



# Orange County Transportation Authority

## Transit Committee Agenda

Thursday, November 14, 2024 at 9:00 a.m.

Board Room, 550 South Main Street, Orange, California

### Committee Members

Fred Jung, Chair

Vicente Sarmiento, Vice Chair

Valerie Amezcua

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](http://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.

### Written Comment

Written public comments may also be submitted by emailing them to [ClerkOffice@octa.net](mailto: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.

# TRANSIT COMMITTEE MEETING AGENDA

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## Call to Order

## Pledge of Allegiance

Director Klopfenstein

## Closed Session

There are no Closed Session items scheduled.

## Special Calendar

There are no Special Calendar matters.

## Consent Calendar (Items 1 through 6)

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

### 1. Approval of Minutes

Clerk of the Board

#### ***Recommendation(s)***

Approve the minutes of the October 10, 2024, Transit Committee meeting.

#### ***Attachments:***

[Minutes](#)

### 2. Approval of Minutes

Clerk of the Board

#### ***Recommendation(s)***

Approve the minutes of the September 12, 2024, Transit Committee meeting.

#### ***Attachments:***

[Minutes](#)

### 3. Amendment to the Agreement for Contracted Fixed-Route Bus Services

Damon Blythe/Johnny Dunning, Jr.

#### ***Overview***

On March 13, 2023, the Orange County Transportation Authority Board of Directors approved an agreement with Keolis Transit Services, LLC to provide the management, operation, and maintenance of contracted fixed-route bus services. An amendment is necessary to address service-related elements including reimbursement of additional maintenance costs, a maintenance software system with support equipment and labor, and to revise certain performance standards within the agreement.

#### ***Recommendation(s)***

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Agreement C-2-2578 between the Orange County Transportation Authority and Keolis Transit Services, LLC, in the amount of \$2,217,968, to allow reimbursement of additional maintenance costs, a maintenance software system with support equipment and labor, and to revise certain performance standards within the agreement.

## TRANSIT COMMITTEE MEETING AGENDA

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***Attachments:***

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

**4. Funding Recommendations for the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program**

Louis Zhao/Kia Mortazavi

***Overview***

On May 28, 2024, the Orange County Transportation Authority Board of Directors released the Enhanced Mobility for Seniors and Individuals with Disabilities Program call for projects for 2024. Evaluation of the 33 grant applications received for capital and operating assistance is complete, and program funding recommendations are presented for Board of Directors' review and approval.

***Recommendation(s)***

- A. Approve the award of \$8,623,864 million in local funding to 22 applications submitted for consideration of funding through the Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- B. Authorize the Chief Executive Officer to negotiate and execute cooperative agreements with awarded applicants to receive funding through the Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- C. Authorize staff to utilize the contingency list for capital applications if an awarded capital project is cancelled and direct unused program funding to support OC ACCESS service.

***Attachments:***

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

**5. Acceptance of Grant Award from Department of the Homeland Security Transit Security Grant Program**

Jason Huang/Kia Mortazavi

***Overview***

The Orange County Transportation Authority has been awarded \$116,600 in Federal Emergency Management Agency funding awarded by the Department of Homeland Security through the Transit Security Grant Program. Recommendations for acceptance of these funds are presented for Board of Directors' review and approval.

***Recommendation(s)***

- A. Authorize the Chief Executive Officer, or designee, to accept the award of \$116,600 in Federal Emergency Management Agency funding awarded by the Department of

## TRANSIT COMMITTEE MEETING AGENDA

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Homeland Security through the Transit Security Grant Program and execute grant-related agreements and documents with the Department of Homeland Security.

- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program, as well as execute any necessary agreements to facilitate the recommendation above.

**Attachments:**

[Staff Report](#)

### 6. Low Carbon Transit Operations Program Corrective Action Plans

Jason Huang/Kia Mortazavi

**Overview**

The Orange County Transportation Authority receives California Department of Transportation Low Carbon Transit Operations Program funding via formula to support expanded or new transit operations and capital projects that reduce greenhouse gas emissions, improve mobility, and prioritize disadvantaged communities. Funds may be transferred from a prior year to support ongoing projects with approval from the implementing agency's governing body and approval by the California Department of Transportation. Recommendations to utilize prior year funding for this program are presented for Board of Directors' review and approval.

**Recommendation(s)**

- A. Approve Resolution 2024-084 to authorize the use of prior year Low Carbon Transit Operations Program funds and interest earnings estimated at \$3,736,809 for the Youth Ride Free Program and for new or expanded OC Bus Rapid services (recognized as Bravo! 553 Bus Service Operating Subsidy in the funding program).
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program as well as negotiate and execute any necessary agreements with regional, state, or federal agencies to facilitate the recommendation above.

**Attachments:**

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

# TRANSIT COMMITTEE MEETING AGENDA

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## Regular Calendar

7. **Integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location System with the L3Harris Technologies, Inc. Symphony Dispatch Consoles**

Josh Duke/Andrew Oftelie

**Overview**

Board of Directors' authorization is requested for the purchase of services to integrate the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location system with the L3Harris Technologies, Inc.'s Symphony dispatch console.

**Recommendation(s)**

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2429 between the Orange County Transportation Authority and L3Harris Technologies, Inc., in the amount of \$761,000 for the integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location system with the L3Harris Symphony dispatch console.

**Attachments:**

[Staff Report](#)

8. **Agreement for Payment Processing Services to Support the OC Bus Fare Collection Systems**

Isaac Herrera/Andrew Oftelie

**Overview**

The Orange County Transportation Authority is in the process of implementing a modern fare collection system for OC Bus service through the Rider Validation System. To ensure seamless operation and an enhanced payment experience, the Orange County Transportation Authority is seeking to secure payment processing services that will support the Rider Validation System across multiple sales channels, including ticket office terminals, mobile sales devices, mobile applications, and institutional website portals.

**Recommendation(s)**

- A. Approve the selection of Elavon Inc., as the firm to provide payment processing services for the fare collection system for the Orange County Transportation Authority's fixed-route bus system.
  
- B. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C42563 between the Orange County Transportation Authority and Elavon, Inc., in the amount of \$617,728, for a two-and-a-half-year initial term with two, two-year option-terms to provide payment processing services for the fare collection system for the Orange County Transportation Authority's fixed-route bus system.

**Attachments:**

[Staff Report](#)

## TRANSIT COMMITTEE MEETING AGENDA

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### 9. Agreement for the Replacement of Fareboxes and Related Fare Collection Equipment

Isaac Herrera/Andrew Oftelie

#### **Overview**

On April 22, 2024, the Board of Directors approved the release of a request for proposals to select a firm for the development and implementation of replacement fareboxes and related fare collection equipment for the fixed-route bus system. Board of Directors' approval is requested to execute an agreement for the replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.

#### **Recommendation(s)**

- A. Approve the selection of LECIP Inc. as the firm to develop and implement replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.
  
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2110 between the Orange County Transportation Authority and LECIP Inc., in the amount of \$12,287,429, for a six-and-a-half-year initial term with one, five-year option-term for the development and implementation of replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.

#### **Attachments:**

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Attachment C](#)

[Presentation](#)

### 10. Award the Purchase of Battery-Electric Bus Chargers

Cliff Thorne/Johnny Dunning, Jr.

#### **Overview**

On March 25, 2024, the Orange County Transportation Authority Board of Directors approved the release of an invitation for bids to procure battery chargers for 40-foot battery-electric buses. Bids from qualified firms were received and Board of Directors' approval is requested to award an agreement for the purchase of battery-electric bus chargers to support new battery-electric buses.

#### **Recommendation(s)**

Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3067 between the Orange County Transportation Authority and OneSource Distributors, LLC, the lowest responsive, responsible bidder, in the amount of \$2,194,794, for up to 11 battery chargers for 40-foot battery-electric buses.

## TRANSIT COMMITTEE MEETING AGENDA

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***Attachments:***

[Staff Report](#)

[Presentation](#)

**11. Award the Purchase of Zero-Emission Buses**

Cliff Thorne/Johnny Dunning, Jr.

***Overview***

The California Air Resources Board passed the Innovative Clean Transit Rule in 2018 requiring transit agencies to transition their bus fleets to 100 percent zero-emission buses by the year 2040. The Orange County Transportation Authority intends to replace 50 compressed natural gas buses from the current fleet that have met their useful life with ten battery-electric buses and 40 fuel-cell electric buses. Quotes were requested from a qualified firm under the California Statewide Contract for Zero-Emission Transit Buses issued by the State of California's Department of General Services. Board of Directors' approval is requested to award an agreement for the purchase of these vehicles.

***Recommendation(s)***

- A. Approve the selection of New Flyer of America Inc. as the firm to provide 40 fuel-cell electric buses intended to replace 40 compressed natural gas buses that have exceeded their useful life.
- B. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3021 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$63,594,512 for the purchase of up to 40, 40-foot fuel-cell electric buses.
- C. Approve the selection of New Flyer of America Inc. as the firm to provide ten battery-electric buses intended to replace ten compressed natural gas buses that have exceeded their useful life.
- D. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3022 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$13,870,388, for the purchase of up to ten, 40-foot battery-electric buses.

***Attachments:***

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Presentation](#)

## TRANSIT COMMITTEE MEETING AGENDA

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### 12. 2024 OC Transit Vision Progress Update

Charles Main/Kia Mortazavi

#### **Overview**

The OC Transit Vision is a 30-year integrated master plan for enhancing and expanding public transit service in Orange County. This plan recommends improvements to existing transit service and identifies future potential transit corridors. The draft executive summary and action plan has been developed for Board of Directors' consideration. The final 2024 OC Transit Vision is expected to be complete by the end of 2024.

#### **Recommendation(s)**

Direct staff to incorporate draft recommendations into the final 2024 OC Transit Vision Report which will inform the upcoming 2026 Long-Range Transportation Plan.

#### **Attachments:**

[Staff Report](#)

[Attachment A](#)

[Attachment B](#)

[Presentation](#)

### 13. Draft Orange County Human Services Transportation Coordinated Plan

Kevin Khouri/Kia Mortazavi

#### **Overview**

The Human Services Transportation Coordinated Plan identifies strategies to address unmet needs and enhance mobility for seniors, individuals with disabilities, and low-income residents in Orange County. This plan is a prerequisite for securing Federal Transit Administration Section 5310 Program funding. Staff has updated the Human Services Transportation Coordinated Plan, and Board of Directors' approval is requested to finalize the draft plan.

#### **Recommendation(s)**

Direct staff to finalize the Draft Human Services Transportation Coordinated Plan.

#### **Attachments:**

[Staff Report](#)

[Attachment A](#)

[Presentation](#)



## TRANSIT COMMITTEE MEETING AGENDA

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### Discussion Items

**14. Bimonthly Transit Performance Report**

Kim Tucker/Johnny Dunning, Jr.

***Overview***

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

***Attachments:***

[Presentation](#)

**15. Public Comments**

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

**17. Committee Members' Reports**

**18. Adjournment**

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

**9:00 a.m. on Thursday, December 12, 2024**

OCTA Headquarters  
550 South Main Street  
Orange, California



**Committee Members Present**

Fred Jung, Chair  
Patrick Harper

**Committee Members Absent**

Vicente Sarmiento, Vice Chair  
Valerie Amezcua  
Stephanie Klopfenstein

**Staff Present**

Darrell E. Johnson, Chief Executive Officer  
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 October 10, 2024, regular meeting of the Transit Committee was called to order by Committee Chair Jung at 9:05 a.m.

**Consent Calendar**

**1. Approval of Minutes**

This item was deferred to the next regularly scheduled meeting of the Transit Committee as a quorum was not present to vote on this item.

**2. Contract Change Order for Construction of the OC Streetcar Project**

This item was continued to the October 28, 2024 regular meeting of the Board of Directors as a quorum was not present to vote on this item.

**3. Amendment to Agreement for Bus Stop Maintenance**

This item was continued to the October 14, 2024 regular meeting of the Board of Directors as a quorum was not present to vote on this item.

**4. Amendment to the Agreement for OC ACCESS Paratransit and OC Flex Microtransit Service**

This item was continued to the October 28, 2024 regular meeting of the Board of Directors as a quorum was not present to vote on this item.

**5. Federal Transit Administration Program of Projects for Federal Fiscal Year 2023-24**

This item was continued to the October 14, 2024 regular meeting of the Board of Directors as a quorum was not present to vote on this item.



**Regular Calendar**

**6. OC Streetcar Project Quarterly Update**

Jeff Mills, Director, Capital Project Delivery, and Tresa Oliveri, Community Relations Principal, provided a presentation on this item.

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

**Discussion Items**

**7. Zero-Emission Bus Status**

Cliff Thorne, Director, Maintenance, and Kristin Jacinto, Executive Director, Government Relations, provided a presentation on this item.

No action was taken on this item.

**8. OC Bus Marketing Updates**

Ryan Armstrong, Department Manager, Marketing and Customer Engagement, provided a presentation on this item.

Ian Kemmer, Director, Behavioral Health Director, OC Health Care Agency provided comments on the Route to Well-Being partnership with OCTA.

Director Harper requested information on the ridership numbers on free ride days.

No action was taken on this item.

**10. Public Comments**

No public comments were received.

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

Darrell E. Johnson, Chief Executive Officer, reported on the Small Business Summit held earlier in the week.

**12. Committee Members' Reports**

There were no Committee Member's reports.



**13. Adjournment**

The meeting adjourned at 9:55 a.m.

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

**9:00 a.m. on Thursday, November 14, 2024**

OCTA Headquarters  
550 South Main Street  
Orange, California



**Committee Members Present**

Fred Jung, Chair  
Vicente Sarmiento, Vice Chair  
Patrick Harper  
Stephanie Klopfenstein

**Staff Present**

Darrell E. Johnson, Chief Executive Officer  
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**

Valerie Amezcua

**Call to Order**

The September 12, 2024, regular meeting of the Transit Committee was called to order by Committee Chair Jung at 9:00 a.m.

**Consent Calendar**

**1. Approval of Minutes**

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

**2. Contract Change Order for Construction of the OC Streetcar Project**

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

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 71.2 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$200,000, for traffic signal interconnect work.
- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 170 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$525,000, for additional station spare parts.
- C. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 186.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$900,000, for the maintenance and storage facility interlock system.
- D. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 222 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,500,000, for the Southern California Edison electrical and service connections at various intersections.



- E. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 241 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$425,000, for modifications to the east and west gates at the maintenance and storage facility.

**3. Amendment to Agreement for Compressed Natural Gas Fueling Facility Operation and Maintenance**

A motion was made by Director Harper, seconded by Director Klopfenstein, and passed by those present to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-1-3317 between the Orange County Transportation Authority and Trillium USA Company, LLC, in the amount of \$640,802 to exercise the first option term of the agreement from December 1, 2024, through November 30, 2025, for continued compressed natural gas station operation and maintenance. This will increase the maximum obligation of the agreement to a total contract value of \$2,486,342.

**4. Amendment to Purchase Order for Fluid Management System Operation and Maintenance**

A motion was made by Director Harper, seconded by Director Klopfenstein, and passed by those present to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Purchase Order C-0-2615 between the Orange County Transportation Authority and S&A Systems, Inc., in the amount of \$576,190, to exercise the option term of the purchase order from January 1, 2025, through December 31, 2027, for continued fluid management system operation and maintenance. This will increase the maximum obligation of the purchase order to a total contract value of \$1,220,486

**5. November 2024 Bus Service Change**

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

**Regular Calendar**

**6. Agreement for Construction of the Transit Security and Operations Center**

George Olivo, Program Manager, Facilities Engineering, provided a report on this item.



A motion was made by Committee Vice Chair Sarmiento, seconded by Director Klopfenstein, and passed by those present to authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2097 between the Orange County Transportation Authority and Bernard Bros., Inc., the lowest responsive, responsible bidder, in the amount of \$44,452,000, for construction of the Transit Security and Operations Center.

**7. 2024 Measure M2 Community Based Transit Circulators (Project V) Call for Projects Programming Recommendations**

Adriann Cardoso, Manager, Capital Programing, and Charvalen Alacar, Section Manager, Measure M Local Programs, provided a presentation on this item.

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

- A. Approve programming recommendations for Project V funding in an amount not to exceed \$42,371,101, with a start date of July 1, 2024, if applicable, for 13 local jurisdiction projects.
- B. Direct staff to work with the City of Huntington Beach, the City of Newport Beach, and the City of Orange once operational refinements are submitted by the cities and if consistent with Measure M2 and program requirements, return with a final recommendation on proposed Project V services.
- C. Authorize the Chief Executive Officer to negotiate, execute, amend, and/or consolidate cooperative funding agreements with local jurisdictions for new, expanded, and/or continuing existing Project V services, as applicable.

**Discussion Items**

**8. OC Streetcar Project Video**

Jeff Mills, Director, Capital Program Delivery, provided a presentation on this item.

No action was taken on this item.

**9. OC Streetcar Project Video**

Cleve Cleveland, Operations Manager, OC Streetcar, provided a presentation on this item.

No action was taken on this item.



**10. Bimonthly Transit Performance Report**

Kim Tucker, Department Manager Schedule and Bus Operations Support, provided a presentation on this item.

No action was taken on this item.

**11. Public Comments**

Public comment was received from Paul Hyek.

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

Darrell E. Johnson, Chief Executive Officer, reported that the Customer Code of Conduct has been updated and is available on the OCTA website.

**13. Committee Members' Reports**

There were no Committee Member's reports.

**14. Adjournment**

The meeting adjourned at 9:57 a.m.

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

**9:00 a.m. on Thursday, October 10, 2024**

OCTA Headquarters  
550 South Main Street  
Orange, California





**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Amendment to the Agreement for Contracted Fixed-Route Bus Services

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is positioned to the right of the "From:" field.

**Overview**

On March 13, 2023, the Orange County Transportation Authority Board of Directors approved an agreement with Keolis Transit Services, LLC to provide the management, operation, and maintenance of contracted fixed-route bus services. An amendment is necessary to address service-related elements including reimbursement of additional maintenance costs, a maintenance software system with support equipment and labor, and to revise certain performance standards within the agreement.

**Recommendation**

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Agreement C-2-2578 between the Orange County Transportation Authority and Keolis Transit Services, LLC, in the amount of \$2,217,968, to allow reimbursement of additional maintenance costs, a maintenance software system with support equipment and labor, and to revise certain performance standards within the agreement.

**Discussion**

In 2009, the Orange County Transportation Authority (OCTA) began to use a third-party contractor for the management, operation, and maintenance of a portion of the fixed-route bus service. By assigning a portion of the OC Bus service to a third-party contractor as a cost-saving measure, OCTA is able to provide additional bus service throughout the County in a financially sustainable manner. The amount of service operated by the contractor has varied but has always been less than 40 percent of the total OC Bus service. On March 9, 2023, the Board of Directors (Board) approved the selection of Keolis Transit Services, LLC (Keolis) as the firm to provide the contracted fixed-route bus service.

Under the agreement with Keolis, the projected fleet mix specified the total number of fixed-route buses which included specified numbers of buses manufactured by New Flyer in 2007/2008 and 2016, as well as buses manufactured by Gillig in 2022/2023. The agreement further specified the timeframe in which the older buses would be replaced by newer buses. According to the agreement to operate and maintain OC Bus service, Keolis is responsible for the operation and maintenance of these assigned buses at the Anaheim and Irvine Sand Canyon bus bases.

The contract required that Keolis use OCTA's new INFOR/Hexagon Enterprise Asset Management (EAM) maintenance software system to be provided by OCTA. The system would be used to record, monitor, and report on all revenue vehicle maintenance, inspections, parts utilization, fueling, and repair activities, as well as for inventory and work order tracking, reporting, and analysis.

Due to various factors, the fleet mix and new EAM system were not provided as projected and planned by OCTA. As previously presented to the Board, delivery and acceptance of the 2022/2023 Gillig fixed-route buses were delayed. As transit manufacturers recovered from the impacts of the pandemic, they were challenged with delays in delivery of parts and materials. Once Gillig was able to begin delivery of buses, a series of design corrections were identified and required of Gillig by OCTA that caused further delays. In addition, OCTA has worked with the INFOR/Hexagon contractor to ensure a smooth transition of asset management systems, and delays have occurred such that implementation of the software system remains in process.

On August 29, 2023, consistent with the terms of the contract, Keolis formally requested financial relief to cover the additional costs associated with the maintenance of a fleet mix older than anticipated and for provision of its own maintenance software system with support equipment and labor.

Reimbursement for Incremental Maintenance Costs: Under the terms of the agreement, maintenance costs are included as part of the variable rate, which assumes the contractor would operate the service with the blended fleet, as noted above to include buses manufactured in three different years. However, due to the delay in introducing the Gillig buses into the fleet, the contractor was forced to use the older buses for longer than anticipated. OCTA has evaluated the actual costs associated with the maintenance of the 2007/2008 and the 2016 New Flyer buses, and the 2022/2023 Gillig buses. The incremental additional costs per mile (CPM) to maintain the older vehicle series compared to the cost of maintaining the fleet as proposed in the agreement were validated by OCTA and are listed below:

- Older New Flyer bus series (bus year 2007/2008) maintenance costs versus costs to maintain the newer New Flyer bus series (bus year 2016) is an additional cost of \$0.30 per mile;
- Older New Flyer bus series (bus year 2007/2008) maintenance costs versus costs to maintain the Gillig bus series (bus year 2022/2023) is an additional cost of \$0.68 per mile; and
- New Flyer bus series (2016) maintenance costs versus costs to maintain the Gillig bus series (bus year 2022/2023) is an additional cost of \$0.38 per mile.

The rates were then applied to the actual miles run by each bus that remained in the fleet mix longer than projected, postponing incorporation of newer buses into the fleet (Attachment B). The comparison was done for the fleet mix proportion projected to exist at the start of the contract in June 2023 and adjusted for the fleet mix proportion that was anticipated to be in place by January 2024.

Delivery, implementation of design changes, and acceptance of the Gillig bus order are complete. In June 2024, the older 2007/2008 New Flyer buses began to be transferred out and replaced with newer 2016 New Flyer buses, and in September 2024, the first 2022/2023 Gillig buses began to be transferred into the contracted fixed-route fleet. As the transfer of newer buses and removal of older buses continues, the monthly reimbursement amount will decrease accordingly.

Reimbursement of the incremental additional maintenance costs using the above noted CPM rates equate to an initial payment of \$932,553 for the period of June 11, 2023, through June 30, 2024. The CPM rates shall not be the basis for any subsequent requests for additional payment or fixed or variable rate adjustments. The reimbursement will continue to be paid based on the above noted CPM rates until the fleet mix proportion becomes normalized (consistent with the contract). Achieving the fleet mix proportion projected in the contract is scheduled to be completed by June 30, 2025. The amount of CPM potential reimbursement for the period of June 11, 2023, through June 30, 2025, is approximately \$1,545,094.

Maintenance Computer Software, Equipment, and Labor Reimbursement: The second reimbursement requested is for the maintenance software, equipment tied to use of the software (i.e., barcode printers and scanners), and associated labor costs incurred by Keolis once it became clear the INFOR/Hexagon EAM

maintenance software system would not be available for use by Keolis at the start of the contract. These costs were unanticipated but were necessities for Keolis to perform the maintenance duties required of them in the contract.

Reimbursement of verified actual costs associated with the maintenance software, equipment, and labor costs tied to use of the software is requested for the period from April 24, 2023 (Notice to Proceed) through such time that OCTA can complete implementation of its EAM system and incorporate Keolis maintenance activities as planned in the contract, or until an alternative solution can be implemented. Pending final implementation of OCTA's EAM, the maximum reimbursement will be \$672,874 for the base term of the contract. Staff anticipates that the OCTA EAM will be fully implemented in August 2025. The breakdown of the maximum reimbursement costs is:

Maintenance software licenses for up to four years:	\$ 81,178
Equipment (barcode printers and scanners):	\$ 4,930
<u>Labor:</u>	<u>\$ 586,766</u>
TOTAL Computer Software Reimbursement:	\$ 672,874

Performance Standards Revisions: To clarify application of penalties and incentives, the following changes are recommended:

- The Valid Complaint standard is no more than one valid complaint per 20,000 boardings. Currently, the penalty is \$100 per valid complaint more than the standard; the proposed penalty would assess \$50 for each valid complaint that was preventable and remove the incentive. Applying the penalty to all valid, preventable complaints, instead of just those exceeding a required ratio, encourages the contractor to eliminate complaints they are responsible for. If they fail to reduce these complaints, they will incur penalties every month, regardless of meeting the complaint ratio. The penalty per complaint is based on the total penalties from the first year divided by the number of valid, preventable complaints from that year.
- Clarify the Preventive Maintenance standard and penalty are applicable to all required maintenance inspections.
- The Data Probe standard remains that all buses are to be probed after they have returned from revenue service or before the vehicle is removed from service for maintenance. However, the Data Probe penalty will be revised to include a two percent margin to account for operational reasons that a data probe may be missed.

- Increase the Road Supervisor Coverage penalty from \$500 to \$1,000 per occurrence. The penalty increase is to be applied retroactively to the start of the contract, to offset the previously approved removal of Route Coverage penalty of \$1,000 per occurrence.

***Procurement Approach***

The original procurement was handled in accordance with OCTA's Board-approved policies and procedures for professional and technical services. On March 13, 2023, the Board approved the award of Agreement No. C-2-2578 with Keolis for a four-year initial term with two, two-year option terms, in the amount of \$286,286,201, to provide the management, operation, and maintenance of the contracted fixed-route bus services. The original agreement was awarded on a competitive basis and was previously amended, as described in Attachment A.

The proposed Amendment No. 3 to Agreement No. C-2-2578, in the amount of \$2,217,968, can be absorbed in the contract balance requiring no increase to the maximum cumulative payment obligation. The rates used to assess the amount of incremental additional maintenance costs are based on a cost analysis validated by OCTA staff using actual maintenance costs available from OCTA maintenance records of similar model year vehicles. Prior to payment, OCTA will complete verification of the maintenance software, associated equipment, and labor costs submitted by Keolis for reimbursement.

**Fiscal Impact**

Funds for this service are included in the Operations Division within the services and supplies line item as part of the OCTA Fiscal Year 2024-25 Budget. This expense will be funded through a combination of Federal Transit Administration Section 5307 grant funding and local transportation funds.

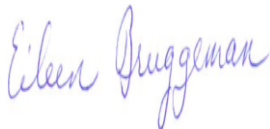
***Summary***

Staff requests Board of Directors' approval to authorize the Chief Executive Officer to negotiate and execute Amendment No. 3 to Agreement No. C-2-2578 between the Orange County Transportation Authority and Keolis Transit Services, LLC, in the amount of \$2,217,968, to allow reimbursement of additional maintenance costs and for a maintenance software system with support equipment and labor, as well as to revise the performance standards provision.

***Attachments***

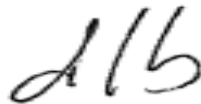
- A. Keolis Transit Services, LLC Agreement No. C-2-2578 Fact Sheet
- B. Cost Per Mile Reimbursement

**Prepared by:**



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**Keolis Transit Services, LLC  
Agreement No. C-2-2578 Fact Sheet**

1. March 13, 2023, Agreement No. C-2-2578, \$286,286,201, approved by the Board of Directors (Board).
  - Keolis Transit Services, LLC to provide the management, operation, and maintenance of contracted fixed-route bus services.
  - Four-year initial term effective April 17, 2023 through June 30, 2027 with two, two-year option terms.
2. January 18, 2024, Amendment No. 1 to Agreement No. C-2-2578, \$0.00, approved by the Contracts Administration and Materials Management Department (CAMM).
  - Revised key personnel, added start-up costs to the payment terms, revised the insurance requirements, added subcontractors, included Notice of Labor Dispute and General Labor and Collective Bargaining Requirements, revised the scope of work to provide corrections and/or clarifications to the requirements.
3. Pending, Amendment No. 2 to Agreement No. C-2-2578, \$0.00, approved by CAMM.
  - Revise key personnel and revise the scope of work to provide corrections and/or clarifications to the requirements.
4. November 25, 2024, Amendment No. 3 to Agreement No. C-2-2578, \$0.00, pending approval by the Board.
  - Revise the scope of work to authorize reimbursement of additional maintenance costs and for a maintenance software system with support equipment and labor, as well as revisions to the performance standards.

Total committed to Keolis Transit Services, LLC, Agreement No. C-2-2578: \$286,286,201.



**Cost Per Mile Reimbursement**

	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Total
5700/5800 vs. Old Series Eligible Fleetmiles	226,738.01	309,692.13	216,703.41	140,471.92	100,041.59	61,954.27	48,653.39	148,189.08	129,011.21	66,020.75	59,725.57	34,904.26	20,143.39	1,562,249.09
CPM Difference	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30
Total 5700/5800 Reimbursement	\$ 68,021.41	\$ 92,907.64	\$ 65,011.02	\$ 42,141.58	\$ 30,012.51	\$ 18,586.28	\$ 14,596.02	\$ 44,456.72	\$ 38,703.36	\$ 19,806.23	\$ 17,917.67	\$ 10,471.28	\$ 6,043.02	\$ 468,674.74
2100 vs. Old Series Eligible Fleetmiles	-	-	-	-	-	-	-	132,752.72	125,429.19	118,837.35	120,429.43	100,645.04	84,079.41	682,173.14
CPM Difference	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68	0.68
Total 2100 vs. Old Series Reimbursement	-	-	-	-	-	-	-	90,271.85	85,291.85	80,809.40	81,892.01	68,438.63	57,174.00	463,877.74
2100 vs. 5700/5800 Eligible Fleetmiles	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CPM Difference	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38	0.38
Total 2100 vs. 5700/5800 Reimbursement	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total 2100 Reimbursement	-	-	-	-	-	-	-	90,271.85	85,291.85	80,809.40	81,892.01	68,438.63	57,174.00	463,877.74
<b>Total CPM Reimbursement</b>	<b>\$ 68,021.41</b>	<b>\$ 92,907.64</b>	<b>\$ 65,011.02</b>	<b>\$ 42,141.58</b>	<b>\$ 30,012.51</b>	<b>\$ 18,586.28</b>	<b>\$ 14,596.02</b>	<b>\$ 134,728.57</b>	<b>\$ 123,995.21</b>	<b>\$ 100,615.63</b>	<b>\$ 99,809.68</b>	<b>\$ 78,909.91</b>	<b>\$ 63,217.02</b>	<b>\$ 932,552.48</b>

\*CPM – Cost Per Mile





**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller letters to the right of the signature.

**Subject:** Funding Recommendations for the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities Program

### **Overview**

On May 28, 2024, the Orange County Transportation Authority Board of Directors released the Enhanced Mobility for Seniors and Individuals with Disabilities Program call for projects for 2024. Evaluation of the 33 grant applications received for capital and operating assistance is complete, and program funding recommendations are presented for Board of Directors' review and approval.

### **Recommendations**

- A. Approve the award of \$8,623,864 million in local funding to 22 applications submitted for consideration of funding through the Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- B. Authorize the Chief Executive Officer to negotiate and execute cooperative agreements with awarded applicants to receive funding through the Enhanced Mobility for Seniors and Individuals with Disabilities Program.
- C. Authorize staff to utilize the contingency list for capital applications if an awarded capital project is cancelled and direct unused program funding to support OC ACCESS service.

### **Background**

In May 2024, the Orange County Transportation Authority (OCTA) Board of Directors (Board) approved the guidelines for the 2024 Enhanced Mobility for Seniors and Individuals with Disabilities (EMSD) Program and authorize staff to issue the 2024 EMSD call for projects (call) with an \$8.5 million funding target.

Following that Board action, staff held office hours for eligible applicant agencies to provide application support and program guidance. Applications were due on June 27, 2024.

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OCTA received 33 applications requesting \$14.6 million in EMSD Program funding from 14 nonprofit and seven public agency applicants. The applicants requested funding for the purchase of paratransit vans, buses, and related equipment and to support mobility management and operating assistance projects. Five operating project applications are part of existing OCTA cooperative agreements to fund specialized transportation services. These projects were required to submit applications consistent with their existing cooperative agreements.

***Discussion***

Of the total \$8.5 million funding target, the EMSD guidelines require a minimum of 55 percent, or \$4.7 million, of total awarded EMSD funding to be directed to capital projects. This requirement was met and was a primary factor in determining funding availability towards operating assistance projects.

Staff conducted an initial review of all applications to confirm that the applications were consistent with the 2024 EMSD Program guidelines and requirements. The applications were scored and ranked based on Board-approved scoring criteria and funding priorities. The resulting programming recommendations include:

- \$4.973 million to ten capital projects
- \$3.650 million to 12 operating projects

The funding recommendations are further detailed in Attachment A, which provides a comprehensive breakdown of the proposed allocations for each project. The EMSD Program supports the purchase of Americans with Disabilities Act (ADA)-compliant accessible buses, vans, and supporting equipment. Eligible equipment includes the purchase of ADA accessibility and security devices, dispatching and routing software and hardware, computers, and communication equipment. In addition, the program will fund operating assistance for service expansion and continuation of existing services, which include supporting transportation operating expenses, maintenance costs, and trip planning. It will also support mobility management training and coordination. These investments will enhance services for approximately 362,000 seniors and individuals with disabilities across Orange County. Project descriptions are included in Attachment B.

The funding recommendation includes an additional \$123,864 in EMSD funding over the \$8.5 million target to fully fund the Dayle MacIntosh Center for the Disabled Mobility Management Professionals Program. This will allow for a more comprehensive program to ensure that the mobility needs of seniors and individuals with disabilities are better addressed.

Additionally, 13 programming recommendations have been designated as "highly recommended," with the remaining nine designated as "recommended." Two capital projects that are not recommended for programming have been placed on a contingency list to be programmed if additional funding becomes available due to project cancellations or cost savings. These projects serve as a safeguard to ensure that, should any awarded capital funding be cancelled or cost savings realized, we continue to meet the program's requirement of directing 55 percent of funds to capital projects. Any remaining unused funds will then be directed into OC ACCESS service.

#### Next Steps

With Board approval, OCTA staff will conduct office hours for awarded applicants to discuss the next steps of the program, which will include review of cooperative agreements, procurement, and reimbursement processes, as well as required reporting and oversight requirements. Following the office hours, awarded applicants will enter into cooperative agreements with OCTA to receive funding through the EMSD Program. Any remaining or unused funding will be utilized to support OC ACCESS service.

#### **Summary**

Staff is recommending Board approval to award \$8.5 million in local funding with an additional request of \$123,864, for a total of \$8,623,864, to 22 applications through the EMSD Program to provide additional transportation options for seniors and individuals with disabilities in Orange County.

#### **Attachments**

- A. 2024 Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program, Programming Recommendations
- B. 2024 Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program, Project Descriptions

#### **Prepared by:**



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Development Manager  
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#### **Approved by:**



Kia Mortazavi  
Executive Director, Planning  
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Capital Application - Funding Recommendations						
Project Number	Agency	Agency Type	Application Type	Project Name	Recommendation Score	Total Award (000's)
1	Age Well Senior Services, Inc	Private Non-Profit Organization	Capital - Vehicles	Replacement Vehicles for Age Well Senior Services	Highly Recommended	\$ 989.656
2	Abrazar, Inc.	Private Non-Profit Organization	Capital - Vehicles, Equipment	OC Equity Mobility Management - Abrazar (OCEMMA)	Highly Recommended	\$ 898.21
3	City of Huntington Beach	Public Agency	Capital - Equipment	Rider Notifications	Highly Recommended	\$ 46.517
4	City of Irvine	Public Agency	Capital - Vehicles, Equipment	Irvine On Demand - Rides for Older Adults	Highly Recommended	\$ 644.992
5	City of Newport Beach	Public Agency	Capital - Vehicles	Vehicle Replacements	Highly Recommended	\$ 217.8
6	AbleLight, Inc	Private Non-Profit Organization	Capital - Vehicles	Transportation for People with Developmental Disabilities	Highly Recommended	\$ 254.778
7	Southland Integrated Services, Inc.	Private Non-Profit Organization	Capital - Vehicles	Transportation Services for Ethnic Seniors and Disabled	Highly Recommended	\$ 343.578
8	Access California Services	Private Non-Profit Organization	Capital - Vehicles, Equipment	AccessCal's Access to Transportation Program	Highly Recommended	\$ 122.643
9	Korean Community Services, Inc. dba KCS Health Center	Private Non-Profit Organization	Capital - Vehicles, Equipment	KCS's Senior Mobility & Integrated Healthcare Program	Highly Recommended	\$ 537.913
10	Orange County Adult Achievement Center dba My Day Counts	Private Non-Profit Organization	Capital - Vehicles, Equipment	My Day Counts 2025 -2026 Capital Replacement	Highly Recommended	\$ 917.610
<b>Subtotal</b>						<b>\$ 4,973.697</b>

**2024 Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program, Programming Recommendations**

<b>Operating Application - Funding Recommendations</b>						
<b>Project Number</b>	<b>Agency</b>	<b>Agency Type</b>	<b>Application Type</b>	<b>Project Name</b>	<b>Recommendation Score</b>	<b>Total Award (000's)</b>
11	City of Laguna Woods	Public Agency	Operating - Operating Assistance	City of Laguna Woods Senior Mobility Program Augmentation Project	<b>Highly Recommended</b>	\$ 325
12	Community SeniorServ, Inc. dba Meals on Wheels, Orange County	Private Non-Profit Organization	Operating - Mobility Management	Enhanced Transportation Initiative	<b>Highly Recommended</b>	\$ 247.467
13	Access California Services	Private Non-Profit Organization	Operating - Operating Assistance	AccessCal's Access to Transportation Program	<b>Highly Recommended</b>	\$ 600
14	Southland Integrated Services, Inc	Private Non-Profit Organization	Operating - Operating Assistance	Transportation Services for Seniors and The Disabled	<b>Recommended</b>	\$ 227.596
15	KCS Health Center	Private Non-Profit Organization	Operating - Operating Assistance	KCS Senior Mobility and Integrated Healthcare Program	<b>Recommended</b>	\$ 470.112
16	SoCal Senior Services, LLC	Private Non-Profit Organization	Operating - Operating Assistance	Healthy Aging Center Laguna Woods	<b>Recommended</b>	\$ 246.048
17	City of Seal Beach	Public Agency	Operating - Operating Assistance	Seal Beach - Service Expansion	<b>Recommended</b>	\$ 100
18	Age Well Senior Services, Inc	Private Non-Profit Organization	Operating - Operating Assistance, Mobility Management	Operating Assistance for Age Well Senior Services	<b>Recommended</b>	\$ 352.41
19	Alzheimer Family Services Center	Private Non-Profit Organization	Operating - Mobility Management	Patient Transportation	<b>Recommended</b>	\$ 267.746
20	North County Senior Services	Private Non-Profit Organization	Operating - Operating Assistance	Acacia Adult Day Services	<b>Recommended</b>	\$ 276.188
21	City of Costa Mesa	Public Agency	Operating - Operating Assistance	Senior Taxi Program	<b>Recommended</b>	\$ 237.6
22	Dayle MacIntosh Center for the Disabled <sup>1</sup>	Private Non-Profit Organization	Operating - Mobility Management	Mobility Management Professionals Program	<b>Recommended</b>	\$ 300
					<b>Subtotal</b>	<b>\$ 3,650.167</b>
					<b>TOTAL FUNDED</b>	<b>\$ 8,623.864</b>

**2024 Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program, Programming Recommendations**

Capital Application - Contingency List						
Project Number	Agency	Agency Type	Application Type	Project Name	Recommendation Score	Total Award (000's)
23	Hope Community Services, Inc.	Private Non-Profit Organization	Capital - Vehicles	Hope-On Senior Ride	Contingency List	\$ 119.79
24	Vocational Vision	Private Non-Profit Organization	Capital - Vehicles, Equipment	Community Engagement Benefits Everyone	Contingency List	\$ 538.95
					<b>Subtotal</b>	<b>\$ 658.74</b>

Operating Application - Not Recommended						
Project Number	Agency	Agency Type	Application Type	Project Name	Recommendation Score	Total Award (000's)
25	North Orange Continuing Education District (NOCE)	Public Agency	Operating - Mobility Management	The Mobility Training Program	Not Recommended	\$ 299
26	Alzheimer Family Services Center <sup>2</sup>	Private Non-Profit Organization	Operating - Co-Op - Operating Assistance	Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2288)	Not Recommended	\$ 613.37
27	Meals on Wheels, Orange County <sup>2</sup>	Private Non-Profit Organization	Operating - Co-Op - Operating Assistance	Support of Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2289)	Not Recommended	\$ 839.018
28	Hope Community Services, Inc.	Private Non-Profit Organization	Operating - Operating Assistance, Mobility Management	Hope-On Senior Transportation Program	Not Recommended	\$ 204.999
29	North County Senior Services <sup>2</sup>	Private Non-Profit Organization	Operating - Co-Op - Operating Assistance	Acacia Adult Day Services Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2287)	Not Recommended	\$ 334.464
30	SoCal Senior Services, LLC <sup>2</sup>	Private Non-Profit Organization	Operating - Co-Op - Operating Assistance	SoCal Senior Services Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2290)	Not Recommended	\$ 708.952
31	Alzheimer Family Services Center	Private Non-Profit Organization	Operating - Operating Assistance	Patient Transportation	Not Recommended	\$ 321.131
32	My Day Counts <sup>2</sup>	Private Non-Profit Organization	Operating - Co-Op - Operating Assistance	My Day Counts 2025-26 Operating (Special Agency Agreement Requirement – Cooperative Agreement C-4-2291)	Not Recommended	\$ 1,000
33	Pearl Transit Corp.	Private Non-Profit Organization	Operating - Operating Assistance	Trip planning and 24 hour transportation for Orange County seniors and individuals with disabilities.	Not Recommended	\$ 1,000
					<b>Subtotal</b>	<b>\$ 5,320.934</b>

**Acronym**  
 Board - Board of Directors  
 Co-Op - Cooperative

**TOTAL REQUEST (000's) \$ 14,603.538**

**Notes:**

- Through an additional Board request of \$123.864, the Dayle MacIntosh Center for the Disabled will receive a fully funded award at \$300,000.
- Members of the Special Agencies Group, which contract with the Orange County Transportation Authority to share costs for specialized services, were required to submit separate Operating - Co-Op applications to cover the costs under new cost-sharing agreements effective July 1, 2024. These applications would only receive Enhanced Mobility for Seniors and Individuals with Disabilities funding if an undersubscription of the program occurred.

**2024 Orange County Enhanced Mobility for Seniors and Individuals with Disabilities Program, Project Descriptions**

## Highly Recommended Projects

<b>Agency</b>	<b>Project Names</b>	<b>Project Description</b>
Age Well Senior Services, Inc	Replacement Vehicles for Age Well Senior Services	Purchase for replacement of eight vehicles. Six 14-passenger 2015 Ford E450 buses with two wheelchair positions and two F30 transit vans for seven-passengers with two wheelchair positions.
Abrazar, Inc.	OCEMMA	Purchase for replacement of ten computers, eight minivans, and four small buses.
City of Huntington Beach	Rider Notifications	TripSpark Pass rider notification software add-on project in 2025.
City of Irvine	Irvine On Demand - Rides for Older Adults	Purchase of six Toyota Sienna hybrid vans with accessible manual ramp, six Samsung Galaxy Tab S9 FE mobile Tablet, TripSpark software upgrade, DriverMate application modules.
City of Newport Beach	Vehicle Replacements	Purchase of two Ford Transit vans with wheelchair lifts.
AbleLight, Inc	Transportation for People with Developmental Disabilities	Purchase of three eight-passenger replacement vans with capacity for two to three wheelchairs, including a lift.
Southland Integrated Services, Inc.	Transportation Services for Ethnic Seniors and Disabled	Purchase of two replacement vehicles and two new vehicles to expand transportation services.
Access California Services	AccessCal's Access to Transportation Program	Purchase of two minivans with wheelchair ramps, computers, and cell phones to expand fleet and routes.
Korean Community Services, Inc. dba KCS Health Center	KCS's Senior Mobility & Integrated Healthcare Program	Purchase of six nine-passenger ADA-compliant vans or 15 without a wheelchair, 12 interior/exterior security cameras, seven mobile radios, and three phones for our requested drivers.

Orange County Adult Achievement Center dba My Day Counts	My Day Counts 2025 - 2026 Capital Replacement	Purchase of five small buses - mobility transit vans, three medium buses - Class B StarCraft buses for replacement, and one Momentm routing and dispatching software.
City of Laguna Woods	City of Laguna Woods Senior Mobility Program Augmentation Project	Expansion of existing services and first-and-last mile connections for trips from Irvine Station to and from John Wayne Airport, and trips greater than ten miles in length. Project also to offer \$0 fares for trips from Laguna Woods, Laguna Hills Transportation centers, and SARTC.
Community SeniorServ, Inc. dba Meals on Wheels, Orange County	Enhanced Transportation Initiative	Proposed service expansion for a Transportation Coordinator, program aide support during loading and offloading participants from Oc ACCESS and similar transportation vehicles, and additional indirect related costs.
Access California Services	AccessCal's Access to Transportation Program	Support for continuation and expansion of EMSD transportation program for a duration of 24 months. Provide service to underserved limited English proficient low-income immigrant and refugee seniors for trips that do not exceed 15 miles.

Recommended Projects

<b>Agency</b>	<b>Project Names</b>	<b>Project Description</b>
Southland Integrated Services, Inc.	Transportation Services for Seniors and The Disabled	Service expansion of existing transportation program.
KCS Health Center	KCS Senior Mobility and Integrated Healthcare Program	Proposed services to launch a dual transportation and senior mobility program for low income, multiethnic, elderly, and disabled Asian communities. Funding early staffing expenses to operationalize the ADA-accessible fleet.
SoCal Senior Services, LLC	Healthy Aging Center Laguna Woods	Proposed continuation of existing paratransit services and operational assistance for the salaries of transportation personnel.



<b>Agency</b>	<b>Project Names</b>	<b>Project Description</b>
City of Seal Beach	Seal Beach - Service Expansion	Support for continuation and expansion of existing services of Senior Mobility program including senior shuttle and Dial-a-Ride program.
Age Well Senior Services, Inc.	Operating Assistance for Age Well Senior Services	Support for the continuation of existing services for a 12-month period. Contributions to fuel, parking, and maintenance and repair for fleet. And support for continuation of existing mobility management, cloud-based application Route Match. Annual fees and monthly subscription fees.
Alzheimer Family Services Center	Patient Transportation	Expansion of services for existing mobility management project, and driver or travel training project.
North County Senior Services	Acacia Adult Day Services	Proposed continuation of existing paratransit services and operational assistance for the salaries of transportation personnel.
City of Costa Mesa	Senior Taxi Program	Support for the continuation of existing services to provide free taxi services for seniors within Costa Mesa for non-medical reasons and non-emergency medical transportation.
Dayle MacIntosh Center for the Disabled	Mobility Management Professionals Program	Proposed service restoration and expansion of services for Mobility Management Professionals Program, which offers personalized small group learning instruction to users on how to use public transportation and first-and-last mile connections.

### Contingency List Projects

<b>Agency</b>	<b>Project Names</b>	<b>Project Description</b>
Hope Community Services, Inc.	Hope-On Senior Ride	Purchase of one ADA large bus and startup costs.
Vocational Vision	Community Engagement Benefits Everyone	Purchase of six 2024 Ford Transit passenger vans XL, 24 SAMCOM FPCN30A two-way radios (five Watt), 50 Nexar Beam GPS dashboard cameras, and 12 Sets of Q'Straint standard retractors (wheelchair tie-down restraints) with shoulder belts.

### Not Recommended Projects

<b>Agency</b>	<b>Project Names</b>	<b>Project Description</b>
NOCE	The Mobility Training Program	Support for continuation and expansion of existing services for mobility training program.
Alzheimer Family Services Center	Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2288)	Renewal of Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2288). Request for EMSD operating funds will supplement the cost of the cooperative transit agreement.
Meals on Wheels, Orange County	Support of Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2289)	Service Expansion: The application is to fulfill the contractual requirement to apply for EMSD as part of OCTA's Cooperative Transit Agreement No. C-4-2289 for the Provision of Special Transit Services.
Hope Community Services, Inc.	Hope-On Senior Transportation Program	Proposed new services for existing transportation programs, including staff and building a referral network. And expansion of existing service to allocate and coordinate appropriate transportation services for mobility management.

North County Senior Services	Acacia Adult Day Services Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2287)	Renewal of Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2287).
SoCal Senior Services, LLC	SoCal Senior Services Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2290)	Renewal of Cooperative Transit Agreement for the Provision of Special Transit Services (Agreement No. C-4-2290).
Alzheimer Family Services Center	Patient Transportation	Expansion of services for existing mobility management project, and drier or travel training project.
My Day Counts	My Day Counts 2025-26 Operating (Special Agency Agreement Requirement – Cooperative Agreement No. C-4-2291)	Transporting program participants between their home and our My Day Counts facility where they attend a site-based day program.
Pearl Transit Corp.	Trip planning and 24-hour transportation for Orange County seniors and individuals with disabilities	Service expansion for a new 24-hour transportation and trip planning service for individuals with disabilities.

**Acronyms**

- ADA - American with Disabilities Act
- EMSD - Enhanced Mobility for Seniors and Individuals with Disabilities
- NOCE - North Orange Continuing Education District
- OCEMMA - OC Equity Mobility Management - Abrazar
- OCTA – Orange County Transportation Authority
- SARTC – Santa Ana Regional Transportation Center



**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller letters above it.

**Subject:** Acceptance of Grant Award from Department of the Homeland Security Transit Security Grant Program

### **Overview**

The Orange County Transportation Authority has been awarded \$116,600 in Federal Emergency Management Agency funding awarded by the Department of Homeland Security through the Transit Security Grant Program. Recommendations for acceptance of these funds are presented for Board of Directors' review and approval.

### **Recommendations**

- A. Authorize the Chief Executive Officer, or designee, to accept the award of \$116,600 in Federal Emergency Management Agency funding awarded by the Department of Homeland Security through the Transit Security Grant Program and execute grant-related agreements and documents with the Department of Homeland Security.
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program, as well as execute any necessary agreements to facilitate the recommendation above.

### **Background**

On April 16, 2024, the Department of Homeland Security (DHS) made available the fiscal year (FY) 2023-24 Transit Security Grant Program (TSGP), which provided \$83,700,000 to eligible public transit systems to promote sustainable, risk-based efforts to protect critical transportation infrastructure and the traveling public from acts of terrorism, major disasters, and other emergencies.

The TSGP is one of four grant programs that constitute the DHS focus on transportation infrastructure security activities. It is part of a comprehensive set of measures authorized by Congress and implemented by the DHS to secure

the nation's critical infrastructure. For FY 2023-24, the DHS focused on critical information sharing and collaboration to build a national culture of preparedness and protection against terrorism.

On June 24, 2024, the Orange County Transportation Authority (OCTA) submitted an application requesting support for the Visible Intermodal Protection and Response (VIPR) Project, which aims to prevent and deter acts of violence and terrorism against, on, and around OCTA's transit systems. On August 23, 2024, the DHS formally announced that OCTA was awarded \$116,600 in TSGP funding for the VIPR Project, which will support one year of additional Transit Police Services patrols at transit facilities, railroad right-of-way, buses, and trains.

### ***Discussion***

The DHS award to OCTA of \$116,600 in TSGP funding represents 100 percent of the total cost of implementing the VIPR Project for one year.

The VIPR Project is designed to present a visible presence and ability to respond to the public on the transit system to deter terrorist acts, which may potentially interrupt terrorist pre-planning activities targeted towards soft-targets and crowded places. Periodic VIPR operations coordinated by OCTA's Security and Emergency Preparedness Department and the Orange County Sheriff's Department Transit Police Services, under contract to OCTA, will show the public that the transit system is patrolled on a regular basis, deter terrorist threats, and lower the likelihood of a successful terrorist attack.

Staff is requesting the Board of Directors (Board) authorize acceptance of this grant and to further authorize the Chief Executive Officer to negotiate and enter into a contract with the DHS, allowing OCTA to seek reimbursement for the costs of the project.

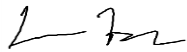
### ***Summary***

The DHS awarded OCTA \$116,600 in TSGP funding, representing 100 percent of the total cost of implementing the VIPR Project for one year. Board authorization is requested to accept the grant and enter into a contract with the DHS to seek reimbursement for the cost of the VIPR Project.

**Attachment**

None.

**Prepared by:**



Jason Huang  
Transportation Funding Analyst  
(714) 560-5982

**Approved by:**



Kia Mortazavi  
Executive Director, Planning  
(714) 560-5741



**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller blue ink above the signature.

**Subject:** Low Carbon Transit Operations Program Corrective Action Plans

### **Overview**

The Orange County Transportation Authority receives California Department of Transportation Low Carbon Transit Operations Program funding via formula to support expanded or new transit operations and capital projects that reduce greenhouse gas emissions, improve mobility, and prioritize disadvantaged communities. Funds may be transferred from a prior year to support ongoing projects with approval from the implementing agency's governing body and approval by the California Department of Transportation. Recommendations to utilize prior year funding for this program are presented for Board of Directors' review and approval.

### **Recommendations**

- A. Approve Resolution 2024-084 to authorize the use of prior year Low Carbon Transit Operations Program funds and interest earnings estimated at \$3,736,809 for the Youth Ride Free Program and for new or expanded OC Bus Rapid services (recognized as Bravo! 553 Bus Service Operating Subsidy in the funding program).
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program as well as negotiate and execute any necessary agreements with regional, state, or federal agencies to facilitate the recommendation above.

### **Background**

The California Department of Transportation (Caltrans) Low Carbon Transit Operations Program (LCTOP) provides funds to transit agencies on a formula basis to support expanded or new transit operations and capital projects that reduce greenhouse gas emissions, improve mobility, and prioritize disadvantaged communities. The LCTOP funds are derived from the

Greenhouse Gas Reduction Fund (GGRF), which is generated from proceeds from the California Air Resources Board's Cap-and-Trade Program.

Consistent with the Orange County Transportation Authority's (OCTA)'s Capital Programming Policies, LCTOP funds are primarily used for transit operations, capital projects that support bus transit expansion, and fare reduction programs to enhance transit availability and accessibility. LCTOP funds from previous funding cycles have been used for transit fare subsidy programs, bicycle racks on buses, bus purchases, a hydrogen fueling station, and the expansion of bus and commuter rail operations.

According to the fiscal year 2023-24 LCTOP guidelines, to change an approved project request, including any changes to the scope, schedule, cost, or funding, including the transfer of funds, the lead agency must first obtain approval from Caltrans by submitting a Corrective Action Plan which also requires evidence of Board of Directors' (Board) approval through a resolution.

### ***Discussion***

Staff is proposing programming changes to prior year LCTOP funds totaling \$2,829,300 that were programmed to the College Pass Program for Orange Coast College and the Welcome Back Fare Reduction Program for OC Bus Riders, as well as \$907,508.96 in interest accrued on LCTOP funds. These two programs will not be able to fully expend the allocated funds before the LCTOP funds expiration date of June 30, 2025. Sufficient LCTOP funding was retained on these two programs to ensure funding through June 2025. The Welcome Back Fare Reduction Program will not continue past this date, and the College Pass Program for Orange Coast College will continue and be funded with student fees. Staff is proposing to transfer the balance of funds to two existing and eligible LCTOP projects to fully expend the funds prior to lapsing, as follows:

- \$2,319,300 in LCTOP and \$907,508.96 in accrued interest to Youth Ride Free Program.
- \$510,000 in LCTOP to OC Bus Rapid 553 (Rapid 553) Service. This is an existing ongoing project in the LCTOP which was established as the Bravo! 553 Bus Service Operating Subsidy. Rapid 553 runs along Main Street serving 15 stops from the Anaheim Regional Transportation Intermodal Center to MacArthur Boulevard and provides service to the cities of Anaheim, Orange, and Santa Ana.

Detailed descriptions for each project are provided in Attachment A. The funds will support existing operational needs for the Rapid 553 service and cover



ongoing costs tied to OCTA's successful Youth Ride Free Program. These projects have helped to increase OC Bus ridership.

Consistent with Caltrans' LCTOP guidelines, Board approval is requested to adopt the resolution that authorizes the redirection of prior year LCTOP funds and confirms OCTA's agreement to other standard LCTOP requirements (Attachment B).

**Next Steps**

With Board approval, staff will submit the Board resolution along with a request to direct the use of \$2,829,300 in expiring LCTOP funds and \$907,508.96 in accrued interest to the Youth Ride Free Program and Rapid 553 (referenced as Bravo! 553 Bus Service Operating Subsidy in the resolution consistent with the funding program requirements). The use of LCTOP funds is subject to approval by both Caltrans and the California Air Resources Board. However, both of these projects are already in the LCTOP program and will likely be approved.

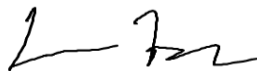
**Summary**

The Board is requested to approve the use of LCTOP fund balances and accrued interest to fulfill timely use of funds requirements for transit projects that improve OC Bus services and ridership. Board authorization is also requested to negotiate and execute agreements as appropriate.

**Attachments**

- A. Orange County Transportation Authority Low Carbon Transit Operations Program – Project Descriptions
- B. Resolution No. 2024-084, Authorization for the Submittal of the Corrective Action Plans for the Low Carbon Transit Operations Program and for the Execution of the Low Carbon Transit Operations Program Projects Using Prior Year Funds and Interest

**Prepared by:**



Jason Huang  
Transportation Funding Analyst  
(714) 560-5982

**Approved by:**



Kia Mortazavi  
Executive Director, Planning  
(714) 560-5741

**Orange County Transportation Authority  
Low Carbon Transit Operations Program – Project Descriptions**

**Youth Ride Free Program**

OC Bus 360°, Orange County Transportation Authority's (OCTA) comprehensive plan to improve bus service from all angles, identifies youth as a key audience for bus service growth. Beginning in September 2021, OCTA began offering subsidized youth passes to youth aged 18 and under. The free transit service allows this transit dependent group to reach destinations such as home, schools, parks, and other recreation centers at no cost. From October 2019 to October 2023, countywide youth boardings doubled with an increase of 165,376.

**OC Bus Rapid 553 or Bravo! 553 Service Operating Subsidy**

OC Bus Rapid 553 service operates on weekdays approximately between 5:50 a.m. to 8:00 p.m. along Main Street serving 15 stops from Anaheim Regional Transportation Intermodal Center to MacArthur Boulevard and provides service to the cities of Anaheim, Orange, and Santa Ana. The service is limited-stop, which speeds up travel times, and operates with a combination of near-zero and zero-emission vehicles. The OC Bus Rapid 553 serves communities that are identified as disadvantaged communities under SB 535 (Chapter 830, Statutes of 2012) and AB 1550 (Chapter 369, Statutes of 2016).

**College Pass Program for Orange Coast College**

This program allows college students at Orange Coast College to ride free in the first year of the program (fiscal year 2021-22) and for a reduced fare in future years. The Low Carbon Transit Operations Program (LCTOP) was designed to support the operating costs for year one as well as marketing and outreach. After the first year of the College Pass Program, the Orange Coast College began charging every student a fee assessment that continues to support the operating costs. The need for LCTOP to support ongoing operating costs was significantly less than projected and the program will continue to be supported by fee assessments in the future.

**Welcome Back Fare Reduction Program for OC Bus Riders**

As part of a coordinated customer comeback program following the coronavirus ridership reductions, the fare discount promotion was designed to encourage existing and lapsed customers to return, along with a campaign highlighting the benefits and safety of public transit. OCTA proposed to provide the Fare Reduction Program for a promotional period of up to 12 months, subject to rider demand and funding availability. Note that the promotional period was planned to be divided into two-to-three-month phases, not a continuous period, but fewer phases were implemented than initially planned, so a significant amount of LCTOP was not needed.

**RESOLUTION NO. 2024-084**

**AUTHORIZATION FOR THE SUBMITTAL OF THE CORRECTIVE ACTION PLANS FOR THE LOW CARBON TRANSIT OPERATIONS PROGRAM AND FOR THE EXECUTION OF THE LOW CARBON TRANSIT OPERATIONS PROGRAM PROJECTS USING PRIOR YEAR FUNDS AND INTEREST**

**\$2,319,300 IN FISCAL YEAR (FY) 2020-21 FUNDS ALONG WITH \$907,508.96 IN ACCRUED LOW CARBON TRANSIT OPERATIONS PROGRAM (LCTOP) INTEREST FOR THE YOUTH RIDE FREE PROGRAM**

**\$510,000 IN FY 2020-21 FUNDS FOR THE BRAVO! 553 RAPID BUS SERVICE OPERATING SUBSIDY PROJECT, REFERENCED AS RAPID 553 IN THE CURRENT OC BUS SYSTEM**

**WHEREAS**, the Orange County Transportation Authority (OCTA) is an eligible project sponsor and may receive state funding from the LCTOP for transit projects; and

**WHEREAS**, the statutes related to state-funded transit projects require a local or regional implementing agency to abide by various regulations; and

**WHEREAS**, SB 862 (Chapter 36, Statutes of 2014) named the California Department of Transportation (Caltrans) as the administrative agency for the LCTOP; and

**WHEREAS**, Caltrans has developed guidelines for the purpose of administering and distributing LCTOP funds to eligible project sponsors (local agencies); and

**WHEREAS**, OCTA wishes to delegate authorization to execute these documents, the authorized agent form and any amendments thereto or other related documents, to Darrell E. Johnson, Chief Executive Officer (CEO); and

**WHEREAS**, OCTA wishes to implement the LCTOP projects listed above;

**NOW, THEREFORE, BE IT RESOLVED** by the OCTA Board of Directors (Board) that the fund recipient agrees to comply with all applicable conditions and requirements set forth in the Certification and Assurances and the authorized agent documents and applicable statutes, regulations, and guidelines for all LCTOP-funded transit projects;

**NOW THEREFORE, BE IT FURTHER RESOLVED** that Darrell E. Johnson, CEO, or his designee, be authorized to execute all required documents of the LCTOP and any amendments thereto with Caltrans;

**NOW, THEREFORE, BE IT FURTHER RESOLVED** that the OCTA Board hereby authorizes the submittal of program documentation to Caltrans to transfer funding to the following projects in FY 2020-21 LCTOP funds:

Project Name: Youth Ride Free Program

Amount of LCTOP Funds Transferred: FY 2020-21 LCTOP funding at \$2,319,300 from the Welcome Back Fare Reduction Program for OC Bus riders and \$907,508.96 in accrued LCTOP interest

Project Name: Bravo! 553 Rapid Bus Service Operating Subsidy

Amount of LCTOP Funds Transferred: FY 2020-21 LCTOP funding at \$510,000 from the College Pass Program for Orange Coast College

Short Descriptions of Projects:

FY 2020-21 LCTOP Funds from the Welcome Back Fare Reduction Program for OC Bus Riders and Accrued LCTOP Interest to the Youth Ride Free Program:

- Youth Ride Free Program (\$3,226,808.96): The program allows youth 18 and under to ride the OCTA Bus system for free. The free transit service allows this transit-dependent group to reach destinations such as home, schools, parks and other recreation centers at no cost.

FY 2020-21 LCTOP Funds from the College Pass Program for Orange Coast College:

- Bravo! 553 Rapid Bus Service Operating Subsidy (\$510,000): The Bravo! 553 service started in October 2022 providing new service while giving OCTA the opportunity to test new battery-electric bus technology in revenue service. The route serves AB 1550 (Chapter 369, Statutes of 2016) populations, operating weekdays along Main Street, serving 15 stops from the Anaheim Regional Transportation Intermodal Center to MacArthur Boulevard. This service is currently called Rapid 553 in the OC Bus system.

ADOPTED, SIGNED AND APPROVED this \_\_\_\_ day of November 2024.

AYES:

NOES:

ABSENT:

ATTEST:

\_\_\_\_\_  
Andrea West  
Clerk of the Board

\_\_\_\_\_  
Tam T. Nguyen, Chair  
Orange County Transportation Authority

OCTA Resolution No. 2024-084



**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller letters to the right.

**Subject:** Integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location System with the L3Harris Technologies, Inc. Symphony Dispatch Consoles

### **Overview**

Board of Directors' authorization is requested for the purchase of services to integrate the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location system with the L3Harris Technologies, Inc.'s Symphony dispatch console.

### **Recommendation**

Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2429 between the Orange County Transportation Authority and L3Harris Technologies, Inc., in the amount of \$761,000 for the integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location system with the L3Harris Symphony dispatch console.

### **Discussion**

The Orange County Transportation Authority (OCTA) is currently using L3Harris Technologies, Inc.'s (L3Harris) Maestro dispatch consoles as part of its communication system for managing transit operations. These consoles are essential for providing clear and reliable communication between OCTA's dispatchers, coach operators, field personnel, and other staff. The Maestro consoles are used for both data and voice communications, as well as for responding to emergencies and performing other tasks. Use of the L3Harris Maestro consoles to streamline operations, improves safety, and helps to ensure smooth communication between the workforce and transit fleet.

OCTA's Maestro consoles are integrated with Conduent Transport Solutions' (Conduent) OrbCAD Computer Aided Dispatch/Automatic Vehicle Location (CAD/AVL) system, which provides OCTA dispatchers with a unified

## **Integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location System with the L3Harris Technologies, Inc. Symphony Dispatch Consoles**

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platform that significantly enhances public transit operations. It allows dispatchers to manage real-time voice communications and access up-to-date vehicle data within a single interface, streamlining workflows and eliminating the need to switch between systems. By combining OrbCAD's real-time vehicle tracking with the communication capabilities of the Maestro consoles, dispatchers can target specific drivers or groups based on location, which is critical for issuing timely instructions during delays, detours, and incidents. The integrated system also supports incident management, enabling quick coordination of responses. Additionally, automating tasks like trip logging and schedule adherence reduces the manual workload, allowing dispatchers to focus on critical communications. Overall, this integration enhances operational efficiency, safety, and responsiveness by providing centralized access to essential tools and real-time updates, ultimately improving service reliability and decision-making for OCTA.

The Maestro consoles have reached the end of their life cycle and are being replaced by the newer L3Harris Symphony dispatch consoles. OCTA has already purchased ten Symphony dispatch consoles to replace the Maestro consoles currently in use for radio dispatch at the Irvine Construction Circle and Garden Grove bases, and two Symphony consoles were acquired for the OC Streetcar.

Before OCTA can replace its existing Maestro dispatch consoles, OCTA will need to collaborate with L3Harris to integrate the newer Symphony dispatch consoles with Conduent's OrbCAD CAD/AVL system. This integration is essential to ensure that dispatchers maintain access to real-time vehicle data and unified communication capabilities within a single platform. Working closely with L3Harris will help OCTA customize the Symphony consoles to seamlessly interface with the OrbCAD system, preserving operational efficiency, safety, and responsiveness during and after the transition from the Maestro consoles.

L3Harris will collaborate with Conduent by providing application programming interfaces, documentation, and engineering assistance throughout the integration, testing, and development stages. L3Harris will also manage the overall project with OCTA. Additionally, L3Harris will provide Conduent with access to an L3Harris lab for validation testing.

### ***Procurement Approach***

The procurement was handled in accordance with OCTA's Board of Directors-approved policies and procedures for a sole source procurement. L3Harris is the exclusive owner of the Symphony dispatch consoles. 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, L3Harris meets OCTA's criteria for a sole source procurement, and based on its technical ability and financial status, the firm is deemed responsible.

L3Harris' 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 agreement 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, L3Harris did not provide a detailed cost breakdown in a format that would be required in order to perform a comprehensive price review. As a result, Internal Audit was unable to compare L3Harris' proposed pricing to comparable contracts or quotes. Therefore, CMM performed a price analysis using the information available, such as pricing with another government agency, to analyze the reasonableness of the quoted price. CMM determined that the quoted pricing from L3Harris aligns with the OCTA project manager's independent cost estimate and is less than the price with the San Francisco Municipal Transportation Agency for a similar project. Therefore, the quoted price is deemed fair and reasonable.

### **Fiscal Impact**

The project was approved in OCTA's Fiscal Year 2024-25 Budget, Finance and Administration Division/Information Systems Department, account nos. 1286-7669-IT107-5AY and 1286-7519-A5354-070, and is funded through local funds.

**Integration of the Conduent OrbCAD Computer-Aided Dispatch/Automatic Vehicle Location System with the L3Harris Technologies, Inc. Symphony Dispatch Consoles** Page 4

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**Summary**

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-4-2429 between the Orange County Transportation Authority and L3Harris Technologies, Inc., in the amount of \$761,000, for a one-year term for the purchase of services necessary to integrate the Conduent OrbCAD Computer Aided Dispatch/Automatic Vehicle Location system with the L3Harris Symphony dispatch consoles.

**Attachment**

None.

**Prepared by:**



Josh Duke  
Department Manager, Information  
Systems  
714-560-5095

**Approved by:**



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



Pia Veesapen  
Director, Contracts Administration and  
Materials Management  
714-560-5619





**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller letters to the right.

**Subject:** Agreement for Payment Processing Services to Support the OC Bus Fare Collection Systems

### **Overview**

The Orange County Transportation Authority is in the process of implementing a modern fare collection system for OC Bus service through the Rider Validation System. To ensure seamless operation and an enhanced payment experience, the Orange County Transportation Authority is seeking to secure payment processing services that will support the Rider Validation System across multiple sales channels, including ticket office terminals, mobile sales devices, mobile applications, and institutional website portals.

### **Recommendations**

- A. Approve the selection of Elavon Inc., as the firm to provide payment processing services for the fare collection system for the Orange County Transportation Authority's fixed-route bus system.
- B. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C42563 between the Orange County Transportation Authority and Elavon, Inc., in the amount of \$617,728, for a two-and-a-half-year initial term with two, two-year option-terms to provide payment processing services for the fare collection system for the Orange County Transportation Authority's fixed-route bus system.

### **Discussion**

On October 23, 2023, the Board of Directors (Board) approved the selection of INIT Innovations in Transportation, Inc. to develop and implement a Rider Validation System (RVS) for the Orange County Transportation Authority's (OCTA) fixed-route bus system. The RVS is a key element in OCTA's ongoing efforts to modernize its OC Bus fare collection system. The new payment processing services will be essential in supporting payments across points of sale for OCTA's

transit services, including buses, mobile applications, and online sales channels, as the agency transitions away from the magnetic fare media legacy system.

Key Objectives of the Payment Processing Services:

1. **Provide support for the OC Bus Fare Collection System:** Ensure payment processing services fully align with the RVS, enabling modern fare payment options such as mobile ticketing and smart (stored value) cards.
2. **Seamless Integration:** The services will integrate smoothly with OCTA's existing fare collection infrastructure, ensuring a streamlined payment experience.
3. **Scalability and Flexibility:** The system will be scalable, accommodating future growth and new fare products as OCTA continues to evolve its transit services.
4. **Enhanced Security:** Advanced security measures will be implemented to safeguard customer data and prevent fraud, adhering to payment card industry compliance standards.
5. **Improved User Experience:** The payment interface will be user-friendly, enhancing the overall experience for OCTA passengers.
6. **Efficient Revenue Management:** The new solution will optimize revenue collection and management, supporting OCTA's operational objectives.

### ***Procurement Approach***

The Board-approved procurement policies and procedures allow for two options to procure these services. OCTA can issue a competitive request for proposals (RFP), or piggyback to purchase goods, information technology, rolling stock, or nonprofessional services from the State of California, the federal government, or other appropriate California public agencies, when it is in the best interest of OCTA to do so.

Using the first option, OCTA would issue an RFP which would contain detailed payment processing services specifications. The advantage of this procurement method would be that OCTA could specify exactly the type of payment processing services desired. The disadvantage to this procurement option would be the inability to obtain better pricing through the piggyback option from the State of California.

The second method to consider is an intergovernmental procurement or “piggybacking” and is supported by OCTA policy and procedures as it is in the best interest of OCTA to do so for agency procurements of property or services in order to obtain better pricing through larger purchases. OCTA entered into a Joint Powers Agreement with the State of California in order to piggyback electronic payment acceptance services at established prices negotiated by the State of California and Elavon, Inc.

Staff determined that the piggyback procurement method would be the most advantageous to OCTA. By purchasing electronic payment acceptance services under the State of California’s Master Service Agreement No. 5-22-70-22-01, which contains similar specifications to OCTA’s requirements for payment processing services, OCTA would benefit from pre-negotiated competitive pricing and terms, enabling OCTA to secure services without conducting a separate procurement resulting in a shortened procurement time and administrative cost savings.

#### Fiscal Impact

This project was approved in OCTA’s Fiscal Year 2024-25 Budget, Finance and Administration Division, Account No. 1261-7520-A5104-DU9.

#### ***Summary***

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C42563 between the Orange County Transportation Authority and Elavon, Inc., in the amount of \$617,728, for a two-and-a-half-year initial term with two, two-year option terms to provide payment processing services for the fare collection system’s fixed-route bus system.

***Attachment***

None.

**Prepared by:**



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

**Approved by:**



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



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



**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", with the word "For" written above it.

**Subject:** Agreement for the Replacement of Fareboxes and Related Fare Collection Equipment

### **Overview**

On April 22, 2024, the Board of Directors approved the release of a request for proposals to select a firm for the development and implementation of replacement fareboxes and related fare collection equipment for the fixed-route bus system. Board of Directors' approval is requested to execute an agreement for the replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.

### **Recommendations**

- A. Approve the selection of LECIP Inc. as the firm to develop and implement replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2110 between the Orange County Transportation Authority and LECIP Inc., in the amount of \$12,287,429, for a six-and-a-half-year initial term with one, five-year option-term for the development and implementation of replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.

### **Discussion**

The Orange County Transportation Authority (OCTA) currently uses fareboxes installed on its fixed-route bus fleet to collect cash and validate magnetic stripe fare media. These fareboxes are 24 years old and have far exceeded their useful life. OCTA plans to replace the existing fareboxes with new fareboxes across the entire fixed-route bus fleet, consisting of 534 buses plus an additional 53 units to be utilized as spares and five additional units to be used for training,

fare programming, and testing. Replacement of the fareboxes also includes replacement of associated equipment, including 23 fare collection vaults distributed and utilized among OCTA's four bus bases.

The project includes an 18-month implementation phase, which will encompass the design, manufacturing, testing, and deployment of new fareboxes across the fixed-route bus fleet. This timeframe ensures a smooth transition before the commencement of the initial five-year operations and maintenance (O&M) service term. Following this, an additional five-year option term for continued O&M service will be available, aligning with the industry standard ten-year lifespan for farebox systems.

***Procurement Approach***

The procurement was handled in accordance with OCTA Board-approved procedures for professional and technical services. Various factors are considered in the award for professional and technical services. The award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On April 22, 2024, the Board authorized the release of Request for Proposals (RFP) 4-2110 and the proposed evaluation criteria and weightings, which was issued electronically on CAMM NET. The RFP was advertised in a newspaper of general circulation on April 22 and April 29, 2024. A pre-proposal conference was held on April 30, 2024, with five attendees from four firms. Five addenda were issued to make available the pre-proposal conference registration sheet and presentation, respond to written questions, as well as handle administrative issues related to the RFP.

On June 11, 2024, five proposals were received. An evaluation committee consisting of OCTA staff from the Revenue Administration, Operations, Transit Service Planning, and Information Systems departments met to evaluate all the proposals received.

The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

- Qualifications of the Firm 20 percent
- Staffing and Project Organization 20 percent
- Work Plan 35 percent
- Cost and Price 25 percent

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 20 percent as the firm had to demonstrate experience implementing replacement fareboxes and related fare collection equipment. Staffing and project organization was also weighted at 20 percent as the firm had to demonstrate the level of expertise, availability, and involvement for the roles of the proposed project team. Work plan was weighted at 35 percent as the firm's proposed implementation plan and solution had to be able to meet the functional and technical requirements established for the replacement fareboxes and related farebox collection equipment as specified in the scope of work. Cost and price were weighted at 25 percent to ensure that OCTA receives value for the services provided.

On July 9, 2024, the evaluation committee reviewed the proposals based on the Board-approved evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Genfare, LLC

Headquarters: Elk Grove Village, Illinois

Project Office: Elk Grove Village, Illinois

LECIP (LECIP) Inc.

Headquarters: Bensenville, Illinois

Project Office: Bensenville, Illinois

On July 17, 2024, the evaluation committee conducted interviews with the two short-listed firms. The interviews consisted of a presentation by each firm to demonstrate the firms' understanding of OCTA's requirements. The firms were also asked to provide a live demonstration of the farebox system including real-time monitoring and the interface between the back office and farebox related to setting up new fare types. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to

qualifications, relevant experience, project team availability, approach to the requirements of the scope of work, as well as specific clarification questions related to each firm's proposal.

At the conclusion of the interviews, a request for a best and final offer (BAFO) was issued to the two short-listed firms to seek additional clarifications and final pricing. Both firms made adjustments to their pricing based on the clarifications.

After considering responses to the questions asked during the interviews and the information provided in the BAFOs, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. LECIP remained the higher-ranked firm with the higher overall score.

Based on the evaluation of the written proposals and the information obtained from the interviews and BAFOs, as well as cost and price, the evaluation committee recommends LECIP for consideration of the award. The following is a brief summary of the proposal evaluation results.

#### Qualifications of the Firm

LECIP, established in Japan, has been providing bus equipment and systems since 1953 and has 590 employees. The firm is headquartered in Bensenville, Illinois and is the wholly owned United States (U.S.) subsidiary of LECIP Holdings. LECIP has manufacturing facilities in both the U.S. and Japan. The firm demonstrated relevant experience implementing fare technology with its systems which are currently operational in 265 transit agencies around the world. The firm's experience with farebox replacement projects includes completed projects with the North County Transit District (NCTD), Beloit Transit System (Beloit Transit) in Wisconsin, Rogue Valley Transportation District in Medford, Oregon, and Clark County Public Transportation Benefit Area in Vancouver, Washington, as well as current projects with the Tri-County Metropolitan Transportation District of Oregon (TriMet) and Metropolitan Transit Authority of Harris County in Houston, Texas. LECIP did not propose any subcontractors and received positive feedback from its references.

Genfare, founded as General Farebox, Inc. in 1980, is a provider of fare collection equipment in the U.S and Canada. The firm has approximately 150 employees and is headquartered in Elk Grove Village, Illinois, which includes its manufacturing facility. The firm has equipment in service at over 400 agencies throughout North America, including over 80 percent of validating fareboxes in use. Genfare demonstrated relevant experience working on farebox system projects, such as Pace Suburban Bus in Chicago, Illinois, Riverside Transit Agency in Riverside, California, Palm Tran Public Transportation in



Delray, Florida, and Capital District Transportation Authority in Albany, New York. Additionally, OCTA's current farebox system was provided by Genfare. The firm did not propose any subcontractors and received generally satisfactory feedback from its references with one indicating that there were multiple issues encountered with its farebox project, including schedule delays.

#### Staffing and Project Organization

LECIP proposed a highly skilled project team with experience working on projects of similar size and scope. The proposed project manager has over 17 years of experience and has been with the firm for eight years. The proposed project manager is the current project manager on the TriMet project and worked on the NCTD and Beloit Transit projects. The proposed lead engineer has 16 years of experience and has been with the firm for seven years. The proposed project manager and lead engineer are both proposed to serve as on-site representatives during key project milestones as required by the scope of work. The firm provided a detailed staffing plan with clearly defined roles during the design review phase, as well as O&M support. During the interview, the project manager provided assurances that his commitments to the TriMet project would not conflict with OCTA's project. The project team, which included the proposed project manager and lead engineer, presented their approach and provided a live demonstration of the proposed farebox solution during the interview, as well as provided detailed responses to the evaluation committee's questions.

Genfare proposed an experienced project team. The proposed project manager has over 25 years of experience and has been with the firm for four years. The individual was the project manager on the Pace Suburban Bus project. The proposed lead engineer has ten years of experience and has been with Genfare for seven years. As required in the scope of work, both the proposed project manager and lead engineer will serve as on-site representatives during key project milestones. The firm discussed its design review process and O&M support. During the interview, Genfare presented its approach and included a live demonstration of its farebox solution. While both the proposed project manager and lead engineer were requested to attend the interview, the lead engineer did not attend. The project team responded to the evaluation committee's questions.

#### Work Plan

LECIP presented a comprehensive work plan that demonstrated an understanding of the scope of work requirements. The firm described in detail its proposed approach, which includes the design, development, installation, and testing of the farebox system, as well as the implementation processes and

procedures. The firm demonstrated a strong technical solution with its farebox hardware, back-office components, and vaulting system. The farebox system utilizes an open architecture as required in the scope of work, providing flexibility with integration and data transfer. The proposed system also allows for customizations and modifications to meet OCTA's business needs. The firm demonstrated an innovative vaulting infrastructure, which utilized smartcard access to securely open and manage a farebox for revenue service. In addition, the proposed real-time monitoring capabilities can ensure efficient oversight of fare collection operations and streamline maintenance. LECIP's approach includes a comprehensive overhaul of the farebox system, replacing all existing fareboxes, probes, and revenue collection equipment at each of OCTA's bus bases. This strategic replacement plan ensures substantial system enhancements, moving beyond mere incremental upgrades to fundamentally modernizing fare collection operations and enhances overall system efficiency. The simple design and controls of the fareboxes provide ease-of-use for both bus riders and coach operators. During the interview, LECIP provided a demonstration of the capabilities and functionality of the fareboxes, as well as the back-office system, including setting up new fare types in real time and generating reports. Additionally, the response to clarifications in the BAFO provided further assurances regarding LECIP's ability to meet OCTA's requirements, as well as transparency related to associated costs and level of O&M support to be provided.

Genfare presented a work plan that addressed all the elements of the scope of work. The firm described its proposed farebox solution, which includes an open architecture as required. The firm discussed integration with existing systems and ways to minimize disruption to OCTA's operations. Although Genfare demonstrated a proven product and description of its capabilities, the solution does not appear to have major upgrades to OCTA's existing system with few technological advancements. As an example, there are only minor improvements to the vaulting system, which would limit substantial benefits related to replacing the entire system. Additionally, the design of the farebox screen seems complex and may be cumbersome for bus riders to use. There were also concerns about additional costs related to subscriptions and licensing, as well as the level of O&M support that would be provided. Although Genfare was given an opportunity to provide clarifications related to any additional associated costs, the firm did not address them in its BAFO response. During the interview, Genfare demonstrated its farebox hardware and functionality, such as establishing new fare types in real time and creating reports.

### Cost and Price

Pricing scores were based on a formula, which assigned the highest score to the firm with the lowest total firm-fixed price and scored the other proposals' total firm-fixed price on its relation to the lowest total firm-fixed price. Although LECIP did not propose the lowest total firm-fixed price, it is competitive among the proposing firms and is less than the OCTA project manager's independent cost estimate. Additionally, the farebox solution proposed by LECIP presents significant improvements and clear benefits over OCTA's existing system. By leveraging the latest technology, the new farebox solution enhances efficiency, simplifies operations, and improves the overall user experience. While replacing the entire farebox system requires an initial investment, the long-term gains in reliability, performance, and cost-effectiveness will add significant value to OCTA's overall operations.

### Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, the information obtained from the interviews and BAFOs, as well as cost and price, the evaluation committee recommends the selection of LECIP as the top-ranked firm to develop and implement the replacement of fareboxes and related fare collection equipment for OCTA's fixed-route bus system. LECIP delivered a thorough and comprehensive proposal and an interview that was responsive to all of the requirements of the RFP.

Although LECIP's pricing was higher than Genfare's, the evaluation committee recommends LECIP as the top-ranked firm for the following reasons:

- Demonstrated relevant experience working on farebox replacement projects and received high remarks from its references.
- Proposed an experienced project team with a detailed staffing plan.
- Presented a detailed work plan and approach to implementing a robust, innovative farebox solution that consists of a comprehensive overhaul of the farebox system and replacement of related fare collection equipment.
- Proposed pricing directly aligns with the firm's experience, proposed project team, and approach to the farebox replacement project.

### Fiscal Impact

This project was approved in OCTA's Fiscal Year 2024-25 Budget, Finance and Administration Division, Account No. 1261-9028-D3131-2PE, and is funded through local funds.

**Summary**

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2110 between the Orange County Transportation Authority and LECIP Inc., in the amount of \$12,287,429, for a six-and-a-half-year initial term with one, five-year option-term for the development and implementation of the replacement fareboxes and related fare collection equipment for the Orange County Transportation Authority's fixed-route bus system.

**Attachments**

- A. Review of Proposals, RFP 4-2110 Replacement of Fareboxes and Related Fare Collection Equipment
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 4-2110 Replacement of Fareboxes and Related Fare Collection Equipment
- C. Contract History for the Past Two Years, Request for Proposals 4-2110: Replacement of Fareboxes and Related Fare Collection Equipment

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**Approved by:**



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**Review of Proposals**  
**RFP 4-2110 Replacement of Fareboxes and Related Fare Collection Equipment**

**ATTACHMENT A**

Presented to Transit Committee - November 14, 2024

**5 firms proposed, 2 firms were interviewed, 1 firm is being recommended**

<b>Overall Ranking</b>	<b>Proposal Score</b>	<b>Firm &amp; Location</b>	<b>Sub-Contractors</b>	<b>Evaluation Committee Comments</b>	<b>Total Firm-Fixed Price for the Initial Term</b>
1	85	<p align="center"><b>LECIP Inc.</b></p> Headquarters: Bensenville, Illinois Project Office: Bensenville, Illinois	None	Demonstrated relevant experience developing and implementing farebox systems to agencies of similar size and scope. Proposed project team has extensive experience. Project manager and lead engineer are proposed to be on-site during key milestones. Demonstrated a clear understanding of project requirements and schedule. Detailed discussion of proposed farebox system and approach. Proposed an innovative and modern system leveraging the latest technology. Presented approach and demonstrated farebox system, as well as provided detailed responses to interview questions. Received positive responses from references. Responsive to best and final offer clarifications and confirmed all associated costs related to the requirements. Proposed competitive firm-fixed price, which is less than the independent cost estimate.	\$12,287,429
2	80	<p align="center"><b>Genfare, LLC</b></p> Headquarters: Elk Grove Village, Illinois Project Office: Elk Grove Village, Illinois	None	Demonstrated experience providing similar services to transit agencies of similar size and scope. Provided OCTA's current farebox system. Proposed a knowledgeable and experienced project team. Project manager and lead engineer are proposed to be on-site during key milestones. Proposed lead engineer had a prior commitment and did not attend the interview. Described approach and proposed farebox system. Proposed farebox has minor improvements compared to existing system nor does it seem to offer significant upgrades and benefits. Presented approach and demonstrated farebox system, as well as responded to the evaluation committee's questions. Received satisfactory responses from references. Did not clearly address if there are any additional associated costs related to the requirements. Proposed lower firm-fixed price.	\$9,622,117

**Evaluation Panel:**

Internal:  
 Revenue Administration (1)  
 Operations (2)  
 Transit Planning Services (1)  
 Information Systems (1)

**Proposal Criteria**

Qualifications of the Firm  
 Staffing and Project Organization  
 Work Plan  
 Cost and Price

**Weight Factors**

20%  
 20%  
 35%  
 25%

**PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed Firms)  
RFP 4-2110 Replacement of Fareboxes and Related Fare Collection Equipment**

<b>LECIP Inc.</b>						<b>Weights</b>	<b>Overall Score</b>
<b>Evaluator Number</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>		
Qualifications of Firm	4.5	4.5	4.5	4.5	4.5	4	18.0
Staffing/Project Organization	4.5	4.0	4.0	4.5	4.0	4	16.8
Work Plan	4.5	4.0	4.5	4.5	4.5	7	30.8
Cost and Price	3.8	3.8	3.8	3.8	3.8	5	19.0
<b>Overall Score</b>	<b>86.5</b>	<b>81.0</b>	<b>84.5</b>	<b>86.5</b>	<b>84.5</b>		<b>85</b>

<b>Genfare, LLC</b>						<b>Weights</b>	<b>Overall Score</b>
<b>Evaluator Number</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>		
Qualifications of Firm	4.0	4.5	4.5	4.0	4.0	4	16.8
Staffing/Project Organization	3.5	3.5	3.5	3.5	3.5	4	14.0
Work Plan	3.5	3.5	3.5	3.5	3.5	7	24.5
Cost and Price	5.0	5.0	5.0	5.0	5.0	5	25.0
<b>Overall Score</b>	<b>79.5</b>	<b>81.5</b>	<b>81.5</b>	<b>79.5</b>	<b>79.5</b>		<b>80</b>

Range of scores for non-short-listed firms was 63 to 66.

**ATTACHMENT C**

**CONTRACT HISTORY FOR THE PAST TWO YEARS**

Request for Proposals 4-2110: Replacement of Fareboxes and Related Fare Collection Equipment

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
<b>Genfare, LLC</b>						
Contract Type: N/A	N/A	N/A	N/A	N/A		N/A
<i>Subconsultants:</i>						
N/A						
<b>Total</b>					<b>\$</b>	<b>-</b>
<b>LECIP Inc.</b>						
Contract Type: N/A	N/A	N/A	N/A	N/A		N/A
<i>Subconsultants:</i>						
N/A						
<b>Total</b>					<b>\$</b>	<b>-</b>

# Agreement for the Replacement of Fareboxes and Related Fare Collection Equipment



# Overview – Current System

- Current System:
  - Accepts cash/coin
  - Magnetic-striped passes (non-reusable)
  - 24+ years old



# New Farebox System - Operational Benefits

- **Improved Efficiency:** The new fareboxes reduce the operational complexity by handling cash-only payments, streamlining fare collections
- **Enhanced Monitoring:** Real-time monitoring of fareboxes and improved administrative tools provide better oversight of fare collection
- **Reduced Maintenance Costs:** The elimination of magnetic-stripped fare readers and simplified components lower long-term maintenance expenses

# New Farebox System - Operator Benefits

- **Ease of Use:** Simplified farebox and operator control design allows operators to focus on customer service and driving, reducing fare-related distractions
- **Onboard System Integration:** Seamless integration with the bus' existing onboard systems, allowing for fewer manual processes and improved data collection
- **Secure and Reliable:** Smartcard access for secure cash collection helps ensure smooth and secure operations

# New Farebox System - Customer Ease of Use

- **Simplicity for Riders:** Cash-only system makes the payment process straightforward, reducing confusion
- **Enhance Rider Experience:** Real-time monitoring reduces farebox downtime, ensuring fewer disruptions for passengers
- **Improved Accessibility:** User-friendly farebox display with clear instructions improved interactions for all passengers, including those with visual impairments

# LECIP Farebox

- Design more fitting to OCTA's requirements
- More streamlined, simplified tactile operation
- Vaulting system more advanced
- Stellar references
- Proven project team and solution
- \$12.3 million



CASH > FULL FARE



\$

2.00

Paid

\$

0.00

OCTA – Orange County Transportation Authority  
LECIP – LECIP, Inc.

# Genfare Farebox

- Off-the-shelf design not specific to OCTA's requirements
- More complex for operator and customers
- Vaulting system similar to existing system
- Less experienced project team
- \$9.6 million



# Recommendations

- Approve the selection of LECIP, as the firm to develop and implement replacement fareboxes and related fare collection equipment for OCTA's fixed-route bus system
- Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2110 between OCTA and LECIP, in the amount of \$12,287,429, for a six-and-a-half-year initial term with one, five-year option-term for the development and implementation of replacement fareboxes and related fare collection equipment for OCTA's fixed-route bus system



**November 14, 2024**

**To:** Transit Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Award the Purchase of Battery-Electric Bus Chargers

A handwritten signature in blue ink, appearing to be "DEJ", with the word "For" written in small letters above the signature.

**Overview**

On March 25, 2024, the Orange County Transportation Authority Board of Directors approved the release of an invitation for bids to procure battery chargers for 40-foot battery-electric buses. Bids from qualified firms were received and Board of Directors' approval is requested to award an agreement for the purchase of battery-electric bus chargers to support new battery-electric buses.

**Recommendation**

Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3067 between the Orange County Transportation Authority and OneSource Distributors, LLC, the lowest responsive, responsible bidder, in the amount of \$2,194,794, for up to 11 battery chargers for 40-foot battery-electric buses.

**Discussion**

On March 25, 2024, the Orange County Transportation Authority (OCTA) Board of Directors (Board) approved the release of Invitation for Bids (IFB) 3-3067 to purchase up to 11 battery chargers to support the deployment and operation of ten battery-electric buses (BEB) that will be added to OCTA's Zero-Emission Bus Pilot Program. This will increase the number of BEBs that OCTA is piloting to 20, with ten assigned to both the Garden Grove and Santa Ana Bus Bases. The chargers will be installed at the Santa Ana Bus Base where the ten new BEBs will be assigned. Operationally, these chargers will provide the infrastructure needed to consistently deploy the BEBs. In addition to providing back-up to the chargers located at the Garden Grove Bus Base, installing chargers at two OCTA bus bases provides flexibility to deploy BEBs from either location on various routes expanding the operating environments in which these buses are being tested.



The chargers will consist of ten 150-kilowatt battery chargers and one 450-kilowatt pantograph style fast charger, which is designed to accommodate shorter charging times based on operational needs. The electrical energy will be transferred to the bus batteries by plug-in connectors from the 150-kilowatt battery chargers or by connection to charging bars on the roof of the bus by the 450-kilowatt pantograph style charger.

The chargers will be capable of supplying power evenly or sequentially to the charging stations based on recharging needs and time of use electricity rates. This allows each bus to be intelligently charged in a manner tailored to the power and logistical needs of each bus. In addition, training will be provided for the operation and maintenance of the chargers.

***Procurement Approach***

This procurement was handled in accordance with OCTA’s Board-approved procedures for competitive sealed bid procurements. These procedures, which conform to both federal and state requirements, are used when minimum requirements can be clearly specified and, therefore, the lowest price is the only criterion for choosing among the bidders who are responsive and responsible after a sealed bidding process.

On March 25, 2024, the Board authorized the release of IFB 3-3067 through OCTA’s CAMM NET system. The project was advertised in a newspaper of general circulation on March 26 and April 1, 2024. A pre-bid conference was held on April 2, 2024, and was attended by four firms. Three addenda were issued to post the presentation slides and registration sheets, as well as to respond to questions received, and handle administrative issues related to the IFB. On May 9, 2024, three bids were received and publicly opened.

All bids were reviewed by staff from both the Contracts Administration and Materials Management and Transit Technical Services 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>
OneSource Distributors, LLC Oceanside, California	\$2,194,794

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Eneridge, Inc. Santa Fe Springs, California	\$2,506,061
SMB International, LLC doing business as Sustainable Energi San Diego, California	\$2,578,943

The OCTA project manager’s independent cost estimate (ICE) for this project was \$2,500,000. The recommended firm’s bid is approximately 12 percent lower than the OCTA project manager’s ICE and is therefore considered by staff to be fair and reasonable.

State law requires award to the lowest responsive, responsible bidder. As such, staff recommends award to OneSource Distributors, LLC., the lowest responsive, responsible bidder, in the amount of \$2,194,794, to provide up to 11 battery chargers for 40-foot battery-electric buses.

**Fiscal Impact**

Funding is included in OCTA’s Fiscal Year 2024-25 Budget, Account No. 2114-9022-D2116-ODC.

**Summary**

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3067 between the Orange County Transportation Authority and OneSource Distributors, LLC, in the amount of \$2,194,794, for up to 11 battery chargers for 40-foot battery-electric buses at Garden Grove and Santa Ana Bus Bases.

***Attachment***

None.

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# Award the Purchase of Battery-Electric Bus Chargers

# Background

- Current Battery-Electric Bus (BEB) Pilot
  - Ten BEBs
  - Ten plug-in battery chargers
  - Located at the Garden Grove Bus Base
- Expanding Pilot - *Adding*
  - Ten BEBs
  - Ten plug-in battery chargers
  - One pantograph charger
  - Located at the Santa Ana Bus Base

# Depot Chargers

- Ten single dispenser chargers
- 150-kilowatt battery chargers
- ChargePoint chargers
- Recharge time 4 - 4.5 hours



Power link 2000



Power Block

# Pantograph Charger

- One overhead charger
- 450-kilowatt battery charger
- ChargePoint chargers
- Recharge time 1 – 1.5 hours



# Procurement

- March 25, 2024, Orange County Transportation Authority Board of Directors approved the release Invitation for Bids
- Three bids received
- OneSource Distributors, LLC
  - 12 percent under the independent cost estimate
- Diagnostic equipment included
- Operator and mechanic training included
- Extended warranty to 72 months



# Recommendation

Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3067 between the Orange County Transportation Authority and OneSource Distributors, LLC, the lowest responsive, responsible bidder, in the amount of \$2,194,794, for up to 11 battery chargers for 40-foot battery-electric buses.



**November 14, 2024**

**To:** Transit Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Award the Purchase of Zero-Emission Buses

A handwritten signature in blue ink, appearing to read "DEJ For", is located to the right of the "From:" field.

**Overview**

The California Air Resources Board passed the Innovative Clean Transit Rule in 2018 requiring transit agencies to transition their bus fleets to 100 percent zero-emission buses by the year 2040. The Orange County Transportation Authority intends to replace 50 compressed natural gas buses from the current fleet that have met their useful life with ten battery-electric buses and 40 fuel-cell electric buses. Quotes were requested from a qualified firm under the California Statewide Contract for Zero-Emission Transit Buses issued by the State of California's Department of General Services. Board of Directors' approval is requested to award an agreement for the purchase of these vehicles.

**Recommendations**

- A. Approve the selection of New Flyer of America Inc. as the firm to provide 40 fuel-cell electric buses intended to replace 40 compressed natural gas buses that have exceeded their useful life.
- B. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3021 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$63,594,512, for the purchase of up to 40, 40-foot fuel-cell electric buses.
- C. Approve the selection of New Flyer of America Inc. as the firm to provide ten battery-electric buses intended to replace ten compressed natural gas buses that have exceeded their useful life.
- D. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3022 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$13,870,388, for the purchase of up to ten, 40-foot battery-electric buses.

***Discussion***

The California Air Resources Board (CARB) passed the Innovative Clean Transit (ICT) Rule in 2018 requiring all public transit agencies to transition their bus fleets to zero-emission technologies by year 2040. The ICT rule requires 25 percent of new bus purchases to be zero-emission buses (ZEB) starting in 2023 and increasing to 50 percent in 2026. In 2029, all bus purchases must be for ZEB with the goal of a complete transition to a ZEB fleet by 2040.

The Orange County Transportation Authority (OCTA) initiated a pilot program to test both existing ZEB technologies, starting with the introduction of ten hydrogen fuel-cell electric buses (FCEB) which were placed into service in early 2020, and followed by ten battery electric buses (BEB) introduced in 2022. The ZEB Pilot Program has enabled OCTA to gain necessary operational and technological experience for each ZEB type available to shape and define the fleet mix required to meet the service demands of Orange County.

The new buses will be equipped with all OCTA-required equipment and branding requirements, which includes exterior paint and OC Bus branding for use in regular service. In addition, these buses will include an on-board video surveillance system (OBVSS) equipped with reverse-motion and interior 360-degree cameras, fire and hydrogen detection systems, driver barriers, three-position bicycle racks, awareness monitors/displays, provisions to mount devices at the front and rear doors for electronic fare transactions, radio communication system wiring and components, as well as all other systems and components required for a full integration of these buses into the OCTA fleet.

Grant funding for the purchase of the FCEBs will come from various state and federal sources including the Transit and Intercity Rail Capital Program, Low Carbon Transit Operations Program, Congestion Mitigation and Air Quality (CMAQ), and the Conservation Reserve Program (CRP). The BEBs will also be purchased with grant funding from the SB 125 (Chapter 54, Statutes of 2023) Transit Program, CMAQ, and CRP.

***Procurement Approach***

According to the Federal Transit Administration (FTA), public transit agencies are encouraged to use cooperative agreements for the procurement of common goods and services to foster greater economy and efficiency. As such, OCTA identified existing cooperative agreements issued by the State of California's Department of General Services (DGS) that contain an assignability clause and include the type of buses needed by OCTA.

These procurements were handled in accordance with OCTA-approved procedures for acquisition through assigned contract rights, also known as piggybacking. OCTA's piggybacking policies and procedures authorized OCTA to request pricing directly from the qualified firm if the existing agency's agreement only lists one qualified firm that can meet OCTA's specifications.

On March 22, 2024, OCTA requested quotes from New Flyer of America Inc. (New Flyer), an awarded participant, to provide pricing for FCEBs and BEBs. DGS awarded the BEB contracts through a competitive procurement process to three manufacturers: BYD Motors, Inc. (BYD), Proterra, and New Flyer. However, Proterra is undergoing bankruptcy proceedings, and the bus offered by BYD does not meet OCTA's technical requirements. As a result, New Flyer is the only manufacturer on the BEB approved list that meets OCTA's specifications and is also the only manufacturer on the FCEB approved DGS award list.

On May 15, 2024, quotes were received and reviewed by staff from the Contracts Administration and Materials Management and Transit Technical Services departments. OCTA met with New Flyer to discuss technical requirements, among other issues including warranty and acceptance payment process.

To meet OCTA's standard vehicle inspection procedures and ensure that new buses are operating successfully, OCTA requires the lead bus in production to achieve 40 hours of uninterrupted service before proceeding with the full production. This requirement exceeds the standard DGS acceptance process. As part of the negotiation for these buses, OCTA has preliminarily agreed to provide milestone payments per bus and cover the acceptance fee for the pilot/lead buses.

Optional equipment that is specific to OCTA such as the Cradlepoint mobile routers, Kidde Fire suppression system, and March Networks OBVSS accounted for approximately four percent of the overall cost per BEB and FCEB. Staff conducted a cost-price analysis comparing the equipment in the FCEBs purchased in 2018 and BEBs purchased in 2020 to the proposed pricing for the current ZEB procurement. In 2018, the costs of OBVSS for the FCEBs were incorporated into the base price, making direct comparison difficult. Staff conducted a cost-price analysis on the remaining equipment. The cost of Cradlepoint mobile routers has decreased by 83 percent, while the cost of Kidde Fire suppression system has decreased by 60 percent.

OCTA last purchased BEBs in 2020. During the period of 2020 to 2024, the Producer Price Index (PPI) for transportation equipment increased by approximately 87 points, or about 33 percent. In comparison, when evaluating

the cost of equipment from OCTA's 2020 BEB purchase against the proposed costs in 2024, the average cost of Cradlepoint mobile routers, and Kidde Fire system have increased by only 20 percent, which is lower than the PPI. Pricing for the OBVSS increased by 41 percent.

Overall, the pricing for the equipment is deemed fair and reasonable when considering the changes reflected in the PPI and the limited competition among manufacturers.

The initial quote for the purchase of 40 FCEBs was \$69,764,991, and the cost for ten BEBs was \$14,624,938 for a total cost of \$84,389,929. Staff negotiated the vehicle pricing and sought the zero-emission vehicle sales tax exemption under Section 6377 of the California Revenue and Taxation Code that was extended until January 1, 2026. This tax exemption reduced the taxes on all buses from 7.75 percent per bus to 3.94 percent per bus. The total negotiated cost to replace the 50 buses that have exceeded their useful life with 40, 40-foot FCEBs and ten, 40-foot BEBs is \$77,464,900, a total savings of \$6,925,029 from the original quote. This includes a final cost of \$63,594,512 for the purchase of 40, 40-foot FCEBs and \$13,870,388 for the purchase of ten BEBs. The total cost also includes all OCTA required equipment and branding, which is to be installed following delivery and acceptance.

The FTA requires completion of a pre-award Buy America audit for purchases using FTA funds for rolling stock. The audit is to verify the requirement that 70 percent of the parts content of the vehicle to be purchased are made in the United States. A recipient purchasing revenue service rolling stock with FTA funds must ensure that a pre-award audit is complete before the recipient enters into a formal contract for purchase. The pre-award Buy America audit was performed by OCTA's Internal Audit Department.

#### **Fiscal Impact**

Funds required for the FCEB purchase will be provided through FTA and funds for the BEB purchase will be provided through state and local sources. The amount budgeted for OCTA fiscal year 2024-25 is \$74,500,000 and \$77,464,900 is required. As a result, staff is requesting the approval of a budget transfer in the amount of \$2,964,900.

#### **Summary**

Board of Directors' approval is requested to authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3021 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount

of \$63,594,512, for the purchase of up to 40, 40-foot fuel-cell electric buses, and Purchase Order No. C-3-3022 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$13,870,388, for the purchase of up to ten, 40-foot battery-electric buses.

**Attachments**

- A. Independent Pre-Award Agreed-Upon Procedures Applied to New Flyer's Proposal for Forty 40-Foot Hydrogen Fuel Cell Buses
- B. Independent Pre-Award Agreed-Upon Procedures Applied to New Flyer's Proposal for Ten 40-Foot Battery-Electric Buses

**Prepared by:**



Bill Habibe  
Sr. Section Manager, Maintenance  
Transit Technical Services  
714-668-4574



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Johnny Dunning Jr.  
Chief Operating Officer, Operations  
714-560-5964

**Orange County Transportation Authority  
Internal Audit Department**



**Independent Pre-Award  
Agreed-Upon Procedures Applied to  
New Flyer's Proposal for  
Forty 40-Foot Hydrogen Fuel Cell Buses**

INTERNAL AUDIT REPORT NO. 24-517

**June 11, 2024**



**Audit Team:**

Jonathan Thompson, Internal Auditor *Jonathan Thompson*  
Ricco Bonelli, CIA, Principal Internal Auditor

**Distributed to:**

Georgia Martinez, Manager of Contract Administration and Procurement  
Monique Touch, Senior Contract Administrator

**Orange County Transportation Authority  
Independent Pre-Award Agreed-Upon Procedures Applied to  
New Flyer’s Proposal for Forty 40-Foot Hydrogen Fuel Cell Buses  
June 11, 2024**

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**Orange County Transportation Authority  
Independent Pre-Award Agreed-Upon Procedures Applied to  
New Flyer's Proposal for Forty 40-Foot Hydrogen Fuel Cell Buses  
June 11, 2024**

## **Independent Auditor Report**

The Internal Audit Department (Internal Audit) of the Orange County Transportation Authority (OCTA) has performed the procedures enumerated below on the vehicles proposed to be manufactured by New Flyer (Manufacturer) related to Requisition No. 32936. The Manufacturer is responsible for the list of components for the rolling stock being purchased, including their origin, cost, and supporting cost documentation; the final assembly location and a listing of final assembly activities; and other Buy America compliance documentation.

A recipient purchasing revenue service rolling stock with Federal Transit Administration (FTA) funds must ensure that a pre-award audit under Title 49 Code of Federal Regulations (CFR) § 663 is complete before the recipient enters into a formal contract for the purchase of such rolling stock.

The Contracts Administration and Materials Management (CAMM) Department has agreed to, and acknowledged, that the procedures performed are appropriate to meet the intended purpose of ensuring that the proposed buses comply with Federal Buy America requirements. The agreed-upon procedures (AUP) are based on recommended procedures outlined in the FTA handbook, *Conducting Pre-Award and Post-Delivery Audits for Rolling Stock Procurements*. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

Internal Audit was engaged by CAMM to perform this AUP engagement. Internal Audit conducted the AUP engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants and Generally Accepted Government Auditing Standards. Internal Audit was not engaged to, and did not, conduct an examination or review engagement, the objective of which would be the expression of an opinion or conclusion, respectively, on the accounting records and compliance with the provisions of Federal Buy America requirements. Accordingly, Internal Audit does not express such an opinion or conclusion. Had Internal Audit performed additional procedures, other matters might have come to our attention that would have been reported to you.

Internal Audit is required to be independent of the Manufacturer and CAMM, and to meet our other ethical responsibilities in accordance with the relevant ethical requirements related to our AUP engagement.

The purpose of this report is to present the results of the procedures applied, and it is not suitable for any other purpose. This report is intended solely for the information and use of the CAMM Department of the Orange County Transportation Authority and is not intended to be, and should not be, used by anyone other than this specified party.

**Orange County Transportation Authority  
Independent Pre-Award Agreed-Upon Procedures Applied to  
New Flyer's Proposal for Forty 40-Foot Hydrogen Fuel Cell Buses  
June 11, 2024**

The procedures and results are as follows:

***70 Percent Domestic Requirement***

Procedures: Internal Audit:

- Obtained the complete component listing of the proposed buses documenting the individual cost of each component and the total United States (U.S.) domestic percentage of the total vehicle cost from the Manufacturer.
- Agreed cost for 49 components and related subcomponents representing at least 70 percent of the total U.S. domestic cost of the vehicle to recent invoices and/or price quotations.
- For the components and related subcomponents selected above, obtained from the supplier a signed Buy America Certification or a detailed listing identifying each subcomponent's country of origin and percentage of cost.

Results: Internal Audit calculated a U.S. domestic content of 71.63 percent from 49 components and related subcomponents, as defined under Title 49 CFR § 661. See Schedule of Verified Components.

***Final Assembly in the United States***

Procedures: Internal Audit:

- Identified the proposed final assembly location from documentation provided by the Manufacturer and confirmed that the proposed final assembly location is in the U.S.
- Compared the list of final assembly activities provided by the Manufacturer to the list of activities that qualify as final assembly activities per the FTA Handbook and further described in Appendix D to Title 49 CFR § 661.11 "Minimum Requirements for Final Assembly".

Results: The proposed final assembly location is in the U.S. and the list of proposed final assembly activities qualify as final assembly activities, as described in Appendix D to Title 49 CFR § 661.11.

***FMVSS Compliance Certification***

Procedures: Requested a copy of the Manufacturer's self-certification information stating that the proposed vehicles will comply with the relevant Federal Motor Vehicle Safety Standards (FMVSS) issued by the National Highway Traffic Safety Administration in Title 49 CFR § 571.

Results: Internal Audit obtained the required FMVSS Self-Certification from the Manufacturer.

# Pre-Award Buy America Compliance Certification

As required by Title 49 of the Code of Federal Regulations, Part 663 – Subpart B, the Orange County Transportation Authority is satisfied that the vehicles to be purchased, forty 40-foot Hydrogen Fuel Cell Buses from New Flyer meet the requirements of 49 United States Code 5323(j), as amended. The Orange County Transportation Authority’s Internal Audit Department has reviewed documentation provided by the manufacturer, which lists (1) the proposed component and subcomponent parts of the vehicles identified by manufacturer, country of origin, and cost; and (2) the proposed location of the final assembly point for the vehicles, including a description of the activities that will take place at the final assembly point and the cost of final assembly.

Date: June 11, 2024



Signature: \_\_\_\_\_

Ricco Bonelli, CIA  
Principal Internal Auditor, Internal Audit  
Orange County Transportation Authority

## Pre-Award Federal Motor Vehicle Safety Standards Compliance Certification

As required by 49 Code of Federal Regulations (CFR) § 663 – Subpart D, the Orange County Transportation Authority certifies that it received, at the pre-award stage, a copy of New Flyer’s self-certification information stating that the buses, forty 40-foot Hydrogen Fuel Cell Buses, will comply with the relevant Federal Motor Vehicle Safety Standards issued by the National Highway Traffic Safety Administration in 49 CFR § 571.

Date: June 11, 2024



Signature: \_\_\_\_\_  
Ricco Bonelli, CIA  
Principal Internal Auditor, Internal Audit  
Orange County Transportation Authority



May 10, 2024

**PRE-AWARD**

**FMVSS COMPLIANCE CERTIFICATION**

<b>Purchaser</b>	:	<b>Orange County Transportation Authority</b>
<b>Number of Buses</b>	:	<b>40</b>
<b>Description of Buses</b>	:	<b>XHE40</b>
<b>New Flyer Build No.</b>	:	<b>New Flyer Option # 2024-046</b>

As required by Title 49 of the CFR, Part 663 – Subpart D, New Flyer of America Inc., on its behalf and on the behalf of its affiliates, New Flyer Industries Canada ULC, certifies that the above described buses to be manufactured for the above purchaser will comply with the relevant Federal Motor Vehicle Safety Standards issued by the National Highway Traffic Safety Administration in Title 49 of the Code of Federal Regulations, Part 571.

**NEW FLYER OF AMERICA INC.**

By: \_\_\_\_\_

**Ian Macpherson**  
Vice President, Engineering Services

**BUY AMERICA CALCULATION  
SCHEDULE OF VERIFIED COMPONENTS**

<b>Vendor Name</b>	<b>Component / Subcomponent Description</b>	<b>Percentage of Total Cost</b>
MGM BRAKES	AIR, BRAKES & LEVELING SYSTEM	0.10%
IO KMG	BATTERY SYSTEM	6.46%
NEW FLYER OF AMERICA	BATTERY SYSTEM	11.77%
CARFAIR COMPOSITES USA INC	BODY APPLIED PARTS - INTERIOR	0.10%
ENGINEERED MACHINED PRODUCTS	COOLING SYSTEM	0.48%
MODINE MANUFACTURING	COOLING SYSTEM	2.54%
BYK RAK LLC	CUSTOMER OPTIONS	0.26%
KIDDE AEROSPACE TECHNOLOGIES	CUSTOMER OPTIONS	1.46%
MARCH NETWORKS CORPORATION	CUSTOMER OPTIONS	0.61%
CONDUENT TRANSPORT SOLUTIONS INC	DESTINATION SIGNS	1.53%
IO KMG	DESTINATION SIGNS	0.26%
LUMINATOR TECHNOLOGY GROUP	DESTINATION SIGNS	0.63%
VAPOR BUS INTERNATIONAL	DOORS	1.78%
KONGSBERG POWER PRODUCTS SYSTEMS I LLC	DRIVER'S CONTROLS	0.12%
IO KMG	ELECTRICAL HARNESSES	0.12%
BALLARD FUEL CELL SYSTEMS INC	ENGINE	15.05%
ARTIK OEM CORPORATION	FLOORING	0.34%
CARFAIR COMPOSITES USA INC	FLOORING	0.22%
MAN ENGINES AND COMPONENTS	FRONT SUSPENSION	0.42%
HEXAGON MASTERWORKS INC	FUEL SYSTEM	4.74%
SWAGelok ALABAMA WEST TENNESSEE	FUEL SYSTEM	0.51%
WEH TECHNOLOGIES INC	FUEL SYSTEM	0.24%
METAL SOLUTIONS INC	HEATING & AIR CONDITIONING SYSTEMS	0.26%
THERMO KING LLC	HVAC SYSTEM	2.83%
IO KMG	INTERIOR LIGHTS	0.57%
BERENDSEN FLUID POWER	POWER STEERING	0.56%
MAN ENGINES AND COMPONENTS	REAR SUSPENSION	0.75%
MGM BRAKES	REAR SUSPENSION	0.12%
AROW GLOBAL CORP	SEATING & STANCHIONS	0.81%
UNITED SAFETY & SURVIVABILITY CORPORATION	SEATING & STANCHIONS	5.33%
IO KMG	SIDE CONSOLE & PANELS	1.61%
NEW FLYER OF AMERICA-CBS	STRUCTURES	5.54%
LIFT U INC	WHEELCHAIR RAMPS	0.84%
HOWMET AEROSPACE INC	WHEELS & TIRES	0.26%
AROW GLOBAL CORP	WINDOWS	2.40%
		71.63%

**Orange County Transportation Authority  
Internal Audit Department**



**Independent Pre-Award  
Agreed-Upon Procedures Applied to  
New Flyer's Proposal for  
Ten 40-Foot Battery-Electric Buses**

INTERNAL AUDIT REPORT NO. 24-518

**June 11, 2024**



**Audit Team:**

Jonathan Thompson, Internal Auditor *Jonathan Thompson*  
Ricco Bonelli, CIA, Principal Internal Auditor

**Distributed to:**

Georgia Martinez, Manager of Contract Administration and Procurement  
Monique Touch, Senior Contracts Administrator

**Orange County Transportation Authority  
Independent Pre-Award Agreed-Upon Procedures Applied to  
New Flyer’s Proposal for Ten 40-Foot Battery-Electric Buses  
June 11, 2024**

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**Orange County Transportation Authority**  
**Independent Pre-Award Agreed-Upon Procedures Applied to**  
**New Flyer's Proposal for Ten 40-Foot Battery-Electric Buses**  
**June 11, 2024**

## **Independent Auditor Report**

The Internal Audit Department (Internal Audit) of the Orange County Transportation Authority (OCTA) has performed the procedures enumerated below on the vehicles proposed to be manufactured by New Flyer (Manufacturer) related to Requisition No. 32935. The Manufacturer is responsible for the list of components for the rolling stock being purchased, including their origin, cost, and supporting cost documentation; the final assembly location and a listing of final assembly activities; and other Buy America compliance documentation.

A recipient purchasing revenue service rolling stock with Federal Transit Administration (FTA) funds must ensure that a pre-award audit under Title 49 Code of Federal Regulations (CFR) § 663 is complete before the recipient enters into a formal contract for the purchase of such rolling stock.

The Contracts Administration and Materials Management (CAMM) Department has agreed to, and acknowledged, that the procedures performed are appropriate to meet the intended purpose of ensuring that the proposed buses comply with Federal Buy America requirements. The agreed-upon procedures (AUP) are based on recommended procedures outlined in the FTA handbook, *Conducting Pre-Award and Post-Delivery Audits for Rolling Stock Procurements*. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

Internal Audit was engaged by CAMM to perform this AUP engagement. Internal Audit conducted the AUP engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants and Generally Accepted Government Auditing Standards. Internal Audit was not engaged to, and did not, conduct an examination or review engagement, the objective of which would be the expression of an opinion or conclusion, respectively, on the accounting records and compliance with the provisions of Federal Buy America requirements. Accordingly, Internal Audit does not express such an opinion or conclusion. Had Internal Audit performed additional procedures, other matters might have come to our attention that would have been reported to you.

Internal Audit is required to be independent of the Manufacturer and CAMM, and to meet our other ethical responsibilities in accordance with the relevant ethical requirements related to our AUP engagement.

The purpose of this report is to present the results of the procedures applied, and it is not suitable for any other purpose. This report is intended solely for the information and use of the CAMM Department of the Orange County Transportation Authority and is not intended to be, and should not be, used by anyone other than this specified party.

**Orange County Transportation Authority  
Independent Pre-Award Agreed-Upon Procedures Applied to  
New Flyer's Proposal for Ten 40-Foot Battery-Electric Buses  
June 11, 2024**

The procedures and results are as follows:

***70 Percent Domestic Requirement***

Procedures: Internal Audit:

- Obtained the complete component listing of the proposed buses documenting the individual cost of each component and the total United States (U.S.) domestic percentage of the total vehicle cost from the Manufacturer.
- Agreed cost for 322 components and related subcomponents representing at least 70 percent of the total U.S. domestic cost of the vehicle to recent invoices and/or price quotations.
- For the components and related subcomponents selected above, obtained from the supplier a signed Buy America Certification or a detailed listing identifying each subcomponent's country of origin and percentage of cost.

Results: Internal Audit calculated a U.S. domestic content of 70.17 percent from 322 components and related subcomponents, as defined under Title 49 CFR § 661. See Schedule of Verified Components.

***Final Assembly in the United States***

Procedures: Internal Audit:

- Identified the proposed final assembly location from documentation provided by the Manufacturer and confirmed that the proposed final assembly location is in the U.S.
- Compared the list of final assembly activities provided by the Manufacturer to the list of activities that qualify as final assembly activities per the FTA Handbook and further described in Appendix D to Title 49 CFR § 661.11 "Minimum Requirements for Final Assembly".

Results: The proposed final assembly location is in the U.S. and the list of proposed final assembly activities qualify as final assembly activities, as described in Appendix D to Title 49 CFR § 661.11.

***FMVSS Compliance Certification***

Procedures: Requested a copy of the Manufacturer's self-certification information stating that the proposed vehicles will comply with the relevant Federal Motor Vehicle Safety Standards (FMVSS) issued by the National Highway Traffic Safety Administration in Title 49 CFR § 571.

Results: Internal Audit obtained the required FMVSS Self-Certification from the Manufacturer.

# Pre-Award Buy America Compliance Certification

As required by Title 49 of the Code of Federal Regulations, Part 663 – Subpart B, the Orange County Transportation Authority is satisfied that the vehicles to be purchased, ten 40-foot zero-emission battery-electric buses from New Flyer, meet the requirements of 49 United States Code 5323(j), as amended. The Orange County Transportation Authority’s Internal Audit Department has reviewed documentation provided by the manufacturer, which lists (1) the proposed component and subcomponent parts of the vehicles identified by manufacturer, country of origin, and cost; and (2) the proposed location of the final assembly point for the vehicles, including a description of the activities that will take place at the final assembly point and the cost of final assembly.

Date: June 11, 2024



Signature: \_\_\_\_\_  
Ricco Bonelli, CIA  
Principal Internal Auditor, Internal Audit  
Orange County Transportation Authority

## Pre-Award Federal Motor Vehicle Safety Standards Compliance Certification

As required by 49 Code of Federal Regulations (CFR) § 663 – Subpart D, the Orange County Transportation Authority certifies that it received, at the pre-award stage, a copy of New Flyer’s self-certification information stating that the buses, ten 40-foot zero-emission battery-electric buses will comply with the relevant Federal Motor Vehicle Safety Standards issued by the National Highway Traffic Safety Administration in 49 CFR § 571.

Date: June 11, 2024



Signature: \_\_\_\_\_  
Ricco Bonelli, CIA  
Principal Internal Auditor, Internal Audit  
Orange County Transportation Authority



May 13, 2024

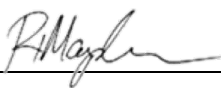
**PRE-AWARD**

**FMVSS COMPLIANCE CERTIFICATION**

**Purchaser** : Orange County Transportation Authority  
**Number of Buses** : 10  
**Description of Buses** : XE40  
**New Flyer Build No.** : New Flyer Option No. 2024-047

As required by Title 49 of the CFR, Part 663 – Subpart D, New Flyer of America Inc., on its behalf and on the behalf of its affiliates, New Flyer Industries Canada ULC, certifies that the above described buses to be manufactured for the above purchaser will comply with the relevant Federal Motor Vehicle Safety Standards issued by the National Highway Traffic Safety Administration in Title 49 of the Code of Federal Regulations, Part 571.

**NEW FLYER OF AMERICA INC.**

By: \_\_\_\_\_

**Ian Macpherson**  
Vice President, Engineering Services

**BUY AMERICA CALCULATION  
SCHEDULE OF VERIFIED COMPONENTS**

<b>Vendor Name</b>	<b>Component / Subcomponent Description</b>	<b>Percentage of Total Cost</b>
IO KMG	AIR, BRAKES & LEVELING SYSTEM	0.007%
JOHNSON WELDED PRODUCTS	AIR, BRAKES & LEVELING SYSTEM	0.087%
AMERICAN BATTERY SOLUTIONS	BATTERY SYSTEM	27.059%
DALSIN INDUSTRIES INC	BATTERY SYSTEM	0.181%
GENERAL PLASTICS INC	BATTERY SYSTEM	0.087%
IMECO CABLES AMERICA INC	BATTERY SYSTEM	0.172%
IO KMG	BATTERY SYSTEM	6.217%
JOHNSON WELDED PRODUCTS	BATTERY SYSTEM	0.036%
MACKOW INDUSTRIES INTERNATIONAL	BATTERY SYSTEM	0.086%
RITZ MACHINE WORKS USA LLC	BATTERY SYSTEM	0.341%
VANNER INC	BATTERY SYSTEM	0.048%
WESTBURNE ELECTRIC	BATTERY SYSTEM	0.001%
CARFAIR COMPOSITES USA INC	BODY APPLIED PARTS - EXTERIOR	0.065%
ROMEO RIM INC	BODY APPLIED PARTS - EXTERIOR	0.050%
SPRAGUE DEVICES	BODY APPLIED PARTS - EXTERIOR	0.052%
WESTBURNE ELECTRIC	BODY APPLIED PARTS - EXTERIOR	0.000%
ARTIK OEM CORPORATION	BODY APPLIED PARTS - EXTERIOR	0.075%
CARFAIR COMPOSITES USA INC	BODY APPLIED PARTS - EXTERIOR	0.361%
DALSIN INDUSTRIES INC	BODY APPLIED PARTS - EXTERIOR	0.021%
ELO ENGINEERING INC	BODY APPLIED PARTS - EXTERIOR	0.009%
GENERAL PLASTICS INC	BODY APPLIED PARTS - EXTERIOR	0.376%
IO KMG	BODY APPLIED PARTS - EXTERIOR	0.252%
PERFORATED METALS PLUS	BODY APPLIED PARTS - EXTERIOR	0.009%
ROMEO RIM INC	BUMPERS	0.214%
ENGINEERED MACHINED PRODUCTS	COOLING SYSTEM	0.374%
INTERSTATE ASSEMBLY SYSTEMS	COOLING SYSTEM	0.031%
IO KMG	COOLING SYSTEM	0.052%
METAL SOLUTIONS INC	COOLING SYSTEM	0.054%
MODINE MANUFACTURING	COOLING SYSTEM	1.140%
ORISKANY MFG TECHNOLOGIES	COOLING SYSTEM	0.096%
PARKER HANNIFIN CORPORATION	COOLING SYSTEM	0.017%
RITZ MACHINE WORKS USA LLC	COOLING SYSTEM	0.044%
BYK RAK LLC	CUSTOM EQUIPMENT	0.288%
INIT INNOVATIONS IN TRANSPORTATION INC	CUSTOM EQUIPMENT	0.100%
KIDDE AEROSPACE	CUSTOM EQUIPMENT	1.108%
MARCH NETWORKS CORPORATION	CUSTOM EQUIPMENT	0.677%
WESTBURNE ELECTRIC	CUSTOM EQUIPMENT	0.027%
CONDUENT TRANSPORT SOLUTIONS INC	DESTINATION SIGNS	1.697%
HANOVER DISPLAYS	DESTINATION SIGNS	0.097%
IO KMG	DESTINATION SIGNS	0.293%
LUMINATOR TECHNOLOGY GROUP INC	DESTINATION SIGNS	0.695%
S AND A SYSTEMS INC	DESTINATION SIGNS	0.131%
INDIANA MILLS & MANUFACTURING INC, DBA IMMI	DRIVER'S CONTROLS	0.011%
RH SHEPPARD CO INC	DRIVER'S CONTROLS	0.025%
IMECO CABLES AMERICA INC	ELECTRICAL HARNESSSES	0.033%
IO KMG	ELECTRICAL HARNESSSES	0.036%
WESTBURNE ELECTRIC	ELECTRICAL HARNESSSES	0.002%
VAPOR BUS INTERNATIONAL	DOORS	1.982%
CARFAIR COMPOSITES USA INC	EXTERIOR LIGHTS	0.009%
IO KMG	EXTERIOR LIGHTS	0.053%
JW SPEAKER CORPORATION	EXTERIOR LIGHTS	0.104%
ALTRO USA INC	FLOORING	0.198%
ARTIK OEM CORPORATION	FLOORING	0.391%
CARFAIR COMPOSITES USA INC	FLOORING	0.441%
FIRESTONE INDUSTRIAL PRODUCTS	FRONT SUSPENSION	0.019%

**BUY AMERICA CALCULATION  
SCHEDULE OF VERIFIED COMPONENTS**

<b>Vendor Name</b>	<b>Component / Subcomponent Description</b>	<b>Percentage of Total Cost</b>
MAN ENGINES AND COMPONENTS	FRONT SUSPENSION	0.455%
MGM BRAKES	FRONT SUSPENSION	0.023%
RH SHEPPARD CO INC	FRONT SUSPENSION	0.068%
ROADMASTER INC	FRONT SUSPENSION	0.069%
ZF GAINESVILLE LLC	FRONT SUSPENSION	0.052%
WESTBURNE ELECTRIC	HARNES MOUNTING SUPPORTS	0.014%
AMETEK TECHNICAL INDUSTRIAL	HEATING & AIR CONDITIONING SYSTEMS	0.228%
ARTIK OEM CORPORATION	HEATING & AIR CONDITIONING SYSTEMS	0.007%
DALSIN INDUSTRIES INC	HEATING & AIR CONDITIONING SYSTEMS	0.025%
INTERSTATE ASSEMBLY SYSTEMS	HEATING & AIR CONDITIONING SYSTEMS	0.011%
IO KMG	HEATING & AIR CONDITIONING SYSTEMS	0.140%
JOHNSON WELDED PRODUCTS	HEATING & AIR CONDITIONING SYSTEMS	0.024%
ORISKANY MFG TECHNOLOGIES	HEATING & AIR CONDITIONING SYSTEMS	0.044%
POLAR BEAR RUBBER LTD	HEATING & AIR CONDITIONING SYSTEMS	0.010%
THERMO KING LLC	HEATING & AIR CONDITIONING SYSTEMS	3.135%
WESTBURNE ELECTRIC	HEATING & AIR CONDITIONING SYSTEMS	0.000%
IO KMG	INSTRUMENT PANEL & SWITCHES	0.182%
ARTIK OEM CORPORATION	INSULATION	0.111%
PERFORATED METALS PLUS	INSULATION	0.058%
ARTIK OEM CORPORATION	INTERIOR LIGHTS	0.063%
IO KMG	INTERIOR LIGHTS	0.770%
SAFE FLEET BUS AND RAIL	MIRRORS	0.166%
RADIO ENGINEERING IND INC	P.A. SYSTEM	0.008%
GENERAL PLASTICS INC	PASSENGER SIGNALS	0.009%
IMECO CABLES AMERICA INC	POWER CABLES	0.257%
IO KMG	POWER CABLES	0.135%
WESTBURNE ELECTRIC	POWER CABLES	0.002%
BERENDSEN FLUID POWER	POWER STEERING	0.623%
METAL SOLUTIONS INC	POWER STEERING	0.044%
WESTBURNE ELECTRIC	POWER STEERING	0.000%
ARTIK OEM CORPORATION	PROPULSION DRIVE	0.107%
IO KMG	PROPULSION DRIVE	0.017%
FIRESTONE INDUSTRIAL PRODUCTS	REAR SUSPENSION	0.038%
INTERSTATE ASSEMBLY SYSTEMS	REAR SUSPENSION	0.012%
IO KMG	REAR SUSPENSION	0.210%
MACKOW INDUSTRIES INTERNATIONAL	REAR SUSPENSION	0.028%
MAN ENGINES AND COMPONENTS	REAR SUSPENSION	0.817%
MGM BRAKES	REAR SUSPENSION	0.066%
ZF GAINESVILLE LLC	REAR SUSPENSION	0.065%
AROW GLOBAL CORP	SEATS, STANCHIONS, MODESTY PANELS	0.901%
IO KMG	SEATS, STANCHIONS, MODESTY PANELS	0.557%
ORISKANY MFG TECHNOLOGIES	SEATS, STANCHIONS, MODESTY PANELS	0.068%
UNITED SAFETY & SURVIVABILITY CORPORATION	SEATS, STANCHIONS, MODESTY PANELS	5.899%
IO KMG	SIDE CONSOLE & PANELS	1.794%
WESTBURNE ELECTRIC	SIDE CONSOLE & PANELS	0.001%
NEW FLYER OF AMERICA	STRUCTURES	3.705%
IO KMG	TAPPING PLATES	0.008%
IMECO CABLES AMERICA INC	WHEELCHAIR RAMPS	0.018%
IO KMG	WHEELCHAIR RAMPS	0.017%
HOWMET AEROSPACE INC	WHEELS & TIRES	0.369%
AROW GLOBAL CORP	WINDOWS	2.650%
CUSTOM GLASS SOLUTIONS LLC	WINDOWS	0.025%
POLAR BEAR RUBBER LTD	WINDOWS	0.031%
		<b>70.167%</b>

# Award the Purchase of Zero-Emission Buses



# Background

- 2018 California Air Resources Board - Innovative Clean Transit Rule
- 2020 Orange County Transportation Authority (OCTA) submitted the Board of Directors-approved Zero-Emission (ZEB) Rollout plan
- 2020 Initiated the ZEB Pilot Program
  - 10 fuel-cell electric buses (FCEB)
  - 10 battery-electric buses (BEB)
- 2024 Expand the ZEB fleet
  - 40 FCEBs
  - 10 BEBs

# Zero-Emission Buses



## Equipment and Support

- OCTA standard equipment
- Operator protection barrier
- Three-position bike rack
- ADA/accessibility equipment
- USB chargers and Wi-Fi
- On-board video surveillance system
- 360-degree cameras
- Awareness monitors/displays
- Fire and hydrogen detection systems
- Radio communication system wiring
- Extended warranties
- Technician training
- Preventive maintenance and procedure manuals
- Operator manuals
- Parts manuals

## ZEB Improvements

- BEB - Larger battery capacity 650 kWh
  - *Increases operating range*
- FCEB - Larger fuel-cell 100 kWh
  - *Improves route deployment*

\*ADA – Americans with Disabilities Act

USB – Universal Serial Bus

kWh – Kilowatt hour

# Cost Analysis

Procurement Year FCEB	Price	Procurement Year CNG	Price	FCEB Cost Over CNG
2018 FCEB	\$1,296,262	2019 CNG	\$608,312	113%
2024 FCEB	<b>\$1,589,863</b>	2024 CNG (Est)	\$966,500	64%

Procurement Year BEB	Price	Procurement Year CNG	Price	BEB Cost Over CNG
2020 BEB	\$1,037,000	2019 CNG	\$608,312	71%
2024 BEB	<b>\$1,387,039</b>	2024 CNG (Est)	\$966,500	44%

Bus Type	Original Proposal (May 2024)	Negotiated Final Price	Savings
40 FCEBs	\$69,764,991	\$63,594,512	<b>-\$6,170,479</b>
10 BEBs	\$14,624,938	\$13,870,388	<b>-\$754,550</b>
			<b>-\$6,925,029</b>

\*CNG – Compressed Natural Gas

\*Est – Estimate

# Recommendations

- A. Approve the selection of New Flyer of America Inc. as the firm to provide 40 fuel-cell electric buses intended to replace 40 buses that have exceeded their useful life.
- B. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3021 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$63,594,512 for the purchase of up to 40, 40-foot fuel-cell electric buses.
- C. Approve the selection of New Flyer of America Inc. as the firm to provide ten battery-electric buses intended to replace ten buses that have exceeded their useful life.
- D. Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-3-3022 between the Orange County Transportation Authority and New Flyer of America Inc., in the amount of \$13,870,388, for the purchase of up to ten, 40-foot battery-electric buses.



**November 14, 2024**

**To:** Transit Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** 2024 OC Transit Vision Progress Update

A handwritten signature in blue ink, appearing to read "DEJ", with the word "For" written in smaller letters above it.

### **Overview**

The OC Transit Vision is a 30-year integrated master plan for enhancing and expanding public transit service in Orange County. This plan recommends improvements to existing transit service and identifies future potential transit corridors. The draft executive summary and action plan has been developed for Board of Directors' consideration. The final 2024 OC Transit Vision is expected to be complete by the end of 2024.

### **Recommendation**

Direct staff to incorporate draft recommendations into the final 2024 OC Transit Vision Report which will inform the upcoming 2026 Long-Range Transportation Plan.

### **Background**

The Orange County Transportation Authority (OCTA) initiated the 2024 OC Transit Vision (Plan) in spring 2023, building off of the 2018 Plan. This effort takes a high-level look at long-term transit needs throughout Orange County and recommends both improvements to existing transit service and identifies a series of corridors suitable for additional transit improvement. In addition, the Plan will guide future recommendations for fixed-route bus service and innovative mobility strategies. Projects identified in the Plan will be included in the OCTA Long-Range Transportation Plan (LRTP) and position OCTA for upcoming transit funding opportunities.

### **Discussion**

The draft 2024 OC Transit Vision Executive Summary (Attachment A) is the culmination of efforts completed over the last 18 months. These efforts included regular updates to, and input from, the OCTA Citizens Advisory Committee,

Transit Committee, and Board of Directors (Board). General public and other stakeholder input was solicited via interviews and throughout the process, which is also reflected in the Plan.

Development of the Plan was initiated through the “State of OC Transit” report, which provided the existing conditions for the transit system. This was followed by the establishment of the project goals and objectives to determine countywide priorities for transit. During this step, 24 “Transit Opportunity Corridors” (TOC) were identified, evaluated, and screened to determine the top TOCs in Orange County where transit demand is strongest for increased service and capital investments. In addition to the corridor recommendations, proposals for transit service improvements in other areas of Orange County have also been included. The draft 2024 OC Transit Vision Executive Summary provides an overview of the process and recommendations. The full report is expected to be completed by the end of the year and will be posted on the OCTA website.

Staff presented the draft recommendations to the Board in May 2024. The Board directed staff to implement Phase 2 of the public outreach plan to gather feedback on the draft countywide transit strategies with a focus on selecting the top TOCs. Evaluation criteria were applied to rank the top ten TOCs that will advance to the final list of recommendations. Based on public input and technical analysis, the Plan outlines the following countywide transit strategies and ten TOCs.

#### Strategies for Countywide Improvements

In areas of Orange County not recommended for TOCs, the Plan recommends additional public transit service to better meet the needs in these communities. These recommendations include:

- Fully implement the Making Better Connections Plan with Board-approved improvements to OC Bus routes and conduct an OC Bus Comprehensive Operations Analysis to identify additional systemwide enhancements.
- Analyze remaining TOCs that did not make the list of top ten for potential OC Bus improvements.
- Conduct an Express Bus and follow-up Freeway Bus Rapid Transit Study that addresses post-pandemic regional travel demand.
- Monitor the performance of OC Flex and pursue partnerships through Project V to expand on-demand services.
- Implement OC ACCESS software integration and a transportation network company (Uber/Lyft) pilot program to expand paratransit access.
- Promote the OC Vanpool subsidy increase and expand partnerships with employers.
- Coordinate with active transportation projects to improve first/last mile connections and conduct a follow-up study to expand mobility hubs.

These recommendations are being considered for inclusion in the LRTP. This process will help determine which projects are feasible to be included in the LRTP's financially constrained project list.

#### Transit Opportunity Corridors to Major Destinations

As Orange County looks to the future, the core of the County will continue to become more dense with respect to housing, employment, and activity areas as well as concentration of key destinations. Meeting the related transportation needs will require more efficient and effective public transportation options given that roadways are approaching full capacity.

The Plan anticipates increased transit demand on Harbor Boulevard with the commencement of the OC Streetcar operations. The OC Streetcar will travel between the Santa Ana Regional Transportation Center in the City of Santa Ana and the intersection of Harbor Boulevard and Westminster Avenue in the City of Garden Grove. The Plan recommends ten-minute peak frequencies for the Harbor Boulevard TOC with potential capital investments to improve speed and reliability such as transit signal priority and dedicated bus lanes.

The Plan also proposes both short-term and long-term improvement strategies for the Katella Avenue TOC. A short-term recommendation is to extend OC Bus Rapid Route 553 from the Anaheim Regional Transportation Intermodal Center (ARTIC) to the Anaheim Resort along Katella Avenue starting in 2025. The route currently serves the Main Street corridor through downtown Santa Ana and the City of Orange. The proposed 2.3-mile extension from ARTIC to the Anaheim Resort at Harbor Boulevard would approximately double OC Bus frequencies, improve multimodal connections, and promote a convenient one-seat ride for residents and workers to the resort area. A long-term recommendation is to extend limited-stop bus service on Katella Avenue from the Anaheim Resort to California State University, Long Beach.

#### Transit Opportunity Corridors to Transportation Hubs

As the Los Angeles Metro rail system continues to expand, the Southeast Gateway Line will terminate close to the Orange County Line near the Los Cerritos Center in Cerritos around 2035. As part of the Plan, the La Palma Avenue/Lincoln Avenue TOC was evaluated as an east/west corridor connecting North Orange County with regional bus service and the future Southeast Gateway Line in Los Angeles County.

In October, the Southern California Regional Rail Authority's Metrolink (Metrolink) expanded its regional rail service in Orange County with seven additional trips on the Orange County Line and four additional trips on the Inland Empire-Orange County Line. Long-term plans call for further increases in the number of rail trips. The Plan recommends two potential east/west TOCs that

would facilitate regional travel between the Goldenwest Transportation Center in the City of Huntington Beach and the Tustin Metrolink Station. The Edinger Avenue TOC would serve high-density residential neighborhoods in central Orange County, while the Warner Avenue TOC would increase bus frequencies in the emerging Tustin Legacy mixed-use district in the City of Tustin. Other TOCs with connections to Metrolink stations include the Westminster Avenue/17th Street TOC at the Santa Ana Regional Transportation Center, Main Street TOC at ARTIC, and the Garden Grove Boulevard/Chapman Avenue TOC at the Orange Metrolink Station.

Throughout the public involvement process, OCTA staff received requests to expand transit service to John Wayne Airport. This recommendation was included as part of the 2018 OC Transit Vision and the Bristol Street Corridor Study in 2020. OC Bus Route 76 currently travels to the airport approximately every hour. The Plan recommends studying the feasibility of a State College Boulevard/Bristol Street TOC that would serve the John Wayne Airport every ten minutes during peak hours and every 15 minutes during off-peak hours.

Another major transportation hub is the Fullerton Park-and-Ride, which serves six OC Bus routes and one Los Angeles Metro bus route. The Beach Boulevard TOC would travel from the Fullerton Park-and-Ride to Pacific Coast Highway in the City of Huntington Beach.

The TOCs are recommended for areas which justify the higher level of capital and operating investment required for higher-capacity transit. Either ten- or 15-minute peak frequencies are being proposed for the TOCs, depending on the corridor. In general, the cities with the highest transit ridership would have the most lines, and 17 of 34 cities would have at least one line.

### 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 spring and summer 2024, an engagement strategy was executed to increase awareness of the Plan and encourage active participation in a community webinar and survey, which included questions related to the TOCs. The countywide transit strategies were also presented and discussed during the stakeholder and general public meetings.

The following engagement was completed from May to July. All materials were created in English, Spanish, and Vietnamese. A complete Phase 2 Public Engagement and Survey Analysis Report is included in Attachment B.



- Collected 4,423 multilingual surveys
- Hosted a community webinar, community leader's roundtable, planning forum, and elected official's roundtable
- Presented and facilitated discussions at OCTA's Citizens Advisory Committee, Diverse Community Leaders group, and bus customer roundtable
- Engaged more than 3,300 community members at 20 events throughout Orange County
- Reached more than 75,000 readers through Spanish and Vietnamese newspapers
- Sent five email notices in multiple languages to more than 2,500 interested community stakeholders
- Advertised the webinar and survey through Facebook, Instagram, and X (Twitter) posts

OCTA incorporated survey results and public feedback when scoring the ten TOCs. OCTA also used public feedback to improve countywide coverage, such as expanding transit service in higher-growth areas, facilitating regional connections through express bus service, and constructing mobility hubs.

### **Summary**

With Board direction, OCTA will incorporate draft recommendations and action plan into the final 2024 Plan report which will inform the upcoming 2026 LRTP. The final 2024 Plan report will be posted on OCTA's website and will be made available to cities and the public upon request.

### **Attachments**

- A. 2024 OC Transit Vision, Executive Summary
- B. 2024 OC Transit Vision Public Engagement and Survey Analysis Report Phase 2

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# 2024 OC TRANSIT VISION

## EXECUTIVE SUMMARY

OCTOBER 2024





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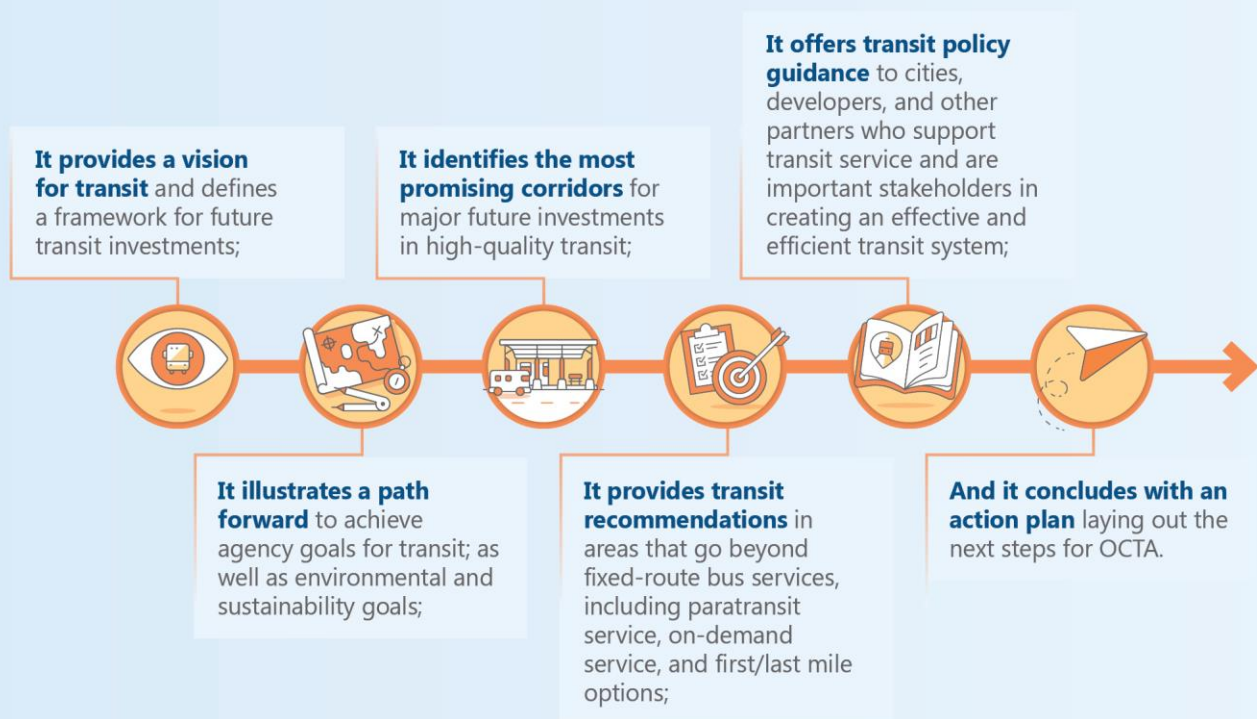
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# WHY AN OC TRANSIT VISION

The OC Transit Vision is a 30-year plan for enhancing and expanding public transit service in Orange County. The Vision identifies near-term, mid-term, and long-term projects and programs that can make transit a more compelling travel option for Orange County residents and visitors.

Why develop a vision for transit in Orange County? Because the county is evolving, and major changes have been taking place in the transportation landscape—with more of them on the horizon. OCTA, in turn, has had to look at the transit services it provides from the ground-up to be relevant for these changing times. Emerging technologies, impacts from the coronavirus pandemic, and policy shifts have all forced transit providers like OCTA to evolve. The OC Transit Vision is an effort by OCTA to be more responsive and proactive in addressing the changing transit market. This is the second OC Transit Vision which builds upon the goals and objectives laid out in the 2018 Plan.

The OC Transit Vision features a number of elements to help improve transit service today and in the coming decades.



## WHAT IS TRANSIT LIKE TODAY?

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OC Bus is OCTA's largest and most visible service, providing 52 routes and serving 30 million passengers annually throughout Orange County (2023). OC Bus also provides service to major events and destinations, as well as vanpools and OC ACCESS service for those with disabilities.

OCTA's OC Bus Rapid comprises of four rapid lines, providing service that is faster and more reliable, convenient, and attractive than local bus service. Stops serve only the busiest locations, such as transfer points and major destinations.

Scheduled to open in 2025, the OC Streetcar will be Orange County's first urban rail line. It will run more than four miles from the Santa Ana Regional Transportation Center to Garden Grove, intersecting with existing OC Bus Rapid routes to form a key transit connection. Orange County is served by both Amtrak Pacific Surfliner and Metrolink regional/commuter rail lines. The Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor is a north-south regional rail spine connecting Orange County to Los Angeles and San Diego. LA Metro operates service connecting to 17 OC Bus routes. Agencies in neighboring counties also provide limited connections to Orange County transit services.

More locally, numerous communities offer a variety of circulators, shuttles, ridershare services, and active transportation options.

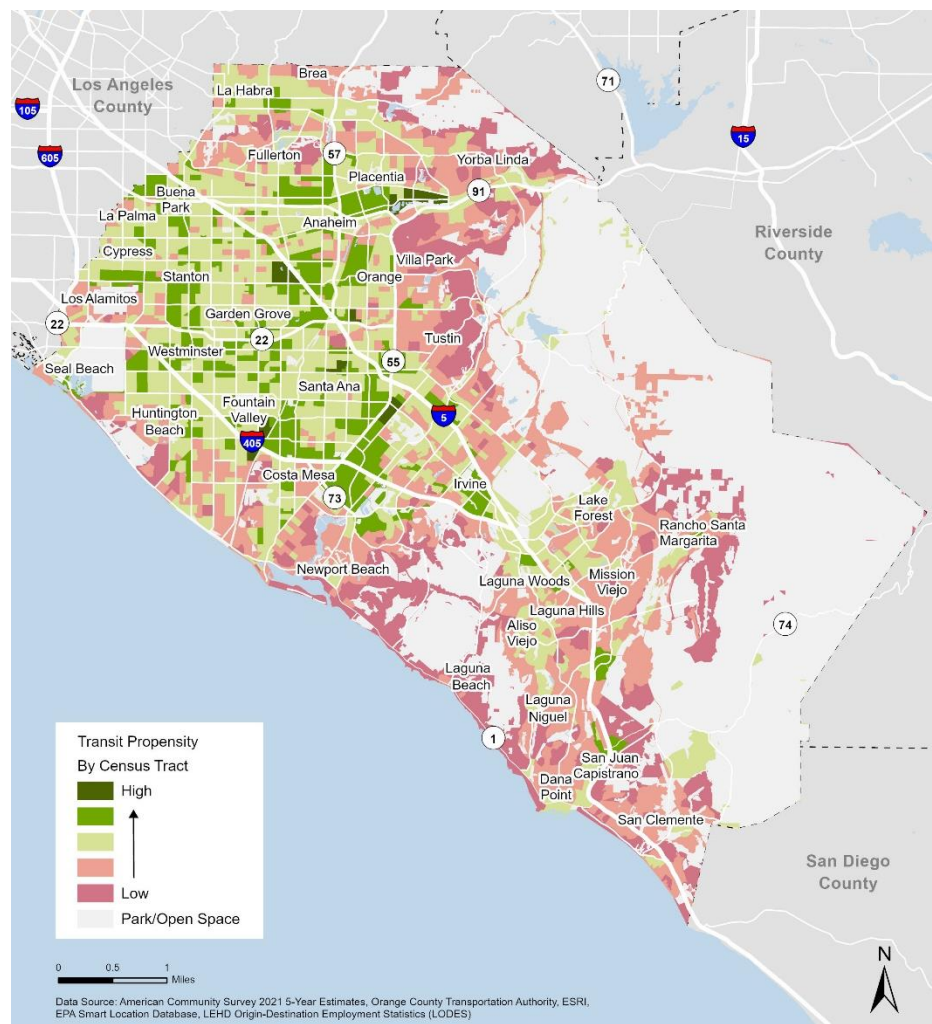


## WHERE ARE INVESTMENTS NEEDED?

The population of Orange County is nearly 3.2 million people, making it the third most populous county in the state. To understand where transit investments are needed both today and in the future, the OC Transit Vision looks at travel patterns and demand for service by considering the following factors: traffic volumes, intersection density, total employment, employment density, low-income households, and per capita income. These factors determine transit propensity, where people are more likely to use transit in Orange County (see Figure 1).

- In Orange County, most areas of high and medium-high transit propensity are located in the urban core of north/central county, most notably in Santa Ana and Anaheim. There are, however, areas of relatively high propensity throughout Irvine and south along the I-5 corridor.
- Lower-income individuals and households—those more likely to rely on transit—are highly concentrated in the urban core of north/central county.
- The Irvine Business Complex boasts the largest concentration of jobs in Orange County. However, it is located in an especially auto-oriented part of the county and does not currently generate significant transit ridership.
- Wealthier, auto-centric communities along the coast, to the east, and in much of south county demonstrate lower levels of transit propensity.

FIGURE 1 TRANSIT PROPENSITY MAP





## How Have We Involved the Community?

### Interactive Surveys

The project team conducted two multilingual interactive surveys, available in multiple languages, to solicit feedback regarding the existing transit system and proposed OC Transit Vision recommendations.

The project team met quarterly with the OCTA Citizens Advisory Committee and participated in two workshops with county elected officials and planning directors.

### Citizens Advisory Committee, Elected Officials, and Planning Directors Meetings

### Public Engagement

The project team implemented a comprehensive outreach plan that included attending 32 community events, hosting multiple stakeholder roundtables and webinars, conducting stakeholder interviews, and making multiple presentations.



## What Is the Community Saying About Transit?

Across these various engagements and from the thousands of people who shared their feedback, a number of priorities emerged. People expressed particular support for the following improvements to transit in Orange County:



**Faster and more frequent transit** that is time competitive with driving, such as rapid transit in the core of the county or express bus serving trips over long distances.



**Longer hours of operation**, and more frequent service during peak and off-peak periods, including early morning, late night, and weekends.



**More service to more areas**, including lower-usage areas.



**More seasonal and special event services**, similar to the existing beach community trolleys, OC Fair Express, and Angels Express.



**More service outside of Orange County**, including more inter-city and regional rail service, express bus routes, and connections with other transit agencies.



**Direct service to key activity and employment centers** that is cost efficient and time competitive with driving.

# TRANSIT VISION RECOMMENDATIONS

Improving transit service and expanding travel options in Orange County requires a multifaceted approach that relies on partnerships with OCTA and the county's jurisdictions. This section outlines a vision and goals for transit in Orange County and offers recommendations for improving transit—both in the higher transit demand areas of north county and in the lower transit demand areas of south county. The analysis to inform these recommendations considered both current and future conditions, recognizing that changes to the transportation network and built environment needed to support transit will evolve as Orange County continues to grow and change.

This section introduces recommendations focused on specific corridors and routes as well as new types of services and programs that can be provided countywide. Collectively these recommendations form a transit vision that will support the next 30 years of growth and development in Orange County.

## What Is Our Vision for Transit?



Provide compelling and competitive transit service that expands transportation choices for current riders, attracts new riders, and equitably supports immediate and long-term mobility in Orange County.

## 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 services that supports community priorities



### Sustain

Create a system that is *resilient* over the long term

The recommendations of the OC Transit Vision acknowledge that different types of services are needed in different parts of the county. Higher capacity, fixed-route transit (like Rapid Bus and Bus Rapid Transit [BRT]) has great potential for success in Orange County’s denser, more walkable areas. At the same time, service in the lower density, more suburban areas of the county should focus on key connections to jobs, including local bus routes and on-demand services.

The OC Transit Vision offers something for everyone, whether improvements to existing OC Bus routes, enhancements to OC ACCESS paratransit service, new high-capacity transit corridors, expanded seasonal and special event services, “microtransit” (or on-demand) service, more trips on Metrolink, or future connections to Los Angeles County. The recommendations shown in Figure 2 on page 9 capture the key corridor investments identified through the OC Transit Vision. Additional information about all countywide recommendations can be found in the following sections.

## INVESTMENTS IN TRANSIT OPPORTUNITY CORRIDORS

One of the primary reasons to develop a transit vision for Orange County was to identify Transit Opportunity Corridors (TOC)—high-demand corridors meriting major investment in higher-quality service (see Transit Propensity map on page 3). Major investments along TOCs may include more frequent service, higher-capacity vehicles, roadway improvements such as transit signal priority and dedicated lanes, and other transit enhancements to improve speed and reliability. The following two modes appeared most feasible for Orange County and were evaluated as part of the TOC development process.



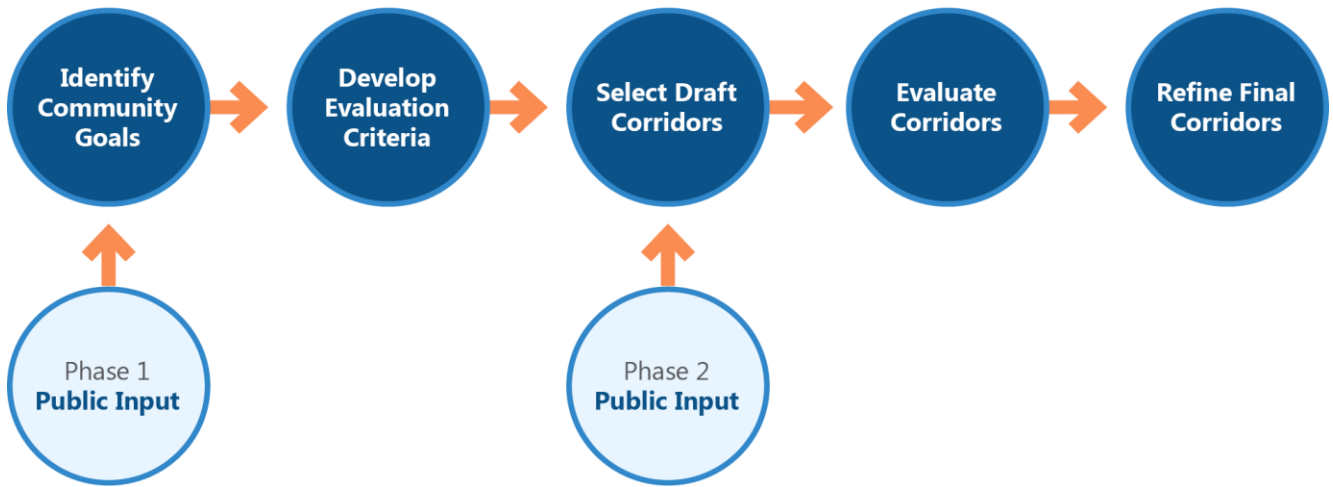
**Bus Rapid Transit**

*Enhanced bus service that operates on dedicated lanes or with signal priority, offering faster and more frequent service.*



**Rapid Bus**

*Bus service that is similar to BRT but does not operate in dedicated transit lanes. Targeted measures to improve transit priority may include queue jump lanes and signal priority. OCTA currently operates four rapid routes.*



The Transit Opportunity Corridors were selected based on community input and technical evaluation:

- Initial public input helped to determine shared community goals for transit in Orange County.
- The goals helped to shape the TOC evaluation criteria.
- A second round of public input—including an interactive online survey in which respondents could see corridors and vote for their preferred options—helped to select a prioritized list of TOCs for evaluation.
- The TOC evaluation used criteria based on OC Transit Vision goals and public feedback from the second round of public input to rank the top ten corridors.



## TRANSIT OPPORTUNITY CORRIDORS - NEXT STEPS

- Conduct corridor studies for the Bristol/State College, Harbor, and Beach corridors.
- Identify short-term corridor improvements (2025–2029) to support the OC Streetcar, major destinations, and future events such as the 2028 Olympic and Paralympic Games.
- Implement all ten TOCs through a phased approach over the mid to long term (2030–2040+).

FIGURE 2 TRANSIT OPPORTUNITY CORRIDORS



## COUNTYWIDE TRANSIT STRATEGIES

### Fixed-Route Recommendations

Continue to improve the efficiency and connectivity of the bus network through full implementation of the Making Better Connections (MBC) Plan. Through the MBC Plan, certain routes will experience increased frequencies, extended operational hours, and reduced wait times at transfer locations. A separate OC Bus Comprehensive Operations Analysis should be conducted over the next five years to analyze travel patterns since the pandemic and further optimize service levels. The OC Transit Vision also recommends a study to explore the feasibility of returning express bus service that was discontinued during the pandemic.

Other fixed-route recommendations include the following:

- Identify short-term transit improvement strategies on Harbor Boulevard upon completion of two ongoing Harbor corridor studies.
- Extend OC Bus Rapid Route 553 from the Anaheim Regional Transportation Center (ARTIC) to the Anaheim Resort on Katella Avenue to serve increased demand due to the upcoming OC Vibe project and Anaheim Resort expansion.
- Determine high-growth areas in the county where OC Bus service coverage may expand or where existing route frequencies may increase.
- Implement a new Rider Validation System (RVS) to simplify the fare payment process and introduce a fare capping mechanism to save riders money.
- Accelerate the transition to a 100 percent zero-emission bus fleet by 2040 to fully comply with The State of California's clean air goals.
- Prepare for OC Streetcar by coordinating bus connections through the Bus-Rail Interface Plan.

## LOSSAN/Metrolink Improvements

The LOSSAN corridor is the existing rail spine for Orange County. A regional rail line, it connects Orange County to downtown Los Angeles. Within Orange County, it runs from Buena Park in the north to San Clemente in the south via major destinations, including downtown Fullerton, Anaheim's Platinum Triangle, downtown Santa Ana, Irvine, and Laguna Niguel. It is served by multiple operators and several lines, including Amtrak's Pacific Surfliner from San Luis Obispo to San Diego, as well as the Metrolink Orange County, 91/Perris Valley, and Inland Empire-Orange County lines. Additionally, the Metrolink 91/Perris Valley and Inland Empire-Orange County lines operate on tracks east of LOSSAN, connecting to Riverside County.

OCTA should support improvements to Orange County rail service planned by Metrolink and other partner agencies. Proceed with existing plans to increase the number of rail trips, improve station access, and reduce the number of at-grade crossings.

## OC Vanpool Expansion

OCTA's OC Vanpool Program offers a subsidized, month-to-month shared commuting option for groups of seven to 15 people traveling to workplaces within Orange County. As demand for vanpool services begins to recover from the coronavirus pandemic, OCTA may incentivize employee vanpools in a number of ways:

- Promote increased financial incentives offered to participants. OCTA recently increased vehicle lease subsidies from \$400 to \$600, as well as an additional \$100 for high-occupancy vanpools and zero-emission vehicles.

- Continue partnership with the California Department of Transportation to expand the high-occupancy vehicle (HOV) lane network on freeways.

## Paratransit Enhancements

OC ACCESS provides nearly one million boardings annually and projected growth in the population of older Americans is expected to boost paratransit demand in the future. Recognizing the growth in paratransit costs, OCTA has begun taking steps to manage demand, including continued support of senior mobility programs, expanding cooperative agreements, and expanding the Same-Day Taxi Program. Going forward, the following additional steps will be implemented over the short term:

- Procurement of a Software-as-a-Service (SaaS) that will retire current legacy products and bring all services available to OC ACCESS eligible riders under one platform while integrating with the existing OC Bus app. The new software will provide flexibility for other service types like Same-Day Taxi and Senior Mobility Programs to easily schedule trips for alternative services. Scheduling and dispatching for paratransit trips will be automated to improve accuracy and continuous optimization.
- Initiation of a Transportation Network Company (TNC) Pilot that will utilize services like Uber and Lyft to provide supplemental services to the Same-Day Taxi Program in an effort to expand access to more paratransit riders.

## Seasonal and Special Event Services

Building on the success of existing services such as the beach community trolleys, the OC Fair Express, and the Angels Express, seek other opportunities to provide part-time service where traffic and parking issues make transit an attractive alternative.

OCTA should explore opportunities to expand its existing seasonal and special event services. It should also pilot new services through Project V (its program of matching grants for local transit services), which may include on-demand “microtransit” in areas of the county where demand for fixed-route service is low. A Measure M2 Project V call for projects in 2031 should focus on additional opportunities for seasonal, on-demand, and special event services that reduce local congestion and expand access.

## First/Last Mile Connections

Every transit trip begins and ends with a connection to an origin or destination. Investments in first/last mile journeys are essential for making transit trips safe, accessible, and convenient for riders.

OCTA should advance recommendations outlined in the Mobility Hub Study to implement a suite of mobility services at major transit centers and destinations throughout the county.



The active transportation network also plays an important role in expanding access to transit. OCTA should continue to coordinate with local jurisdictions to improve connections to bus stops and transit services.



# TRANSIT ACTION PLAN

The OC Transit Vision has been developed over 18 months with significant input from the OCTA Board of Directors, the OCTA Citizens Advisory Committee, elected officials, and municipal staff from Orange County's 34 jurisdictions, and thousands of residents and visitors to Orange County. The plan builds on extensive data analysis and national best practices to explore transit trends and markets and proposes recommendations for improving transit throughout Orange County.

Implementing the recommendations of the OC Transit Vision will require concerted effort and resources from OCTA. While many of the projects identified in this plan will take years to come to fruition, there are steps that OCTA can take immediately to begin moving the vision to reality. This chapter outlines a phasing strategy for implementing the OC Transit Vision.

## HOW DO WE MOVE TO ACTION?

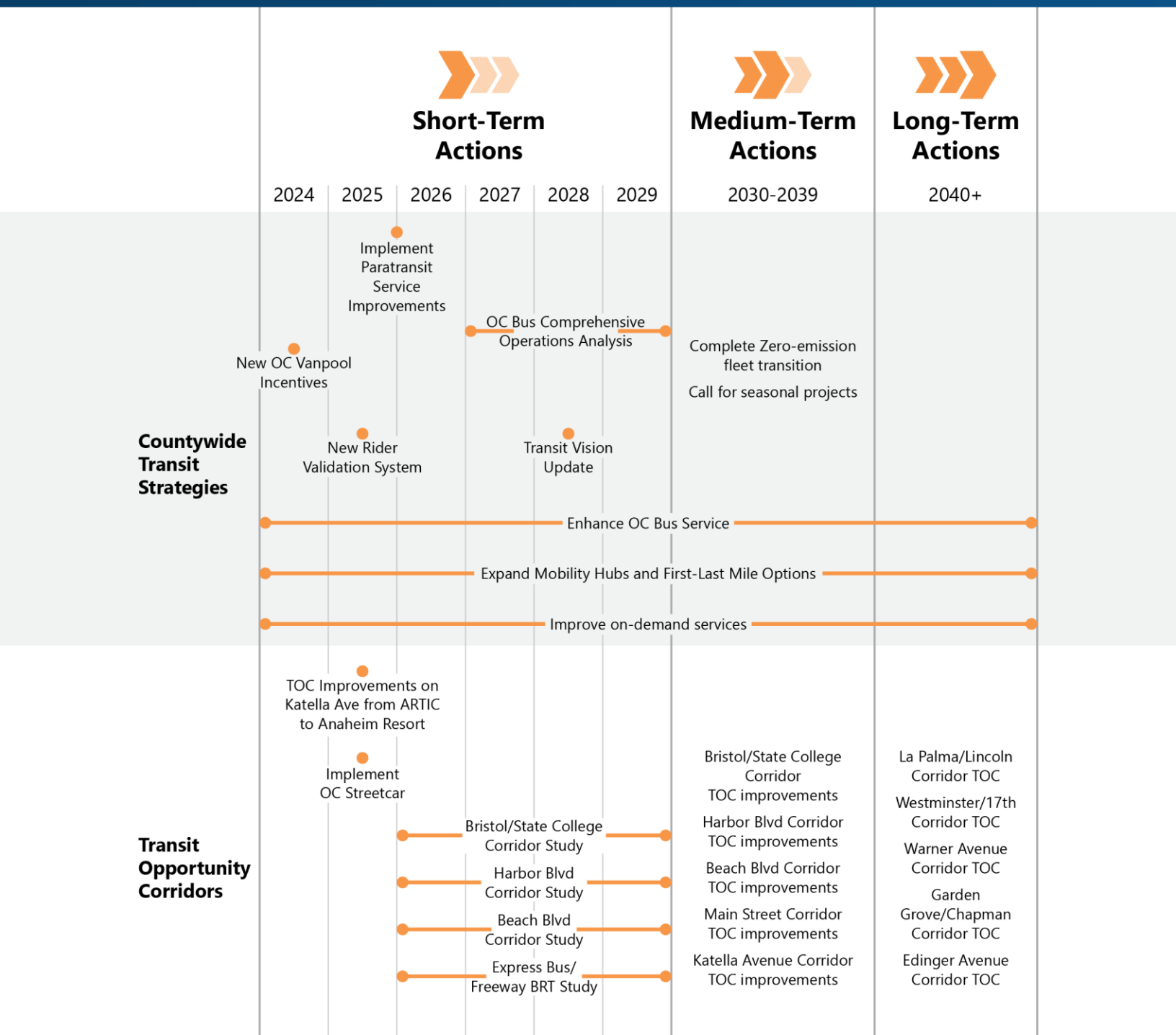
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The projects outlined in the OC Transit Vision are grouped into three timeframes for implementation: short-term (2025–2029), mid-term (2030–2039), and long-term (2040+). This phasing approach recognizes the project development process for major capital investments, such as procuring zero-emission buses and implementing the OC Streetcar, as well as existing and projected OCTA revenues.

The short-term recommendations focus on projects, programs, and additional studies that largely can be undertaken using existing OCTA resources. By improving bus service on existing routes through the MBC Plan, expanding countywide transit services, and advancing studies along high-priority TOCs, OCTA can take immediate steps to make transit more frequent, fast, and reliable for Orange County residents and visitors.

The mid- and long-term recommendations will require additional revenues and depend, in part, on progress made in the next five years.

FIGURE 3 OC TRANSIT VISION PHASING



## WHERE DO WE GO FROM HERE?

The OC Transit Vision builds on the transit service and programs that are working well in Orange County today and sets a vision for “compelling and competitive transit service that expands transportation choices for current riders, attracts new riders and equitably supports immediate and long-term mobility” in the county.

The OC Transit Vision provides a near-, mid-, and long-term roadmap for making transit an increasingly popular choice for travel to, through, and within Orange County. The Vision identifies specific actions and investments that will help OCTA achieve the goals set forth and prioritizes which steps to take immediately.



The Vision is built on 18 months of research, analysis, and conversations with Orange County residents and visitors. The recommendations are data-driven and are targeted to different needs and markets throughout the county. High-capacity transit projects are focused in areas of Orange County with a high propensity for transit use, while on-demand services and integrated mobility hubs with first/last mile connections are recommended for areas where fixed-route transit historically has been less successful. This combination of approaches means that the OC Transit Vision offers something for everyone—and tailors mobility options to match markets and the communities OCTA serves.

Looking to OCTA’s past successes, and to the good work happening in the county and region today, the OC Transit Vision helps Orange County chart a path to becoming a home for transit service that provide mobility for all residents and visitors.



OCACCESS

OCTA **OCbus.com**

Operated By:  
**First Transit**  
CA 100967

**OCACCESS**

CA 100967  
**1280070**

6005

OCACCESS



## 2024 OC Transit Vision

### *Public Engagement and Survey Analysis Report*

### *Phase 2*

---

October 2024

**Prepared for:** Orange County Transportation Authority  
550 South Main Street  
Orange, CA 92868



**Prepared by:** Arellano Associates  
5851 Pine Avenue, Suite A  
Chino Hills, CA 91709



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## I. EXECUTIVE SUMMARY

The Orange County Transportation Authority (OCTA) continues to develop the 2024 OC Transit Vision (Plan), which is a 30-year plan aimed to integrate, enhance, and expand transportation services in Orange County. This study builds upon the previous 2018 transit plan and other recent studies to establish a framework for future transit investments that include high-capacity transit corridors, which offer fast and frequent service, and other recommendations ranging from fixed-route bus to first/last mile options. For this effort, a community and stakeholder engagement program was developed to inform Orange County communities about the Plan and gain their feedback. This summary report documents the outreach and notification activities, along with community survey results for the latter part of the study, which was conducted from May 3 through July 14, 2024. The engagement strategy was executed to increase awareness and encourage active participation in a community webinar and survey, specifically seeking feedback on the proposed Transit Opportunity Corridors and countywide transit strategies.

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

Following the outreach efforts conducted in the first engagement phase, a separate strategy was developed to engage Orange County residents and stakeholders. The priorities for this phase focused on spreading information about the Plan and encouraging stakeholder participation in the public webinar and community survey.

The community engagement approach encompassed a range of outreach strategies designed to connect with the public and historically underserved Orange County communities. These engagement strategies included digital and traditional notification. Digital efforts included:

- Organic social media posts
- Emails to the OC Transit Vision database
- Posting to the OC Bus mobile ticketing app
- Creating and distributing a digital toolkit to community organizations

Traditional notification strategies involved:

- Posting flyers in county libraries and community centers
- Placing newspaper advertisements
- OC bus interior advertising
- Extensive efforts to target and directly engage with stakeholders at community events

*Figure 1 Anaheim Juneteenth Celebration*



Over the summer, a series of 20 pop-up events were conducted by the OC Transit Vision Outreach Team and OCTA's Diversity Outreach Team. The OC Transit Vision Outreach Team participated in 12 pop-ups across each of the five supervisorial districts in Orange County. The team also conducted two additional pop-ups each in Santa Ana and Anaheim, given the size and language diversity of the cities. The Diversity Outreach Team supported and promoted the survey effort at eight additional events. The pop-up events had two goals: to encourage residents to attend a public informational webinar on July 9th to learn more about the proposed transit improvement corridors and to drive overall survey participation. The survey aimed to ask the community to identify which corridors they felt were most important for potential transit improvements. These events provided opportunities to directly engage with the community, answer questions, provide information about the Plan, and receive feedback.

In conjunction with the pop-up efforts, stakeholder briefings and presentations were held during the engagement period. The project team presented at OCTA's Citizen's Advisory Committee, Diverse Community Leaders Group and the OC Bus Customer Roundtable. They also hosted a Community-Based Organization Roundtable, an Elected Officials Roundtable, and Planning Directors Forum for key stakeholders and local jurisdictions to learn more about the OC Transit Vision background and goals and receive input.

*Figure 2 Costa Mesa Dungan Library Pop-up*



## ii. Equitable Engagement

To reflect the county's diversity, the engagement strategy was created to connect with traditionally marginalized groups. Our goal was to gather input on the Plan from diverse audiences spanning various ethnic backgrounds, ages, languages, and socioeconomic statuses. As with the initial phase of engagement, project materials such as promotional flyers, bus advertisements, social media content, e-blasts, surveys, newspaper advertisements, and presentation materials were available in English, Spanish, and Vietnamese. In addition, the public webinar included live simultaneous interpretation in

*Figure 3 Santa Ana Cinco de Mayo*



Spanish, Vietnamese, and American Sign Language. This linguistic inclusivity helped break down barriers to access and participation.

Furthermore, the outreach team expanded its in-community outreach by connecting with the community at city-hosted events and cultural celebrations throughout the county. These events and locations were strategically chosen to reach residents less likely to do so through traditional means, a strategy that proved effective throughout the study. This targeted outreach approach was essential for gathering a wide range of perspectives, which enhanced our understanding of community priorities for transit corridor improvements.

### iii. Survey Implementation

The survey opened to the public on May 3, 2024, and closed on July 14, 2024. During that period, a total of 4,423 surveys were collected. Out of that total, 3,655 were collected in English, 505 in Spanish, and 263 in Vietnamese. Below is a summary of the survey implementation:

- The survey was provided in English, Spanish, and Vietnamese languages.
- The survey was made available in both digital and print form.
- Promotional print flyers were distributed to 13 community centers across the five Orange County supervisorial districts.
- The survey was promoted at 20 community pop-up events across Orange County.
- Transit pass incentives, light refreshments, and branded notepads were offered to encourage event visitors to learn more and take the survey.
- Both traditional and digital communication methods were developed to encourage survey participation. This includes use of newspaper advertisements, social media posts, emails, outreach toolkits, OC Bus mobile app, and bus interior advertising.
- As an incentive for participation, all respondents were given the opportunity to enter a sweepstakes, with the chance to win one of four gift cards valued at \$50 each.

*Figure 4 Fountain Valley Summerfest*



### iv. Survey Results Analysis

A survey was created to collect feedback from the Orange County community to learn more about which Transit Opportunity Corridor they would like to see potential transit improvements implemented. The survey opened on May 3, 2024, and closed on July 14, 2024. The top five corridors selected included Harbor Blvd (46%), Beach Blvd (43%), Garden Grove Blvd (31%), Katella Ave (31%) and Main St (30%). Please note that the survey percentage exceeds 100%

because it reflects how many times participants select each specific corridor. Following the first question, an open-ended question was asked, inviting suggestions for other potential transit corridors. The following section presents the questions and additional results from the survey.

**Table 1. Transit Corridors**

Q1: Below are twelve Orange County corridors identified for potential transit improvements. Please choose up to five of these transit corridors that you consider the most important to you.	
Harbor Blvd (Fullerton to Costa Mesa)	46%
Beach Blvd (Fullerton Park and Ride to Huntington Beach)	43%
Garden Grove Blvd - Chapman Ave (Westminster to Orange)	31%
Katella Ave (Long Beach to Orange)	31%
Main St (Anaheim to Costa Mesa)	30%
Bolsa Ave – 1st St (Westminster to Irvine)	27%
Edinger Ave (Goldenwest Transportation Center to Tustin Station)	27%
La Palma Ave - Lincoln Blvd (Cerritos to Orange)	25%
State College Blvd - Bristol St with South Coast Plaza to John Wayne Airport extension	24%
Westminster Blvd – 17th St (Long Beach to Santa Ana)	21%
State College Blvd - Bristol St (Brea to Costa Mesa) without extension to John Wayne Airport	18%
Warner Ave (Huntington Beach to Santa Ana)	18%

The second question of the survey was in an open-ended format. Survey participants were encouraged to write suggestions for a corridor not mentioned in the current list. Top five corridor suggestions included:

- Brookhurst St (16)
- Euclid St (15)
- Magnolia St (15)
- Orangethorpe Ave (15)
- Pacific Coast Hwy (14)

After completing the first two questions, survey participants had the option to complete demographic questions. Demographic participation was optional and did not affect their raffle eligibility.

**Table 2. Key Demographic Findings**

Survey Question	Response Rate	Top Three Findings
<b>Q3: What is your age range?</b>	94%	<b>35%</b> of participants were between the ages of 20-35, <b>27%</b> were between 36-50, and <b>20%</b> were between 51-65.
<b>Q4. What is your combined annual household income?</b>	79%	<b>32%</b> of the respondents make less than 30,000 a year in household income. <b>17%</b> of the respondents make between 30,000 to 49,000 annually in household income. <b>12%</b> of respondents shared their annual household income is between \$50,000-\$79,000.
<b>Q5. What ethnic group do you consider yourself a part of or feel closest to?</b>	90%	Over <b>51%</b> of respondents represent the Latino/Hispanic community. Followed by <b>21%</b> of the respondents who represent Asian ethnic groups. <b>16%</b> of respondents identified themselves as Caucasian/White.

A detailed breakdown of the full demographic findings is located on page 9. An infographic of survey results can be found in **Appendix A**.

## v. Stakeholder Briefings

Three stakeholder briefings (Planning Leaders Forum, Elected Office Roundtable, Community Leader’s Roundtable) were held to gather feedback from Orange County leaders. Each meeting followed a similar format, starting with an overview and background of the Plan, followed by a review of maps of the 12 corridors under consideration for transit improvements, two poll questions, and a discussion session. Brief summaries and key themes from each meeting are found below.

### Planning Forum

A planning forum was held on May 30, 2024, to engage Orange County planning directors and other city staff on the OC Transit Vision Master Plan background, process, and goals. The forum was attended by 13 city members. Key themes discussed during the polls and discussion included:

- Coordination of transit corridors with housing growth plans.
- Preferences to prioritize Beach Blvd, Harbor Blvd, and Bristol St and State College Blvd (with John Wayne Airport Extension) for transit corridor improvements.
- Emphasis on prioritizing first/last mile connections.

### **Elected Office Roundtable**

On June 6, 2024, an Elected Official’s Roundtable was organized to engage Orange County elected representatives and their staff in discussions regarding the OC Transit Vision Master Plan. The roundtable was attended by 15 elected representatives and five city staff members. Attendees were encouraged to ask questions throughout the presentation. Key themes discussed during the roundtable included the following:

- Multiple representatives expressed the need for broader transportation options beyond buses, including street cars, autonomous vehicles, and enhanced pedestrian connections.
- Several comments highlighted concerns about the current efficiency and accessibility of the transit system.
- Concerns about passenger safety and the need for an overall reliable and safe transit experience.
- Importance of involving cities in the planning process to address gaps to meet local needs.
- Preferences to prioritize Bristol St and State College Blvd (with John Wayne Airport Extension), Beach Blvd, and Harbor Blvd for transit corridor improvements.
- Preference for OC Bus Improvements and Cross County Express Bus Service transit strategies.

*Figure 5 Elected Office Roundtable*



### **Community Leader’s Roundtable**

A Community Leader’s Roundtable was held on June 11, 2024, to engage Orange County community leaders on the Plan. Eleven community leaders attended the online meeting. Key themes discussed during the roundtable included the following:

- Importance of paratransit services and service improvements.
- Emphasis on the importance of more bus routes for low-income and disadvantaged students.
- Importance of connecting bus routes to elderly communities.
- Improvements for OC Bus route schedules to ensure reliability.
- Preferences to prioritize Harbor Blvd and Garden Grove Blvd for transit corridor improvements.
- Preference for Mobility Hubs and OC Bus Improvements transit strategies.

## II. OUTREACH AND SURVEY IMPLEMENTATION

Traditional and digital outreach and notification tactics were used to spread information about the Plan, promote the community webinar, and increase survey participation. Digital outreach tactics included email campaigns to the contact list, organic social media posts on Facebook and X (Twitter), and the distribution of an electronic toolkit. The toolkit comprised of copy, content, and graphics for community organizations and key stakeholders to share the information with their audiences. In addition to digital engagement, the outreach team placed advertisements on Instagram and in local Vietnamese and Spanish publications, placed flyers in county libraries and community centers, and advertised the project on OC Buses across the county. The interior bus ads featured a QR code which directed participants to the OC Transit Vision Master Plan website.

### i. Survey Outreach

The OC Transit Vision Outreach Team launched a comprehensive notification campaign as part of the survey engagement efforts. Successful digital and traditional tactics conducted during the first phase of outreach were incorporated into the latter engagement approach.

The recent round of survey outreach notification and engagement efforts are detailed below:

- Collected 4,423 digital and hard copy surveys from May 3 to July 14, 2024.
- Hosted one Planning Forum, one Community Leader Roundtable, one Elected Officials roundtable, and one community Webinar.
- Presented at one Citizen Advisory Committee (CAC) meeting, one Diverse Community Leaders Group, and one OC Bus Customer Roundtable.
- Connected with over 3,300 community members across 20 events in Orange County's five supervisorial districts.
- Reached over 75,000 readers via Spanish and Vietnamese-language newspapers.
- Emailed five multilingual notices to a network of more than 2,500 interested community stakeholders.
- Promoted the project and website through bus ads in OC Buses and on the OC Bus App.
- Advertised the survey and community webinar through five Facebook posts, and five X (Twitter) organic posts.
- Developed a digital toolkit as a convenient and efficient communication aid and shared it with more than 109 local municipalities, community leaders, and organizations associated with OCTA committees and stakeholders.
- Developed and distributed materials in English, Spanish, and Vietnamese.

*Figure 6 Anaheim Pride Farmers Market*





## ii. Survey Format

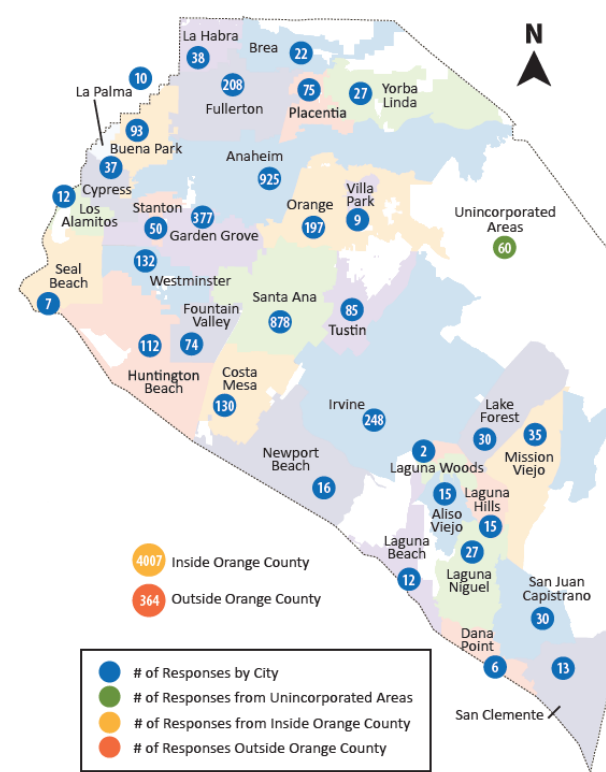
The survey was hosted on the Typeform platform and featured one main multiple-choice question. After providing their zip code, participants were asked to select up to five of 12 Transit Opportunity Corridors under consideration for transit improvements. Each selection described the proposed corridor and featured a map with key destinations along the route. A link to high-quality images of each map was available for participants to view. Respondents selected their preferred corridors and an additional open-ended question asked visitors if they had other suggestions for transit corridors that were not already listed. Following the open-ended response, participants were asked a series of demographic questions. Hard copy versions of the survey (**Appendix B**) were also created and distributed at pop-up events.

The survey questions were designed to:

- Determine which proposed transit corridors are the most preferred to respondents.
- Obtain feedback on other corridors stakeholders are interested in.
- Collect demographic information from respondents.
- Gather updated contact information for ongoing project communication.

The survey consisted of 6 questions in total, including three optional demographic questions and an option for participants to enter their email address for the gift card raffle. A question asking for participant’s zip codes was mandatory to continue. A total of 4,423 surveys were collected which included 3,655 responses in English, 505 in Spanish, and 263 in Vietnamese.

Figure 7: Home Zip Code Map



## III. ADDITIONAL SURVEY RESULTS

The following are additional survey results which represent the survey participants’ geographic area and demographics.

### iii. Geographic Distribution

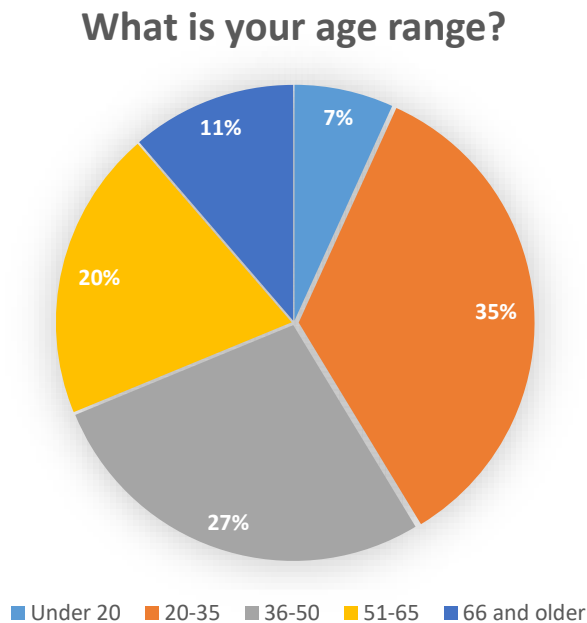
Most survey respondents shared their home zip code (98.8%; 4,371). Of those that provided zip code information, more than 90% (90.6%; 4,007) of respondents shared they live within Orange County. The top three cities with the highest percentage of survey responses within Orange County included Anaheim (23%; 925), Santa Ana, (21.9%; 878), and Garden Grove (8.4%; 377).

The respondent distribution map provides the number of total surveys collected by city and include unincorporated areas in Orange County. The total respondent count for survey input received from those residing outside Orange County is also provided (9%; 364).

#### iv. Demographics Results

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

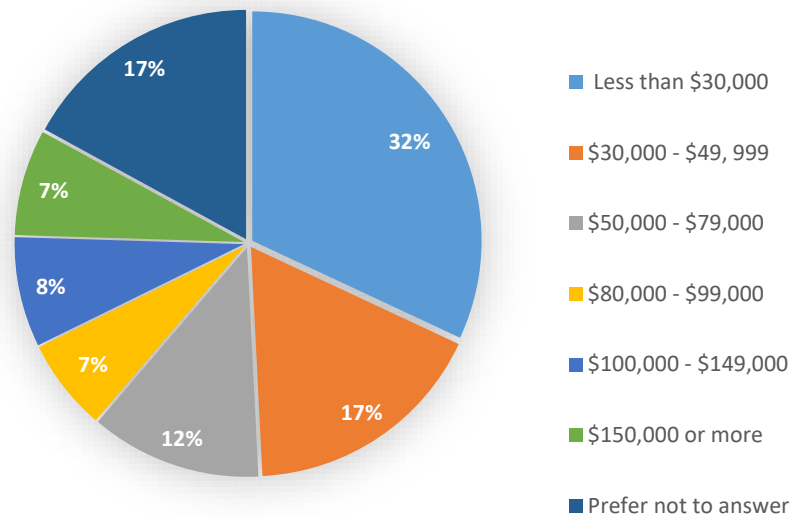
*Figure 8: Age Range*



Most survey participants disclosed their age was between 20 – 35 (35%). Respondents between ages 36 – 50 were the second largest age group to participate in the survey (27%) The third largest age group to participate in the survey were from ages 51 – 65 (20%)

Figure 9: Annual Household Income

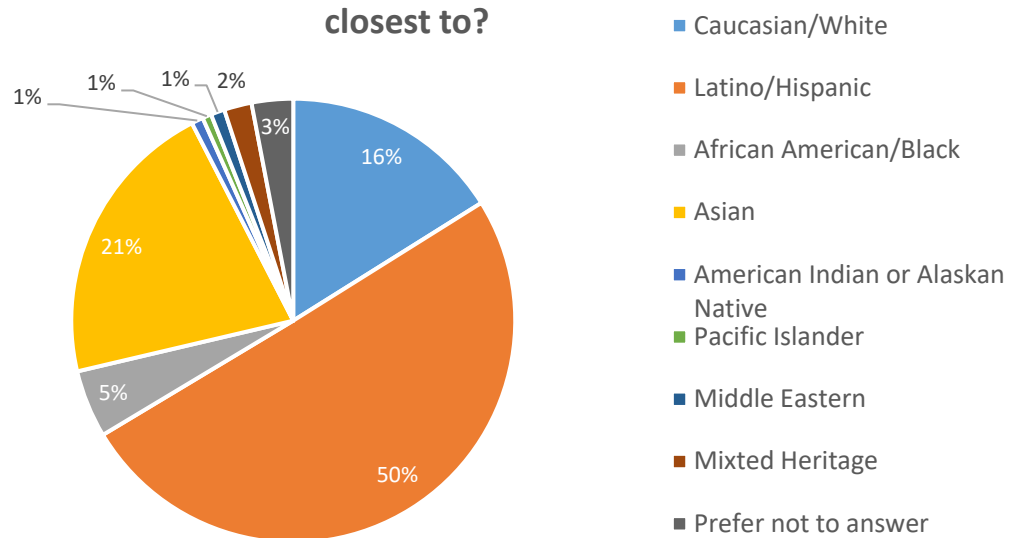
### What is your combined annual household income?



Of those who provided their annual household income, 32% make less than \$30,000. 17% of survey participants shared their combined annual household income is between 30,000 and 49,000. Another 17% preferred not to answer.

Figure 10: Ethnicity

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



The three largest ethnic groups that participated in the survey were the following: 51% represented the Latino/Hispanic ethnic group, 21% represented the Asian ethnic group, and 16% of respondents represented Caucasian/White.

#### v. New Contacts

Enhancing public engagement is a key priority for OCTA, and a significant part of this study. During this last survey effort, a total of 855 new email addresses were gathered from survey respondents. These emails will be used for future OC Transit Vision Master Plan announcements and notifications.

## IV. CONCLUSION

The OC Transit Vision Master Plan technical team will further analyze survey results and public feedback to formulate a set of draft project recommendations. This effort along with the results of community engagement from the first phase of the study, conducted in fall/winter 2023, will be presented to the OCTA Board of Directors. These draft project recommendations will be reviewed and subsequently considered for approval at the end of 2024.

# APPENDIX

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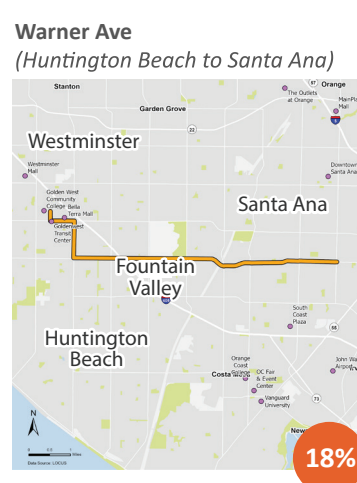
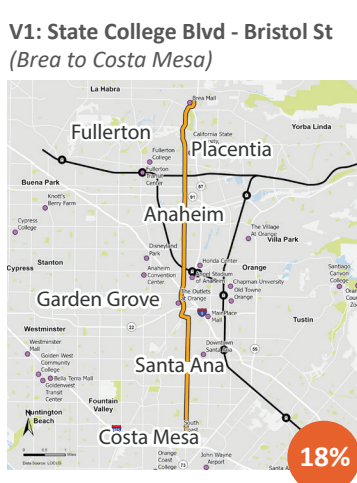
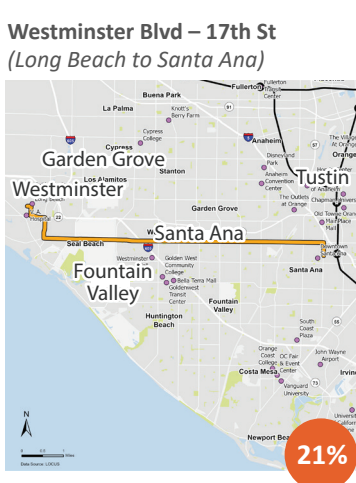
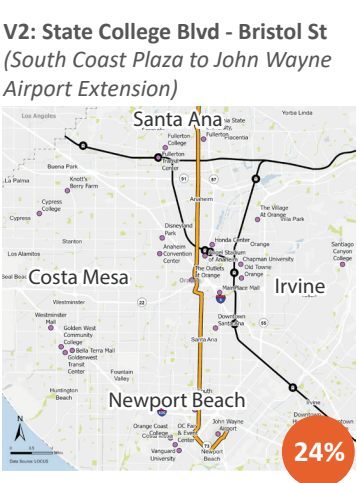
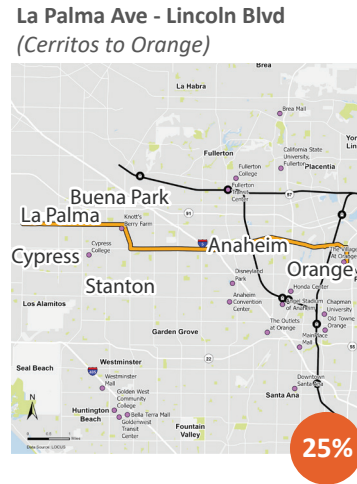
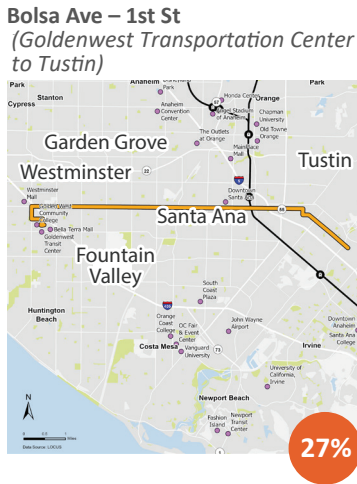
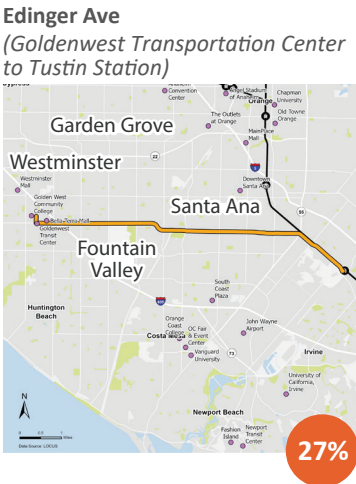
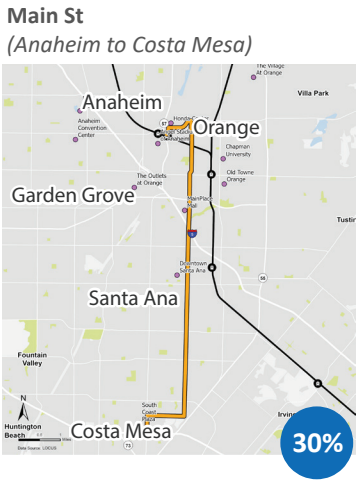
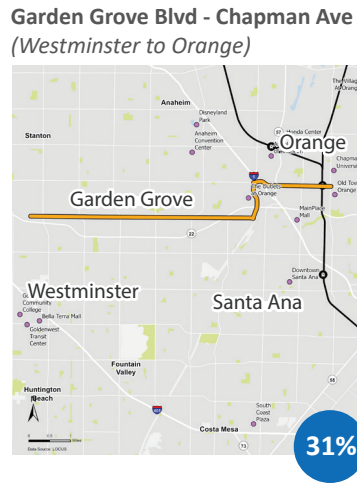
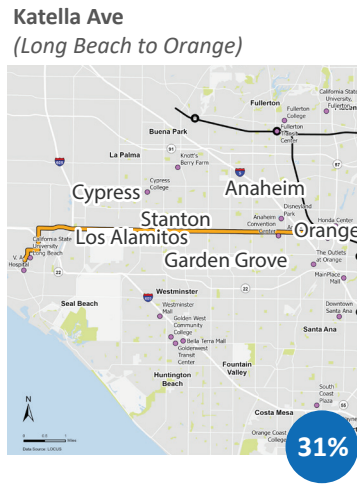
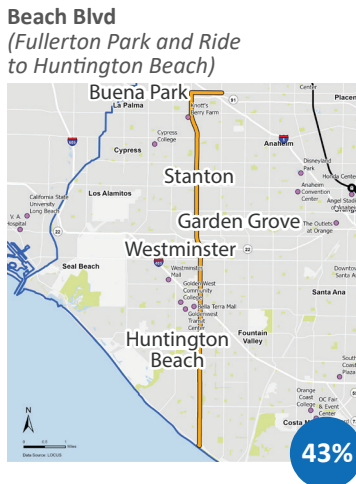
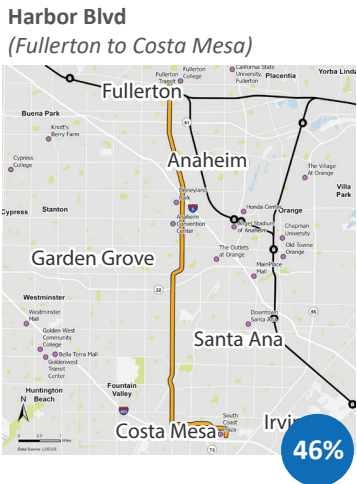
# APPENDIX A: Survey Infographic



# OC TransitVISION

## 2024 OC Transit Vision Survey Results & Outreach

Below are 12 Orange County corridors identified for potential transit improvements. Please choose up to FIVE of these transit corridors that you consider the most important to you.



\*The survey percentage exceeds 100% because it reflects how many times participants select each specific corridor.

**Survey Results**  
The graphic illustrates the twelve proposed transit improvement corridors. The top five selected corridors are Harbor Blvd, Beach Blvd, Katella Ave, Garden Grove Blvd - Chapman Ave, and Main St. The five least selected corridors are Warner Ave, State College Blvd - Bristol St, Westminster Blvd - 17th St, State College Blvd - Bristol with an Airport Extension, and La Palma Ave - Lincoln Blvd. Of the twelve corridors, Harbor Blvd (46%) and Beach Blvd (43%) were the top selected corridors.





# OC TransitVISION

## 2024 OC Transit Vision Survey Results & Outreach

### What is your age range?

- 7% Under 20
- 35% 20-35
- 27% 36-50
- 20% 51-65
- 11% 66 or older



### What is your combined annual household income?

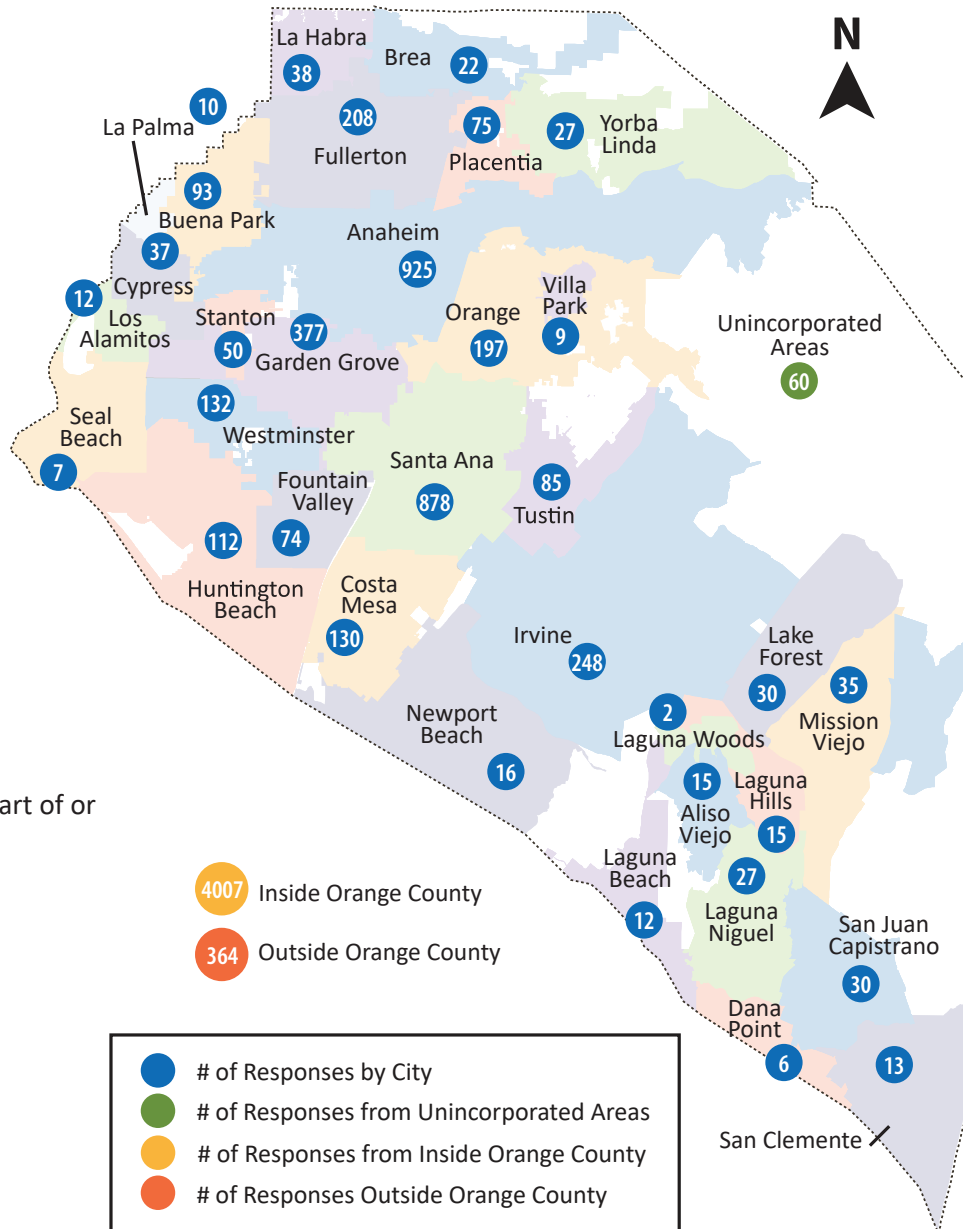
- 32% Less than \$30,000
- 17% \$30,000 – \$49,000
- 12% \$50,000 – \$79,000
- 6% \$80,000 – \$99,000
- 8% \$100,000 – \$149,000
- 8% \$150,000 or more
- 17% Prefer not to answer



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

- 51% Latino/Hispanic
- 21% Asian – Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian
- 16% Caucasian/White
- 5% African American/Black
- 1% American Indian or Alaskan Native
- 1% Pacific Islander
- 1% Middle Eastern
- 2% Mixed Heritage
- 2% Prefer not to answer

### Participant home zip code:



### Community Engagement



Collected **5,839** respondent surveys between May 3, 2024 and July 14, 2024



Sent **10** email notices to **4,000+** interested community stakeholders



Held **2** Community Webinars, **7** Stakeholder Interviews, **1** Planning Forum, **11** Teen Councils, **3** Citizen Advisory Committee (CAC) Meetings, **3** Diverse Community Leaders Groups, **2** OC Bus Customer Roundtables, **1** Elected Officials Roundtable, **3** Community Leader Roundtables



Promoted the project and website on interior bus advertisements in **OC Buses** and on the **OC Bus App**



Advertised the survey and community webinar through **8** Facebook posts, **3** Instagram posts and **9** X (Twitter) posts



Engaged **4,700+** community members across **32** events in Orange County, spanning all five Orange County Supervisor Districts



Developed a digital communications toolkit with project information and survey link and shared it with more than **218** local municipalities, community leaders and stakeholder organizations



Reached **163,000+** readers through Spanish and Vietnamese newspapers



Created and shared materials in **English, Spanish, and Vietnamese**



## APPENDIX B: Print Surveys in English, Spanish, and Vietnamese



## 2024 OC Transit Vision Survey

The Orange County Transportation Authority (OCTA) continues to develop the 2024 OC Transit Vision Master Plan (OC Transit Vision), which is a 30-year plan aimed to integrate, enhance, and expand transportation services in Orange County. Your feedback is important! Let us know which of the draft top 12 Orange County corridors are most important to you.

**Take our 2-minute survey for a chance to win one of four \$50 gift cards!**

### Part 1: Transit Corridors

**1. Below are twelve Orange County corridors identified for potential transit improvements. Please choose up to FIVE of these transit corridors that you consider the most important to you. For detailed maps, visit [octa.net/OCTransitVision](https://octa.net/OCTransitVision).**

- A) Beach Blvd (Buena Park to Huntington Beach)
- B) Bolsa Ave – 1st St (Westminster to Irvine)
- C) Edinger Ave (Westminster to Irvine)
- D) Garden Grove Blvd – Chapman (Westminster to Orange)
- E) Harbor Blvd (Fullerton to Costa Mesa)
- F) Katella Ave (Long Beach to Orange)
- G) La Palma Ave – Lincoln Blvd (Cypress to Anaheim)
- H) Main St (Anaheim to Costa Mesa)
- I) Warner Ave (Huntington Beach to Santa Ana)
- J) Westminster Blvd – 17th St (Seal Beach to Santa Ana)
- K) Version #1: State College Blvd - Bristol St (Brea to Costa Mesa) without extension to John Wayne Airport
- L) Version #2: State College Blvd - Bristol St with South Coast Plaza to John Wayne Airport extension

**2. Do you have any suggestions for a corridor that is not included in the current list? If yes, please specify the general location of your proposed corridor.** (Ex. On Harbor Blvd between Anaheim and Costa Mesa)

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### Part 2: Demographic Questions

Thanks for your input! Please tell us a little about yourself.

**1. What is your home zip code?**

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**2. What is your age range?**

- Under 20
- 20-35
- 36-50
- 51-65
- 66 or older

**3. What is your combined annual household income?**

- Less than \$30,000
- \$30,000 – \$49,000
- \$50,000 – \$79,000
- \$80,000 – \$99,000
- \$100,000 – \$149,000
- \$150,000 or more
- Prefer not to answer

**4. What ethnic group do you consider yourself a part of or feel closest to?**

- Caucasian/White
- Latino/Hispanic
- African American/Black
- American Indian or Alaskan Native
- Asian – Korean, Japanese, Chinese, Vietnamese, Filipino or other
- Pacific Islander
- Middle Eastern
- Mixed Heritage
- Prefer not to answer
- Other

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Enter your email below to receive project updates and meeting invitations and be entered into a drawing for a chance to **receive one of four \$50 gift cards.**

NO PURCHASE OR PAYMENT NECESSARY TO WIN. See official rules at [octa.net/OCTransitVision](https://octa.net/OCTransitVision).

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## Encuesta sobre el Plan OC Transit Vision 2024

La Autoridad de Transporte del Condado de Orange (OCTA) continúa desarrollando el Plan Maestro OC Transit Vision 2024 (OC Transit Vision), un plan de 30 años, que tiene como objetivo integrar, mejorar y ampliar los servicios de transporte en el condado de Orange. ¡Su opinión es importante! Háganos saber cuáles de los 12 corredores principales del Condado de Orange son más importantes para usted.

¡Tome nuestra encuesta de 2 minutos para tener la oportunidad de ganar una de las cuatro tarjetas de regalo de \$50!

### Parte 1: Corredores de tránsito

1. A continuación se presentan doce corredores del Condado de Orange identificados para posibles mejoras de tránsito. Por elija hasta CINCO de estos corredores de tránsito que creas que son más importantes para ti. Para mapas detallados, visite [octa.net/OCTransitVision](http://octa.net/OCTransitVision).

- A) Beach Blvd (Buena Park a Huntington Beach)
- B) Bolsa Ave – 1st St (Westminster a Irvine)
- C) Edinger Ave (Westminster a Irvine)
- D) Garden Grove Blvd (Westminster a Orange)
- E) Harbor Blvd (Fullerton a Costa Mesa)
- F) Katella Ave (Long Beach a Orange)
- G) La Palma Ave - Lincoln Blvd (Cypress a Anaheim)
- H) Main St (Anaheim a Costa Mesa)
- I) Warner Ave (Huntington Beach a Santa Ana)
- J) Westminster Blvd – 17th St (Seal Beach a Santa Ana)
- K) Versión #1: State College Blvd - Bristol St (Brea a Costa Mesa) sin extensión al Aeropuerto John Wayne
- L) Versión #2: State College Blvd - Bristol St con South Coast Plaza hasta la extensión del aeropuerto John Wayne

2. ¿Tiene alguna sugerencia para un corredor que no esté incluido en la lista actual? En caso afirmativo, especifique la ubicación general del corredor propuesto. (Por ejemplo, en Harbor Blvd entre Anaheim y Costa Mesa)

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### Parte 2: Preguntas demográficas

¡Gracias por su opinión! Cuéntenos un poco sobre usted.

1. ¿Cuál es el código postal de su lugar de residencia?

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2. ¿Cuál es su rango de edad?

- Menos de 20 años
- 20-35
- 36-50
- 51-65
- 66 años o más

3. ¿Cuáles son los ingresos anuales combinados de su familia?

- Menos de \$30,000
- \$30,000 – \$49,000
- \$50,000 – \$79,000
- \$80,000 – \$99,000
- \$100,000 – \$149,000
- \$150,000 o más
- Prefiero no responder

4. ¿A qué grupo étnico se considera que pertenece o se siente más cercano?

- Caucasico/Blanco
- Latino/Hispano
- Afroamericano/Negro
- Indio Americano o Nativo de Alaska
- Asiático: Coreano, Japonés, Chino, Vietnamita, Filipino u otro
- Isleño del Pacífico
- De Oriente Medio
- Herencia mixta
- Prefiero no responder
- Otro \_\_\_\_\_

Ingrese su correo electrónico a continuación para recibir las novedades del proyecto e invitaciones a reuniones, y participar en un sorteo para tener la oportunidad de recibir una de las cuatro tarjetas de regalo de \$50.

SIN OBLIGACIÓN DE COMPRA O PAGO PARA GANAR. Consulte las reglas oficiales en [octa.net/OCTransitVision](http://octa.net/OCTransitVision).

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## Khảo Sát Về Tuyến Đường Cho Kế Hoạch Tổng Thể 2024 Tầm Nhìn Vận Tải Quận Cam

Cơ Quan Giao Thông Quận Cam (OCTA) đang tiếp tục phát triển Kế Hoạch Tổng Thể 2024 Tầm Nhìn Vận Tải Quận Cam (OC Transit Vision), một kế hoạch kéo dài 30 năm nhằm hợp nhất, nâng cao và mở rộng các dịch vụ giao thông công cộng tại Quận Cam. Phản hồi của quý vị rất quan trọng! Hãy cho chúng tôi biết trong 12 tuyến đường giao thông công cộng trong Quận Cam hiện đang có mặt trong bản dự thảo, tuyến nào là quan trọng nhất đối với quý vị.

**Hãy dành 2 phút để tham gia khảo sát để có cơ hội nhận một trong bốn thẻ quà tặng trị giá \$50!**

### Phần 1: Tuyến đường giao thông

**1. Dưới đây là mười hai tuyến đường trong Quận Cam là xác định những cải tiến tiềm năng đối với giao thông công cộng. Vui lòng chọn tối đa NĂM tuyến đường những con đường bạn cho là quan trọng nhất cho tôi. Để xem bản đồ chi tiết, vui lòng truy cập [octa.net/OCTransitVision](http://octa.net/OCTransitVision).**

- A) Beach Blvd (Buena Park đến Huntington Beach)
- B) Bolsa Ave – 1st St (Westminster đến Irvine)
- C) Edinger Ave (Westminster đến Irvine)
- D) Garden Grove Blvd - Chapman (Westminster đến Orange)
- E) Harbor Blvd (Fullerton đến Costa Mesa)
- F) Katella Ave (Long Beach đến Orange)
- G) La Palma Ave - Lincoln Blvd (Cypress đến Anaheim)
- H) Main St (Anaheim đến Costa Mesa)
- I) Warner Ave (Huntington Beach đến Santa Ana)
- J) Westminster Blvd – 17th St (Seal Beach đến Santa Ana)
- K) Phiên bản #1: State College Blvd - Bristol (từ Brea đến Costa Mesa) không bao gồm đường nối đến sân bay John Wayne.
- L) Phiên bản #2: State College Blvd - Bristol St bao gồm đoạn từ South Coast Plaza đến sân bay John Wayne.

**2. Quý vị có bất kỳ gợi ý nào cho tuyến đường không chưa được bao gồm trong danh sách hiện tại không? Nếu có, vui lòng chỉ định vị trí chung của tuyến đường quý vị muốn gợi ý. (Ví dụ: Trên đường Harbor giữa Anaheim và Costa Mesa)**

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### Phần 2: Câu hỏi về nhân khẩu học

*Xin cảm ơn góp ý của quý vị! Xin chia sẻ một ít thông tin về mình.*

**1. Mã bưu điện của bạn là gì?**

**2. Nhóm tuổi của bạn là gì?**

- Dưới 20
- 20-35
- 36-50
- 51-65
- 66 trở lên

**3. Thu nhập hộ gia đình kết hợp của bạn là bao nhiêu?**

- Dưới \$30,000
- \$30,000 – \$49,000
- \$50,000 – \$79,000
- \$80,000 – \$99,000
- \$100,000 – \$149,000
- \$150,000 trở lên
- Không muốn trả lời

**4. Nhóm dân tộc mà bạn xem mình thuộc về hoặc cảm thấy gần gũi nhất là gì?**

- Da trắng
- Latino/Mỹ La-tin
- Mỹ Gốc Phi Châu/Da Đen
- Người Mỹ bản xứ hoặc Gốc Alaska
- Á châu - Hàn Quốc, Nhật Bản, Trung Quốc, Việt Nam, Philippines hoặc tương tự
- Người Thái Bình Dương
- Người Thái Bình Dương
- Da sắc tộc
- Không muốn trả lời
- Gốc dân tộc khác \_\_\_\_\_

Để nhận cập nhật dự án và thư mời tham dự các cuộc họp, vui lòng nhập email của quý vị vào bên dưới để được đăng ký tham gia vào cuộc bốc thăm để có cơ hội nhận một trong bốn thẻ quà tặng trị giá \$50.

**KHÔNG CẦN MUA HÀNG HOẶC TRẢ LỆ PHÍ ĐỂ THẮNG GIẢI.**  
Xem quy định chính thức tại [octa.net/OCTransitVision](http://octa.net/OCTransitVision).

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# 2024 OC Transit Vision Progress Update



# OC Transit Vision Overview

- 30-year plan to improve transit services in the County
- Identifies TOCs and countywide services
- Recommends transit-supportive design and policies for cities
- Informs the OCTA Long-Range Transportation Plan

## WHAT ARE OUR GOALS FOR TRANSIT?



**ENHANCE**



**CONNECT**



**SIMPLIFY**



**COLLABORATE**



**SUSTAIN**

# Public Outreach

- Feedback on transit corridors (May-July)
- Collected 4,423 multilingual surveys
- Engaged 3,300+ community members across 20 events
- Presented at seven community meetings
- Reached 75,000 readers through Spanish and Vietnamese newspapers
- The following corridors were selected by the public:
  - Harbor Blvd, Beach Blvd, State College Blvd/Bristol St, Katella Ave, Garden Grove Blvd/Chapman Ave



Ave - Avenue  
Blvd - Boulevard  
St - Street

# Recommended Corridors

Rank	Corridor
1	Bristol Street and State College Boulevard
2	Harbor Boulevard
3	Beach Boulevard
4	Main Street
5	Katella Avenue
6	La Palma Avenue and Lincoln Avenue
7	Westminster Boulevard and 17th Street
8	Warner Avenue
9	Garden Grove Boulevard and Chapman Avenue
10	Edinger Avenue





# Corridor Improvement Strategies

- Connections to Major Destinations
  - Katella Avenue Rapid Route
  - Harbor Boulevard Transit Opportunity Corridor
- Connections to Transportation Hubs
  - Future Los Angeles Metro Southeast Gateway Line
  - Metrolink service increases
  - John Wayne Airport
  - OC Streetcar and Santa Ana Station
  - Fullerton Park-and-Ride
  - Regional connections at Long Beach



# Short-Term Action Plan (2025-2029)

- Analyze Transit Opportunity Corridors
  - Bristol Street/State College Boulevard
  - Harbor Boulevard
  - Beach Boulevard
- Countywide Transit Strategies
  - Fully implement Making Better Connections Plan improvements
  - Conduct OC Bus comprehensive operations analysis
  - Expand OC Bus Rapid Route 553 to Anaheim Resort area
  - Launch new Rider Validation System and farebox system
  - Integrate bus service with OC Streetcar
  - Assess OC Streetcar performance
  - Enhance paratransit service
  - Study feasibility of express bus service and freeway BRT

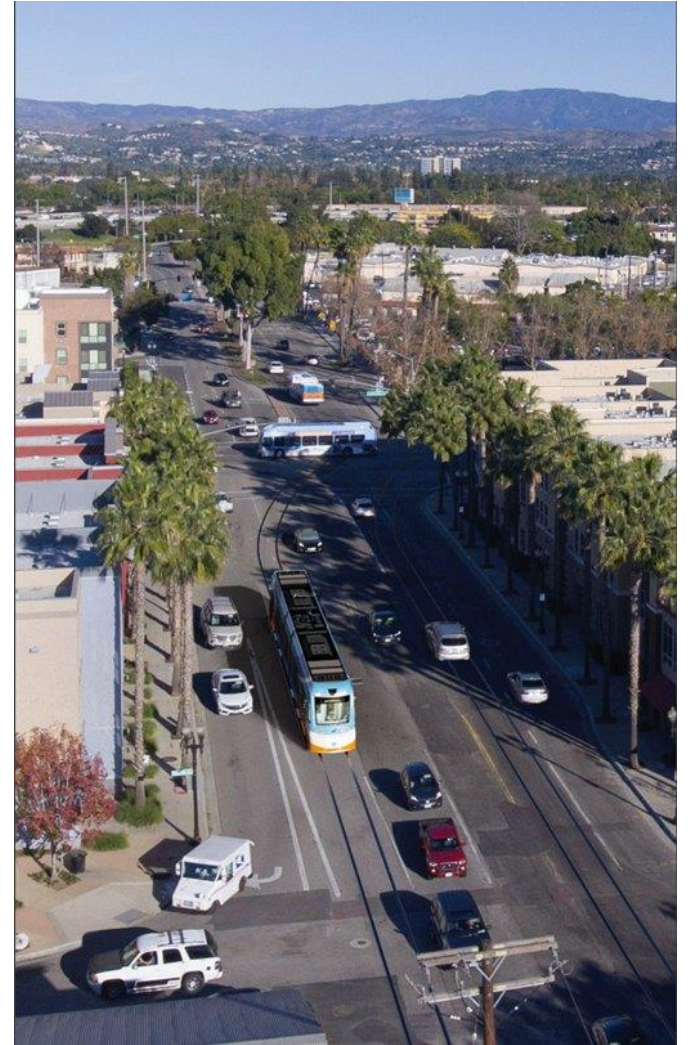
# Mid-Term Recommendations (2030-2039)

- Transit Opportunity Corridors: Implementation
  - Bristol Street/State College Boulevard
  - Harbor Boulevard
  - Beach Boulevard
  - Main Street
  - Katella Avenue
- Countywide Transit Strategies
  - Complete zero-emission bus fleet transition
  - Call for projects (Project V)
  - Expand OC Bus service, mobility hubs, first/last mile connections, on-demand services



# Long-Term Recommendations (2040+)

- Transit Opportunity Corridors: Implementation
  - La Palma Avenue/Lincoln Avenue
  - Westminster Avenue/17<sup>th</sup> Street
  - Warner Avenue
  - Garden Grove Boulevard/Chapman Avenue
  - Edinger Avenue
- Countywide Transit Strategies
  - Increase bus frequencies to improve transit connections
  - Expand mobility hubs, first/last mile connections, on-demand services



# Next Steps

- Incorporate draft recommendations and action plan into the final 2024 OC Transit Vision report which will inform the upcoming 2026 Long-Range Transportation Plan
- Complete final plan by the end of 2024
- Make final plan available to local agencies and the public



The logo for OC Transit Vision, featuring the letters "OC" in a large, white, sans-serif font with a small green leaf above the "O". To the right of "OC" is the word "Transit" in a smaller, white, sans-serif font, and "VISION" in a larger, white, sans-serif font.



**November 14, 2024**

**To:** Transit Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "Darrell E. Johnson", is written over the printed name. To the right of the signature, the word "For" is written in blue ink.

**Subject:** Draft Orange County Human Services Transportation Coordinated Plan

### **Overview**

The Human Services Transportation Coordinated Plan identifies strategies to address unmet needs and enhance mobility for seniors, individuals with disabilities, and low-income residents in Orange County. This plan is a prerequisite for securing Federal Transit Administration Section 5310 Program funding. Staff has updated the Human Services Transportation Coordinated Plan, and Board of Directors' approval is requested to finalize the draft plan.

### **Recommendation**

Direct staff to finalize the Draft Human Services Transportation Coordinated Plan.

### **Background**

The Human Services Transportation Coordinated Plan (Plan) consolidates efforts between public transit and private or nonprofit human service organizations to address the transportation needs of individuals with disabilities, older adults, and people with low incomes. Consistent with requirements in the Federal Transit Administration (FTA) Section 5310 Program, the Plan process helps leverage and extend scarce transportation resources between public transportation and private or nonprofit transportation providers. The Plan identifies and prioritizes strategies for coordinating transportation services, meeting mobility needs, and addressing barriers to transportation access. The Plan provides guidance for the allocation and distribution of funds throughout Orange County. The Plan is also used to identify project and program needs prior to developing specific funding guidelines.

The Orange County Transportation Authority (OCTA) Board of Directors (Board) adopted the first Plan in 2008 and it is updated every four years to be consistent with Federal requirements. Strategies identified in this Plan have been used to award grant funding to Orange County agencies to support transportation programs for target populations. In 2018, OCTA began using the FTA Section 5310 funds to support OC ACCESS, a federally required complementary paratransit service to persons with disabilities who cannot use the fixed-route bus system.

In addition to OC Bus and OC ACCESS, OCTA also provides supplemental same-day taxi service for individuals who qualify for OC ACCESS and funding for specialized services, such as the Senior Mobility Program and the Senior Non-Emergency Transportation Program, which are designed to enhance transportation alternatives for seniors. There are a number of human services transportation (HST) providers that provide these services and are the focus of the Plan.

The Plan is structured around four essential elements:

1. An assessment of existing services, detailing current transportation providers across public, private, and nonprofit sectors.
2. An evaluation of transportation needs specific to seniors and individuals with disabilities.
3. Strategies and projects aimed at addressing the gaps between current services and identified needs, alongside opportunities to enhance service efficiency.
4. Prioritization of strategies and projects based on available resources, timing, and feasibility.

To receive funding, projects must be consistent with the Plan or address a need or strategy outlined in the Plan. It is important to note that not everything identified in the Plan is required to be funded and/or implemented. Agencies may experience resource constraints that also influence their ability to provide services.

### ***Discussion***

OCTA retained consulting services to assist in updating the Plan. This process covered the following areas further described below:

- Evaluating demographic shifts among target populations
- Conducting robust community outreach to reassess transportation needs and resources
- Developing forward-looking goals and strategies to address identified transportation gaps

### Existing Community Conditions and Travel Patterns

Among the nearly 3.2 million residents in Orange County, over 900,000 (29 percent) are either in poverty, have a disability, are over age 65, are a veteran, or are some combination of these. Over 23,000 of these individuals are in poverty and have a disability, and another 15,041 individuals are in poverty, have a disability, and are over 65 years old. These trends underscore the value of specialized transportation services. Understanding the overlapping factors that individuals face can help OCTA and partner organizations tailor services and outreach accordingly. While veterans and individuals with low income are not a focus population under the FTA Section 5310, they are commonly included in coordinated plans since many HST providers serve these groups as part of their customer base. Veterans and individuals with low income are considered in conjunction with other key characteristics, such as being seniors or individuals with disabilities, ensuring the focus remains on populations facing transportation challenges.

An analysis conducted on OC ACCESS trips from October 2023 identified the most frequent travel links as being mainly concentrated in densely populated or retail areas. These areas of the County include several major adult day care centers. The data indicates that the top travel connections involve key locations such as medical and adult day care facilities, shopping centers, and senior living facilities, highlighting the critical need for efficient transit options to and from these destinations.

### Key Findings

- The top OC ACCESS trip links show a high concentration of trips related to medical and adult day care facilities, as well as social service offices, indicating a strong demand for connecting services.
- The analysis identifies the distribution of trip destinations across the County, revealing patterns which inform future service planning.
- The top origin-destination pairs underscore the importance of targeted service enhancements in high-traffic areas to meet the specific needs of target users.

### Transportation Provider and Community Engagement Activities

This update to the Plan involved comprehensive engagement with key stakeholder groups, including community members, transportation and human services providers, OCTA's Accessible Transit Advisory Committee (ATAC), and OCTA's internal project development team.



OCTA conducted a detailed survey targeting all 5,049 active OC ACCESS riders. The survey was available both online and through a postage-paid mailer, which garnered 2,391 responses. The survey provided critical insights into travel patterns, unmet needs, and community recommendations for improving transportation services. A virtual community meeting held on March 20, 2024, further engaged participants, offering a platform for additional feedback and interactive discussion.

Engagement with service providers was facilitated through an online agency survey, which collected over 500 responses, and with ATAC, who played a crucial role providing ongoing feedback. These responses helped identify service offerings, client demographics, and notable gaps in transportation services. Following on the agency surveys, the project team conducted interviews with five key human services transportation service providers. Questions were tailored to each agency's survey responses and community role. These discussions provided in-depth insights into the specific challenges and opportunities faced by each entity. In addition, a virtual meeting was held on February 21, 2024. The meeting included an overview of the Plan and the planning process, including high-level information about transportation providers and population characteristics. OCTA also held virtual open office hours on February 28 and 29, 2024, for agencies to discuss the Plan, the process, their projects, and answer any questions they might have regarding the survey.

The insights from community and agency interactions were critical in updating the Plan, helping identify key service gaps and informing strategic development.

### Goals and Strategies

As a result of the outreach and engagement analysis, assessment of transportation services, and public outreach efforts, five goals and strategies were developed to address identified needs. These are recommended strategies that OCTA and human service transportation providers should consider based on their effectiveness and feasibility of implementation. Details for each goal and strategy can be found in the Executive Summary (Attachment A).

- **Goal 1 – Sustain existing services.**  
Need: Support funding, staffing and ability to maintain and enhance the capability of service providers to meet demand in an effective and sustainable way.
  
- **Goal 2 – Enhance existing service coverage and operating hours.**  
Need: Existing services have limited operating hours, and geographic coverage, in part due to low demand for fixed-route service in low density areas.

- Goal 3 – Improve rider-facing information and communication.  
Need: Not all riders are able to access important transportation information, including information about the status of their trip.
  
- Goal 4 – Improve service quality and rider experience.  
Need: Some riders, especially those with disabilities and/or who have limited English proficiency, express concerns with safety and comfort while waiting, and customer service challenges.
  
- Goal 5 – Increase Number of Service Options.  
Need: Gaps in existing services limit the ability of seniors, people with disabilities, and people with low incomes to fully meet their travel needs.

***Summary***

The Draft Human Services Transportation Coordinated Plan outlines a comprehensive approach to addressing the transportation needs of Orange County's most vulnerable populations. It reflects a commitment to improving mobility through enhanced coordination, targeted resource allocation, and innovative service delivery strategies. The recommended strategies for human service transportation providers will be assessed considering resource and financial constraints for service enhancements.

***Attachment***

- A. Draft Human Services Transportation Coordinated Plan Executive Summary

**Prepared by:**



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**Approved by:**



Kia Mortazavi  
Executive Director, Planning  
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*DRAFT*  
**Human Services  
Transportation  
Coordinated Plan**  
*EXECUTIVE SUMMARY*



October 2024

Prepared by **transpogroup**   
WHAT TRANSPORTATION CAN BE.

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## Introduction and Policy Overview

The Orange County Transportation Authority (OCTA) is the regional public transit operator in Orange County. OCTA's stated mission "is to develop and deliver transportation solutions to enhance the quality of life and keep Orange County moving." OCTA is also the designated Consolidated Transportation Services Agency (CTSA). As the CTSA, OCTA is required to prepare a Human Services Transportation Coordinated Plan ("HSTCP," "Coordinated Plan," or "the Plan") every four years. While OCTA is responsible for developing the Plan, the Plan addresses existing conditions, transportation needs, and recommended strategies that reflect all of Orange County and are addressed to all Orange County transportation service providers and related organizations.

The OCTA Coordinated Plan was developed to address the needs of individuals with disabilities, seniors, low-income populations, and other Orange County residents with enhanced mobility needs. OCTA is a recipient of funding under the Enhanced Mobility for Seniors and Individuals with Disabilities (Section 5310) Program. Section 5310 is a federal grant program overseen by the Federal Transit Administration (FTA) to improve mobility for seniors and individuals with disabilities. The 5310 program requires funding recipients to develop a Coordinated Plan with human services transportation operators and clients. To be eligible for funding, projects must be directly included in the Plan or address a Plan need or strategy, and must be updated every four years. It is important to note that not everything identified in the plan is required to be funded and or implemented, as the OCTA grant programs are intended to supplement other sources of funds available to the specialized transportation providers.

The following objectives were established by OCTA to guide completion of the Plan:

- To develop a Human Services Transportation Coordinated Plan and implementation process to guide the prioritization and selection of projects for funding by the Federal Transit Administration (FTA) Section 5310 within Orange County over the next four years;
- To facilitate stakeholder participation among a broad group of agencies and encourage a higher level of public-private participation in the transportation coordination discussion and planning process;
- To update the inventory of public transit – human services transportation in Orange County;
- To provide relevant peer examples of coordination that offer fresh ideas to Orange County;
- To ensure the proposed plan is consistent with the transportation coordination regulatory requirements; and
- To devise a program for the coordination of human services transportation.

## Overview of the Planning Process

Development of this Coordinated Plan began in November 2023 and is expected to be completed in October 2024 with Board adoption. The development of this Coordinated Plan included:

- Identification of human services transportation (HST) providers, their services and programs, and fleet characteristics
  - Efforts included a survey of HST agencies and follow-up interviews
- Analysis of travel needs of older adults, people with disabilities, people with low incomes, and other transportation disadvantaged populations
  - Efforts included a survey of riders, analysis of OCTA ACCESS trip data, analysis of simulated and forecasted trip data, and demographic and socioeconomic analysis
- Comparison of available services with community travel needs

- Recommendation of strategies to address human services transportation needs in Orange County

## Existing Transportation Services

This Plan summarizes the public and human services transportation (and related) services available in Orange County. Transportation services in Orange Counties are provided by public transit systems, human service agencies/non-profit programs, and other private providers such as taxis or transportation network companies (TNCs) like Uber or Lyft. This diversity of services is considered the “supply” side of mobility, which works in conjunction with the “demand” side of transportation services, which will be discussed in the next section.

### Public Fixed-Route Services

Fixed route services are those that operate along an established route with scheduled stops at predetermined locations. Within Orange County, OCTA provides the vast majority of fixed route services throughout 34 cities and unincorporated areas in Orange County. OCTA provides local and community routes, Metrolink Stationlink routes, and Rapid routes.

Other fixed-route services in Orange County include those provided by Laguna Beach, Anaheim Transportation Network, and the Project V-funded community-based circulators in Anaheim, Dana Point, Huntington Beach, Newport Beach, Laguna Beach, San Clemente, Laguna Niguel, Mission Viejo, County of Orange, and San Juan Capistrano.

### Public Demand-Response Services

Public on-demand services are flexible shared-ride transit services available to the public. These services do not travel a fixed route and instead allow passengers to request a trip to and from specific locations, sometimes from within a list of eligible locations. Depending on the rules of the service, riders can request trips in advance or for immediate fulfillment.

Public demand-response services in Orange County are limited to the Laguna Beach Local, San Clemente SC Rides, and OC Flex in parts of Aliso Viejo, Laguna Niguel, and Mission Viejo.

### ADA Paratransit Services

OCTA's OC ACCESS is the Americans with Disabilities Act (ADA) complementary paratransit service for Orange County, providing curb-to-curb demand-response transportation to individuals certified to ride the service. OC ACCESS service is available to qualified applicants whose physical or cognitive limitations prevent them from using the standard OC Bus fixed-route service. OC ACCESS is available within 3/4 of a mile of OCTA fixed-route bus routes during the same span of service. OCTA also offers a same-day taxi service for OC ACCESS-eligible riders. This service is not a shared-ride service nor limited to providing transportation within 3/4 of a mile of fixed-route services.

### Specialized Transportation Services

Many city and non-profit operated programs, intended to provide additional travel options to increase mobility for the vulnerable populations of Orange County, supplement transportation services provided by OCTA. OCTA lends funding support to many of these programs to relieve demand on OC ACCESS and offer low- or no-cost solutions for individuals not able to ride the OC Bus.

***OCTA-Contracted Specialized Services***

OCTA contracts with four non-profit organizations for additional transportation services beyond what OC ACCESS provides. Contracted service providers include Alzheimer’s Family Services, Alzheimer’s Orange County, Community Senior Services/Meals on Wheels, and My Day Counts. These contracted services are only available to OC ACCESS riders, and other trip and rider eligibility requirements depend on individual service providers. These services transport riders to and from eligible adult day health center programs.

***Senior Non-Emergency Transportation (SNETM)***

The OC Go Senior Non-Emergency Transportation (SNETM) Program, run by the Orange County Office on Aging, provides transportation to adults ages 60 and over who need low-cost transportation to and from medical appointments and other health-related trips. Service is provided under contract by Age Well Senior Services in the south part of the county and Abrazar, Inc. in the north and central/west part of the county. The Office on Aging receives funding from OCTA and other agencies to operate the SNETM. There is a voluntary \$2.00 donation fee per one-way trip, but riders are limited to 16 one-way trips per month. Care attendants may ride free.

***Senior Mobility Program (SMP)***

OCTA’s Senior Mobility Program (SMP) provides funding for participating cities and communities in Orange County to provide senior transportation services. Participating cities receive operational funds and/or vehicles from OCTA to support the transportation services that best fit the seniors’ needs in their communities. Funding for the Senior Mobility Program comes from Measure M, Orange County’s half-cent sales tax for transportation improvements. One percent of this tax revenue is allocated to the SMP, and participating cities receive an allocation based on their share of Orange County’s population of seniors aged 60 years and older. In addition to the participating cities, there are three non-profit agencies participating, which include Abrazar, Inc, Korean-American Seniors Association, and Southland Integrated Services, Inc. A list of the participating SMP providers is presented in Table 1. Communities receiving SMP funds may provide services directly or by contracting with an outside provider such as taxicab company or non-profit provider like Abazar. The program is designed to leverage local funds; communities must provide 20 percent or more of the cost of the full program.

*Table 1. Orange County Senior Mobility Program Participating Cities & Organizations*

Aliso Viejo	La Habra	San Juan Capistrano
Anaheim	Laguna Beach	Santa Ana
Brea	Laguna Hills	Seal Beach
Buena Park	Laguna Niguel	Stanton
Costa Mesa	Laguna Woods	Tustin
Cypress	Lake Forest	Villa Park
Dana Point	Mission Viejo	Westminster
Fountain Valley	Newport Beach	Yorba Linda
Fullerton	Orange	Abrazar, Inc.
Garden Grove	Placentia	Korean-American Seniors Association
Huntington Beach	Rancho Santa Margarita	Southland Integrated Services
Irvine	San Clemente	



## **Other Dedicated and Contracted Services**

Depending on their location and their eligibility, residents may have access to other services, such as local taxicab companies, transportation network companies (TNCs such as Uber or Lyft) or private non-emergency medical transportation providers, in addition to the public and specialized services available in Orange County. The availability of these services differs throughout the county, and some providers may also act as contracted providers for programs described earlier in this section.

In Laguna Beach, Sally's Fund provides transportation outside of Orange County for veterans to the Long Beach VA. Sally's Fund also provides services above and beyond the Senior Mobility Program services for seniors and people with disabilities. These services include assisted and escorted door-to-door transportation to medical and other appointments within a 30-mile radius, food and grocery delivery, and more.

Several senior living facilities, nursing facilities, and adult day health centers also manage their own in-house transportation programs or contract out for transportation services for their residents or members. This group includes dozens of different organizations, including private for-profit and non-profit groups. Just a few are highlighted below:

- Reimagine O.C. supports over 400 individuals with neurodevelopmental disabilities and their families. Reimagine O.C. provides in-house transportation services and contracts with Yellow Cab to help clients access their sites and programs.
- Orange County Rescue Mission provides in-house transportation services and arranges and pays for clients to use transportation network companies (i.e., Uber or Lyft) for medical transportation.
- Goodwill Industries of O.C. teaches clients how to use public transportation and provides direct transportation for clients in their Community-Based Services Program.

## **Transportation Support Programs**

The following organizations and programs provide transportation-related support (for example: referrals, travel training, or bus passes) but do not provide transportation services directly.

- 2-1-1 Orange County (211OC)
- Braille Institute Orientation and Mobility Program
- Dayle McIntosh Center
- Tierney Center for Veteran Services
- Disabled American Veterans

## Existing Community Conditions & Travel Patterns

The project team identified needs for specialized transportation services in Orange County by reviewing demographics and travel patterns compared to available services and by implementing an extensive engagement program consisting of an agency survey, agency interviews, and a community survey. Coordinated human services transportation plans focus on individuals that may have limited transportation options, including older adults, people with disabilities, and people with low incomes. While veterans and individuals with low income are not a focus population under the FTA Section 5310, they are commonly included in Coordinated Plans since many HST providers serve these groups as part of their customer base. Veterans and individuals with low income are considered in conjunction with other key characteristics, such as being seniors or individuals with disabilities, ensuring the focus remains on populations facing transportation challenges.

The total population of Orange County is 3,182,954 as of 2022. The Plan includes maps that reflect the proportions of each group throughout the county, though the maps only include one factor at a time so do not represent individuals with multiple characteristics.

Table 2 represents the number of individuals with characteristics related to human service transportation planning. Understanding the overlapping factors that individuals face can help OCTA and partner organizations tailor services and outreach accordingly. Among the nearly 3.2 million people in Orange County, over 900,000 are either in poverty, have a disability, are over age 65, are a veteran, or are some combination of these. Over 23,000 individuals are in poverty and have a disability, and another 15,041 individuals are in poverty, have a disability, and are over 65 years old. The Plan includes maps that reflect the proportions of each group throughout the county, though the maps only include one factor at a time so do not represent individuals with multiple characteristics.

Table 2. Individuals with One or More Demographic Characteristics Related to Human Services Transportation\*

Exclusive Groups	Population
In poverty	251,883
With a disability	112,801
Age 65 or older	264,455
Veteran	41,980
In poverty and with a disability	23,026
In poverty and age 65 or older	25,431
In poverty and a veteran	2,674
With a disability age 65 or older	101,067
With a disability and a veteran	5,131
Age 65 or older and a veteran	40,247
In poverty, with a disability, and age 65 or older	15,041
In poverty, with a disability, and a veteran	913
In poverty, age 65 or older, and a veteran	1,949
With a disability, age 65 or older, and a veteran	22,845
In poverty, with a disability, age 65 or older, and a veteran	1,351
Total unique individuals with one or more focus characteristics	911,154
Total population (all PUMAs in OC)	3,182,954

\*All data variables were from ACS 5-Year Estimates PUMS (2021)

As described later in the Transportation Provider & Community Engagement Activities section, OCTA surveyed OC ACCESS riders and the broader community to understand their transportation needs. Respondents were asked questions about their demographic and socioeconomic characteristics. Key factors are presented here.

Understanding the overlapping factors individuals face can help OCTA and partner organizations tailor services and outreach accordingly. Among the survey respondents, 1,769 answered all the demographic and socioeconomic questions related to age, income, disability, English proficiency, and how many vehicles are in their household.

Among survey respondents who answered all the relevant demographic and socioeconomic questions, 0.5 percent (ten individuals) do not have any of the characteristics typically associated with transportation disadvantage. For all other respondents who answered all the relevant demographic and socioeconomic questions, the breakdown of overlapping factors is:

- 5 percent (83 individuals) have one characteristic
- 28 percent (498 individuals) have two characteristics
- 35 percent (615 individuals) have three characteristics
- 23 percent (411 individuals) have four characteristics
- 9 percent (152 individuals) have all five characteristics

Over two-thirds of respondents who answered the relevant questions have three or more characteristics that are associated with transportation disadvantage. This suggests that most survey respondents are likely to have more unmet transportation needs and greater challenges to meeting those needs than individuals who do not have such overlapping factors.

The responses to the community survey are largely representative of the Coordinated Plan's focus populations. Many respondents have multiple characteristics associated with limited transportation options, and their travel needs, existing transportation challenges, and suggestions for improvement reflect their desire to access key services and take part in their communities in a more convenient, safe, and affordable manner. The key needs and suggestions identified by respondents (described in the Needs Identification section), along with the existing conditions data analysis and agency survey results, guided the development of Coordinated Plan goals and strategies.

## **Travel Patterns**

The project team examined current travel patterns through analysis of OC ACCESS trips, information provided by the community through the community survey, and as modeled using big data from location-based services. The team also created an estimation of future HST travel, based on existing conditions and anticipated population changes in Orange County.

### ***OC ACCESS Trips***

The project team examined OC ACCESS trips from October 2023 to better understand the most common OC ACCESS trips. The team examined trips that shared common origins and destinations to identify the twenty most common trips. Once these were identified, locations were mapped to the center of the Census tract they are located in in order to protect the privacy of OC ACCESS travelers, who are often traveling to or from their home addresses. Figure 1 shows the twenty most common trips as a straight line between origins and destinations.

Figure 1 also represents the number of OC ACCESS trip destinations in each Census tract. While some of the Census tracts with the highest number of trips include an origin or destination in the top

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twenty trips, others have a high number of destinations but without a clear pattern to the trips that begin or end in that tract.

Amongst the top twenty links served by OC ACCESS in October 2023, the top five links primarily occurred within a small area – heavily populated and retail portions of Mission Viejo and Laguna Hills, with one exception being a link a few miles away in Laguna Beach.

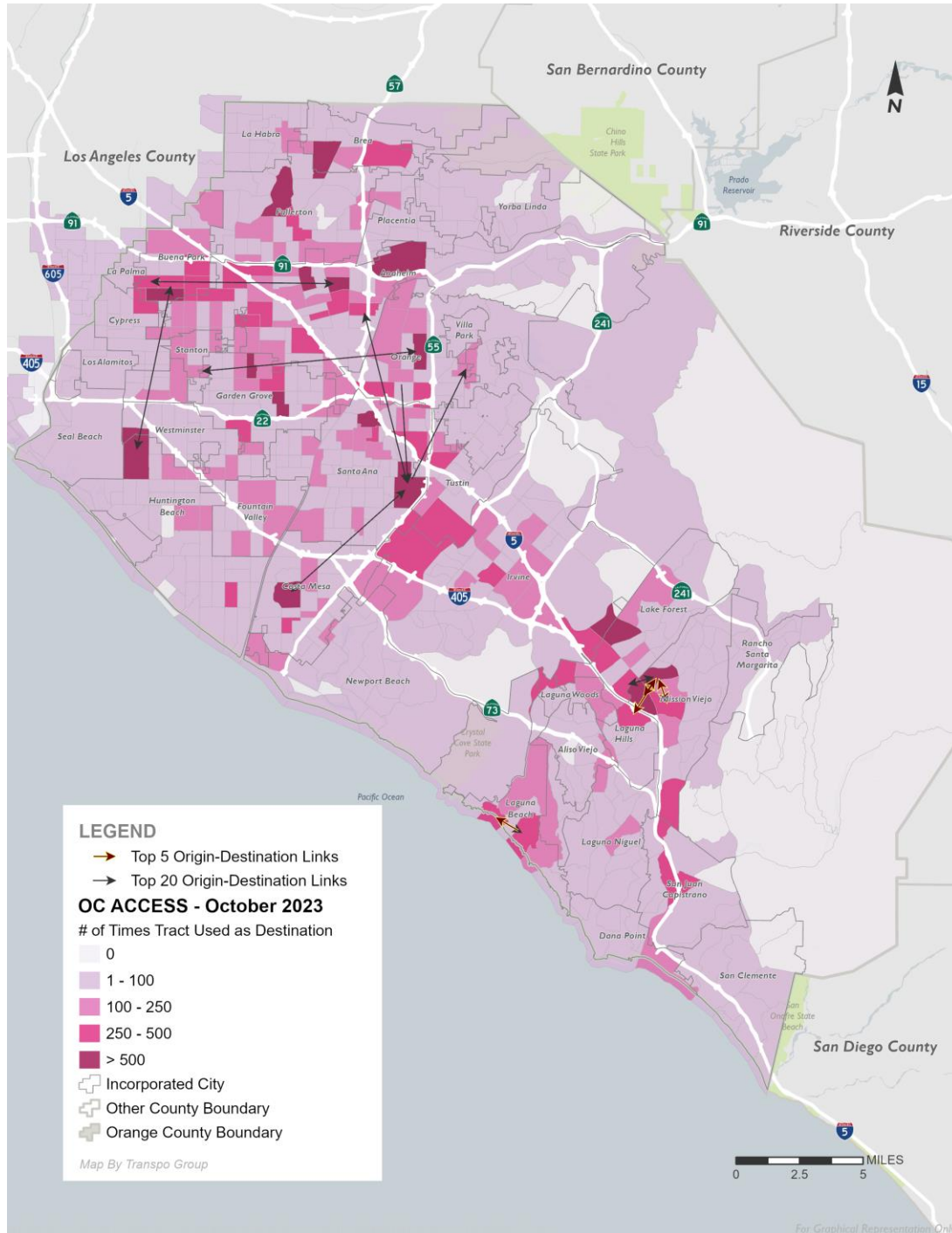


Figure 1. OC ACCESS Pick-Ups and Drop-Offs by 2022 Census Tracts, October 2023

### ***Community Survey Respondents Travel Patterns***

OCTA received 2,320 (non-duplicated) surveys between survey responses online and completed through the paper mailer OCTA sent out to all active OC ACCESS riders. The survey included questions about respondents' individual and household characteristics, travel patterns, and challenges and recommendations related to human services transportation in Orange County.

For questions about respondent travel patterns, the project team analyzed responses across all respondents and for specific groups of the most significant focus for the Coordinated Plan (older adults, people with disabilities, people with low incomes) and for other groups that have limited transportation options or are transportation disadvantaged (households with 0 vehicles and people with limited English proficiency).

Outside of OC ACCESS and OC Bus, major transportation options used regularly for all groups include: 1) being driven by friends or family, 2) walking, and 3) taking a taxi, Uber, or Lyft. Most respondents make trips outside of their home three to four times a week or more. Most respondents miss or are unable to make a trip less than once a month.

Trips that respondents regularly make include, in rank order are below. Educational, work, and volunteering were the least chosen.

1. Medical/dental (#1 across all groups)
2. Shopping and errands (#2 across all groups)
3. Social/recreational; Visiting friends and family; Religious

Three trip types tied for third in terms of which ranks highest, varying by individual groups (older adults, people with disabilities, and people with low incomes).

Overall, respondents appear to rely on OCTA services for most of their travel, followed by friends and family, and make regular healthcare and shopping-related trips. Nearly all respondents (92 percent have one or more disabilities, so there was little difference in results between the full set of respondents and people with disabilities. Among people with LEP and low incomes, there is generally less travel outside of the home and a slightly higher number of respondents who miss or are unable to make trips on a more regular basis. Adults aged 60 and older also have a slightly higher rate of lower travel outside of their home.

### ***Modeled Current Trip Demand***

OC ACCESS trip data represent trips that travelers took, but the data do not provide information about the trips that travelers might want to take but may not be able to. To identify potential demand for trips beyond those taken through OC ACCESS, the project team used data from Replica to examine travel demand. Replica, a commercial data product, is essentially a synthetic travel-survey database with advanced relational characteristics; it is described by its vendor as a "High-fidelity travel model with simulated population and trip-taking activity."

Replica data was filtered to isolate the travel patterns of specific groups most likely to use human services transportation. Disability is not a demographic factor available in Replica; analysis included zero-vehicle households, people aged 65 and older, and households with low and limited annual incomes (\$0-\$15,000; \$15,000-\$25,000; \$25,000-\$50,000). For each group, the top 100 origin-destination pairs were identified. The Plan includes each of these maps, which can be used to identify potential future services for OCTA or other providers.

**Estimated Future Human Services Transportation Demand**

The project team developed estimates of HST demand for 2045 using the framework developed for the SCAG ADA Paratransit Tool. The framework considers total service area population, proportion of the population with at least one type of disability, and agency factors related to ADA service (including percentage of population that applies for ADA paratransit service, percentage of applicants deemed eligible, percentage of registrants who have taken at least one trip in the last year, total trip requests, denial rate, and cancellation and no-show rate).

Illustrated in Figure 2 below are the annual unlinked trips for demand-responsive services spanning from 2017 to the present day. The data indicates a gradual increase in unlinked trips followed by a decline by roughly two-thirds as the pandemic's impact on mobility became apparent. Ridership has shown an upward trend since hitting a low point in 2021, suggesting a gradual return of demand for these services to pre-pandemic levels.

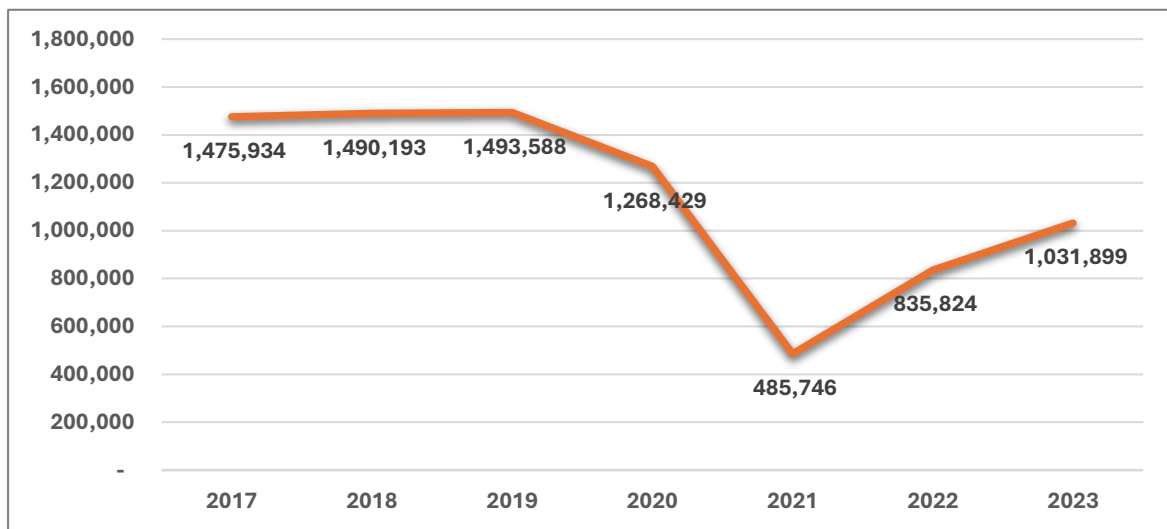


Figure 2. Historical Annual Unlinked Passenger Trips: Demand Response Services

When the tool was developed, parameters were fine-tuned based on conditions prevailing in 2017. Since then, external factors, particularly the COVID-19 pandemic, have significantly influenced the demand for HST services. Table 3 shows the estimated future Year 2045 annual unlinked passenger trips based on a short-term rebound to pre-pandemic levels, followed by adjustments linked to demographic shifts.

Table 3. Current and Future Unlinked Passenger Trips

Category	Year 2017	Year 2023	Year 2045
	Model Base	Current	Future
Total Population of Service Area	3,151,184	3,158,331	3,251,576
Target Population	282,529	288,138	296,645
Annual Unlinked Passenger Trips	1,475,934	1,031,899	1,522,954

## Transportation Provider & Community Engagement Activities

The project team relied on activities with four key groups during the development of the Coordinated Plan:

- Community members
- Transportation providers and other human services providers
- OCTA's Accessible Transit Advisory Committee (ATAC)
- OCTA's internal project development team

The project team developed a website to provide high-level information about the plan update. The project website was also where the community and the agency surveys were available and where participants could learn about and register for the community and agency virtual meetings. Website content was made available in English, Spanish, and Vietnamese.

### Community Members

As part of community outreach and developing a deeper understanding of community human services transportation needs, OCTA made a rider survey available online and in print. In late February 2024, OCTA mailed the printed survey to all 5,049 active OC ACCESS riders (as a postage-paid mailer which respondents could return to OCTA). OCTA printed the survey in English with a note in Spanish and Vietnamese, letting recipients know they could complete the survey online or request a paper survey in those and other languages as well. OCTA did not receive any requests for paper surveys in Spanish, Vietnamese, or any other language. The online survey was available in English, Spanish, and Vietnamese. The surveys were available in early February and closed at the beginning of April.

All survey respondents were asked to submit their responses by March 31<sup>st</sup> and had the option to take part in a drawing for one of five \$25 Visa gift cards. OCTA hosted a virtual community meeting on March 20<sup>th</sup> to provide participants an opportunity to learn more about the plan, share their thoughts, and get assistance filling out the survey, if needed. OCTA received 2,391 survey responses, 2,079 of which were paper surveys. At least 13 surveys were completed in Spanish, and none were completed in Vietnamese.

In addition to the survey, OCTA offered an online open house during the survey period and posted the draft Plan on the project website for public comment in August 2024.

### Transportation & Social Services Providers

Agency outreach happened in two phases in 2024 – a survey emailed to each agency and follow-up interviews with select agencies. In addition, a virtual meeting was held on February 21<sup>st</sup>. The meeting included an overview of the plan and the planning process, including high-level information about transportation providers and population characteristics. OCTA also held virtual open business hours on February 28<sup>th</sup> and 29<sup>th</sup> from 10:00am-12:00pm for agencies to discuss the plan and their projects. These open business hours aligned with agencies and OCTA preparing for the 2024 call for projects for Enhanced Mobility for Seniors and People with Disabilities (EMSD) funding, and information about the current planning process was available but was not the primary focus of the open business hours.

OCTA made the agency survey available on the project's website from February 12<sup>th</sup> through March 22<sup>nd</sup>. The survey collected information from organizations that provide human services transportation or otherwise support clients who use these services. The project team emailed the survey to over 500 contacts that OCTA identified through multiple OCTA program spreadsheets. Organizations contacted included senior centers, adult day health centers, transit providers, churches, culturally specific advocacy groups, disability advocacy groups, social services providers, and more. The project team followed up with a survey reminder and made phone calls to dozens of agencies whose contact information was unavailable or out of date. After accounting for duplicate entries, 49 agencies or individuals submitted responses to the agency survey. Among the 49 respondents, 32 (nearly 65 percent) represent private, non-profit organizations. Nearly one-third of respondents (14) represent a public agency, and three respondents represent a private, for-profit organization.

Following up on the results of the agency survey, the project team conducted five interviews with key human services transportation providers, including transportation operators and other organizations whose clients use human service transportation. The project team conducted these interviews between April 16 and April 30, 2024. Interview questions differed between the agencies, based on their responses to the survey and their role in the community.

Between the survey and the interviews, agencies identified key challenges and opportunities that informed the project team's work to identify needs and strategies, as discussed in the following sections.

## **Accessible Transit Advisory Committee (ATAC)**

During the plan update, the project team presented at quarterly ATAC meetings.

- January 2024 – outreach plan and project workplan
- April 2024 – project updates including agency and community survey results
- July 2024 – draft Coordinated Plan

In addition, the project team shared both the community survey and the agency survey with ATAC members to complete and to disseminate within their networks.

## **OCTA Project Development Team**

Through the Plan update, OCTA staff representing Transportation Planning, Programming, Special Transit Services, and External Affairs met monthly to guide the update process, provide information and insight, and review analysis.



## Needs Identification

There are areas of Orange County with high concentrations of individuals who are part of one or more of the groups that the Coordinated Plan is most concerned with. In some areas, these individuals have access to multiple transportation options, and in others, options are very limited and may be inaccessible due to service timing, fares, or physical accessibility. The project team relied on the existing conditions analysis and input from the community and agencies to identify unmet transit needs for older adults, people with disabilities, people with low incomes, and other groups with limited transportation options.

This section summarizes the five themes (“Needs”) that emerged. These themes are presented in a ranked order, representing the themes that were most strongly expressed or prioritized by the community, providers, and the OCTA project development team.

### **#1 – Sustainability of Existing Services**

*Support funding, staffing, and ability constraints limit the ability of existing service providers to meet demand in an effective and sustainable way.*

- Contracted rates for human services providers have not kept pace with the increasing cost of service provision, jeopardizing the continuation of existing services.
- Training and compliance requirements may be overly burdensome to service providers, especially very small organizations with limited staff capacity and expertise.

### **#2 – Enhanced Existing Service Coverage and Operating Hours.**

*Existing services have limited operating hours, and geographic coverage, in part due to low demand for fixed route service in low density areas.*

- Some areas of the county are unserved or underserved by existing programs, in part due to limited fixed-route services and resulting limited OC ACCESS service. These areas include the western portion of the county, with Yorba Linda, Anaheim Hills, and Rancho Santa Margarita. Laguna Beach, Laguna Niguel, and San Clemente are also among the areas underserved.
- Across all transportation providers that responded to the survey, there is limited availability of service on weekends and weekday evenings. Riders identified weekend service as a higher priority than weekday evenings.
- Across the network of human service transportation providers, there are too few wheelchair-accessible vehicles available to meet demand.
- Community transportation providers are not mandated to transition their fleets to low- or no-emissions vehicles, but planning for these transitions will benefit the agencies and the communities by expanding funding opportunities and reducing greenhouse gas emissions.

### **#3 – Improved Rider-Facing Information and Communication**

*Not all riders are able to access important transportation information, including information about the status of their trip.*

- Riders are not receiving sufficient communication about trip status. Riders do not receive proactive communication about trip delays and must call OCTA for updates. Though OC ACCESS riders who book online can see trip status updates, many riders who responded to the survey do not appear to be aware of this option.

- Rider-facing information is not sufficiently accessible for people with vision, hearing, and developmental disabilities, people with mental illness, and for people who have limited English proficiency.

#### **#4 – Improved Service Quality and Rider Experience**

*Some riders, especially those with disabilities and/or who have limited English proficiency, experience safety, comfort, and customer service challenges.*

- Some riders and social services staff experience poor service from OC ACCESS and same-day taxi drivers and customer service representatives due to language barriers and/or a lack of understanding about how to support and communicate with people with disabilities.
- OC ACCESS riders complain about spending too much time on the vehicle and/or traveling out of direction.
- Riders may need to change vehicles and drivers between same-day taxi and OC ACCESS even when both services are being provided by the same contracted provider, creating lengthier travel times and potentially requiring riders to wait in an area that is not secure.
- Some riders do not feel safe waiting for the bus in a public, open space.
- Having only one option for fare payment is limiting and can be difficult to keep track of. Stored-value card payment was previously available but deprecated due to software challenges.
- Reliance on phone calls for OC ACCESS and other program booking can be onerous and inefficient. OCTA provides OC ACCESS riders the option of booking online; not all riders seem aware of this option.
- Rider eligibility is conducted across multiple organizations through different processes that can be challenging to navigate and coordinate. For example, riders may require registration and case management through a particular agency such as an adult day health center, eligibility determination by the Office on Aging for SNEMT, and ADA eligibility for OC ACCESS.

#### **#5 – Increased Number of Service Options**

*Gaps in existing services limit the ability of older adults, people with disabilities, and people with low incomes to fully meet their travel needs.*

- Current scheduling limitations make it difficult for riders to meet their transportation needs when more flexibility is required.
- Destinations outside of Orange County are difficult to access due to trip restrictions and limited coordination between providers. Respondents noted destinations, especially medical services, in Los Angeles County, San Diego County, Riverside County, and other surrounding counties.
- Areas not served by OC Bus and OC ACCESS have comparably limited options, making it difficult and/or expensive for riders in those areas to access transportation.
- Riders requested more flexible service options, especially same-day and on-demand services.
- It can be challenging for riders who need to connect across the county lines, especially to medical facilities.
- There is a need for more HST coverage options in remote, low-density areas of the county where fixed-route bus service is not feasible.

## Recommended Strategies

This section presents goals that reflect identified needs, along with strategies to accomplish each goal. They are strategies that OCTA and human service transportation providers should consider based on their effectiveness and feasibility of implementation. Recommendations from community members and agency representatives informed strategy development. Most are relevant to human service transportation providers and related organizations throughout the county.

Because these goals tie directly to the identified needs, they are also presented in the order of greatest emphasis from community members, providers, and the project development team. Within each goal, strategies are not presented in a ranked order; the following section, Prioritizing Goals and Strategies, further explains the strategy ranking.

### **Goal 1 – Sustain Existing Services**

- Prioritize FTA Section 5310 funds to support OC ACCESS.
- Increase or prioritize funding available for capital and operations, first to make existing programs whole and then to enhance services.
- Pilot a mobility coordination committee where all agencies with shared human services clients meet regularly to identify challenges and develop solutions.
- Promote/encourage interagency partnerships to improve coordination and address unmet needs.
- Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.

### **Goal 2 – Enhance Existing Service Coverage and Operating Hours.**

- Increase funding in general for capital and operations to enhance services.
- Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.
- Prioritize areas that require new or enhanced service for high demand and underserved populations.
- Develop an understanding of transportation provider capacity for and interest in low-/no-emission fleet transition and community infrastructure and other resources to support transition.

### **Goal 3 – Improve Rider-Facing Information and Communication**

- Improve day-of-trip communication with riders, informed by 2024 OC ACCESS text notification pilot.
- Provide more comprehensive, up-to-date, and easily understandable rider-facing information online and in print.
- Provide more accessible services information – accessible both in terms of spoken language, American Sign Language, and for people with disabilities.

### **Goal 4 – Improve Service Quality and Rider Experience**

- Improve training for drivers and customer service representatives to better communicate with and support riders with disabilities and/or who have limited English proficiency.

- Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys and/or feedback mechanisms into daily service delivery to identify improvement areas.
- Explore re-introducing more payment options, including account-based payments and stored-value cards, for OC ACCESS and same-day taxi riders.
- Provide riders with the option to book and check the status of trips online and/or through a mobile application. For OC ACCESS, increase promotion and marketing of this feature.
- Improve transportation provider access to advanced scheduling and dispatch software.
- Explore opportunities to coordinate program eligibility.
- Improve the safety and security of fixed route bus stops and designated OC ACCESS stops.

**Goal 5 – Increase Number of Service Options**

- Provide flexible service options, especially same-day and on-demand services.
- Improve coordination of services across the county lines, especially to medical facilities.
- Provide more service coverage and options in remote areas of the county, especially those not served or underserved by OC Bus and OC ACCESS.
- Continue to provide flexible service options to ADA-eligible customers traveling in the areas with the highest origin-destination pairs, as identified by analyzing OC ACCESS data.
- Increase service options for individuals who have disabilities but may not qualify for OC ACCESS or other age- and trip-limited transit services (such as SMP or SNEMT).

## Prioritized Goals and Strategies

The previous plan noted that all proposed strategies, to varying degrees, met one or more of the following criteria:

- Address identified gaps and barriers
- Impact the highest number of members of target populations
- Make use of new technology in delivery of service whenever possible
- Strong potential to be funded and implemented over the life of the Plan

Strategies were prioritized according to costs and implementation timeline. For this Plan update the project development team opted to prioritize the strategies in a similar way. In the table following, the implementation timeline and cost for each strategy is estimated, along with a prioritization of the strategy. Strategies were prioritized based on the following factors:

- High Priority – low cost and short or medium implementation timeline
- Medium Priority – medium cost and implementation timeline, medium cost and long implementation timeline, or high cost and medium implementation timeline
- Low Priority – high cost and long implementation timeline

Strategies ranked “Low” in priority are not less valuable than the strategies ranked “High” or “Medium” priority; the priority ranking indicates which strategies should be pursued first. In addition, some specific implementation actions associated with the strategies may be lower cost or have a shorter implementation timeframe than the full strategy, so it may be beneficial to pursue these specific actions in a shorter timeframe, even for strategies that rank “Low.”

The “Cost” factor considers direct costs such as software or capital expenditures and staff salaries, in addition to soft costs such as staff time spent in coordination or management tasks.

STRATEGY	IMPLEMENTATION TIMELINE	COST	PRIORITY
<b>Goal 1 – Sustain Existing Services</b>			
1.1 Prioritize FTA Section 5310 funds to support OC ACCESS.	Short (6-12 months)	Low	High
1.2 Pilot a mobility coordination committee where agencies with shared human services clients meet regularly to identify challenges and develop solutions.	Short (6-12 months)	Low	High
1.3 Promote/encourage interagency partnerships to improve coordination and address unmet needs	Short (6-12 months) and ongoing	Low	High
1.4 Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.	Medium (12-24 months)	Low	High
1.5 Increase or prioritize funding available for capital and operations, first to make existing programs whole and then to enhance services.	Medium (12-24 months)	Medium	Medium
<b>Goal 2 – Enhance Existing Service Coverage and Operating Hours.</b>			
2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.	Medium (12-24 months)	Low	High
2.2 Prioritize areas that require new or enhanced service for high demand and underserved populations.	Medium (12-24 months)	Low	High
2.3 Develop understanding of factors related to community transportation fleet transition to low-/no-emissions vehicles.	Medium (12-24 months)	Medium	Medium
2.4 Increase funding available for capital and operations to enhance services.	Long (24-48 months)	Medium	Medium
<b>Goal 3 – Improve Rider-Facing Information and Communication</b>			
3.1 Improve day-of-trip communication with riders, informed by 2024 OC ACCESS text notification pilot.	Medium (12-24 months)	Medium	Medium
3.2 Provide more accessible services information – accessible both in terms of spoken language, American Sign Language, and for people with disabilities.	Medium (12-24 months)	Medium	Medium

3.3 Provide more comprehensive, up-to-date, and easily understandable rider-facing information online and in print.	Long (24-48 months)	Medium	Medium
<b>Goal 4 – Improve Service Quality and Rider Experience</b>			
4.1 Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys, and/or feedback mechanisms into daily service delivery to identify improvement areas.	Medium (12-24 months)	Low	High
4.2 Improve transportation provider access to advanced scheduling and dispatch software.	Medium (12-24 months)	Medium	Medium
4.3 Improve training for drivers and customer service representatives to better communicate with and support riders with disabilities and/or who have limited English proficiency.	Long (24-48 months)	Medium	Medium
4.4 Improve coordination of services across the county lines, especially to medical facilities.	Long (24-48 months)	Medium	Medium
4.5 Improve the safety and security of fixed route bus stops and designated OC ACCESS stops.	Medium (12-24 months)	High	Medium
4.6 Explore opportunities to coordinate program eligibility.	Long (24-48 months)	Medium	Low
4.7 Explore re-introducing more payment options, including account-based payments and stored-value card, for OC ACCESS and same-day taxi riders.	Long (24-48 months)	High	Low
4.8 Provide riders with the option to book and check the status of trips online and/or through a mobile application. For OC ACCESS, increase promotion and marketing of this feature.	Long (24-48 months)	High	Low
<b>Goal 5 – Increase Number of Service Options</b>			
5.1 Improve coordination of services across the county lines, especially to medical facilities.	Long (24-48 months)	Medium	Medium
5.2 Provide flexible service options, especially same-day and on-demand services.	Long (24-48 months)	High	Low
5.3 Provide more service coverage and options in remote areas of the county, especially those not served or underserved by OC Bus and OC ACCESS.	Long (24-48 months)	High	Low
5.4 Continue to provide flexible service options to ADA-eligible customers traveling in the areas with the highest origin-destination pairs, as identified by analyzing OC ACCESS data.	Long (24-48 months)	High	Low
5.5 Increase service options for individuals who have disabilities but may not qualify for OC ACCESS or other age- and trip-limited transit services (such as SMP or SNEMT).	Long (24-48 months)	High	Low

## Implementation Steps

This section describes specific tasks and objectives to implement strategies that are ranked “High” priority. For strategies ranked “Medium” or “Low” priority, there may be lower cost or shorter implementation steps that can be identified through future efforts.

STRATEGY	IMPLEMENTATION STEPS
<b>High Priority Strategies</b>	
1.1 Prioritize FTA Section 5310 funds to support OC ACCESS.	Continue OCTA's practice of prioritizing 5310 funds for OC ACCESS and supporting other human services transportation through other funding sources.
1.2 Pilot a mobility coordination committee where agencies with shared human services clients meet regularly to identify challenges and develop solutions.	<p>Facilitate a conversation with ATAC about interest in and capacity to participate in the MCC the benefits and challenges of creating a separate structure.</p> <p>Determine appropriate structure for MCC, including the person or agency with responsibility for the development and facilitation of the MCC.</p>
1.3 Promote/encourage interagency partnerships to improve coordination and address unmet needs	<p>The development of the MCC will allow for regular coordination across all human service transportation providers and related organizations. One of the first steps of the MCC after establishing foundational documents will be to identify opportunities to improve coordination across the county in support of meeting the needs identified in the Plan.</p> <p>=</p>



STRATEGY	IMPLEMENTATION STEPS
<b>High Priority Strategies</b>	
<p>1.4 Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.</p>	<p>The first step in this strategy will be to determine, in greater detail than reflected in this plan, the specific challenges that human transportation providers of all sizes are facing in Orange County to understand the full extent of support needed and the full set of community resources available to provide solutions. The MCC could facilitate this research and create a workplan for developing, funding, and implementing the solutions identified.</p>
<p>2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.</p>	<p>The first step in this strategy will be to identify OCTA's capacity to increase the number of vehicle donations. After understanding the resources needed to enhance the program, OCTA will need to communicate with potential recipients to promote the program and to better understand if organizations are facing barriers to participation.</p>
<p>2.2 Prioritize areas that require new or enhanced service for high demand and underserved populations.</p>	<p>In evaluating proposals for competitive grant funding, OCTA should prioritize projects that meet the identified needs of the communities and areas of focus in the Plan. For all human services transportation partners, projects and programs should consider elevating the needs of communities and areas of focus in the Plan.</p>
<p>4.1 Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys, and/or feedback mechanisms into daily service delivery to identify improvement areas.</p>	<p>With the transition to new scheduling software and a rider-facing application, OCTA should explore providing more real-time opportunities for rider feedback. For all human transportation services providers, providing regular rider feedback opportunities through in-vehicle surveys, phone surveys, mailed surveys, and online surveys will ensure timely recognition of issues and successes and a strong foundation for subsequent Plan updates.</p>

## Conclusion

Several programs in Orange County provide transportation for older adults, people with disabilities, and people with low income. While these programs collectively serve thousands of riders each day, there are still opportunities to improve service sustainability, introduce new services, and improve rider experiences. While OCTA is responsible for producing this Coordinated Plan, the needs, gaps, goals, and strategies presented in this plan reflect the human service transportation network in Orange County.

The Coordinated Plan provides an opportunity to comprehensively examine existing traveler needs and organizational capacities and to develop strategies specifically designed to improve mobility for older adults, people with disabilities, and people with low income. These strategies will guide human services transportation investment in the coming years, but partner organizations do not need to wait for funding opportunities to pursue these strategies. OCTA is actively working on some of the listed strategies, including an OC ACCESS rider notification pilot, procuring a more feature-rich scheduling and dispatch software option for OCTA and partners, and evaluating OCTA's eligibility process.

A woman with blonde hair, wearing a blue patterned button-down shirt and a grey cardigan, is looking down at a black smartphone she is holding in her right hand. She is wearing a ring on her finger. The background is a blurred brick wall. The text "DRAFT ORANGE COUNTY HUMAN SERVICES TRANSPORTATION COORDINATED PLAN" is overlaid in white, bold, sans-serif font on the right side of the image.

**DRAFT ORANGE COUNTY  
HUMAN SERVICES  
TRANSPORTATION  
COORDINATED PLAN**



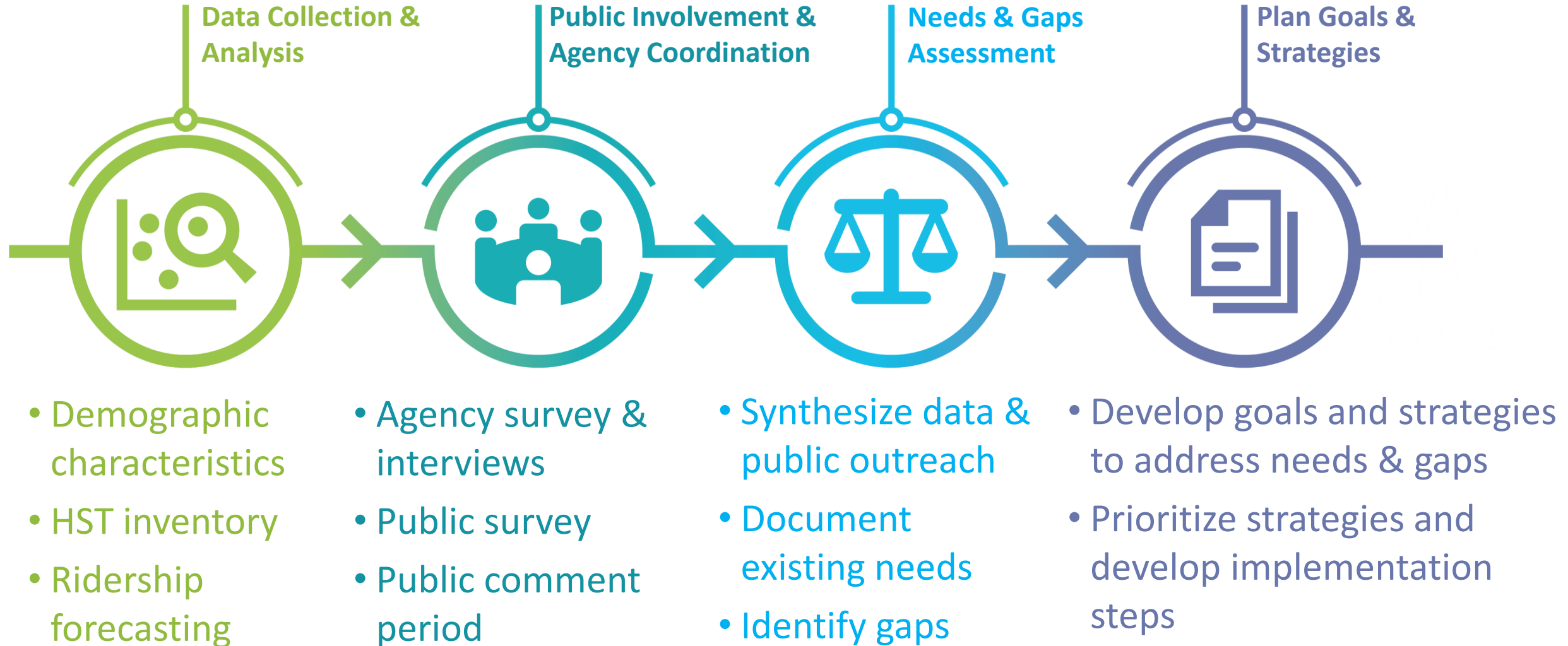
# COORDINATED PLAN OBJECTIVES

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1. Assessment of available services that identifies current transportation providers (public, private, and nonprofit).
2. Assessment of transportation needs for individuals with disabilities and seniors, data collection and modeling efforts, and gaps in service.
3. Develop strategies, activities, and/or projects to address the identified gaps and opportunities to achieve efficiencies in service delivery.
4. Prioritize implementation based on resources, time, available funding sources, and feasibility for implementing specific strategies and/or activities identified.

**Plan must be updated every four years to comply with Federal Transit Administration requirements.**

# 2024 PLAN UPDATE TASKS





# CURRENT CONDITIONS AND TRENDS

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- Target Demographics
  - Persons with disabilities and age 65 or older
- Current travel trends
- Demand forecast model
- Existing OCTA specialized transportation services
  - OC ACCESS Service
    - FY 2023-24 Trips: 986,569 / Budget: \$50,528,609
- OCTA-Contracted Specialized Services
  - Same-Day Taxi, Cooperative Transit Agreements (Special Agencies), Senior Mobility Program, Senior Non-Emergency Transportation
    - FY 2023-24 Trips: 481,409 / Budget: \$13,845,255



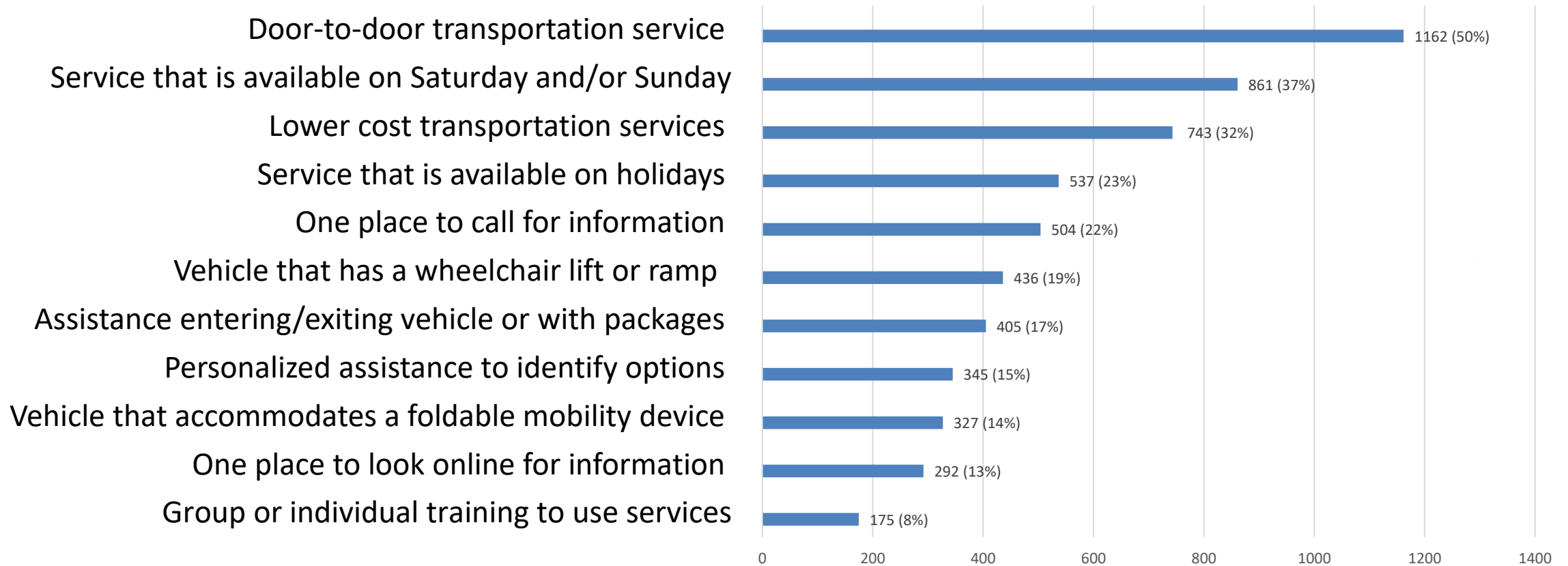
# PROJECT WEBSITE AND OUTREACH

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- Develop project website
- Online community survey available in English, Spanish, Vietnamese on website
- Print survey mailed out to all active OCTA OC ACCESS riders; 2,391 survey responses
  - High representation from older adults and low-income individuals
  - 92% of respondents have one or more disabilities
  - 73% have no driver's license
  - Half of respondents live in a household with zero vehicles
  - 43% of respondents speak a language other than (or in addition to) English at home
- Agency surveys (49 received) and interviews (5 completed)
  - 500+ community, non-profit, and government organizations sent email, phone follow-up for bounce-backs
  - Abrazar, Braille Institute, Dayle McIntosh Center, Office on Aging, and Yellow Cab

# COMMON SURVEY RESULTS AND INTERVIEW THEMES

What would make it easier to use transportation services for the trips you need or want to make?







# NEEDS AND CORRESPONDING GOALS

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## **Goal 1 - Stabilize and Sustain Existing Services**

Funding, staffing, and capacity constraints limit the ability of existing service providers to meet demand in an effective and sustainable way.

## **Goal 2 - Enhance Existing Service Coverage, Operating Hours, and Capacity**

Existing services have limited capacity, operating hours, and geographic coverage.

## **Goal 3 - Improve Rider-Facing Information and Communication**

Not all riders can access important transportation information, including the status of current trips.

## **Goal 4 - Improve Service Quality and Rider Experience**

Some riders, especially those with disabilities and/or who have limited English proficiency, experience safety, comfort, and customer service challenges.

## **Goal 5 - Increase Number of Service Options**

Gaps in existing service limit the ability of older adults, people with disabilities, and people with low incomes to fully meet their travel needs.

# DEVELOPMENT AND PRIORITIZATION OF STRATEGIES

- 25 strategies were designed to meet the goals
- Emphasis from community and agency engagement
- Expertise of OCTA project development team and consulting team
- Consideration of time and resources needed for implementation
- Ranking of low, medium, and high was established depending on combination of factors; low and medium priorities are not less valuable, but high priorities should be pursued first

<b>EXAMPLE: Goal 2 - Enhance Existing Service Coverage, Operating Hours, and Capacity</b>	<b>Implementation Timeline</b>	<b>Cost</b>	<b>Priority</b>
2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation service providers.	Medium (12-24 months)	Low	High

# HIGH-PRIORITY STRATEGY IMPLEMENTATION STEPS

- Identified next steps for OCTA staff and other human services transportation providers
- Focused on the seven high-priority strategies
- Dependencies and interactions between strategies and steps are highlighted

EXAMPLE: Strategy 2.1	Implementation Steps
2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation service providers.	The first step in this strategy will be to identify OCTA's capacity to increase the number of vehicle donations. After understanding the resources needed to enhance the program, OCTA will need to communicate with potential recipients to promote the program and to better understand if organizations are facing barriers to participation.



# NEXT STEPS

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- Present Draft Plan to the Board November 25, 2024
- Finalize Draft Plan based on Transit Committee and Board feedback



# Bimonthly Transit Performance Report

November 2024



## What do we measure?



### Service Demand

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



### Reliability

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



### Safety

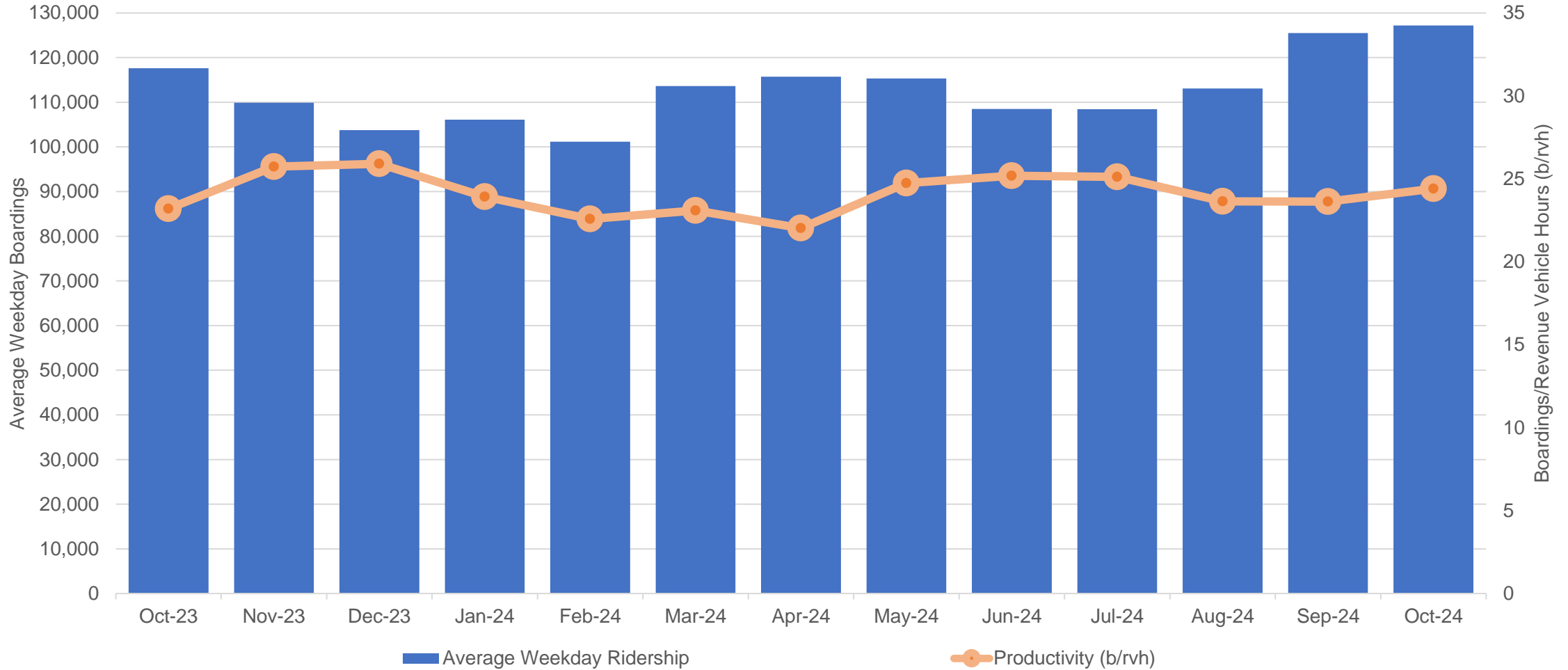
Measures the safety of the service in terms of preventable collisions normalized by miles traveled.



### Courtesy

Measures customer feedback and is typically normalized by boardings.

## Service Demand - Ridership Snapshot

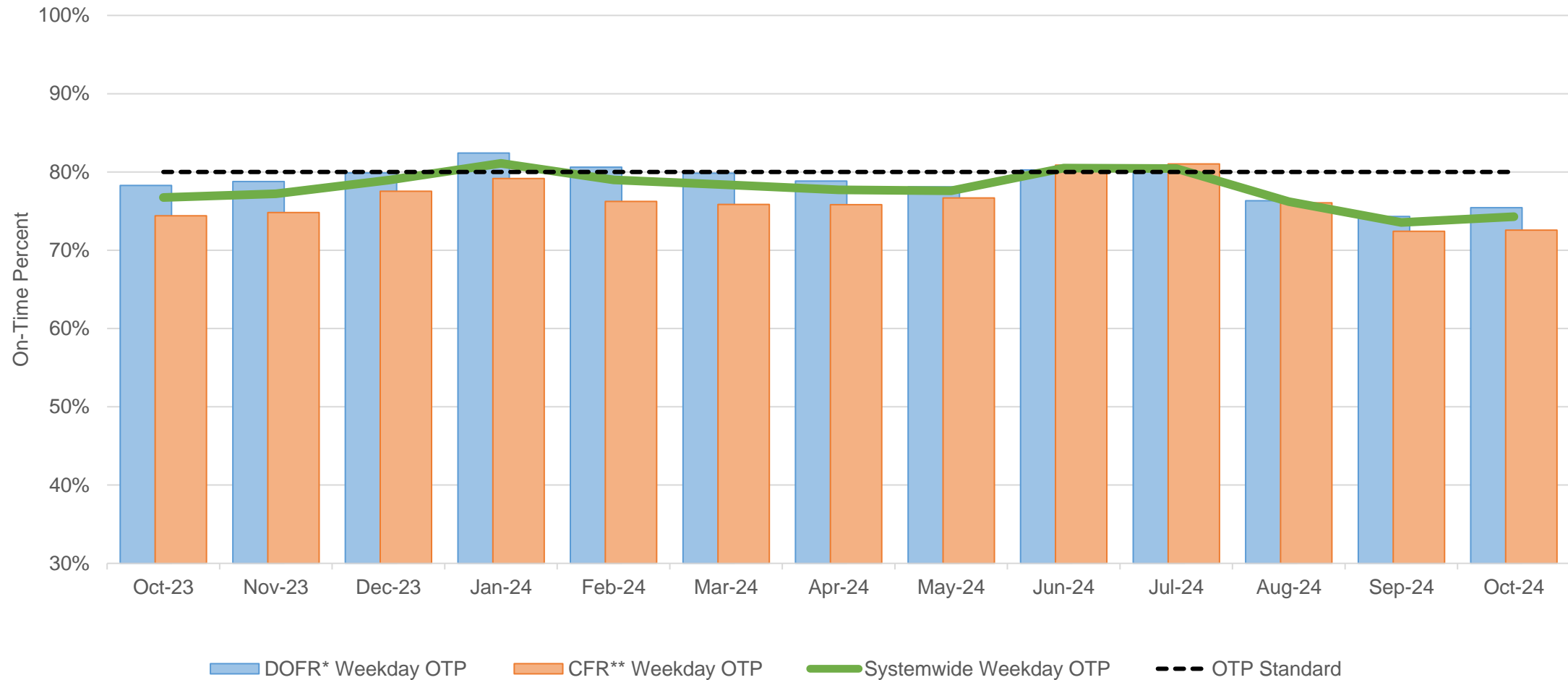


**Service Demand:** Ridership (or boardings) is the number of rides passengers take using public transit. The average weekday boarding activity is used to measure OC bus service demand. Productivity is an industry measure that counts the average number of boardings for each revenue vehicle hour (RVH)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

# OC Bus Performance



## Service Reliability – On-Time Performance (OTP)



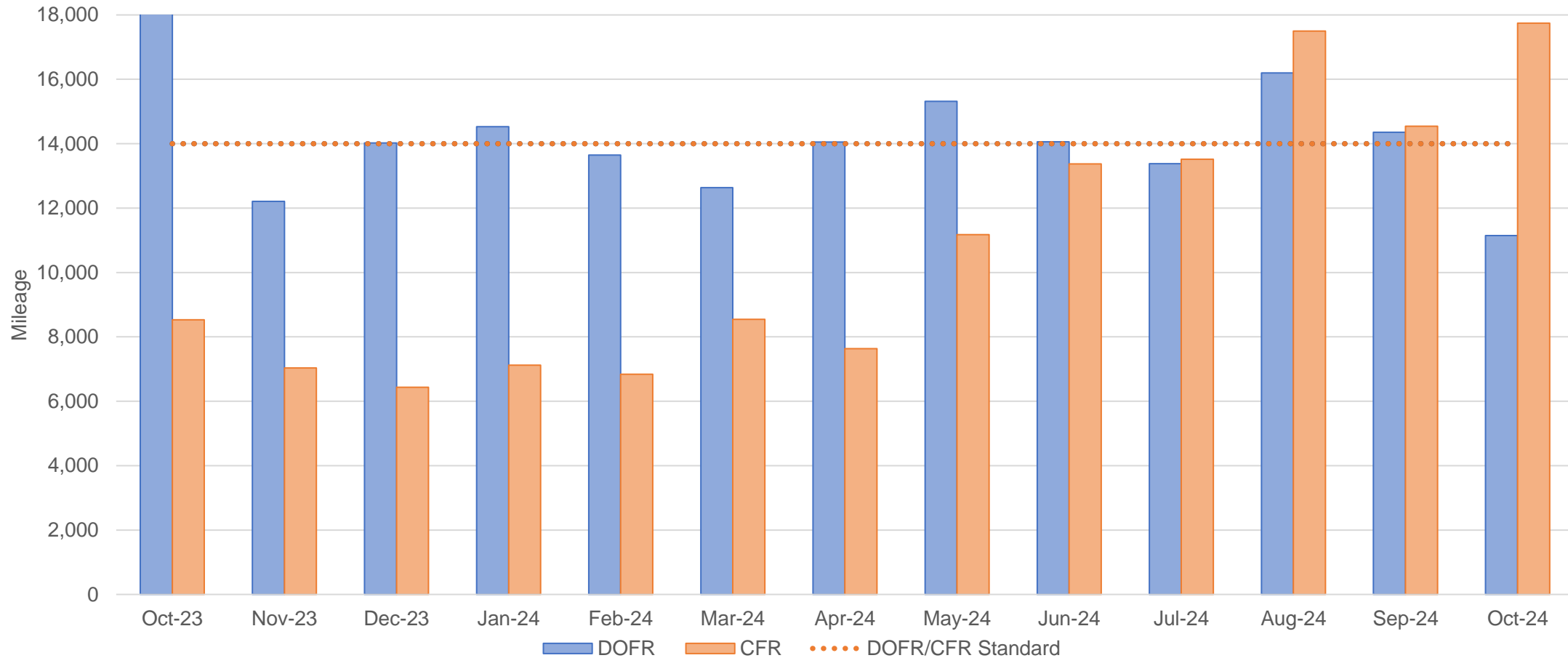
**On-time Performance (OTP):** measures how well OCTA vehicles adhere to the schedule, and it is calculated by dividing the count of vehicle timepoint departures that are on time (within five minutes late or zero minutes early of the scheduled arrival time) by the number of total departures, reported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



# OC Bus



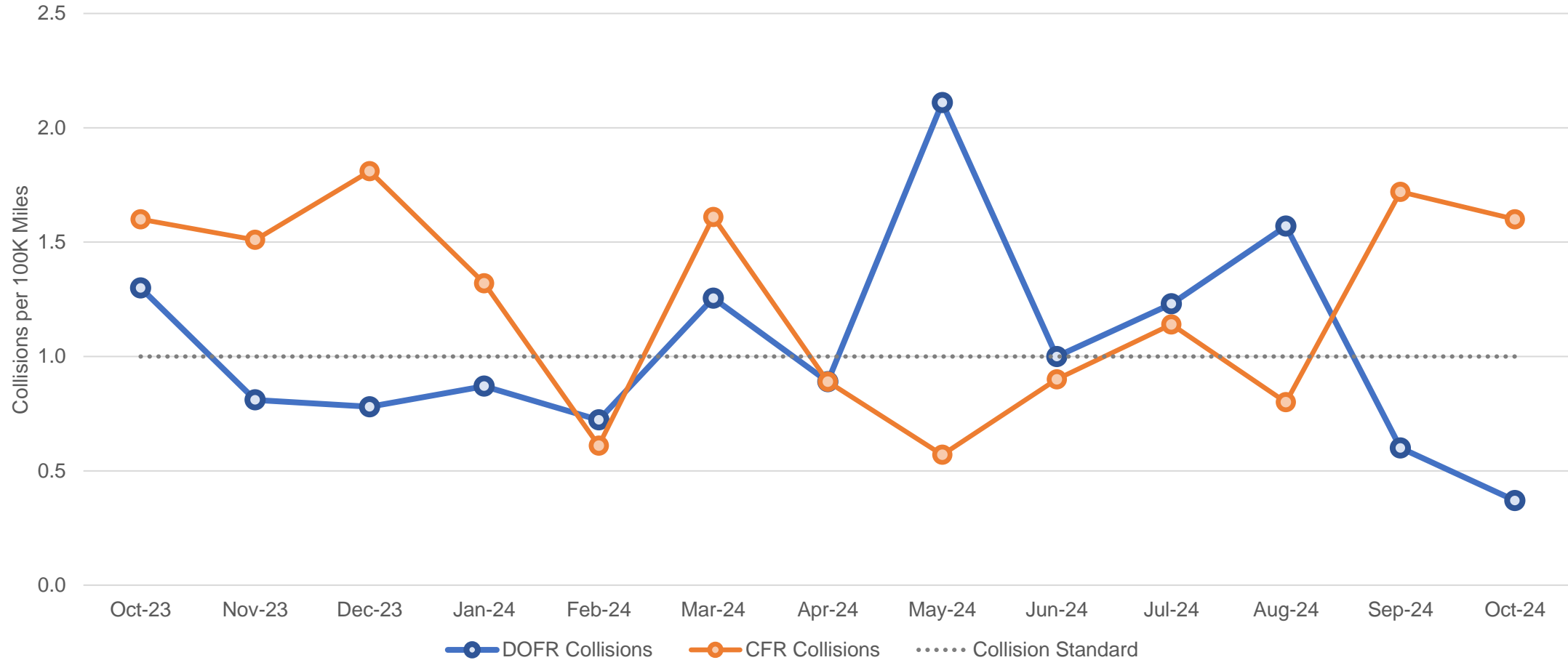
## Service Reliability – Vehicle Performance



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

# OC Bus

## Safety – Preventable Collisions

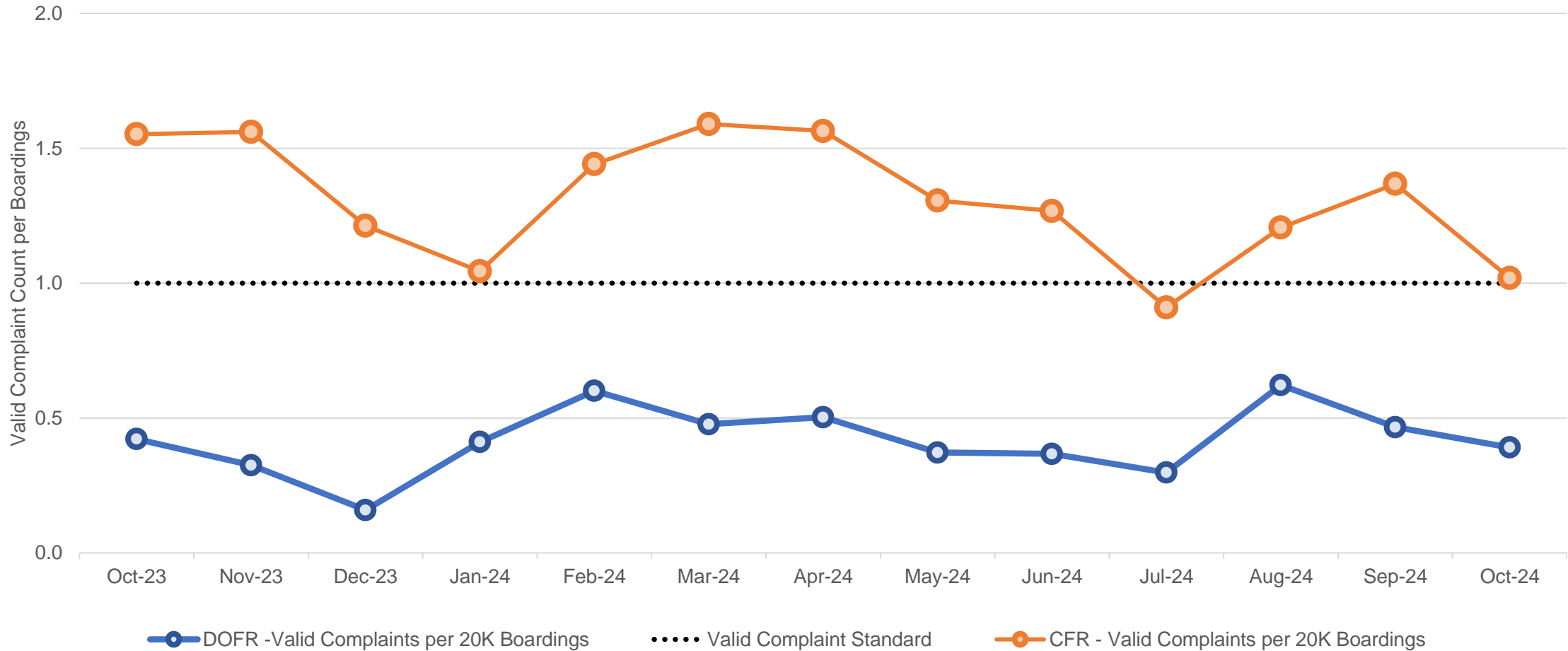


**Preventable Collisions:** Preventable vehicle accidents are defined as incidents when physical contact occurs between vehicles used for public transit and other vehicles, objects, or pedestrians and where a coach operator failed reasonably to prevent the accident. The performance standard is no more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

# OC Bus



## Service Quality – Customer Complaints

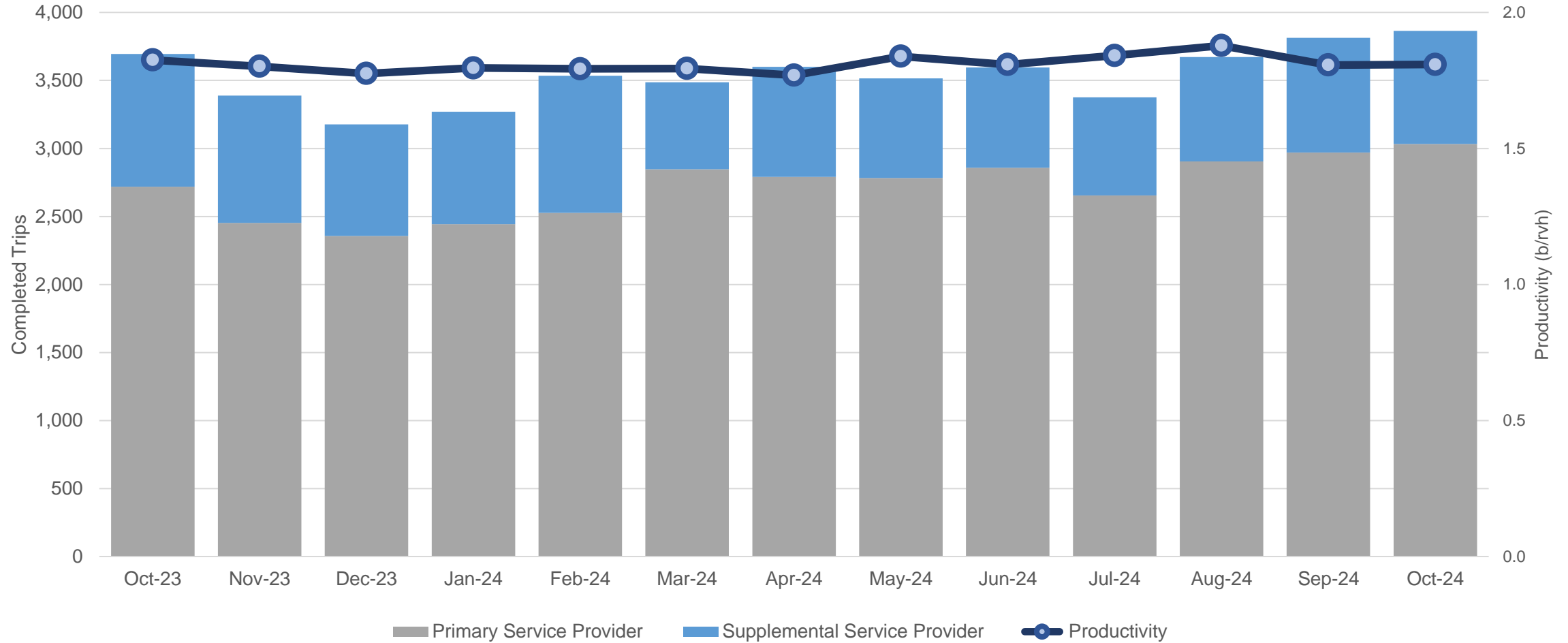


**Customer Satisfaction:** The performance standard for customer satisfaction is courtesy, measured by the number of valid complaints received. Customer complaints are the count of incidents when a rider reports dissatisfaction with service. The standard adopted by OCTA for OC Bus is no more than one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

# OC ACCESS



## Service Demand – Ridership Snapshot

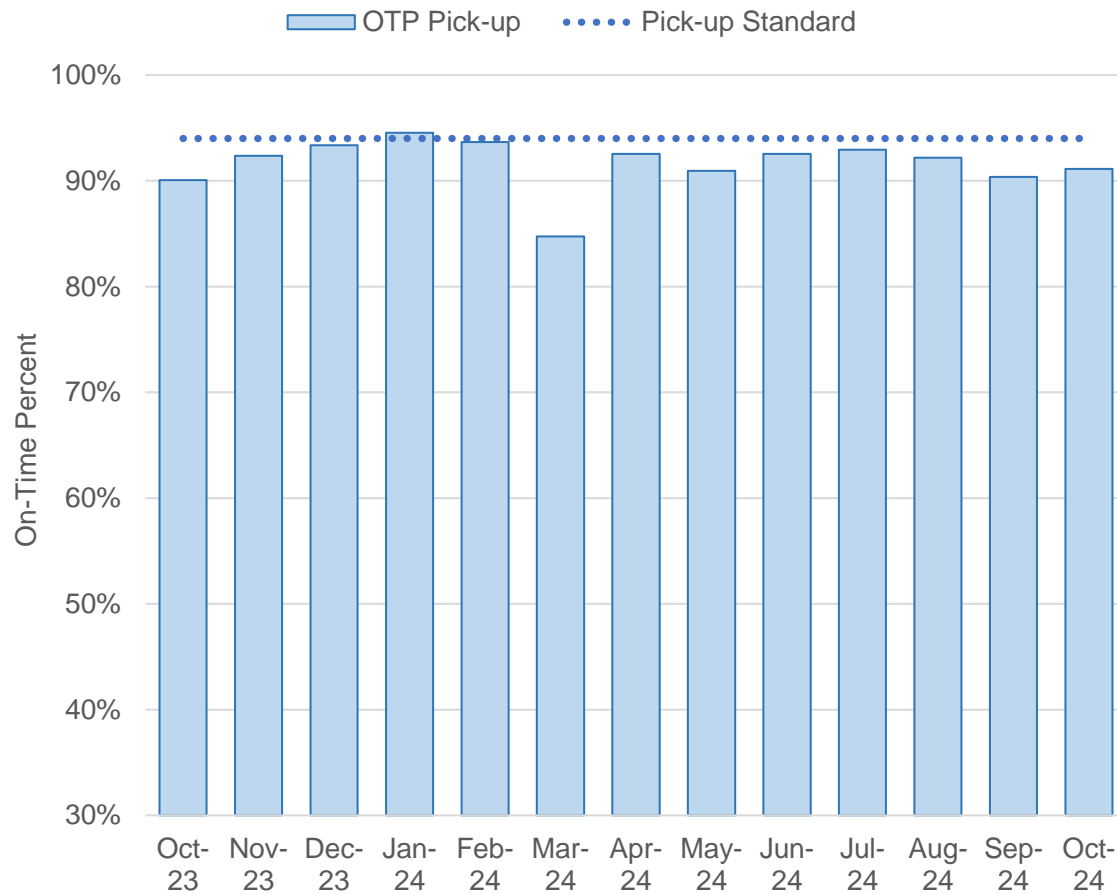


**Service Provider Demand:** OCTA has a primary service provider, First Transit, and supplemental providers which are contracted to meet demand on the network.

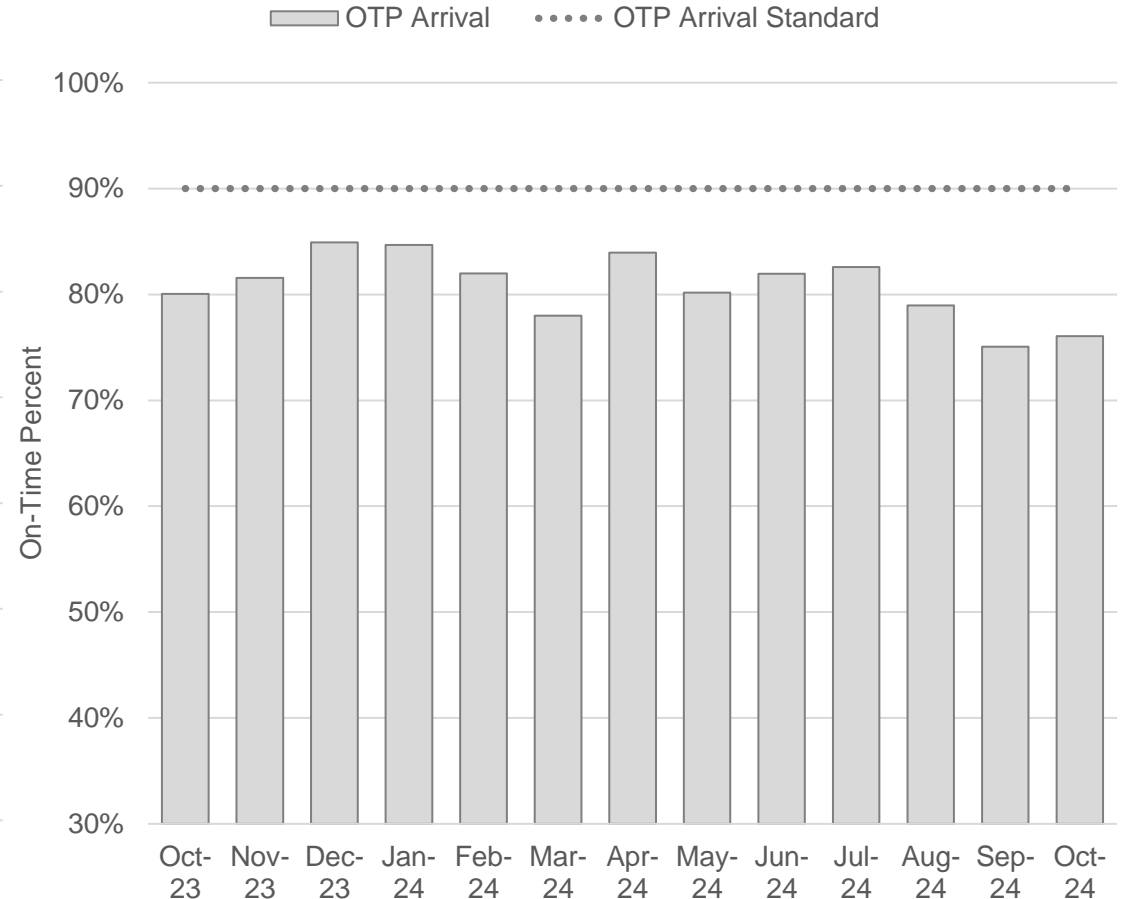
# OC ACCESS



## Service Reliability – On-Time Performance (OTP)



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



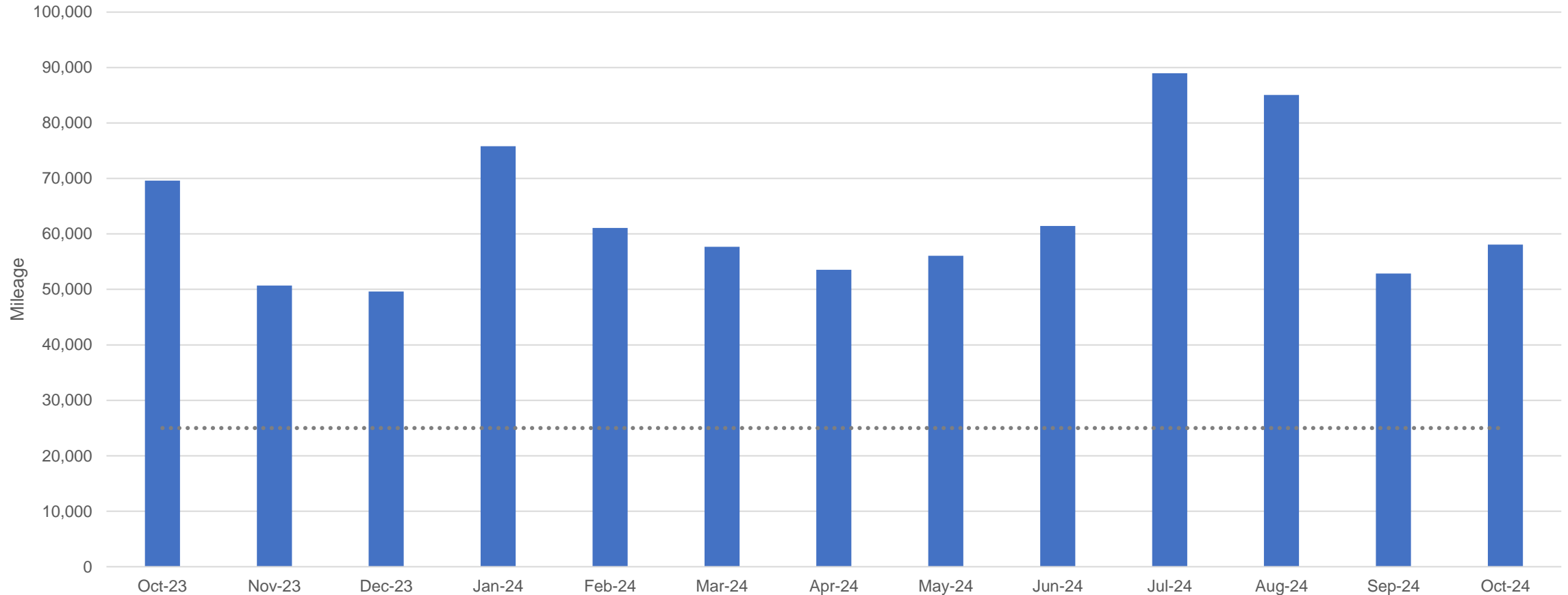
**Arrival OTP:** The percentage of trips when the passenger arrived at their destination by or before the scheduled arrival time.

# OC ACCESS



## Service Reliability – Miles Between Road Calls (MBRC)

■ MBRC    ..... Standard

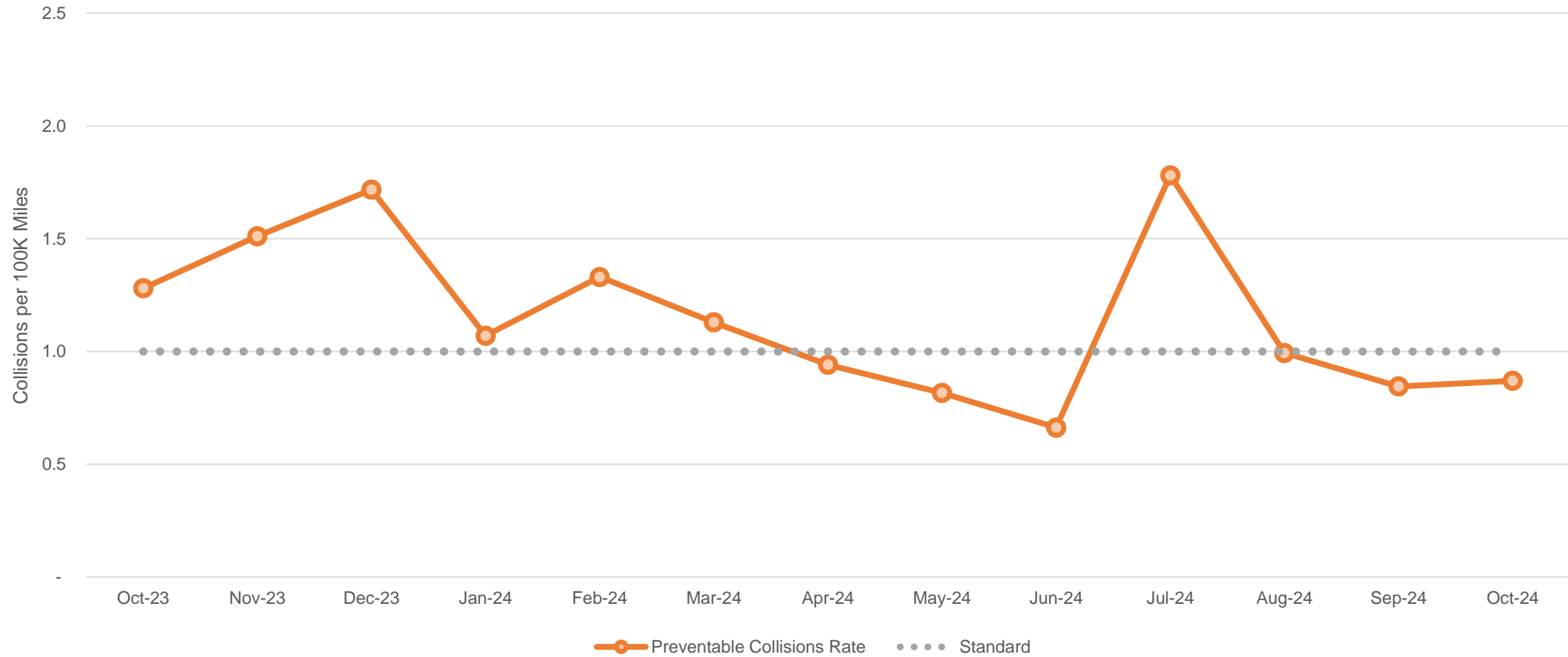


**MBRC:** MBRC is calculated by dividing the total miles traveled by all OC ACCESS vehicles over the calendar month by the total number of road calls or disruptions due to mechanical failures in revenue service during the same period. The MBRC standard for OC ACCESS is 25,000 miles.

# OC ACCESS



## Safety – Preventable Collisions

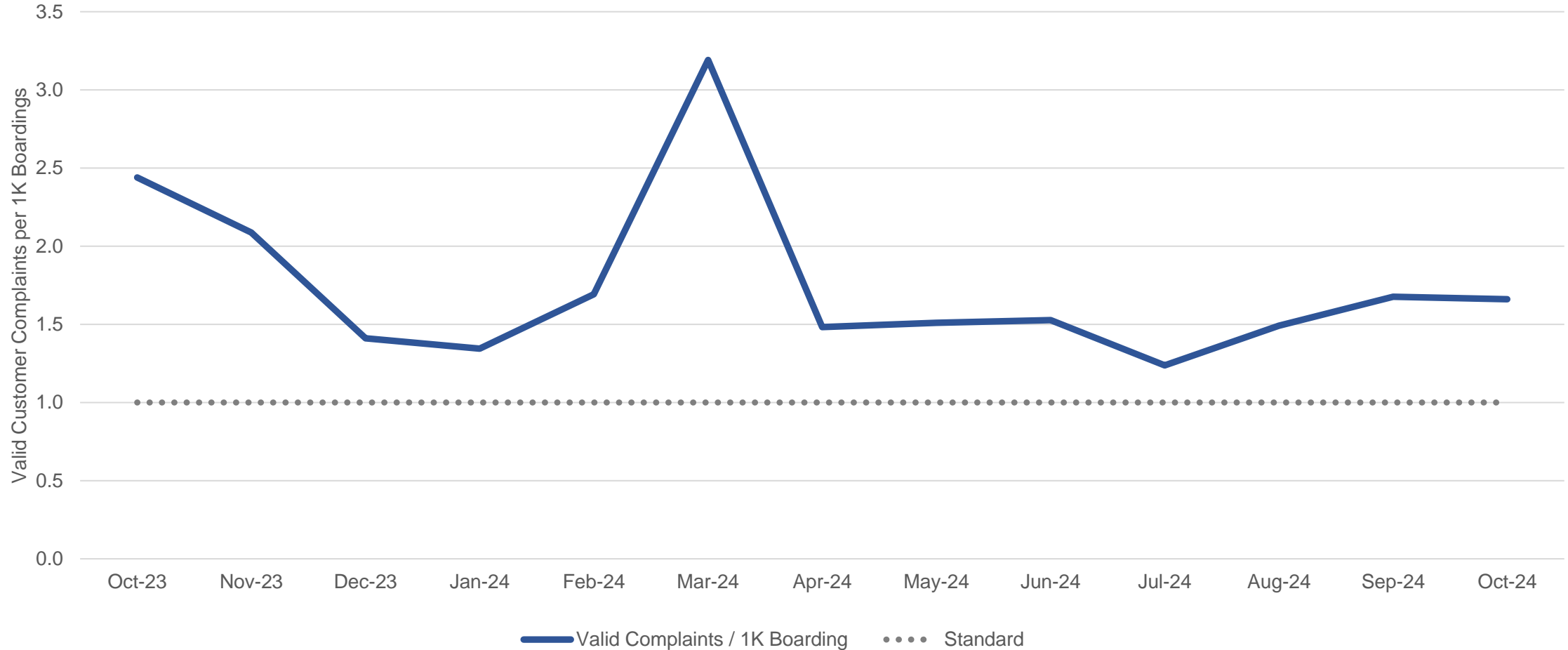


**Preventable Collisions:** A preventable collision is defined as an event where a driver providing revenue service could have been reasonably avoided by the driver. The performance standard is no more than one vehicle accident per 100,000 miles.

# OC ACCESS



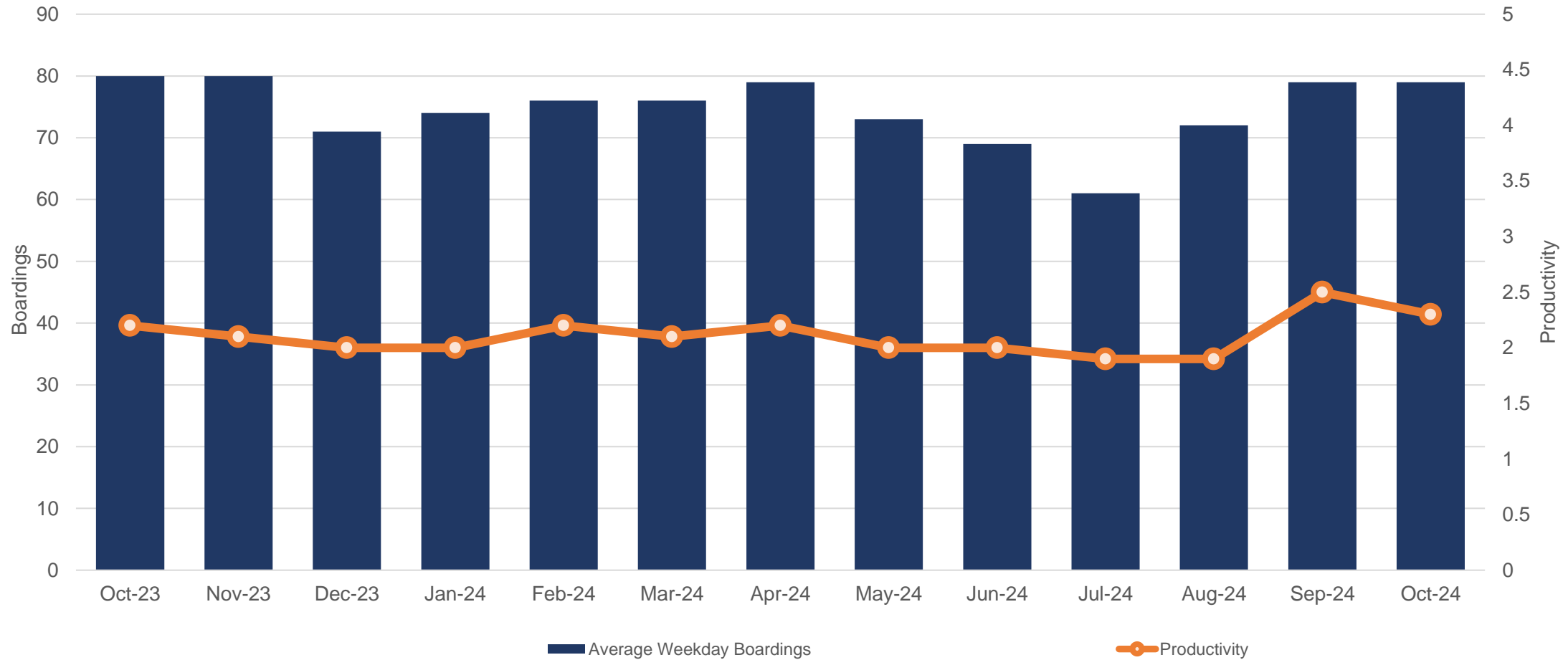
## Service Quality – Customer Complaints



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

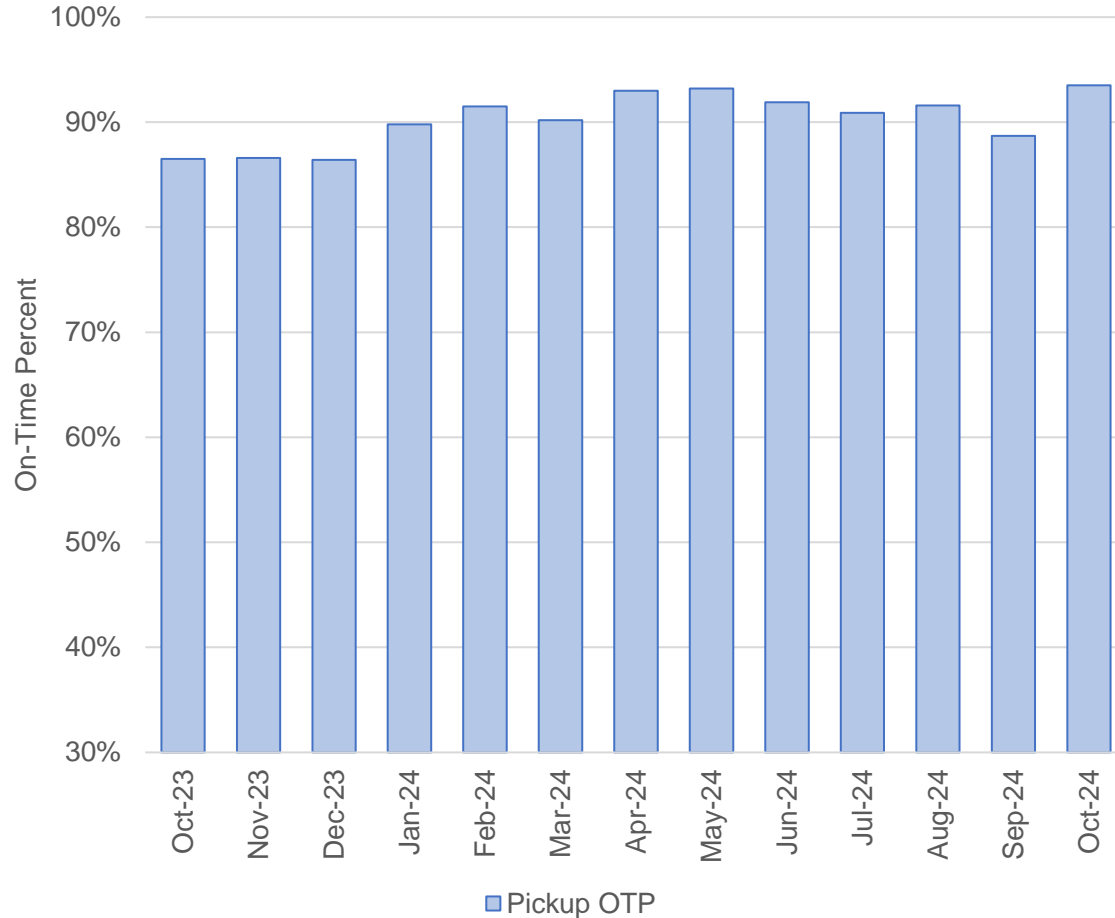


## Service Demand – Ridership Snapshot

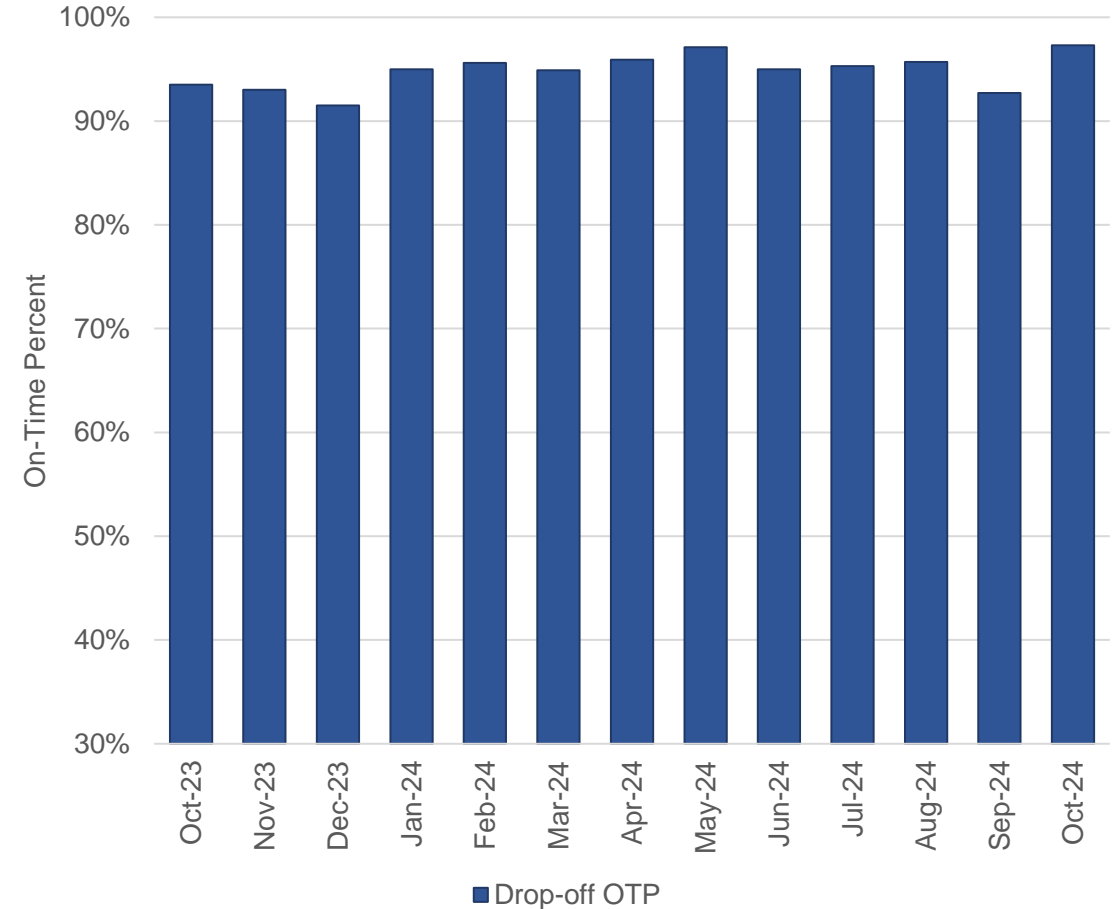


**Service Demand:** The sum of completed passenger boardings on average per weekday within the existing service area.

## Service Reliability – On-Time Performance (OTP)



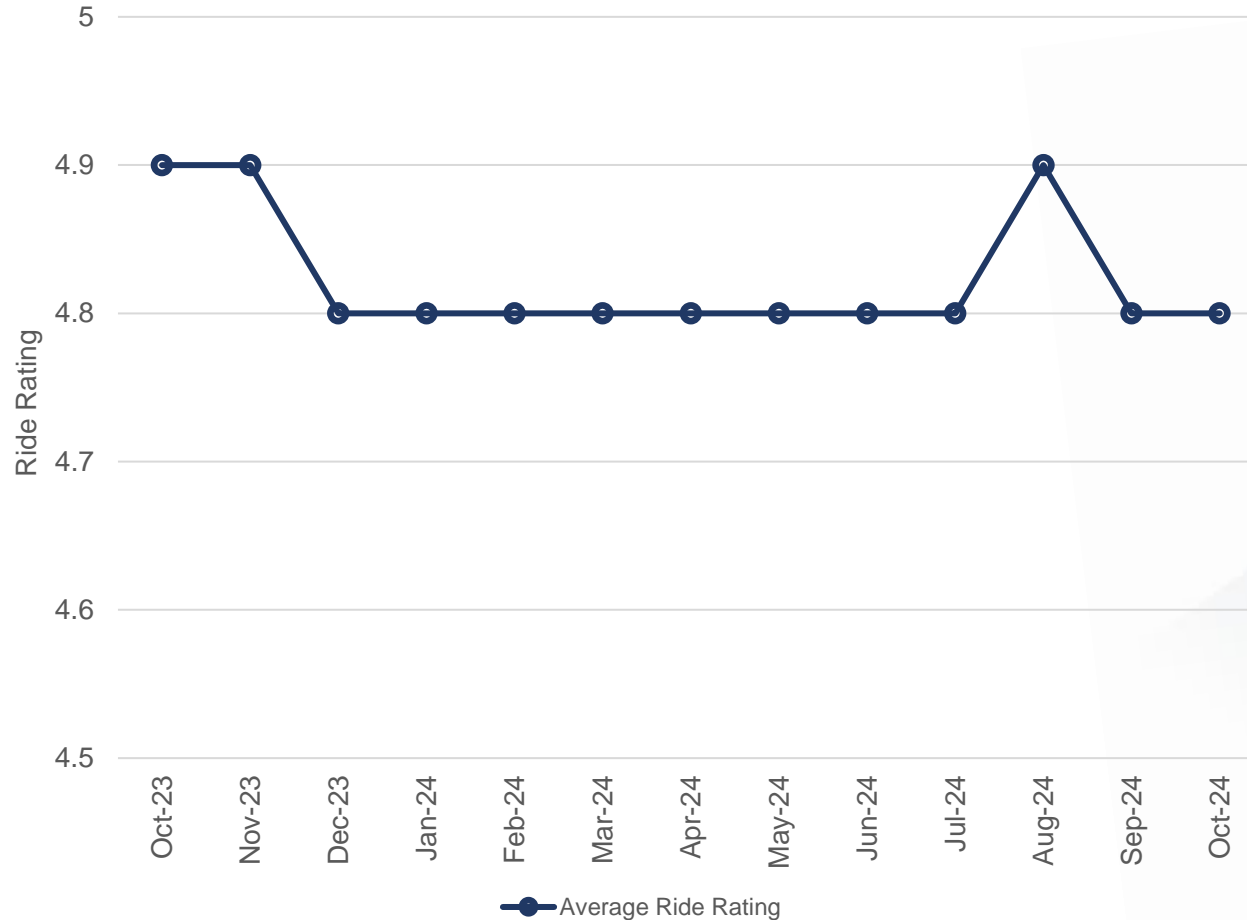
**Pick-up OTP:** The percentage of completed rides in which the rider was picked up within the ten-minute pick-up window that was provided at booking.



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

# OC Flex

## Service Quality – Average Ride Rating



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