is measured in terms of stars; one star indicates a low-quality ride, while five is a high-quality ride.

Upcoming Activities



Service Changes

- OC Bus Service Change Implementation – May 11, 2025
- OC Flex Sunsetting – June 30, 2025

Future Board Items

- Bimonthly Performance Report – June 12, 2025