



Orange County Transportation Authority

Transit Committee Agenda Thursday, May 9, 2024 at 9:00 a.m.

Board Room, 550 South Main Street, Orange, California

Committee Members

Fred Jung, Chair
Vicente Sarmiento, Vice Chair
Ashleigh Aitken
Valerie Amezcua
Andrew Do
Patrick Harper
Stephanie Klopfenstein

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 listen to audio live streaming of the Board and 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 Harper

Closed Session

There are no Closed Session items scheduled.

Special Calendar

There are no Special Calendar matters.

Consent Calendar (Items 1 through 7)

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 - April 11, 2024

Clerk of the Board

Recommendation(s)

Approve the minutes of the April 11, 2024, Transit Committee meeting.

Attachments:

[Minutes](#)

2. Approval of Minutes - March 14, 2024

Clerk of the Board

Recommendation(s)

Approve the minutes of the March 14, 2024, Transit Committee meeting.

Attachments:

[Minutes](#)

3. Agreement for Fence Installation at the Pacific Electric Right-of-Way in the City of Anaheim

George Olivo/James G. Beil

Overview

The Pacific Electric Right-of-Way in the City of Anaheim needs a fence installed to secure the right-of-way property. An invitation for bids was released on February 12, 2024. Bids were received in accordance with Board of Directors' procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

TRANSIT COMMITTEE MEETING AGENDA

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2095 between the Orange County Transportation Authority and Izurieta Fence Company, Inc., the lowest responsive, responsible bidder, in the amount of \$143,340, for the fence installation at Pacific Electric Right-of-Way in the City of Anaheim.

Attachments:

[Staff Report](#)

[Attachment A](#)

4. Agreement for Painting, Coating, and Roof Replacement at the Laguna Hills Transportation Center

George Olivo/James G. Beil

Overview

The Laguna Hills Transportation Center needs painting, coating, and roof replacement to maintain a state of good repair. An invitation for bids was released on February 9, 2024. Bids were received in accordance with procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2073 between the Orange County Transportation Authority and Ankor Associates, Inc., the lowest responsive, responsible bidder, in the amount of \$358,000, for painting, coating, and roof replacement at the Laguna Hills Transportation Center.

Attachments:

[Staff Report](#)

5. Agreement for Bus Hoist Replacement at the Irvine Sand Canyon Bus Base

George Olivo/James G. Beil

Overview

The bus hoist in the bus chassis wash bay at the Irvine Sand Canyon Bus Base is in need of replacement to maintain a state of good repair. An invitation for bids was released on February 12, 2024. Bids were received in accordance with procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2092 between the Orange County Transportation Authority and Autolift Services, Inc., the lowest responsive, responsible bidder, in the amount of \$219,757, for bus hoist replacement at the Irvine Sand Canyon Bus Base.

Attachments:

[Staff Report](#)

TRANSIT COMMITTEE MEETING AGENDA

6. **Amendment to Cooperative Agreements with Non-Profit Agencies to Provide Senior Mobility Program Services**

Martin Browne/Johnny Dunning, Jr.

Overview

The Senior Mobility Program is designed to offer transportation alternatives to seniors in addition to local fixed-route and paratransit service. Three non-profit agencies participate in the Senior Mobility Program and receive funding from local sources other than Measure M2. The current funding agreements with these three agencies require amendments to include fiscal year 2024-25 funding in order to continue the service.

Recommendation(s)

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3259 between the Orange County Transportation Authority and Abrazar, Inc., in the amount of \$93,610, to provide funding through June 30, 2025.
- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3260 between the Orange County Transportation Authority and Korean American Senior Association of Orange County, in the amount of \$115,087, to provide funding through June 30, 2025.
- C. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3261 between the Orange County Transportation Authority and Southland Integrated Services, Inc., in the amount of \$101,193, to provide funding through June 30, 2025.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Attachment D](#)

7. **2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program and Call for Projects**

Denise Sifford/Kia Mortazavi

Overview

The Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program offers grant opportunities to non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. The program augments existing OC Bus fixed-route service, OC ACCESS service, and the Senior Mobility Program in Orange County. Updated program guidelines and request to issue the 2024 call for projects are presented for review and approval.

TRANSIT COMMITTEE MEETING AGENDA

Recommendation(s)

- A. Approve the guidelines for the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- B. Authorize staff to issue the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program call for projects.

Attachments:

[Staff Report](#)

[Attachment A](#)

Regular Calendar

8. Radio Communications Equipment Replacement for OC Bus and OC ACCESS Vehicles

Josh Duke/Andrew Oftelie

Overview

Board of Directors' authorization is requested for the purchase of hardware and services to complete the radio communications equipment replacement on the OC Bus and OC ACCESS vehicle fleet.

Recommendation(s)

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2235 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$6,627,206, for the purchase of hardware and services necessary to replace 123 Integrated Vehicle Unit 2100s and 257 Integrated Vehicle Unit 3100s with the advanced Integrated Vehicle Unit 4000P/4000 for the Orange County Transportation Authority's paratransit and fixed-route fleets, respectively.

Attachments:

[Staff Report](#)

9. 2024 OC Transit Vision Master Plan Progress Update

Charles Main/Kia Mortazavi

Overview

The Orange County Transportation Authority is undertaking an integrated countywide transit plan. The 2024 OC Transit Vision Master Plan analyzes long-term transit needs throughout the County, identifies priorities for future transportation planning studies during the next 30 years, and positions the Orange County Transportation Authority for future local, state, and federal funding programs. Extensive public engagement will help inform the development and evaluation of the final recommendations expected in fall 2024. This report outlines a series of proposed countywide transit strategies that include 12 transit opportunity corridors and multimodal transportation improvements.

Recommendation(s)

- A. Direct staff to continue with the implementation of phase two of the public outreach plan to gather feedback on the 2024 OC Transit Vision draft transit opportunity corridors and countywide transit strategies.

TRANSIT COMMITTEE MEETING AGENDA

- B. Return to the Board of Directors in September 2024 with an update on recommendations.

Attachments:

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Presentation](#)

Discussion Items

10. OC Streetcar Project Video Update

Jeff Mills/James G. Beil

Overview

Staff will show a video highlighting recent OC Streetcar construction activities.

Attachments:

[Presentation](#)

11. OC Bus and OC ACCESS Services Update

Kim Tucker/Johnny Dunning, Jr.

Overview

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

Attachments:

[Presentation](#)

12. Public Comments

13. Chief Executive Officer's Report

14. Committee Members' Reports

15. Adjournment

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

9:00 a.m. on Thursday, June 13, 2024

OCTA Headquarters
550 South Main Street
Orange, California



Committee Members Present

Fred Jung, Chair
Andrew Do
Stephanie Klopfenstein

Committee Members Absent

Vicente Sarmiento, Vice Chair
Ashleigh Aitken
Valerie Amezcua
Patrick Harper

Staff Present

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

Call to Order

The April 11, 2024, regular meeting of the Transit Committee was called to order by Committee Chair Jung at 9:00 a.m.

Consent Calendar (Item 1)

1. Approval of Minutes

Due to a lack of quorum present, this item was deferred to the next regularly scheduled meeting of the Transit Committee.

Regular Calendar

2. OC Streetcar Project Quarterly Update

Jeff Mills, Project Manager, and Christina Byrne, Department Manager, Public Outreach, provided a presentation on this item.

No action was taken on this receive and file as an information item.

3. Award the Purchase of Vehicles for OC ACCESS

Cliff Thorne, Director, Maintenance, provided a presentation on this item.

Due to a lack of quorum present, no action was taken on this item.

4. Award the Purchase of Driver Protection Systems

Cliff Thorne, Director, Maintenance, provided a presentation on this item.

Due to a lack of quorum present, no action was taken on this item.



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

Louis Zhao, Manager, Program and Grants Development, provided a presentation on this item.

Due to a lack of quorum present, no action was taken on this item.

Discussion Items

6. OC Bus and OC ACCESS Service Update

Kim Tucker, Department Manager Schedule and Bus Operations Support, and Ryan Maloney, Manager, Marketing and Data Analytics provided a presentation on this item.

No action was taken on this item.

7. Public Comments

No public comments were received.

8. Chief Executive Officer's Report

Jennifer L. Bergener, Deputy Chief Executive Officer, reported on the following:

- Loyalty program launching April 15
- Free rides on Monday, April 22 for Earth Day

9. Committee Members' Reports

There were no Director's reports.

10. Adjournment

The meeting adjourned at 9:40 a.m.

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

9:00 a.m. on Thursday, May 9, 2024

OCTA Headquarters
550 South Main Street
Orange, California



Committee Members Present

Fred Jung, Chair
Vicente Sarmiento, Vice Chair
Ashleigh Aitken
Valerie Amezcua
Andrew Do
Patrick Harper
Stephanie Klopfenstein

Staff Present

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

Committee Members Absent

None

Call to Order

The March 14, 2024, regular meeting of the Transit Committee was called to order by Committee Chair Jung at 9:02 a.m.

Consent Calendar (Items 1 through 5)

1. Approval of Minutes

A motion was made by Director Harper, seconded by Director Amezcua, and declared passed by those present, to approve the minutes of the February 8, 2024 Transit Committee meeting.

2. Amendments to Agreements for Design Support Services and Construction Management Services for the OC Streetcar Project

A motion was made by Director Harper, seconded by Director Amezcua, and declared passed by those present, to:

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 14 to Agreement No. C-5-3337 between the Orange County Transportation Authority and HNTB Corporation, in the amount of \$2,000,000, and extend the agreement term through August 31, 2025, for continued OC Streetcar project design support services during construction. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$34,083,841.

- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 21 to Agreement No. C-6-0926 between the Orange County Transportation Authority and PGH Wong Engineering, Inc., in the amount of \$7,700,000, and extend the agreement term through February 28, 2025, for continued OC Streetcar project construction management services. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$42,782,570.

Committee Vice Chair Sarmiento, recused himself from voting on this item.

3. Amendment to Agreement for Mobile Ticketing Validators Extended Warranty Coverage Period

A motion was made by Director Harper, seconded by Director Amezcua, and declared passed by those present, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 7 to Agreement No. C-6-0942 between the Orange County Transportation Authority and Init Innovations in Transportation, Inc., to exercise the fourth option term in the amount of \$158,769, for extended warranty coverage and annual maintenance for mobile ticketing validators effective May 1, 2024 through April 30, 2025. Amending this agreement will increase the maximum cumulative payment obligation to a total contract value of \$3,364,110.

4. Amendment to Agreement for Detail Bus Cleaning and Pesticide Application Services

A motion was made by Director Harper, seconded by Director Amezcua, and declared passed by those present, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-0-2702 between the Orange County Transportation Authority and Gamboa Services, Inc., doing business as Corporate Image Maintenance, in the amount of \$810,550, to exercise the two-year option term of the agreement effective May 1, 2024 through April 30, 2026, for continued detail bus cleaning and pesticide application services. This will increase the maximum obligation of the agreement to a total contract value of \$1,887,276.

5. May 2024 OC Bus Service Change

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

Regular Calendar**6. Consultant Selection for Real Property Management Services**

Jim Beil, Executive Director, Capital Programs, provided a report on this item.

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

- A. Approve the selection of Cal Pacific Land Services, Inc., as the firm to provide real property management services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2807 between the Orange County Transportation Authority and Cal Pacific Land Services, Inc., as the firm to provide real property management services, in the amount of \$750,000, for a five-year term.

Discussion Items**7. OC Bus and OC ACCESS Service Update**

Kim Tucker, Department Manager Schedule and Bus Operations Support, and Ryan Maloney, Manager, Marketing and Data Analytics provided a presentation on this item.

Committee Vice Chair Sarmiento commented that the upcoming bus service change will help students at Godinez, Segerstrom, Santa Ana and Foothill High Schools gain better access to bus service to get to and from school.

No action was taken on this item.

8. Public Comments

No public comments were received.

9. Chief Executive Officer's Report

Jennifer L. Bergener, Deputy Chief Executive Officer, reported the following:

- Transit Employee Appreciation Day on Monday, March 18, 2024
- OC Bus Rapid – Route 529
- Rail Update



10. Committee Members' Reports

There were no Director's reports.

11. Adjournment

The meeting adjourned at 9:14 a.m.

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

9:00 a.m. on Thursday, April 11, 2024

OCTA Headquarters

550 South Main Street

Orange, California



May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Fence Installation at the Pacific Electric Right-of-Way in the City of Anaheim

Overview

The Pacific Electric Right-of-Way in the City of Anaheim needs a fence installed to secure the right-of-way property. An invitation for bids was released on February 12, 2024. Bids were received in accordance with Board of Directors' procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2095 between the Orange County Transportation Authority and Izurieta Fence Company, Inc., the lowest responsive, responsible bidder, in the amount of \$143,340, for the fence installation at Pacific Electric Right-of-Way in the City of Anaheim.

Discussion

The Orange County Transportation Authority (OCTA) owns the Pacific Electric Right-of-Way (PEROW) located in Orange County and is responsible for maintaining the property. Maintenance responsibilities include, among other things, securing the PEROW. The City of Anaheim requested OCTA install fence on the short section of the PEROW to mitigate trespassing, camping, and dumping of debris. This PEROW location is between Knott Avenue and Ball Road as shown on Attachment A.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors-approved procedures for public works projects. These procedures,

which conform to both state and federal requirements, require contracts be awarded to the lowest responsive, responsible bidder after a sealed bidding process.

Invitation for Bids (IFB) 4-2095 was released on February 12, 2024, through OCTA's CAMM NET system. The project was advertised on February 12 and February 19, 2024, in a newspaper of general circulation. A pre-bid conference and job walk were held on February 20, 2024, and were attended by five firms. Three addenda were issued to make available the pre-bid conference registration sheets and handle administrative issues related to the IFB. On March 11, 2024, four bids were received and publicly opened.

All bids were reviewed by staff from OCTA's Contracts Administration and Materials Management and Facilities Engineering departments to ensure compliance with contract terms and conditions, and technical specifications. The list of bidders and bid amounts are presented below:

<u>Firm and Location</u>	<u>Bid Amount</u>
Izurieta Fence Company, Inc. Los Angeles, California	\$143,340
Golden Gate Steel, Inc., doing business as Golden Gate Construction Norwalk, California	\$187,350
A2Z Construct, Inc. Rancho Santa Margarita, California	\$190,000
AZ Construction, Inc., doing business as Ace Fence Company La Puente, California	\$245,180

The OCTA engineer's estimate for this project was \$230,000. The recommended firm's bid is approximately 38 percent lower than the engineer's estimate. A bid analysis was completed to confirm that the bid submitted accounts for all elements of the scope of work and technical specifications. A bid breakdown was requested from the contractor and reviewed by the project manager. After review, the bid amount was determined to be fair and reasonable.

State law requires award to the lowest responsive, responsible bidder. As such, staff recommends the award to Izurieta Fence Company, Inc., the lowest responsive, responsible, bidder, in the amount of \$143,340, for fence installation at the PEROW in the City of Anaheim.

Fiscal Impact

The project is approved in OCTA's Fiscal Year 2023-24 budget, Capital Programs Division, Account No. 0018-9022-T1000-TK5, and is funded through Local Transportation Funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2095 between the Orange County Transportation Authority and Izurieta Fence Company, Inc., the lowest responsive, responsible bidder, in the amount of \$143,340, for fence installation at the Pacific Electric Right-of-Way in the City of Anaheim.

Attachment

A. Project Location

Prepared by:



George Olivo, P.E.
Program Manager
(714) 560-5872

Approved by:



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



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

Project Location





May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Painting, Coating, and Roof Replacement at the Laguna Hills Transportation Center

Overview

The Laguna Hills Transportation Center needs painting, coating, and roof replacement to maintain a state of good repair. An invitation for bids was released on February 9, 2024. Bids were received in accordance with procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2073 between the Orange County Transportation Authority and Ankor Associates, Inc., the lowest responsive, responsible bidder, in the amount of \$358,000, for painting, coating, and roof replacement at the Laguna Hills Transportation Center.

Discussion

The Orange County Transportation Authority (OCTA) completed construction of the Laguna Hills Transportation Center (LHTC) in 1988. The LHTC has eight bus dock platform stops and one on-street stop to service OC Bus passengers. The facility is in need of painting and the roof replaced on the mechanical room and bus driver restroom to maintain a state of good repair. The facility painting will be aligned with the OCTA Marketing and Customer Engagement Department branding for facility uniformity.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors-approved procedures for public works projects. These procedures, which conform to both federal and state requirements, require contracts are

awarded to the lowest responsive, responsible bidder after a sealed bidding process.

Invitation for Bids (IFB) 4-2073 was electronically released on February 9, 2024, through OCTA's CAMM NET system. The project was advertised on February 9 and February 16, 2024, in a newspaper of general circulation and the Greensheet. A pre-bid conference was held on February 20, 2024, and a job walk was held on February 21, 2024, and were attended by eight firms. Five addenda were issued to provide the pre-bid conference registration sheets and handle administrative issues related to the IFB. On March 11, 2024, six bids were received and publicly opened.

All bids were reviewed by staff from both the Contracts Administration and Materials Management and Facilities Engineering departments to ensure compliance with the contract terms and conditions, as well as technical specifications. The list of bidders and bid amounts is presented below:

<u>Firm and Location</u>	<u>Bid Amount</u>
Ankor Associates, Inc. Los Angeles, California	\$358,000
Mariscal Painting, Inc. South El Monte, California	\$457,000
Loengreen, Inc. La Canada, California	\$466,320
Golden Gate Steel, Inc. doing business as Golden Gate Construction Norwalk, California	\$932,200
A.J. Fistes Corp. San Pedro, California	\$945,500
Color New Co. Woodland Hills, California	\$1,160,000

The OCTA engineer's estimate for this project was \$535,000. The recommended firm's bid is 33 percent below the engineer's estimate. A bid analysis was completed to confirm that the bid submitted accounts for all elements of the scope of work and technical specifications. A bid breakdown was requested from the contractor and reviewed by the project manager. After review, the bid amount was determined to be fair and reasonable.

State law requires award to the lowest responsive, responsible bidder. As such, staff recommends award to Ankor Associates, Inc., the lowest responsive, responsible bidder, in the amount of \$358,000, for painting, coating, and roof replacement at the LHTC.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2023-24 Budget, Capital Programs Division, Account No. 1722-7611-D3120-KHM, and is funded through Local Transportation Funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2073 between the Orange County Transportation Authority and Ankor Associates, Inc., the lowest responsive, responsible bidder, in the amount of \$358,000, for painting, coating, and roof replacement at the Laguna Hills Transportation Center.

Attachment

None.

Prepared by:



George Olivo, P.E.
Program Manager
(714) 560-5872

Approved by:



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



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



May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Bus Hoist Replacement at the Irvine Sand Canyon Bus Base

Overview

The bus hoist in the bus chassis wash bay at the Irvine Sand Canyon Bus Base is in need of replacement to maintain a state of good repair. An invitation for bids was released on February 12, 2024. Bids were received in accordance with procurement procedures for public works projects. Board of Directors' approval is requested to execute the agreement.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2092 between the Orange County Transportation Authority and Autolift Services, Inc., the lowest responsive, responsible bidder, in the amount of \$219,757, for bus hoist replacement at the Irvine Sand Canyon Bus Base.

Discussion

The Orange County Transportation Authority (OCTA) completed the original construction of the Irvine Sand Canyon Bus Base in 1977, and the maintenance building was expanded in 1981. The bus base is currently used by OCTA's contract operator for the daily operation and maintenance of OC Bus fixed-route bus service. The hoist in the bus chassis wash bay is utilized for high-pressure water and steam cleaning of the engine and chassis undercarriage areas of buses to facilitate maintenance operations of the bus fleet. The existing bus hoist was last replaced in 2010 and has reached the end of its useful life and is in need of replacement to maintain a state of good repair. The project consists of installation of a new flush mount drive-on bus hoist, remote control panels with electric hydraulic power and control units, wiring and connections, safety compliance, and related work.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors-approved procedures for public works projects. These procedures, which conform to both state and federal requirements, require that contracts are awarded to the lowest responsive, responsible bidder after a sealed bidding process.

Invitation for Bids (IFB) 4-2092 was electronically released on February 12, 2024, through OCTA's CAMM NET system. The project was advertised on February 12 and February 19, 2024, in a newspaper of general circulation. A pre-bid conference was held on February 20, 2024, and was attended by seven firms. Five addenda were issued to provide the pre-bid conference registration sheets and address administrative issues related to the IFB. On March 26, 2024, four bids were received and publicly opened.

All bids were reviewed by staff from both the Contracts Administration and Materials Management and Facilities Engineering departments to ensure compliance with the contract terms and conditions, and technical specifications. The list of bidders and bid amounts is presented below:

<u>Firm and Location</u>	<u>Bid Amount</u>
Autolift Services, Inc. Los Alamitos, California	\$219,757
Southwest Lift & Equipment, Inc. San Bernardino, California	\$296,600
Air & Lube Systems, Inc. Sacramento, California	\$564,446
Loghmani & Associates Design Group, Inc. Playa Del Rey, California	\$669,890

The OCTA engineer's estimate for this project was \$395,000. After conducting some further analysis, it was determined that the independent cost estimate was overstated due to cost assumptions associated with subcontracting electrical and safety services, and the cost of a larger capacity hoist. The recommended firm's bid is approximately 44 percent below the engineer's estimate and is deemed to be fair and reasonable. The bidder provided a letter stating its bid included all costs required to perform the work as required by the IFB and addenda.

State law requires award to the lowest responsive, responsible bidder. As such, staff recommends award to Autolift Services, Inc., the lowest responsive, responsible bidder, in the amount of \$219,757, for the bus hoist replacement at the Irvine Sand Canyon Bus Base.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2023-24 Budget, Capital Programs Division, Account No. 1722-9022-D3108-KWH, and is funded through Local Transportation Funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2092 between the Orange County Transportation Authority and Autolift Services, Inc., the lowest responsive, responsible bidder, in the amount of \$219,757, for bus hoist replacement at the Irvine Sand Canyon Bus Base.

Attachment

None.

Prepared by:



George Olivo, P.E.
Program Manager
(714) 560-5872

Approved by:



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



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



May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Amendment to Cooperative Agreements with Non-Profit Agencies to Provide Senior Mobility Program Services

Overview

The Senior Mobility Program is designed to offer transportation alternatives to seniors in addition to local fixed-route and paratransit service. Three non-profit agencies participate in the Senior Mobility Program and receive funding from local sources other than Measure M2. The current funding agreements with these three agencies require amendments to include fiscal year 2024-25 funding in order to continue the service.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3259 between the Orange County Transportation Authority and Abrazar, Inc., in the amount of \$93,610 to provide funding through June 30, 2025.
- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3260 between the Orange County Transportation Authority and Korean American Senior Association of Orange County, in the amount of \$115,087 to provide funding through June 30, 2025.
- C. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Cooperative Agreement No. C-1-3261 between the Orange County Transportation Authority and Southland Integrated Services, Inc., in the amount of \$101,193, to provide funding through June 30, 2025.

Discussion

The Orange County Transportation Authority (OCTA) established the Senior Mobility Program (SMP) in 2001 to help expand transportation services for seniors. The SMP was funded with Transportation Development Act funds from 2001 through 2011. On November 7, 2006, Orange County voters approved the Measure M (M2), renewing the one-half cent sales tax for transportation improvements. M2 Project U apportions funding to support specialized transportation programs for seniors and persons with disabilities, including the SMP. One percent of net M2 revenues is allocated to the SMP and distributed via formula to participating Orange County cities. The formula is based upon each city's population of residents age 60 and older.

To date, 32 cities have implemented SMP services. In addition to these city-initiated programs, four local non-profit agencies operated SMP services before M2 became the primary funding source for SMP and have been grandfathered into the program. These agencies provide services to seniors for trips that cross city boundaries, but do not qualify for M2 funding because the programs are run by local non-profit agencies, not local jurisdictions. Because of the significant transportation benefit provided to the community, OCTA has continued to support these SMP programs using other local transit funding. As of December 31, 2018, the Jewish Federation and Family Services, one of the four non-profit agencies, discontinued its SMP.

The three non-profit agencies that remain in the SMP are Abrazar, Inc., Korean American Senior Association of Orange County, and Southland Integrated Services, Inc., formerly doing business as the Vietnamese Community of Orange County. These three non-profit agencies provided 11,818 trips in fiscal year (FY) 2022-23 and received \$292,334 in funding. For FY 2023-24, the allocated funding is \$299,585 and by the third quarter, the number of completed trips provided by these agencies, totaling 8,794, is expected to exceed the budgeted amount. Although ineligible to receive M2 funding, they comply with all SMP guidelines and continue to receive funding from OCTA to provide a key link in the transportation network.

In 2011, a baseline reimbursement was set based on anticipated annual trip volume. Following that, since 2012, funding for each subsequent year has been determined by a formula utilizing the prior year's actual funding received and percentage of the anticipated growth of M2 net sales tax revenue. This growth rate aligns with M2 to uphold the program's guidelines. Consistent with funding provided to participating cities for SMP, OCTA funds 80 percent of the trip cost and the organization must provide at least a 20 percent match. The current

funding agreements with these three non-profit agencies require amendments each year to provide funding for the subsequent FY.

In order to preserve these services and support OCTA's goal under M2 Project U to expand mobility choices for seniors and persons with disabilities, Board of Directors' approval is necessary to execute amendments to provide the funds for these services through June 30, 2025. The total local funding allocation necessary for these services is \$309,890 per year and has been included in OCTA's proposed FY 2024-25 Budget.

Fiscal Impact

These services are included in OCTA's proposed FY 2024-25 Budget, Operations Division, account nos. 0030-7831-D1502-PDK, 0030-7831-D1502-PDW, and 0030-7831-D1502-PEE using local transportation funds.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute amendments in the total amount of \$309,890 between Orange County Transportation Authority and Abrazar, Inc., Korean American Senior Association of Orange County, and Southland Integrated Services, Inc., three SMP non-profit agencies, to provide trips to local seniors in Orange County through June 30, 2025.

Attachments

- A. Non-Profit Agency Funding Projections, Fiscal Years 2023-24 to 2024-25
- B. Abrazar, Inc., Cooperative Agreement No. C-1-3259 Fact Sheet
- C. Korean American Senior Association of Orange County, Cooperative Agreement No. C-1-3260 Fact Sheet
- D. Southland Integrated Services Inc., Cooperative Agreement No. C-1-3261 Fact Sheet

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Non-Profit Agency Funding Projections
Fiscal Years 2023-24 to 2024-25

Community Center	2024 Disbursement	2025 Allocation*	2024-2025 Total Projection*
Abrazar	\$ 90,497	\$ 93,610	\$ 184,107
Korean American Center	111,260	115,087	226,347
Southland Integrated Services	97,828	101,193	199,021
Total	\$ 299,585	\$ 309,890	\$ 609,475

*Based on current sales tax growth trends. Funding will be determined based on actual receipts.

**Abrazar, Inc.
Cooperative Agreement No. C-1-3259 Fact Sheet**

1. May 24, 2021, Cooperative Agreement No. C-1-3259, \$82,248, approved by the Board of Directors (Board).
 - Agreement to provide funding for the provision of Senior Mobility Program (SMP) services.
 - Initial term effective through June 30, 2026.
 - Shuttle transportation to congregate meal programs in the cities of Westminster and Midway City. Service is for medical appointments, shopping, and personal appointments. Social/recreational activities to the Orange County Fair, Tet Festival, and Cinco de Mayo celebrations.
2. May 23, 2022, Amendment No. 1 to Cooperative Agreement No. C-1-3259, \$89,387, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2023.
3. May 22, 2023, Amendment No. 2 to Cooperative Agreement No. C-1-3259, \$90,497, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2024.
4. May 28, 2024, Amendment No. 3 to Cooperative Agreement No. C-1-3259, \$93,610, pending approval by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2025

Total committed to Abrazar, Inc., Cooperative Agreement No. C-1-3259: \$355,742.

**Korean American Senior Association of Orange County
Cooperative Agreement No. C-1-3260 Fact Sheet**

1. May 2, 2021, Cooperative Agreement No. C-1-3260, \$101,116, approved by the Board of Directors (Board).
 - Agreement to provide funding for the provision of Senior Mobility Program (SMP) services.
 - Initial term effective through June 30, 2026.
 - Shuttle transportation to the senior center, medical appointments, shopping, and social/recreational trips to cultural events, libraries, religious institutions, and restaurants.
2. May 23, 2022, Amendment No. 1 to Cooperative Agreement No. C-1-3260, \$109,894, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2023.
3. May 22, 2023, Amendment No. 2 to Cooperative Agreement No, C-1-3260, \$111,260, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2024.
4. May 28, 2024, Amendment No. 3 to Cooperative Agreement No, C-1-3260, \$115,087, pending approval by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2025.

Total committed to Korean American Senior Association of Orange County, Cooperative Agreement No. C-1-3260: \$437,357.

**Southland Integrated Services, Inc.
Cooperative Agreement No. C-1-3261 Fact Sheet**

1. May 24, 2021, Cooperative Agreement No. C-1-3261, \$88,910, approved by the Board of Directors (Board).
 - Agreement to provide funding for the provision of Senior Mobility Program (SMP) services.
 - Initial term effective through June 30, 2026.
 - Shuttle transportation to senior centers, medical appointments, and personal appointments. Social/recreational trips to local community events, parks, and government offices.
2. May 23, 2022, Amendment No. 1 to Cooperative Agreement No. C-1-3261, \$96,628, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2023.
3. May 22, 2023, Amendment No. 2 to Cooperative Agreement No. C-1-3261, \$97,828, approved by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2024.
4. May 28, 2024, Amendment No. 3 to Cooperative Agreement No. C-1-3261, \$101,193, pending approval by the Board.
 - Amendment to increase funding to support trips provided through June 30, 2025.

Total committed to Southland Integrated Services, Inc., Cooperative Agreement No. C-1-3261: \$384,559.



May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program and Call for Projects

Overview

The Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program offers grant opportunities to non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. The program augments existing OC Bus fixed-route service, OC ACCESS service, and the Senior Mobility Program in Orange County. Updated program guidelines and request to issue the 2024 call for projects are presented for review and approval.

Recommendations

- A. Approve the guidelines for the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- B. Authorize staff to issue the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program call for projects.

Background

The Federal Transit Administration (FTA) Section 5310 (FTA 5310) Program is intended to improve mobility for seniors and individuals with disabilities by removing barriers to transportation service and expanding transportation mobility options. In prior years, the Orange County Transportation Authority (OCTA) worked with the California Department of Transportation (Caltrans), the California Transportation Commission, and FTA to provide FTA 5310 funding through Caltrans to non-profit organizations and public agencies for the purchase and replacement of paratransit-type vehicles and related equipment to help meet the transportation needs of seniors and individuals with disabilities.

In 2015, through the Fixing America's Surface Transportation Act, FTA 5310 statute was updated, and in 2016, OCTA began receiving the Orange County share of FTA 5310 directly. Consistent with OCTA's State and Federal Programming Guidelines, the FTA 5310 funds were directed to support OCTA's OC ACCESS paratransit services. In addition, starting with the 2018 Enhanced Mobility for Seniors and Individuals with Disabilities (EMSD) call for projects (call), the OCTA Board of Directors (Board) approved the use of local funds in lieu of federal FTA 5310 funds for the EMSD Program to eliminate the need for local public agencies and non-profits that seek these funds to adhere to complex federal requirements during project delivery.

The Orange County EMSD Program was developed to mirror the goals and general structure of the FTA 5310 Program. The EMSD retains valuable components of the FTA 5310 Program such as ensuring that projects are consistent with the current Orange County Human Services Transportation Coordination Plan (Coordinated Plan). This plan is updated every four years, and the most current edition was approved by the Board in November 2020. Consistent with FTA 5310 program requirements, at least 55 percent of the EMSD Program funds are used for capital projects. Once projects are awarded, OCTA provides oversight and monitoring for the projects approved through the EMSD Program. The most recent prior EMSD call took place in 2021 and the Board awarded \$2.7 million to eight non-profit agencies for 14 projects.

Discussion

The 2024 EMSD Program Guidelines (Guidelines) have been developed with consideration to the needs, goals, and priorities identified in the current Coordinated Plan as well as ongoing feedback from eligible applicants on funding needs. The funding level is determined by the federal apportionment that OCTA receives from FTA 5310. For this cycle, the funding target is \$8.5 million.

To date, staff has presented information on the EMSD to the OCTA Accessible Transit Advisory Committee, has held scheduled discussions with several Coordinated Plan stakeholders, and held a workshop on April 17, 2024 to identify funding needs and collect feedback on the existing EMSD Program.

Generally, the recommended 2024 EMSD call guidelines will continue to support vehicle and equipment acquisition, operating assistance, and mobility management. Guideline revisions are based on stakeholder feedback, and include significantly simplifying the application, clarifying program requirements, and providing flexibility in vehicle acquisition requirements based on the current vehicle market.

Major revisions to the program include:

- Maximum total funding requests for applications from any single applicant has increased from \$600,000 to \$1.5 million, and maximum funding requests for each application type have been increased as detailed in Attachment A.
- Funding priorities have been revised consistent with identified program need:
 1. Capital projects,
 2. Operating projects, including operating assistance for existing services and mobility management projects.
- Allowance for purchasing and leasing used vehicles, as long as they meet certain requirements.
- Implementation of an accountability measure in the evaluation criteria, deducting five points from application scores in the event of past poor project delivery or mismanagement of funded awards.
- Incorporation of state and federal requirements, including agency drug and alcohol program reporting, driver training reporting, and vehicle maintenance reporting.

EMSD program applications will be evaluated based on consistency with the program goals, applicant experience, implementation plans, program performance indicators, and coordination and outreach efforts. The updated and recommended Guidelines are included as Attachment A.

Key milestones for the 2024 EMSD call are as follows:

Milestone	Date
Board consideration of 2024 Guidelines and issuance of call	May 28, 2024
Eligible applicant agencies office hours with OCTA staff	June 3-7, 2024
Applications due by 4:00 p.m.	June 27, 2024
Project eligibility reviews and evaluations	June – August 2024
EMSD funding recommendations presented to the Board	Fall 2024

Next Steps

With Board approval, OCTA will issue the 2024 EMSD call and notify eligible agencies. Staff has planned a program information session pending Board approval of the Guidelines and the call and will also be available to meet with eligible applicants. Once the eligible applicants submit project nominations, OCTA staff will evaluate applications, and return to the Board in the fall with funding recommendations.

Summary

Staff is recommending Board approval of the Guidelines and authorization to issue the 2024 EMSD call.

Attachment

- A. 2024 Enhanced Mobility for Seniors and Individuals with Disabilities (EMSD) Grant Program, Call for Projects Program Guidelines

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**2024 Enhanced Mobility for Seniors and Individuals with
Disabilities (EMSD) Grant Program**

Call for Projects Program Guidelines

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2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Purpose And Authority

The Orange County Enhanced Mobility for Seniors and Individuals with Disabilities (EMSD) Grant Program call for projects (call) is intended to enhance the mobility of seniors and individuals with disabilities by providing local transportation funding to meet the transportation needs of seniors and individuals with disabilities where public transportation services may not appropriately meet their needs. The EMSD Grant Program offers grant opportunities to non-profit organizations (non-profits) and local public agencies to help meet these needs.

Program Goals

The EMSD Program is intended to meet the transportation needs of older adults and people with disabilities when transportation services provided are unavailable, insufficient, or inappropriate to meet these needs. The goals of the Program are to:

- Improve the mobility for seniors and individuals with disabilities in Orange County.
- Support local agencies and non-profits providing service within their communities.
- Supplement services provided through the OCTA Senior Mobility Program, OC ACCESS, and OC Bus fixed-route service.
- Provide seamless service through improved first- and last-mile connections.
- Incorporate and encourage technology-based solutions to improve mobility options.
- Promote non-profit and public agency outreach to senior and disabled patrons with an emphasis in reaching disadvantaged, underrepresented, and/or diverse communities to ensure services will meet their needs.
- Prioritize funding for agencies that:
 - Collaborate through partnerships to create efficiencies and lower operating costs for service, and/or
 - Increase vehicle revenue hours beyond the minimum ten hours per week.

Background

Prior to 2014, the Federal Transit Administration Section 5310 (FTA 5310) Program was jointly administered by the Orange County Transportation Authority (OCTA) and the California Department of Transportation (Caltrans). In 2016, OCTA assumed the role of designated recipient for the FTA 5310 Program in Orange County to ensure funds are used effectively, efficiently, and consistently with federal requirements.

Since 2018, the Orange County EMSD Grant Program replaced the FTA 5310 by providing local funding support in lieu of federal funding, which allows grantees to streamline project implementation and reduce the risk of non-compliance with federal requirements. Due to the long-standing success of the Section 5310 grant program, all beneficial elements of that program have been retained.

As the regional transportation planning agency for Orange County, OCTA is responsible for conducting a call for projects and distributing EMSD funds to selected projects consistent with the priority strategies identified in the current Orange County Human Services Transportation Coordination Plan¹ (Coordinated Plan). In addition, OCTA has taken on the responsibility of developing and administering funding agreements and providing oversight monitoring of EMSD grantees throughout the useful life of the grant-funded projects.

2024 Call

The 2024 EMSD call will make up to \$8.5 million in local funds available for eligible and high scoring projects. Funding availability is based on the FTA 5310 apportionment to OCTA and is subject to change. All projects proposed and

¹ 2020 Coordinated Plan is available at: <http://www.octa.net/pdf/HumanServicesTransportation.pdf> - applicable to this call.

2024 Coordinated Plan information landing page is available at: <https://www.orangecountyhstcp.com/> - currently under development.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

considered for funding are required to be included in the Coordinated Plan. Under FTA guidelines, the Coordinated Plan is required to be updated every four years. This call will award projects consistent with the 2020 Coordinated Plan, as its 2024 update is still under development.

Program Schedule

EMSD Schedule (Subject to Change)	
April 17, 2024	EMSD Program Workshop (Virtual)
May 28, 2024	Call for Applications Opens
June 3-June 7, 2024	Application Office Hours
June 27, 2024	Application Due Date by 4pm
June – August 2024	Application Reviews and Scoring
September 2024	OCTA Board of Directors (Board) consideration of EMSD funding recommendations
September 2024	Awarded Applicant Office Hours

Eligible Applicants

Eligible applicants include:

- Private non-profit organizations providing transit services for older adults and people with disabilities, and
- Public agencies where private non-profits are not readily available to provide the proposed service for these individuals (see **Public Hearing for Public Agency** section of these Guidelines).

Public Hearing for Public Agencies

Public agency applicants will be required to hold a public hearing to establish coordination with non-profits and ensure services are not being duplicated. This will verify that the nominating public agencies' projects are not overlapping in scope and, where applicable, services can be better coordinated. **Nominating public agencies, including Orange County (County) cities and the County, are to schedule public hearings, and notify relevant non-profits as soon as possible to proceed with the application process. Documentation of a public hearing being held will be required as part of the application package.**

Coordination

Inter-agency coordination is highly recommended. OCTA encourages agencies to work in partnership with other agencies to better offer well-rounded and coordinated services or use of vehicles and/or equipment. The EMSD Program emphasizes the importance of coordinated planning. Priority will be given to nominations that successfully show inter-agency coordination and demonstrate partnership(s).

Funding Priorities

1. Capital
2. Operating (Existing Services Only and Mobility Management)

Eligible Project Categories and Availability of Funds

Funds will be available for two categories and distributed to organizations and agencies serving Orange County based on the funding priorities above.

Project Category	Funding availability
Capital	\$4.7 million (minimum) or 55% minimum of awarded funds
Operating (Mobility Management and Operating Assistance)	\$3.8 million (maximum) or no greater than 45% of awarded funds
Total	\$8.5 million

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Consistent with FTA 5310 requirements, at least **55%** of funds must be used for “traditional” capital projects. That is, those public transportation **Capital** projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate.

As a result, the **Operating** projects category is limited to a total target of \$3.8 million award maximum, and the funding that goes to operations cannot be greater than **45%** of the total available funding.

Capital Projects

Project Types	Eligible Activities
Vehicle and Equipment Acquisition:	Vehicle leases or purchases
Small Capital Purchases:	Purchases under \$10,000 for computer hardware and equipment if the hardware and equipment are tied to an operating need and do not meet the minimum requirements of a capital project. Justification for how the hardware and equipment is directly tied into the function of an operation will be required in the applications narrative.

Capital projects will consist of vehicle leases or purchases. This includes buses and vans with the purpose of transporting seniors and individuals with disabilities. Vehicles may be either new or used (in good condition). Vehicles may be replacements for those currently in operation that have met or exceeded their useful life or vehicles to allow expansion of service. For a project to be categorized as replacement vehicles, the vehicles to be replaced must be in active service during the applicant’s normal days and hours of operation. Unless an acceptable justification is provided, the vehicle should have met a minimum useful life or will meet the useful life at the point the replacement vehicle is put into service.

Each vehicle acquired (both purchased and leased) must be Americans with Disabilities Act (ADA) accessible and provide a minimum of 10 hours of service per week, where service is provided by the awarded applicant or in coordination with other agencies. Zero-emission vehicles (ZEV) and zero-emission buses (ZEB) are encouraged; however, the purchase or installation of ZEV charging equipment is not an eligible expense of the EMSD program.

CalACT Purchasing Cooperative

Agencies may acquire vehicles through the California Association for Coordinated Transportation (CalACT) Purchasing Cooperative; however, this is not a requirement of the EMSD program. Agencies that plan to acquire vehicles through CalACT must notify OCTA of their intent as part of the application.

For more information, please visit <https://calact.org/> or contact Dan Mundy at dan@calact.org or 916-920-8018 (Office)

Vehicle Acquisition Cost-Effectiveness Requirements

The purchase of *used* vehicles will be allowed when the proposed used vehicle is determined to be more cost-effective than the purchase of new vehicles and meets the additional used vehicle provisions noted below. Applicants who opt to request funding for the purchase of used vehicles, must provide a cost-benefit analysis as part of the project application clearly indicating that the purchase of used vehicles is more cost-effective compared to the purchase of new vehicles.

The *leasing* of vehicles will be allowed when it is determined to be more cost-effective than purchasing vehicles. Applicants who opt to request funding for leasing must provide a cost-benefit analysis as part of the project application clearly indicating that leasing is more cost-effective compared to purchasing. A draft lease agreement must be included as part of the application, and a final lease agreement shall be provided to OCTA upon agreement execution.

Cost-effectiveness methodology will be at the discretion of each applicant agency and should be prepared in good faith.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Additional **Used** Vehicle Provisions

Used vehicle purchases will be allowed so long as they meet the following criteria:

- Vehicles are less than three years old (based on model year),
- Vehicles have less than 65,000 miles,
- Vehicles are under warranty,
- Applicants provide proof that multiple vendors were contacted for comparable prices,
- A mechanical inspection must occur prior to purchase, and
- Vehicles must be fully ADA compliant or will be modified to be ADA compliant – including ramps, tie downs, and other safety features.

Additional **Leased** Vehicle Provisions (under warranty and inspected prior to purchase)

- Vehicles are less than three years old (based on model year),
- Vehicles have less than 65,000 miles,
- Applicants provide proof that multiple vendors were contacted for comparable prices,
- Vehicles must be fully ADA compliant or will be modified to be ADA compliant – including ramps, tie downs, and other safety features.

Equipment Purchases

The Capital projects category may also include the purchase of service-related equipment such as wheelchair lifts, ramps, and securement devices as well as computer hardware (i.e., computers, keyboards, mice, dispatching devices and software, etc.). ZEV charging equipment is not an eligible equipment purchase.

Applicants must submit at least one equipment quote consistent with the application, detailing key characteristics. Multiple quotes are preferred. These will serve as an Independent Cost Estimate (ICE), and the lowest quote provided will determine the grant amount.

Operating Projects

Operating projects will consist of mobility management and operating assistance.

Project Types	Eligible Activities
Mobility Management:	Coordinating Transportation Services, Traveler/Client Call Centers, Driver/Travel Training ² , and/or Coordinating/Dispatching Communications System
Operating Assistance:	Labor (Staffing) Expenses, Materials (Fuel, Office Supplies), Continuation of Services, Contracted Services, and/or First and Last-Mile Trips

Award Limitations and Matching Fund Requirements

Applicants may submit applications for either one or both categories. However, the total funding request per applicant may not exceed **\$1.5 million** (does not include local match), as noted in the application and project type table below.

For the purposes of the EMSD Program, match refers to any non-EMSD funding contribution committed and provided by the lead agency to support a share of the total project expenses. Projects will be required to provide a cash match consistent with the table below.

Please note that matching requirements were temporarily reduced as part of the 2021 EMSD Program to allow applicants to restore service and support recovery from the coronavirus (COVID-19) pandemic. This reduction is remaining in place as part of the 2024 EMSD Program to allow continued recovery and to address ongoing supply chain issues.

² Travel training is one-on-one individualized training that gives people with seniors and individuals with disabilities the skills required to travel safely on fixed-route public transportation.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Application and Project Type ³	Minimum Grant Request	Maximum Grant Request	Minimum Match Requirement
Capital: Vehicle purchases, leases, and limited supporting equipment	\$100,000	\$1,000,000	10%
Capital: Standalone Capital Equipment Purchases	\$10,000	\$99,000	10%
Operating: Operating Assistance	\$100,000	\$1,000,000	20%
Operating: Mobility Management	\$50,000	\$300,000	10%

Indirect Costs

The program will allow for no greater than 10% of requested funds to contribute to indirect costs. This will be applicable to the operating category only. Applicants should factor in this limit when structuring their proposed project budgets, demonstrating a clear understanding of how the grant funds will be effectively utilized for both direct and indirect costs.

Examples of indirect costs that could be considered include:

- General administrative and overhead costs.
- Office supplies.
- Development of specifications for vehicles and equipment.
- Staff salaries (for capital applications).
- Technical assistance and planning activities.
- Any other costs deemed necessary for the administration, planning, or technical assistance purposes of the project.

Contingency Costs

Contingency is allowed for unforeseen circumstances, such as cost increases or project delays, amounting to 5-10% of the total requested funds in proposed project budgets. This allocation ensures adaptability to changing conditions while minimizing disruptions to project implementation.

Evaluation Criteria

Applications will be considered for funding based on the evaluation criteria and point distribution shown in this section. Capital and Operating projects will be scored differently with the criteria detailed in their respective tables. The criteria align with federal and state goals for the Section 5310 program and are the basis for reviewing and selecting applications.

All projects are required to be included in the 2020 Coordinated Plan.

Capital Evaluation Criteria

Capital Projects	Maximum Points
A. Goals and Objectives – Project is consistent with overall EMSD Program goals and objectives and meets all program requirements of providing transportation related activities and/or services beyond those required by the ADA.	6
B. Ability of Applicant – Evidence of the applicant's experience providing existing transportation service or social services for elderly or disabled individuals. Scored questions will also include points for agency programs/plans including driver/travel training, dispatching, California Highway Patrol Inspections.	10

³See complete examples of eligible operating activities and vehicle types on **Capital Projects**.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

C. Coordination Planning – Assessment of available services that (1) meet the needs of seniors and disabled individuals and (2) identify gaps in service or equipment needs. Scored questions will ask how the applicant provides strategies, activities, and projects to identify these gaps and achieve efficiencies in service. Discuss the coordination planning your agency conducts with other agencies.	6
D. Outreach and Feedback – Assessment of how the applicant has conducted outreach with senior and disabled clients to ensure their needs are being met and adjustments to service are made accordingly.	5
E. Transportation Service – Evaluation will be based on project type - replacement, expansion vehicles, and/or equipment. Replacement and expansion vehicles will receive ratings based on mileage, service hours per week, and number of people served. Equipment will be scored based on number of vehicles within the fleet which are coordinated and service efficiency enhancement with the new equipment.	18
F. Emergency Planning and Preparedness – Evaluation is based on standards for emergency planning and preparedness, extent to which emergency plans and drill activities are provided, and whether applicant is included in County Office of Emergency Services (OES) response plan.	5
Additional Considerations to Application Scores	
a. Accountability Measure – Consideration of applicants past project delivery performance will be evaluated. 5 points may be deducted.	-5
Total Points	50

Operating Evaluation Criteria

Operating Projects	Maximum Points
A. Goals and Objectives – Project is consistent with overall EMSD Program goals and objectives and meets all program requirements of providing transportation related activities and/or services beyond those required by the ADA.	10
B. Project Implementation – Extent to which applicant provides a well-defined and detailed operations plan with defined routes, schedules, current/project ridership, key personnel, and marketing strategies with supporting documentation for carrying out the project.	15
C. Program Performance Indicators – Extent to which applicant provides clear, measurable, and outcome-based performance measures and indicators, which show a logical, reasonable, and quantifiable methodology to track the effectiveness of the project.	10
D. Coordination, Outreach, and Sustainability – Extent to which applicant identifies communications and outreach plans and goals to target populations that benefit from EMSD program. Evaluation also based on applicant's efforts and accomplishments in coordination with other transportation and/or social services in the project area and extent to which applicant identifies plans to sustain a new, expansion, or continuation program beyond the two-year funding cycle.	11

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

E. Emergency Planning and Preparedness – Extent to which applicant identifies standards for emergency planning and preparedness and provides emergency plans and drill activities, and whether applicant is included in County Office of Emergency Services (OES) response plan.	4
Additional Considerations to Application Scores	
b. Accountability Measure – Consideration of applicants past project delivery performance will be evaluated. 5 points may be deducted.	-5
Total Points	50

Accountability Evaluation

The 2024 EMSD call will evaluate applicants on past project delivery performance. Up to five points may be deducted from the overall project score for applicants with a history of poor past project delivery performance including in contract execution, timing of expenditures and invoicing, and overall program understanding. This evaluation will ensure continuation of responsible delivery of EMSD-funded projects.

Provisions of Use Criteria

- Upon approval by OCTA's Board, awarded applicants will be notified and will be required to enter into an agreement with OCTA to start the project and receive funding. The agreement will remain in effect throughout the project's service period or the equipment's useful life.
- For vehicle request, grantees are responsible for the proper use, operating costs, and maintenance of all vehicles and project equipment, and must be prepared to comply with all applicable regulations and requirements.
- Applicants are responsible for management, oversight, and control over the operations of contracted service and purchased equipment. Appropriate documentation must also be maintained and provided upon request during the project term and through the useful life of the asset or through the service period.
- For non-profit applicants, non-profit status must be documented as "active."
- Public agencies are required to complete a public hearing prior to the application deadline to verify that they would not be nominating overlapping services or providing services where a non-profit could. More information on this can be viewed in the Public Hearing for Public Agency section.

Timely-Use of Funds

Funding will be made available for FY2024-25, FY2025-26, and FY2026-27. All reimbursable work should be completed within the timeframe outlined in the executed agreement.

For **Capital** projects, applicants will be required to award a contract or execute a purchase order by June 30 of the programmed FY. Applicants would then have 24 months from the award or purchase to receive and/or install the equipment. The contract award or purchase date will serve as the start of the 24-month performance period. The expenditure deadline will also start at the contract award or purchase and all eligible awarded funds must be expended by the end of the 24-month period. **Extensions of up to one additional expenditure year (12 months) will be considered on a case-by-case basis with a formal letter indicating reasons for the extension.**

For **Operating** projects, awarded applicants will be required to show evidence that they have entered into a cooperative or service agreement, as applicable to the funded project, and must start service based on the schedule provided and by June 30 of the programmed FY. For existing operating agreements, applicants may request funds to continue service. The date of the OCTA/Agency cooperative or service agreement or start of the continuation of service using the grant funds will begin the 24-month period of performance.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Funding for projects that have not (1) started within the FY programmed and (2) have not invoiced within 60 days of the end of the FY, may be forfeited and projects will be subject to OCTA approval for any delays. Extensions of up to one additional year (12 months) will be approved on a case-by-case basis. Requests should be made through a letter indicating reasons for the delay and how funds will begin invoicing by June of the extended FY.

Extension Requests, Scope Changes and Cost Savings

Scope changes and extension requests are considered on a case-by-case basis and requests must be submitted via email to OCTA EMSD email at OCTAEMSD@octa.net. Typically, to consider a scope change for approval by staff, OCTA expects the project benefits to be the same as what was provided in the original application. If the project does not deliver the same benefits, the project request will either be denied or presented to the OCTA Board for consideration. Applicants must provide an explanation and justification for the change and include documentation for how project benefits will be impacted and how they compare to the benefits proposed in the original application. Please note that project extensions are not guaranteed, and OCTA encourages awarded applicants to initiate and complete projects within the original period of performance of the grant.

OCTA will complete a thorough evaluation of the scope change and/or extension request and the potential impact to the project(s) benefits prior to making a recommendation. Major scope changes which significantly impact the benefits may require approval by the OCTA Board of Directors. If the applicant reduces the scope of an approved project a reduction in EMSD funds must be applied proportionally to maintain the approved local match percentage.

Cost Savings.

Reduced costs associated with a scope reduction will not be considered cost savings. Savings at project completion will either remain with OCTA or be returned to OCTA, if already paid out to the agency.

Cost Increases

The EMSD Program will not cover project cost increases for awarded projects. Applicants commit to cover any cost increases beyond awarded funds and match requirements.

Invoices and Reimbursements

Costs incurred prior to the start of the executed agreement will not be reimbursable unless requested by exception.

The EMSD Program requires that payments to the agency occur on a reimbursement basis, with exceptions for vehicle purchases noted below. Therefore, the lead agency must incur and pay for project costs prior to invoicing OCTA for reimbursement. The lead agency will be required to provide proper documentation with their invoices to validate that the expenditure was properly incurred. For applicants purchasing vehicles, they will be allowed to invoice up to 65% of the purchase order amount covered by OCTA upon receipt of a verifiable purchase order. The remaining 35% will be paid upon delivery and acceptance of the vehicle(s), consistent with the total project cost and considering the required match. Subsequently, the payments will be distributed to the lead agency, which then utilizes these funds to settle project costs, including payments to vendors for vehicle purchases.

Applicants may begin invoicing from the date their contract agreements with OCTA are executed. Reimbursements will be dispersed upon review and approval of a complete expense report, performance report, and consistency with the cooperative agreement requirements and specifications. Invoices for capital must be submitted no later than 21 days after the end of the month in which the expenditure occurred, with the exception for vehicle purchases. For operating projects, invoicing will be required at minimum on a quarterly basis consistent with the quarterly reporting schedule provided.

Applicants are expected to submit a final report form and closeout form within 90 days of project completion.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Project Type	Reimbursement Process
Capital: Vehicles and Equipment	Vehicles: OCTA will pay up to 65% of the award amount (OCTA's share) of the cost up front, based on verifiable purchase order less the required match. The remaining 35% will be paid upon applicant's delivery and acceptance of the vehicle.
	Any funding not initially paid out from the grant will be disbursed consistent with the total project cost and considering the required match, following confirmation of receipt of the vehicle and/or equipment. Applicants must submit an invoice no later than 21 days after the end of the month following vehicle acceptance.
	Equipment: Applicants incur the expense and request reimbursement from OCTA once the equipment has been delivered and accepted at the agency.
Operating: Operating Assistance, Mobility Management, Driver/Travel Training, and/or first and last-mile connections.	Applicants submit invoices to OCTA on a quarterly basis , less required match. (See quarterly reporting due dates below)

If awarded, successful applicants will enter into a cooperative agreement with OCTA specifying grant requirements.

Reporting

Awarded applicants will be required to submit a quarterly report to allow OCTA to monitor progress on the project and ensure that the project will be completed within the period of performance of the grant. Quarterly reporting forms will be available on the [EMSD website](#). Awarded applicants should start submitting quarterly reports to OCTA once cooperative agreements are executed. Monthly data, see quarterly report templates, is to be submitted on a quarterly basis, in accordance with the reporting schedule below:

Performance Period	Quarterly Report Due Date
Quarter 1: January-March	April 21 st
Quarter 2: April-June	July 21 st
Quarter 3: July-September	October 21 st
Quarter 4: October-December	January 21 st

The final invoice for vehicles must be submitted 21 days following the end of the month in which the expenditure occurred. The final invoice for operating must be submitted 21 days following the end of the quarter in which the expenditure occurred. Once the project is complete; the applicant is expected to submit a final report form and closeout from 90 days following issuance of final payment. Final report and closeout templates will be available on the [EMSD website](#) following the project award.

Insurance Requirements

The following insurance is required, subject to change at the time of award:

- Commercial general liability (includes products/completed operations, independent contractors, contractual liability, personal injury liability, property damage) minimum limit \$1,000,000 per occurrence, \$2,000,000 general aggregate.
- Automobile liability insurance to include owned, hired, and non-owned autos combined single limit of \$1,000,000.
- Workers' compensation with limits as required by the State of California including a waiver of subrogation in favor of OCTA, its officers, directors, employees, or agents.
- Employers' liability with minimum limits of \$1,000,000.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Proof of coverage, including certificates and endorsements, will be required as part of the Cooperative Agreements if selected for funding. OCTA will reserve the right to request policy reviews in response to any loss.

Additional Program Requirements

The following State and Federal requirements are required as part of the cooperative agreement and are subject to change at the time of the award. It is important to note that documentation of meeting these requirements could be reviewed, inspected and/or audited, in addition to the required reports that are to be submitted to OCTA by the OCTA Project Implementation contact at the discretion of said contact during their visits to your agency's operating site(s). The following requirements do not need to be included in the reports in their entirety so long as they can be verified in person and the required reporting forms are completed accurately.

Required Drug and Alcohol Programs and Related Reporting

If awarded, applicants will be required to comply with the requirements of the Drug-Free Workplace Act of 1988, the California Drug-Free Workplace Act of 1990, and the U.S. Department of Transportation (USDOT) drug testing regulations. Applicants and their subcontractors performing safety-sensitive tasks are subject to the same regulations. Before finalizing any agreements, selected applicants must establish and enforce a substance abuse program in accordance with state and federal rules, with ongoing revisions to ensure compliance.

OCTA recognizes that some agencies may have existing Drug and Alcohol Programs in place. For example, tests used to comply with Federal Motor Carrier Safety Administration (FMCSA) requirements may also be used to comply with EMSD program requirements provided that they cover the same time period required.

Awarded applicants also agree to periodic reviews of the drug and alcohol testing program by OCTA and/or a designated representative. These reviews will encompass a thorough examination of program-related forms, documents, and procedures employed by the awarded applicant and its service agents, including the Collection Site, Drug Testing Laboratory, Medical Review Officer, Substance Abuse Professional, and Consortium/Third Party Administrator (if applicable). Any identified program deficiencies or findings must be promptly rectified. Corrective actions should be documented for review by authority staff or designated representatives.

Documentation supporting compliance with the aforementioned regulations must be provided to authorized representatives of USDOT or its operating administrations, the State of California oversight agency, or to OCTA and/or their designated representative to inspect the facilities and records associated with the implementation of the drug and alcohol testing program.

The awarded applicant is responsible for submitting an annual Drug and Alcohol Testing Report to OCTA using the current Drug and Alcohol Testing Management Information System (MIS) Data Collection Form published by the FTA. The annual reports are due no later than the 21st of the month following the close of each year. Forms can be found here: <https://www.transportation.gov/odapc/Part40/Appendix-J>.

- Close of each year (January – December) – on or by January 21st of the following year

Additionally on an annual basis, no later January 21st of each year following the close of the previous calendar year for review, applicants are required to:

- Submit to OCTA all required drug and alcohol testing data using the appropriate FTA prescribed forms; and
- Provide certifications for all Service Agents (Includes, but not limited to: The Collection Site for Urine Specimen Collectors, Breath Alcohol Technicians, Screening Test Technicians, Oral Fluid Collectors, Medical Review Officers, and Substance Abuse Professionals)

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

It is recommended that the individual(s) responsible for monitoring the applicant agencies Drug and Alcohol Program attend the Transportation Safety Institute's (TSIs) courses on:

1. Substance Abuse Management and Program Compliance (FT00465)
2. Reasonable Suspicion and Post-Accident Testing Determination Seminar (FT00566)

These courses are to be completed within one year or as soon as practical after initiating your program and included as part of the annual report (due January 21st). If your agency already has a Program in place and individuals who manage the Program, have previously completed trainings, please include applicable documentation as part of your annual report.

Given the courses are only offered once a year in June for 2024 (see: https://www.transportation.gov/sites/dot.gov/files/2024-02/TSIFY-24TransitTrainingSchedulev.9_012424.pdf for course schedule), course sign-up confirmations for the following year will be accepted as proof of intent to complete the courses at a later date. If your agency chooses to proceed with this option, you must be able to show proof of completion for the following years report. More information on the TSI, their courses, and instructions for how to sign up for and attending courses can be viewed in further detail here: <https://www.transportation.gov/tsi/transit-safety-and-security>.

An awarded applicant's failure to comply with these requirements may result in nonpayment or termination of any entered agreements.

Required Driver Training for Vehicles

Applicants will ensure that its operators or its contracted vendor's operators, are properly licensed and trained to proficiency to perform duties safely, and in a manner which treats its riders with respect and dignity. Disability awareness and passenger assistance will be included in this training.

It is required that the individual(s) responsible for operating vehicles for the applicant agency complete the Passenger Assistance, Safety and Sensitivity (PASS) Basic Online course offered by the Community Transportation Association of America (CTAA). More information on the course and instructions to complete the industry standard training is available here: <https://ctaa.org/pass/>.

This course is to be completed within one year or as soon as practical after initiating your program and included as part of the annual report (due January 21st). If your operators have already completed the training, please include applicable documentation as part of your annual report. If your agency participates in another applicable and industry acceptable driver-related training, include this to satisfy this requirement.

Required Maintenance for Vehicles and Equipment

Agency will perform, or ensure that a contracted vendor performs maintenance of all awarded vehicles including:

- Daily pre-trip Inspections.
- Scheduled preventative maintenance that meets or exceeds the vehicle manufacturer's standards;
- Maintaining maintenance records for each vehicle for five (5) years; and
- If required, cooperation in annual motor coach carrier terminal inspections conducted by the California Highway Patrol (CHP).

Useful Life Requirements for Capital Projects

If capital purchases (vehicles, equipment, software, etc.) are purchased with EMSD funds, it is expected that these items will be used for their entire useful life and/or through termination of the service (see timely use of funds). If termination occurs prior to the completion of the capital item's useful life and/or grant term, the applicant shall repay OCTA the same percentage of the sale price [or estimated value of the asset(s)] based on straight line depreciation of the asset(s) consistent with the EMSD percentage of initial purchase. Useful life shall be documented in project agreements.

2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program Guidelines

Submittal Requirements

A completed application will contain the following documents:

- Completed capital and/or operating application with corresponding attachments;
 - Application templates are available on the programs webpage, applications must be submitted following these templates or will not be considered;
- Non-profits must provide verification of non-profit status as “active”.
- Local cities or county agencies must submit documentation of public hearing(s);
- Resolution from governing body or similar confirming match commitment and legal authority to submit;
- Benefit-cost analyses for vehicle acquisitions if applicable;
- Any other required documents, such as documentation of reduced service (if applicable), copy of your agencies most recent financial statement or single audit if applicable and have previously received federal funding, vehicle photos, etc. (refer to application for required documents).

Incomplete applications will not be considered for funding, so please ensure that all submittals contain all the required documentation. Important documents regarding the 2024 EMSD Program are available on the [EMSD website](#).

Applicants to the 2024 EMSD Program will not be required to submit hard copy applications to OCTA. Electronic project applications for the 2024 EMSD call must be received by OCTA no later than 5pm **June 27, 2024**, via a SharePoint location, please email Denise Sifford at dsifford1@octa.net or Vic Mireles at vmireles@octa.net for specific SharePoint file access.

Late applications will not be accepted or considered, so please ensure that you have uploaded all required documentation ahead of the application deadline. ***It is recommended to upload documents at least 48 hours ahead of the submittal deadline to allow for time for troubleshooting if needed.***

Information on how to submit electronic project applications will be posted prior to the call on the OCTA [EMSD website](#)⁴. Applicants to the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program will not be required to submit hard copy applications to OCTA. Hard copies of applications will not be accepted.

OCTA Contacts

EMSD Program Managers

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Community Transportation Coordinator

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⁴ <https://www.octa.net/programs-projects/programs/funding-programs/call-for-projects/emsd-grant-program/>



May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Radio Communications Equipment Replacement for OC Bus and OC ACCESS Vehicles

Overview

Board of Directors' authorization is requested for the purchase of hardware and services to complete the radio communications equipment replacement on the OC Bus and OC ACCESS vehicle fleet.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2235 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$6,627,206, for the purchase of hardware and services necessary to replace 123 Integrated Vehicle Unit 2100s and 257 Integrated Vehicle Unit 3100s with the advanced Integrated Vehicle Unit 4000P/4000 for the Orange County Transportation Authority's paratransit and fixed-route fleets, respectively.

Discussion

The Orange County Transportation Authority (OCTA) is actively transitioning its transit operations technology from the obsolete Integrated Vehicle Unit (IVU) 2100s and 3100s to the more advanced IVU 4000P/4000 models, addressing the critical need for technological updates as the older models have reached end-of-life and are no longer being produced. The updated IVU 4000P/4000 models are provided by Conduent Transport Solutions, Inc. (Conduent). To date, OCTA has already upgraded to the IVU 4000P/4000 on six of the 254 paratransit buses and 223 of the 530 fixed-route buses, with an additional 125 paratransit buses currently being procured with the IVU 4000P model and 50 fixed-route buses with the IVU 4000 model. This widespread adoption is essential for ensuring compatibility and operational cohesion across the entire fleet, simplifying maintenance, and standardizing training processes for all bus operators who will now use consistent system interfaces.

Given the urgent need to replace the end-of-life IVU 2100s and 3100s, OCTA is transitioning to the IVU 4000P/4000 units to ensure continued operational efficiency and passenger satisfaction. The IVU 4000P/4000 models bring significant technological enhancements that greatly enhance service quality for OCTA riders, while also elevating operational efficiency and passenger satisfaction. These upgrades feature advanced audio systems with exceptional radio sound quality and crystal-clear announcements, ensuring that essential information is readily accessible to both coach operators and riders. Enhanced Global Positioning Systems tracking boosts route adherence, thus promoting punctuality and reliability across services. The intuitive user interfaces of these units simplify operations, providing bus operators with a more streamlined control mechanism that eases their daily tasks. Furthermore, these units are equipped with sophisticated data collection capabilities, facilitating effective real-time decision-making and prompt service adjustments, which are key elements for optimizing day-to-day transit operations. Additionally, the IVU 4000P/4000 models are designed for superior integration with other onboard systems, supporting efficient real-time data transmission and dynamic scheduling, which are vital for effective and responsive transit management.

By upgrading to the IVU 4000P/4000, OCTA is not only adhering to current operational demands but is proactively positioning itself for future technological progress. This necessary upgrade is pivotal in fostering long-term cost efficiencies through a reduction in maintenance and repair frequencies, consequently decreasing operational expenditures. This replacement is vital for maintaining an efficient and dependable fleet, which is essential for addressing the continually evolving needs of public transit. Ultimately, this replacement significantly boosts the overall quality of community service, ensuring that OCTA remains at the forefront of public transportation solutions.

Procurement Approach

The procurement was handled in accordance with OCTA's Board of Directors-approved policies and procedures for a sole source procurement. Conduent is the exclusive owner of the IVU 4000P/4000 models. The firm has propriety rights to its technology and is the sole entity able to market and sell its proprietary technology, as it does not have agreements that allow resale through other vendors. Therefore, Conduent meets OCTA's criteria for a sole source procurement, and based on its technical ability and financial status, the firm is deemed responsible.

Conduent's proposal was reviewed by staff from the Contracts Administration and Materials Management (CMM) and Information Systems departments to ensure compliance with the contract terms, as well as the technical requirements.

In accordance with OCTA's sole source procurement procedures, a sole source over \$50,000 requires OCTA's Internal Audit Department (Internal Audit) to conduct a price review of the vendor's proposed pricing. As is common with these types of vendors, Conduent did not provide a detailed cost breakdown in a format that would be required in order to perform a price review. Conduent also stated that OCTA is the first property in which it will be retrofitting a sizable bus fleet with the IVU4000P/4000. As a result, Internal Audit was unable to compare Conduent's proposed pricing to comparable contracts or quotes. Therefore, CMM performed a price analysis using the information available, such as past contracts with Conduent, to analyze the reasonableness of the quoted price. Since Conduent would not provide cost documentation to support proposed labor charges and overhead costs sufficient to allow an Internal Audit price review, CMM staff compared the proposed pricing to previous contracts (Agreement Nos. C-9-1120 and C-2-2165) between OCTA and Conduent for similar services and found the price per vehicle for the fixed-route and paratransit pilot programs to be lower as shown below. In addition, the quoted price is lower than the OCTA project manager's independent cost estimate. Therefore, the quoted price is deemed fair and reasonable.

Project	Quoted Pricing	Comparable Contract (C-9-1120)	Comparable Contract (C-2-2165)
Fixed-Route	\$16,099/vehicle	\$81,103/vehicle	-
Paratransit	\$21,552/vehicle	-	\$41,667/vehicle

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2023-24 Budget, Finance and Administration Division/Information Systems Department, account nos. 1288-9027-D1111-KUR and 1288-9027-D1111-2EM and is funded through local funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2235 between the Orange County Transportation Authority and Conduent Transport Solutions, Inc., in the amount of \$6,627,206, for a one-year term, for the purchase of hardware and services necessary to replace the Integrated Vehicle Unit 2100s and 3100s with the advanced Integrated Vehicle Unit 4000P/4000 for Orange County Transportation Authority's paratransit and fixed-route fleets, respectively.

Attachment

None.

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Approved by:



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May 9, 2024

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: 2024 OC Transit Vision Master Plan Progress Update

Overview

The Orange County Transportation Authority is undertaking an integrated countywide transit plan. The 2024 OC Transit Vision Master Plan analyzes long-term transit needs throughout the County, identifies priorities for future transportation planning studies during the next 30 years, and positions the Orange County Transportation Authority for future local, state, and federal funding programs. Extensive public engagement will help inform the development and evaluation of the final recommendations expected in fall 2024. This report outlines a series of proposed countywide transit strategies that include 12 transit opportunity corridors and multimodal transportation improvements.

Recommendations

- A. Direct staff to continue with the implementation of phase two of the public outreach plan to gather feedback on the 2024 OC Transit Vision draft transit opportunity corridors and countywide transit strategies.
- B. Return to the Board of Directors in September 2024 with an update on recommendations.

Background

The Orange County Transportation Authority (OCTA) provides transit services throughout Orange County (OC), with more than 50 OC Bus routes, paratransit service, and one OC Flex zone. Prior to the original OC Transit Vision Master Plan, which was completed in 2018 (2018 Plan), OCTA developed long-range transit plans as part of the Long-Range Transportation Plan. The OC Transit Vision Master Plan provides transit-specific recommendations for short-term, mid-term, and long-term investments. Since the completion of the 2018 Plan, the following studies and projects have been completed:

- OC Flex Pilot Project Launch – 2018
- Beach Boulevard Bravo! Launch – 2019
- Central Harbor Boulevard Corridor Study – 2019
- Bristol Street Corridor Study – 2021
- Freeway Bus Rapid Transit Network Study – 2021
- Making Better Connections Study – 2022
- Main Street Bravo! Launch – 2022

Another project from the 2018 Plan, the OC Streetcar - Bus Interface Plan Update is anticipated to be completed by 2025, prior to the launch of the OC Streetcar.

The 2024 OC Transit Vision Master Plan (2024 Plan) is a 30-year plan that builds upon the 2018 Plan, accounts for changes in travel patterns, and analyzes long-term transit needs throughout OC. Potential long-term transit needs may include transit opportunity corridors (TOC) with investments in infrastructure that reduce transit travel time such as dedicated transit lanes, more frequent service, larger vehicles, and supportive technology such as transit signal priority (TSP). Other countywide transit strategies may include mobility hubs, first-last mile options, and vital connections to local and regional transportation networks. The 2024 Plan recommends priorities for future transportation planning studies during the next 30 years. The 2024 Plan will also help to position OCTA for upcoming funding programs at the state and federal level.

OCTA recently completed a major fixed-route bus restructuring study, known as the Making Better Connections Study, to better address shifts in travel patterns. The 2024 Plan builds upon the service levels that are being implemented as part of the Making Better Connections Study. As part of the 2024 Plan, a supporting effort to analyze local conditions and address long-term impacts of the coronavirus pandemic on transit ridership and travel patterns was developed through the State of OC Transit report.

The goals of the 2024 Plan include the following principles:

- Enhance: Make it more desirable to use transit
- Connect: Connect OC's people and places with effective transit
- Simplify: Make transit easier to use and more convenient
- Collaborate: Make OC a more attractive place to live, work, and visit by providing transit service that supports community priorities
- Sustain: Create a system that is resilient over the long term

Discussion

Draft Transit Opportunity Corridors

Based on an initial analysis of 24 potential TOCs throughout OC, 12 corridors have been identified as candidates for further consideration. The evaluation criteria used to screen the top 12 corridors were based on overall travel demand, existing bus ridership, transit mode share (i.e., split between automobile travel versus transit usage), equity (i.e., provide essential transportation service for the disadvantaged community), transit propensity, and key destinations. OCTA will be underway with public outreach beginning in May 2024 to seek feedback on the 12 potential TOCs which include:

- Beach Boulevard
- Bolsa Avenue and First Street
- Bristol Street and State College Boulevard to South Coast Plaza
- Bristol Street and State College Boulevard to John Wayne Airport
- Edinger Avenue
- Garden Grove Boulevard and Chapman Avenue
- Harbor Boulevard
- Katella Avenue
- La Palma Avenue and Lincoln Avenue
- Main Street
- Warner Avenue
- Westminster Boulevard and 17th Street

As part of the Public Involvement Plan, OCTA will solicit input from the public and stakeholders to identify their top five corridors and propose any corridors not included in the draft list. The consultant, in coordination with OCTA, will prepare basic operating plans, model runs, and performance measures for each of the corridors. The top ten TOCs will be ranked based on established goals, objectives, performance measures, and public input received. A map of the draft TOCs is included in Attachment A.

Countywide Transit Strategies

In addition to the TOCs, the 2024 Plan includes transit recommendations that build upon existing countywide transportation plans. The Project Development Team (PDT) is currently evaluating multimodal transportation options with draft recommendations expected by summer 2024. The following existing studies and plans are being reviewed to identify opportunities to improve countywide transit access:

- South Orange County Multimodal Transportation Study
 - Strategies include high-frequency transit, Project V circulators, mobility hubs, microtransit, expanded bicycle network, Transportation Demand Management strategies, which are shown in Attachment B
- Metrolink Southern California Optimized Rail Expansion (SCORE) Program
 - Long-term plan to increase passenger rail frequencies
 - Consider long-term plan to increase OC Bus service to connect with future rail trips
- Transit-Oriented Development Opportunities
 - Fullerton Park-and-Ride, OC Vibe, OC River Walk, Doheny Village
- Mobility Hubs Strategy Study
 - Potential hubs identified to improve connectivity and convenience
- Monitor high-growth areas for potential new or increased OC Bus service
 - Disneyland Forward Plan, City of Irvine, City of Rancho Mission Viejo

Public Engagement

Community input is a key factor when developing the proposed strategies and options that will help shape the OC Transit Vision. The primary goals are to inform target audiences about transit options, key issues and challenges, and to gather input. In fall 2023, an engagement strategy was executed to increase awareness of the 2024 Plan and encourage active participation in a community webinar and survey, which included questions related to transit travel patterns, frequency, and improvements. In addition, one-on-one stakeholder interviews were conducted to collect feedback about the future of transit in OC.

The following engagement was completed over a six-week period. All materials were created in English, Spanish, and Vietnamese. A complete Phase 1 Public Engagement and Survey Analysis Report is included in Attachment C.

- Collected 1,416 surveys
- Hosted two Community Leaders Roundtables, one webinar, and seven stakeholder interviews
- Presented facilitated discussions at OCTA's Citizens Advisory Committee, Diverse Community Leaders group, Bus Customer Roundtable, and Teen Council
- Engaged more than 1,400 community members across 12 events throughout OC
- Reached more than 88,000 readers through Spanish and Vietnamese newspapers
- Sent five email notices in multiple languages to more than 1,500 interested community stakeholders

- Advertised the webinar and survey 11 times through Facebook, Instagram, and X (formerly known as Twitter) posts

The next phase of community input is scheduled to begin by May 2024 and will seek input on the proposed TOCs. To ensure the study receives input from a broad range of stakeholders and the general public, the engagement program will continue to use the traditional and non-traditional outreach methods that were executed during the first phase of outreach.

OCTA will continue to seek input from the general public and stakeholders, including OCTA's public committees and diverse communities through various tactics that include social media, an online survey, e-blasts, newspaper ads, pop-up events, a webinar, participation in community events, and three roundtables with community-based organizations, local jurisdictions, and elected officials.

Next Steps

With the Board of Directors' (Board) direction, Phase 2 of the public outreach plan will be fully underway to seek feedback on the draft TOCs and countywide transit strategies. Staff anticipates providing outreach findings and final recommendations to the Transit Committee and Board in early fall 2024. The final 2024 Plan is scheduled to be completed by late 2024.

Summary

OCTA is conducting the 2024 Plan to direct priorities for future transportation planning studies over the next 30 years and position OCTA for upcoming funding programs at the state and federal level. As part of a series of countywide transit strategies, staff has developed a draft list of 12 transit opportunity corridors based on travel demand, equity, transit propensity, key destinations, and input from the public. Staff will engage the public to gather feedback on the draft corridors and return to the Board in fall 2024 to present all final project recommendations.

Attachments

- A. Draft Transit Opportunity Corridors
- B. South Orange County Multimodal Transportation Study: Strategies
- C. OC Transit Vision Master Plan Public Engagement and Survey Analysis Report Phase 1

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Draft Transit Opportunity Corridors



South Orange County Multimodal Transportation Study: Strategies

Strategy Element	Objective
Roadway Infrastructure & Operations Improvements	Improve the operational efficiency of the South Orange County roadway network
High-Frequency Transit	Provide enhanced bus and rail services on major corridors, enabling more travelers to utilize transit
Local Circulators/Shuttles	Continue the Project V community circulator program, providing tailored local connectivity and first/last mile service
Mobility Hubs	Provide convenient, centralized locations where various transportation services connect
Microtransit/OC Flex	Establish on-demand local transportation zones that address gaps in the OC Bus network and improve access to high-frequency transit
Active Transportation	Improve connectivity and safety for the bicycle and pedestrian network, including connections to transit and mobility hubs
Transportation Demand Management	Enhance system performance by encouraging travel when/where capacity exists, including reducing peak-hour trips and promoting transit and active transportation modes



OC Transit Vision Master Plan

Public Engagement and Survey Analysis Report

Phase 1

January 2024

Prepared for: Orange County Transportation Authority
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Orange, CA 92868



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I. EXECUTIVE SUMMARY

The Orange County Transportation Authority (OCTA) is developing the 2024 OC Transit Vision Master Plan (Plan), which aims to integrate, enhance, and expand multimodal transportation services in Orange County. This 18-month study will build upon the previous 2018 plan and other recent studies to establish a framework for future transit investments to include high-capacity transit corridors, first/last mile options, and other mobility services for the County. As part of this effort, a stakeholder and outreach engagement program was implemented to inform and seek feedback from Orange County communities about the Plan. This report documents the outreach efforts and survey results for Phase 1 of the study, which was conducted from October through November 2023.

The survey research was qualitative, which means that results cannot be considered representative of the total population of interest. Informal research methods are useful to explore a group's opinions and views, allowing for the collection of verifiable data. This data can reveal information that may warrant further study and is often a cornerstone for generating new ideas.

i. Community Engagement Approach

An engagement strategy was crafted and executed to increase awareness of the Transit Vision Master Plan (TVMP) among residents, stakeholders, commuters, and visitors of Orange County. The primary goal was to encourage active participation in the community webinar and to prompt stakeholders to complete the TVMP survey. In addition, one-on-one stakeholder interviews were conducted to collect feedback about the future of transit in Orange County.

To achieve community engagement, a robust notification campaign was launched, utilizing both digital and traditional methods of communication. This included social media posts, website updates, email blasts, local multilingual newspaper advertisements, and public announcements.

Additionally, a suite of promotional graphics and text were prepared for community partners to effectively distribute and communicate the webinar and survey details to their respective audiences. This approach ensured a wider reach and deeper penetration into different community segments.

To further enhance engagement, the outreach team participated in a variety of community events throughout the county, servicing each district. These events provided opportunities for face-to-face interactions, allowing the team to directly engage with individuals, answer questions, and

Figure 1: Nightmare on Center St. Pop-up



provide insights about the Plan. This approach was particularly effective in reaching those who might not be as responsive to digital or traditional media, ensuring a more inclusive and comprehensive outreach effort.

ii. Equitable Engagement

The outreach strategy was specifically designed to engage a wide range of community groups, including those often underrepresented. This approach aimed to ensure broad participation from all population segments, irrespective of ethnic background, language preference, or socioeconomic status. To accommodate the diverse linguistic needs of the county, the survey and project materials, including informational fact sheets, surveys, and e-blasts, were made available in English, Spanish, and Vietnamese. This multilingual approach was vital in making the information accessible to a more significant population segment.

The outreach team also proactively identified and engaged with the community at events, including local gatherings and pop-up events across the county. These events were chosen strategically to maximize Plan awareness and encourage survey participation. Special attention was given to cities with significant populations of residents for whom English is a second language. This targeted approach was aimed at achieving a more equitable representation in the feedback and insights gathered, contributing to a more comprehensive understanding of the community's needs and preferences.

Figure 2: Dia de los Muertos Festival Pop-up



iii. Survey Implementation

The survey opened to the public on October 11, 2023, and closed on November 12, 2023. During that time a total of 1,416 surveys were collected which included 1,317 English, 96 Spanish and 3 Vietnamese. The following is a summary of survey implementation:

- The survey was made available in English, Spanish and Vietnamese languages.
- The survey was made available online and in print form.
- Promotional print flyers were distributed to 12 community centers across the five Orange County supervisorial districts.
- Traditional and digital communication tactics were developed to promote survey participation. This includes use of newspaper advertisements, social media posts, emails, outreach toolkits, and promotion at community events.
- As an incentive for participation, respondents were given the opportunity to enter a sweepstakes, with the chance to win one of four gift cards valued at \$50 each.

iv. Survey Results Analysis

The subsequent section presents the results for each question in the survey.

Table 1. Mode of Travel

Q1: What is your primary method of travel?	
Car (drive alone)	55%
Bus	25%
Carpool/Vanpool	6%
Train	5%
Bicycle	3%
Rideshare (Uber, Lyft)	2%
Walking	2%
E-bike/ E-scooter	2%
Other	0%

Table 2. Travel Frequency

Survey Question	Never	4 to 7 days per week	1 to 3 times per week	1 to 3 times per year	1 to 3 times per month
Q2: How often do you ride on an OC Bus?	34%	22%	17%	15%	12%

Table 2a. Reasons for Not Riding the Bus: Non-users

For those who chose "Never" in response to Question 2, a subsequent question was presented to understand their reasons for not using the bus. Table 2a displays the three most common explanations for avoiding bus travel.

Q2a: If selecting never, why do you not ride the bus?	
Takes too long	31%
Can't get where I need to go	17%
Need car for work or errands	13%
Other	9%
Not sure	8%

Makes me feel uncomfortable or unsafe	7%
Hard to understand how to get where I need to go	5%
Doesn't run at the right times	4%
It's not reliable	3%
I bike or walk most places	3%

Participants who stated in Question 2 that they use the bus were asked three additional questions to delve deeper into their bus-riding use.

Table 3. Bus Rider Frequency

Survey Question	8 or more years	1 to 4 years	Less than 6 months	6 months to 1 year	5 to 7 years
Q3: How long have you been riding the OC Bus?	31%	25%	15%	15%	14%

Table 4. Bus Use Reason

Q4: Why do you ride the bus?	
Avoid traffic congestion	23%
Prefer not to drive	22%
Environmental reasons (I.e., air quality)	15%
Can't afford to purchase/maintain a car	14%
No driver's license/ can't drive	11%
High gas prices	8%
Other	7%

Table 5. Trip Purpose

Q5: What is your primary purpose for riding the bus?	
Work	43%
Recreation, social, entertainment	21%
Personal errands	14%
School	9%

Health/ medical appointments	6%
Shopping	5%
Other	2%

All participants were then asked two questions (Table 6 and 7) regarding potential transit improvements.

Table 6. Transit Service Considerations

Q6: If you could increase transit in Orange County, what would be the most important to you? (Select your top 3)	
More frequent service on major routes	17%
Faster bus services with fewer stops	14%
Service to more areas, including lower-usage areas	12%
More weekend services	11%
More early-morning and late-night service	11%
More service for commuters during rush hour	11%
More special event service (concerts, fairs, festivals, etc.)	9%
More long-distance service outside of Orange County	8%
Direct service to key activity and employment centers	7%

Table 7. Transit Improvement Considerations

Q7: What kind of transit improvements would you like to see more of? (Select your top 3)*	
High-capacity rail (train, light rail, streetcars)	19%
Bus rapid transit (limited stops, dedicated lanes, more frequent service)	16%
Increase OC Bus service (improved frequencies and service coverage)	16%
More long-distance service (freeway express routes, Metrolink, Amtrak)	13%
Dedicated lanes for transit	11%
Improved pedestrian and bicycle access to transit	10%

Traffic signal priority for transit (keeping lights green a few seconds longer to avoid delays)	8%
On demand microtransit service (OC Flex), community shuttles, taxis, and ridesharing services (Uber/Lyft) in areas with lower transit demand	7%

At the conclusion of the survey, respondents were given the option to answer demographic questions to assess the characteristics of survey respondents. Participation in providing this information was optional and did not affect their raffle eligibility.

Table 8. Key Demographic Findings

Survey Question	Response Rate	Findings
Q8: What is your age range?	96%	45% of participants were between the ages of 20-35, 27% were between 36-50, and 15% were between 51-65.
Q9. What is your combined annual household income?	95%	19% of respondents shared their annual household income is between \$50,000-\$79,000. Followed by 16% of respondents who shared their annual household income is between \$100,000-\$149,000. 14% of respondents make less than 30% a year
Q10. What ethnic group do you consider yourself a part of or feel closest to?	96%	41% of respondents identified themselves as Caucasian/White, followed by 31% Latino/Hispanic, and 12% Asian.

A detailed breakdown of the demographic findings is located on page 9.

v. Stakeholder Interviews

As an effort to collect feedback from stakeholders throughout the county, several target audiences were identified and invited to participate in a one-on-one interview to comment about their goals for the OC Transit Vision. The project team posed open-ended questions to gather insight on what works and what could be improved to encourage more people to use transit in Orange County.

More than 80 stakeholders were invited to participate and represented the following industries and groups: healthcare, building, educational institutions, tourism, major employers; business and chamber groups, and countywide city organization. The following groups participated in the interviews.

- Caltrans
- The Irvine Company
- UCI Health
- Rancho Mission Viejo
- Visit Anaheim
- South Coast Metro Alliance
- South Orange County Economic Coalition Advocacy Committee

Each group was asked to describe its vision for the future of Orange County transit. Interviews generally followed a script of about 15 questions geared to the interviewee's background and expertise. Transit-related questions focused on identifying barriers, priorities, and opportunities, as well as what is already working well. Interviewees shared a wide range of ideas, issues, and insights. Recurring themes included the following:

- Mobility hubs in Orange County will be beneficial in integrating various transportation modes, promoting connectivity, and offering convenient, multi-modal options for commuters.
- Investing in improved biking infrastructure will encourage people to choose bicycles over cars and facilitate crucial first and last-mile connections.
- Integrating technology will be essential for optimizing Orange County's transit system, improving efficiency, and enhancing the overall passenger experience.
- Microtransit can offer flexible, on-demand transportation solutions tailored to individual needs.
- Education will be pivotal for the success of Orange County's transit initiatives, fostering public awareness, understanding, and contributing to a more informed and supportive community.
- As housing increases in Orange County, it's essential to carefully plan transportation infrastructure to accommodate growing population, ensuring efficient access to transit options and minimizing congestion while promoting sustainable development patterns.

II. OUTREACH AND SURVEY IMPLEMENTATION

A comprehensive outreach strategy was implemented to raise awareness and drive engagement in the greater Orange County community regarding the Plan and survey. This strategy comprised of a mix of email campaigns, where regular blasts were sent to contacts in the TVMP database, and strategic notice distribution at key locations throughout the county. Social media platforms such as Facebook, Instagram, and X (Twitter) were also leveraged for targeted posts to stimulate interest and participation. Electronic communication toolkits were also developed, providing an easy way for community leaders and organizations to share information. The outreach was further bolstered by local print newspaper advertisements catering to a diverse audience, including those less engaged digitally.

i. Survey Outreach

Recognizing Orange County's diverse linguistic landscape, notifications and materials were made available in multiple languages, ensuring inclusivity and greater reach, especially among diverse and disadvantaged communities. TVMP and the survey were also promoted during virtual meetings, key stakeholder engagements, and local community events, facilitating direct interaction with residents and encouraging on-site participation. This multifaceted approach was crucial in achieving widespread community awareness and involvement, capturing the diverse perspectives of Orange County residents for the TVMP.

The survey outreach notification and engagement highlights are detailed below:

- Gathered 1,416 responses to the survey from October 12 to November 12, 2023.
- Hosted two Community Leaders Roundtables, one community Webinar, seven Stakeholder Interviews.
- Presented at two Community Advisory Committee (CAC) meetings, one Teen Council meeting, one Diverse Community Leaders meeting, and one Bus Customer Roundtable.
- Engaged with more than 1,400 community members across 12 events in Orange County's five supervisorial districts.

Figure 3: Survey Flyer



Figure 4: Santa Ana Zoo Pop-up

- Reached over 88,000 readers via Spanish and Vietnamese language newspapers.
- Emailed five multilingual notices to a network of more than 1,500 interested community stakeholders.
- Advertised the survey and community webinar through four Facebook posts, three Instagram stories, and four X (Twitter) posts.
- Created and disseminated toolkits as a convenient communication aid to more than 109 local municipalities, community leaders, and organizations associated with OCTA committees and stakeholders.
- Created and shared materials in English, Spanish, and Vietnamese.

ii. Survey Format

The survey was hosted on the Typeform platform and featured several multiple-choice questions for respondents. After the second question, "How often do you ride on an OC Bus?" the survey implemented skip logic. This divided the subsequent questions based on whether the respondent had ever used an OC Bus. Those who indicated they had never ridden were asked a follow-up question about their reasons for not using the bus. Conversely, all other respondents were presented with three additional questions regarding the duration of using the OC Bus, their reasons for riding, and the purpose of their trips. Finally, every participant was asked the last two questions focusing on increasing transit service and potential transit improvements, followed by optional demographic questions.

The survey questions were designed to:

- Understand travel use and trip purposes.
- Determine which transit services are the most important to respondents.
- Obtain feedback on possible transit improvements.
- Acquire demographic information from respondents.
- Gather updated contact details for future communication.

The survey comprised of 13 questions in total, which included four optional demographic questions and an



Figure 6: Placentia Heritage Festival



Figure 5: Spanish Survey



option for participants to enter their email address for the gift card raffle. A total of 1,416 surveys were collected, which included 1,317 English, 96 Spanish, and 3 Vietnamese.

III. ADDITIONAL SURVEY RESULTS

The following are additional survey results related to the survey participants' geographic distribution and demographics.

Figure 7: Home Zip Code Map

i. Geographic Distribution

More than 94% of survey respondents shared their home zip code (94.8%; 1,343). Of those that provided zip code information, about 85% of respondents stated they reside within Orange County (85.1%; 1,143). Three cities with the highest percentage of survey responses within Orange County included Santa Ana, (17.3%; 233), Anaheim (14.4%; 194), and Irvine (6.8%; 91). The respondent distribution map identifies the number of surveys collected by city and in total for unincorporated areas in Orange County. It also provides a total respondent count for input received from those residing outside Orange County (23.9%; 273).

ii. Demographics Results

The following three figures show the full results from the survey demographic questions.

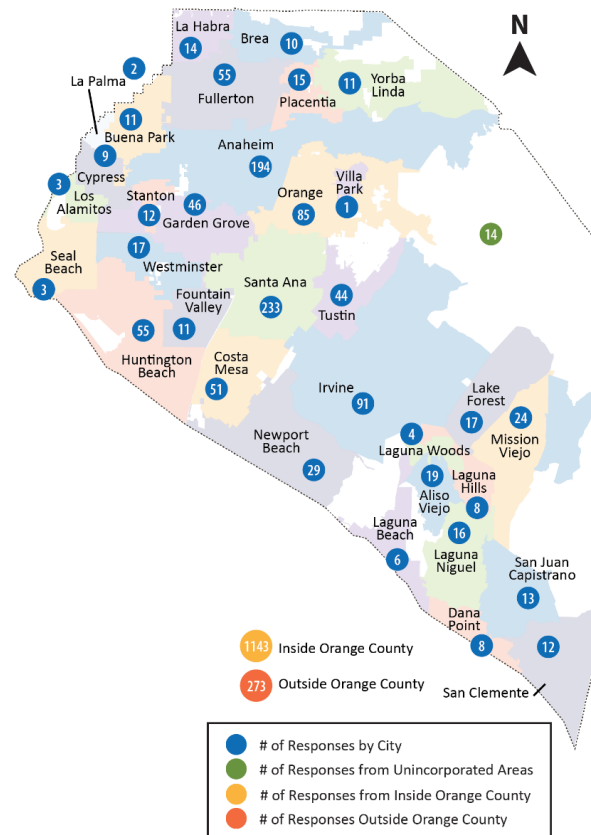


Figure 8: Age Range

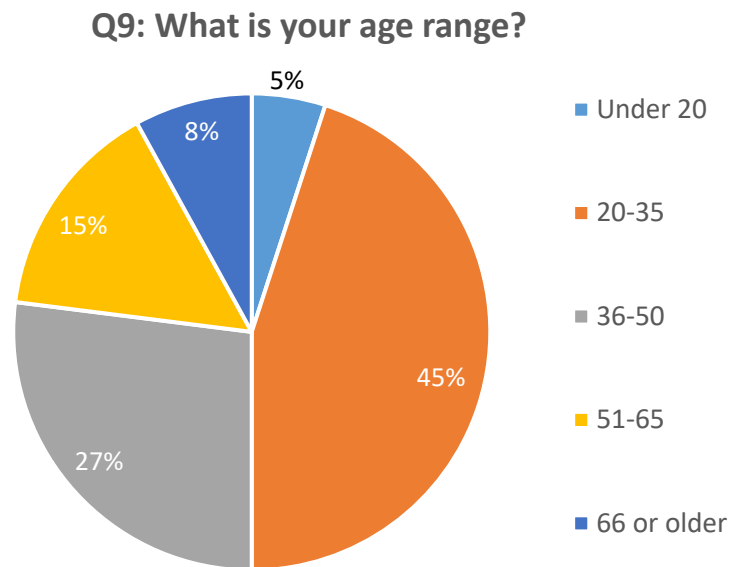


Figure 9: Annual Household Income

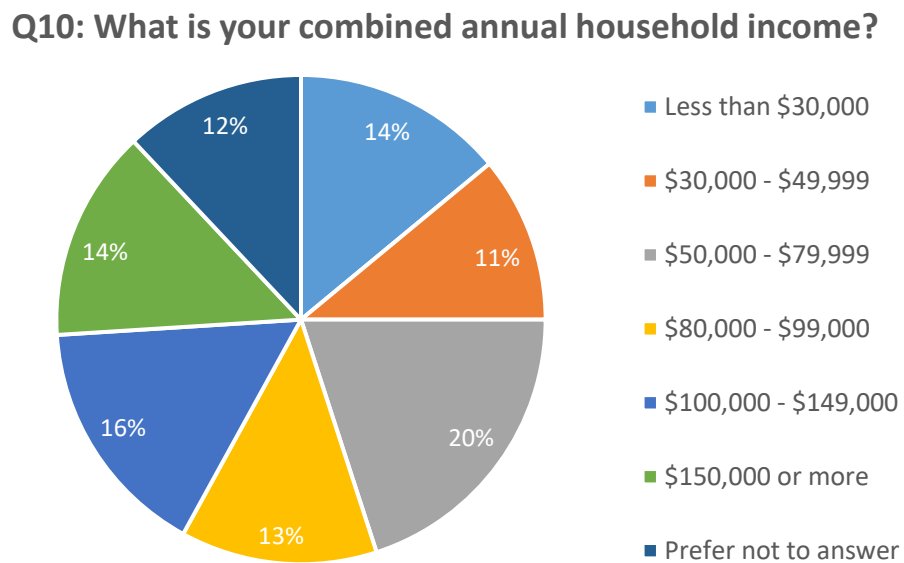
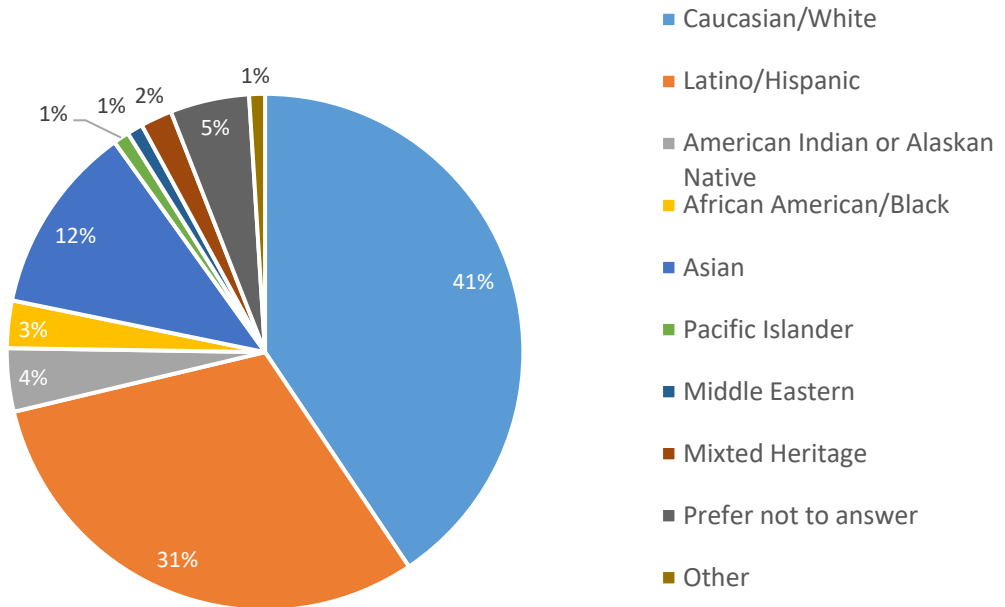


Figure 10: Ethnicity

Q11: What ethnic group do you consider yourself a part of or feel closest to?



iii. New Contacts

Enhancing public engagement is a key priority for OCTA, and a significant part of this involved expanding the study's contact list. During this survey effort, a total of 845 new email addresses were gathered from survey respondents. Emails will be used for future TVMP announcements and notifications.

IV. CONCLUSION

The technical team will analyze the survey results and public feedback to formulate project recommendations for the TVMP. A final phase of outreach will take place in spring/summer 2024 and will involve seeking public and stakeholder feedback on the Draft Project Recommendations.

2024 OC Transit Vision Master Plan Progress Update

Project Overview

- OC Transit Vision: 30-year plan to improve transit services in the County
- Identifies corridors for investment in high-quality transit
- Develops transit-related recommendations and policy guidance
- Informs the OCTA Long-Range Transportation Plan

WHAT ARE OUR GOALS FOR TRANSIT?



ENHANCE

Make it more desirable to take transit



CONNECT

Connect Orange County's people and places with effective transit



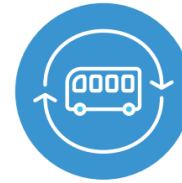
SIMPLIFY

Make transit easier to use and more convenient



COLLABORATE

Make Orange County a more attractive place to live, work, and visit by providing transit service that supports community priorities



SUSTAIN

Create a system that is resilient over the long term

Transit Opportunity Corridors

- Identified 24 preliminary corridors for potential investments in high-capacity transit
- Screened the top 12 corridors
- Gather public feedback on the preferred five corridors
- Analyze service levels, multimodal connections, ridership and cost estimates for the top 10

Evaluation Criteria

Overall Travel Demand (all modes)

Existing Bus Ridership

Transit Mode Share

Equity/Transit Propensity

Key Destinations

Right-of-Way Availability*

*Will be applied later in the evaluation process

Potential Transit Opportunity Corridors

- Beach Boulevard
- Bolsa Avenue and First Street
- Bristol Street and State College Boulevard to South Coast Plaza
- Bristol Street and State College Boulevard to John Wayne Airport
- Edinger Avenue
- Garden Grove Boulevard and Chapman Avenue
- Harbor Boulevard
- Katella Avenue
- La Palma Avenue and Lincoln Avenue
- Main Street
- Warner Avenue
- Westminster Boulevard and 17th Street



Countywide Transit Strategies

- South Orange County Multimodal Transportation Study
 - Strategies include high frequency transit, Project V circulators, mobility hubs, microtransit, expanded bicycle network, TDM strategies
- Metrolink SCORE Program
 - Long-term plan to increase passenger rail frequencies
 - Consider increasing OC Bus service to connect with additional rail trips
- Transit-Oriented Development Opportunities
 - Fullerton Park-and-Ride, OC Vibe, OC River Walk, Doheny Village
- Mobility Hubs Strategy
 - Potential hubs identified to improve connectivity and convenience
- Monitor high-growth areas for potential new/increased OC Bus service
 - Disneyland Forward plan, Irvine, Rancho Mission Viejo

Public Outreach

- Completed Phase I in late 2023
- Phase II will begin in summer 2024
 - Feedback on 12 transit corridors
 - Roundtables: city staff/elected officials/CBOs/stakeholders
 - Interactive survey
 - Webinar
 - Pop-ups



Project Schedule - Summary

Activity/Task	Completion Date
Goals and Objectives	Fall 2023
Public Outreach (Phase I)	Fall 2023
Transit Opportunity Corridor Recommendations	Early 2024
Other Countywide Transit Strategies	Spring 2024
Transit Supportive Design/Policies Recommendations	Spring 2024
Public Outreach (Phase II)	Summer 2024
Final Report	Fall/Winter 2024



Next Steps

- Continue work on Phase 2 of the public outreach plan to gather feedback on the 2024 OC Transit Vision Draft transit opportunity corridors and countywide transit strategies.
- Return to the BOD in September 2024 with an update on recommendations.



A video will be presented for this item.

OC Bus and OC ACCESS Services Update

Ridership

- Average weekday boardings and productivity as measured by boardings per revenue vehicle hour (B/RVH)

On-Time Performance

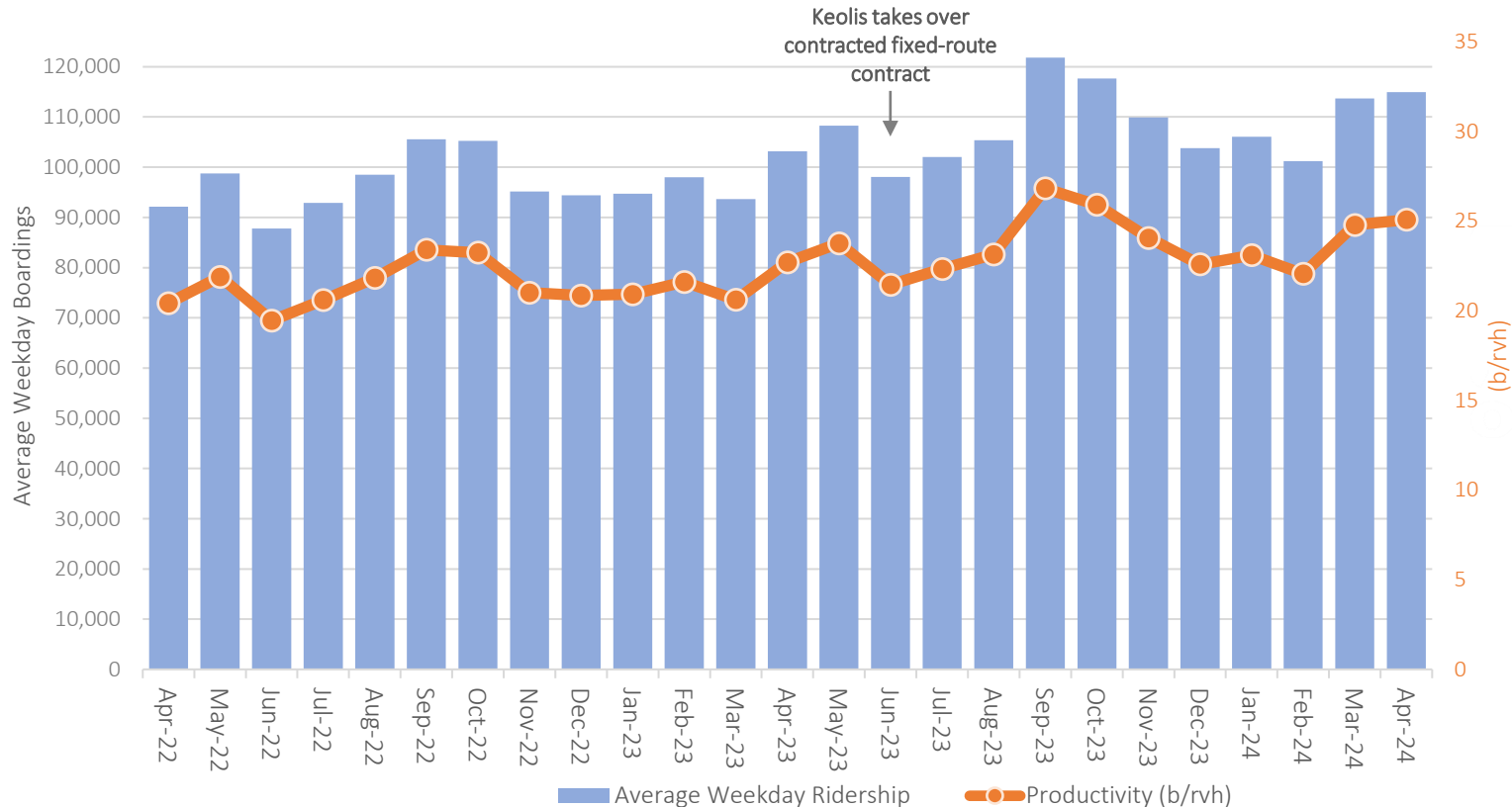
- Measuring service quality

Customer Comments

- Trends, feedback, and issues reported

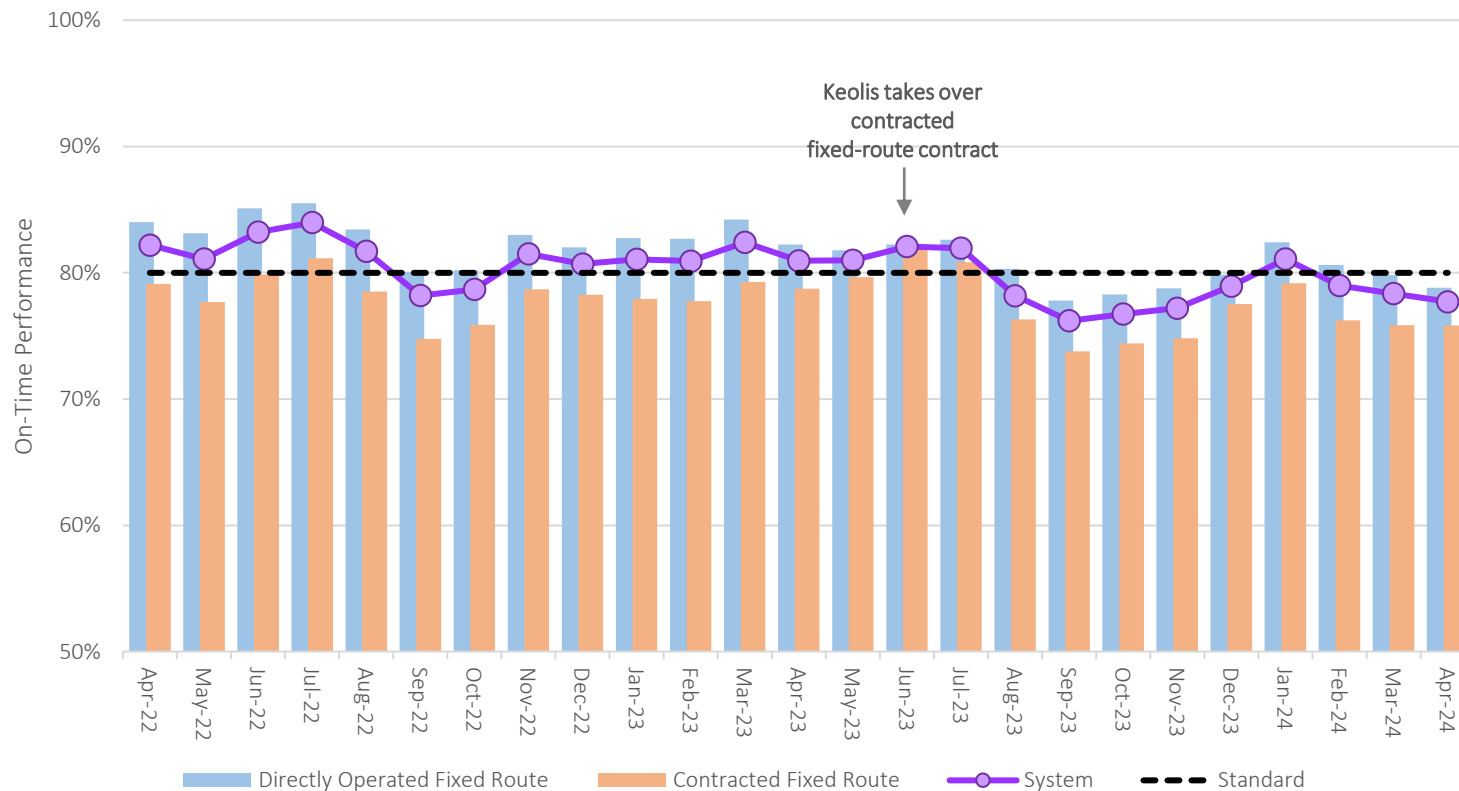
OC BUS RIDERSHIP AND PRODUCTIVITY

(AVERAGE WEEKDAY – LAST TWO YEARS)



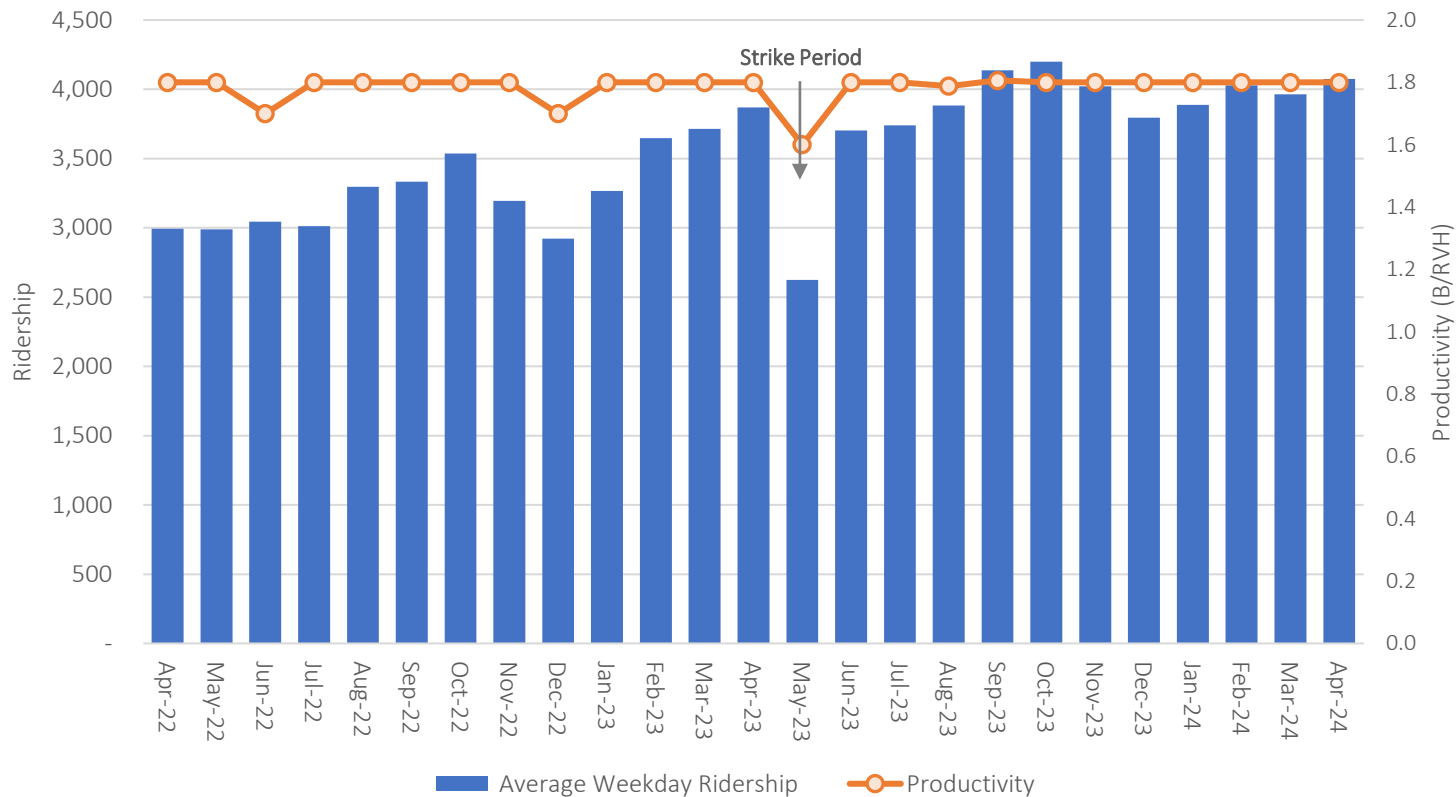
OC BUS ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)



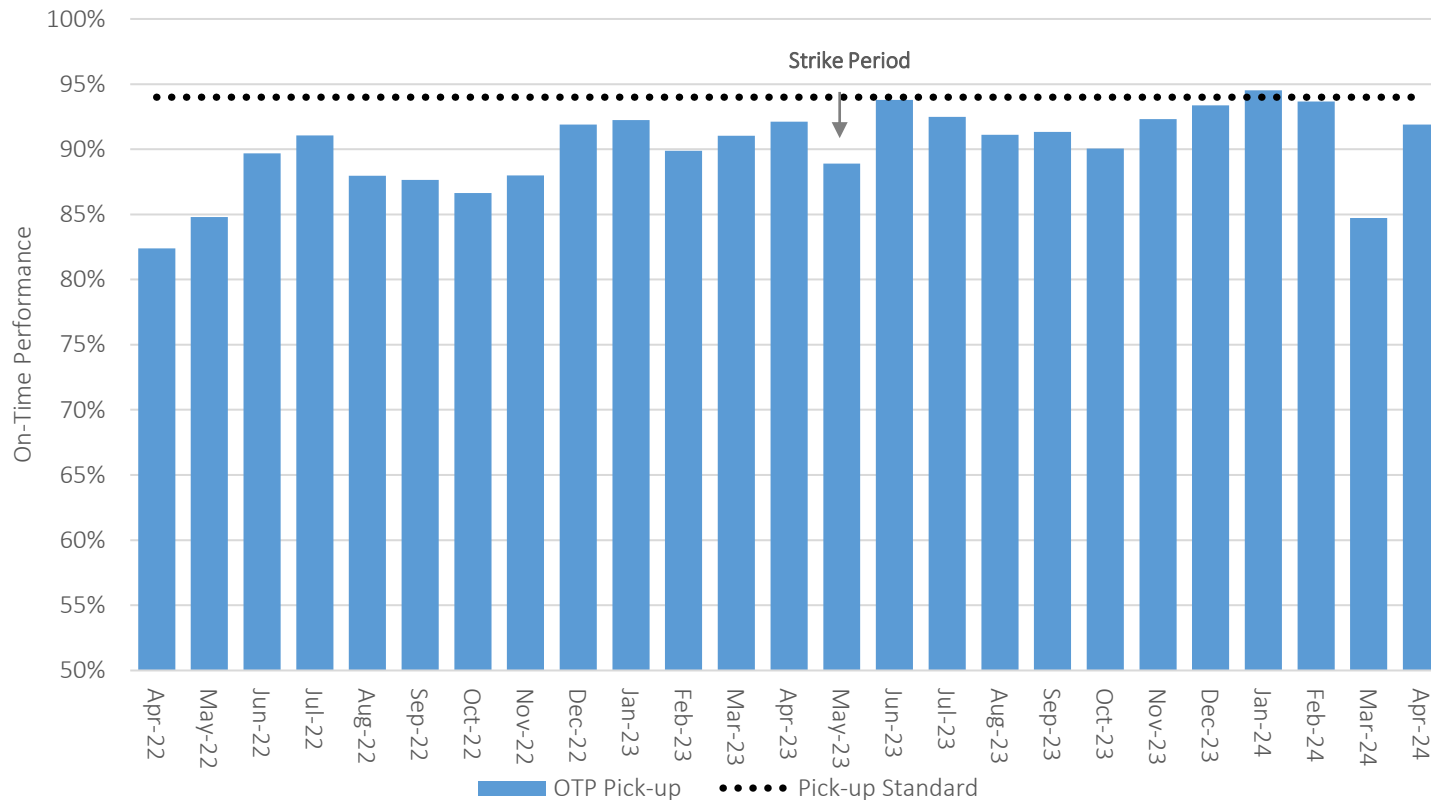
OC ACCESS RIDERSHIP AND PRODUCTIVITY

(AVERAGE WEEKDAY)



OC ACCESS ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)

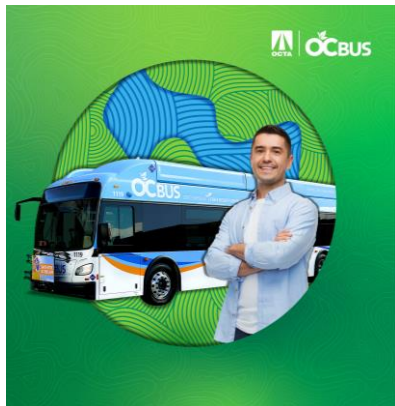


CUSTOMER COMMUNICATION AND FEEDBACK

Marketing and Customer Communications

Customer Communications

- Recognized Earth Day with customer communications and launched OC Bus customer loyalty program.



March Customer Comments

Bus Pass-bys

- Complaints on pass-bys increased to an average of 11.8 complaints per week compared to an average of 9.3 complaints per week in March.

No Shows

- Complaints for “no show” routes decreased to an average of 1.2 complaints per week from an average of 2.7 complaints per week in March.

Good News Story

The customer complimented a Route 1 coach operator for being a great driver. During a recent trip, a car suddenly cut off the operator. She was able to break instantly because she was paying attention, but it wasn't so abrupt as to impact riders. The caller stated the operator handled the situation very well and wanted a supervisor to be aware.

— Customer Call

NEXT STEPS

Continue to Track Service Performance

- Ridership trends
- On-time performance



Next Service Change

- May 12, 2024

