



AGENDA

Transit Committee Meeting

Committee Members

Tim Shaw, Chairman
Harry S. Sidhu, Vice Chairman
Doug Chaffee
Andrew Do
Steve Jones
Tam Nguyen
Vicente Sarmiento

Orange County Transportation Authority
Headquarters
Conference Room 07
550 South Main Street
Orange, California
Thursday, July 8, 2021 at 9:00 a.m.

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, telephone (714) 560-5676, no less than two (2) business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

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.

All documents relative to the items referenced in this agenda are available for public inspection at www.octa.net or through the Clerk of the Board's office at the OCTA Headquarters, 600 South Main Street, Orange, California.

Guidance for Public Access to the Board of Directors/Committee Meeting

On March 12, 2020 and March 18, 2020, Governor Gavin Newsom enacted Executive Orders N-25-20 and N-29-20 authorizing a local legislative body to hold public meetings via teleconferencing and make public meetings accessible telephonically or electronically to all members of the public to promote social distancing due to the state and local State of Emergency resulting from the threat of Novel Coronavirus (COVID-19).

In accordance with Executive Order N-29-20, and in order to ensure the safety of the OCTA Board of Directors (Board) and staff and for the purposes of limiting the risk of COVID-19, in-person public participation at public meetings of the OCTA will not be allowed during the time period covered by the above-referenced Executive Orders.

Instead, members of the public can listen to AUDIO live streaming of the Board and Committee meetings by clicking the below link:

<http://www.octa.net/About-OCTA/Who-We-Are/Board-of-Directors/Live-and-Archived-Audio/>



Guidance for Public Access to the Board of Directors/Committee Meeting (Continued)

Public comments may be submitted for the upcoming Board and Committee meetings by emailing them to ClerkOffice@octa.net.

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.

In order to ensure that staff has the ability to provide comments to the Board Members in a timely manner, please submit your public comments **90 minutes prior to the start time of the Board and Committee meeting date.**

Call to Order

Roll Call

Pledge of Allegiance

Director Sarmiento

1. Public Comments

Special Calendar

There are no Special Calendar matters.

Consent Calendar (Items 2 through 8)

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.

2. Approval of Minutes

Approval of the minutes of the Transit Committee meeting of June 10, 2021.



3. Cooperative Agreement with the Southern California Regional Rail Authority for the Irvine Station Improvements Project

Jason Lee/James G. Beil

Overview

The Orange County Transportation Authority, in coordination with the Southern California Regional Rail Authority, is working in cooperation to implement improvement at the Irvine Station. A cooperative agreement is necessary to define roles, responsibilities, and funding for the preliminary engineering and environmental phase of the Irvine Station Improvements Project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3425 between the Orange County Transportation Authority and the Southern California Regional Rail Authority for the preliminary engineering and environmental phase of the Irvine Station Improvements Project.

4. Consultant Selection for Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

Jason Lee/James G. Beil

Overview

On October 26, 2020, the Orange County Transportation Authority Board of Directors approved the release of a request for proposals for preliminary engineering and environmental services for the Irvine Station Improvements Project. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of AECOM Technical Services, Inc., as the firm to provide preliminary engineering and environmental services for the Irvine Station Improvements Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2604 between the Orange County Transportation Authority and AECOM Technical Services, Inc., for preliminary engineering and environmental services for the Irvine Station Improvements Project.



5. Award of Sole Source Agreement for the Purchase of Bus Engines
Dayle Withers/Jennifer L. Bergener

Overview

The Orange County Transportation Authority operates a fleet of 173 New Flyer Xcelsior compressed natural gas-powered buses, model year 2016, that are due for midlife overhaul maintenance, which includes engine replacement. The proposed replacement engine has been certified by the California Air Resources Board as a near-zero-emission engine, which will further decrease the emissions profile of the entire bus fleet. Only one engine manufacturer is certified to meet these emissions standards. Board of Directors' approval is requested to execute a sole source agreement.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-1-3417 between the Orange County Transportation Authority and Cummins Pacific, LLC, in the amount of \$12,525,823, for the purchase of 173 Cummins L9N, 8.9-liter, compressed natural gas-powered engines.

6. Measure M2 Community-Based Transit Circulators Program Project V Ridership Report
Alfonso Hernandez/Kia Mortazavi

Overview

Measure M2 includes a program to fund Community-Based Transit Circulators known as Project V. The goal of the program is to provide local transit services designed to complement regional transit services. Funding is awarded to local jurisdictions through a competitive call for projects and local jurisdictions then implement the awarded services. Ridership reports for Project V-funded services are presented to the Board of Directors twice annually. This item provides the ridership report for the second and third quarters of fiscal year 2020-21, from October 2020 through March 2021. It also provides a brief update on Project V program-related activities.

Recommendations

- A. Receive and file Project V Ridership Report as an information item.
- B. Release contingency for the award of \$171,810 in M2 Project V capital funds for Dana Point's replacement vehicle.



7. August 2021 Bus Service Change
Jorge Duran/Kia Mortazavi

Overview

California is emerging from the coronavirus pandemic and the stay-at-home orders that were put in place to protect public health are being phased out. The return of economic activity is expected to increase demand for bus transit service. In response, the Orange County Transportation Authority is implementing a mid-summer service change. The proposed August 2021 bus service change represents the largest increase in service since the start of the pandemic. The additional service is intended to address expected ridership increases related to the return of in-person instruction for schools, colleges, and universities, and the resurgence of hospitality industry activities.

Recommendation

Receive and file as an information item.

8. Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects
Jennifer Haith Farinas/Kia Mortazavi

Overview

The Orange Transportation Authority offers grant opportunities to non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. The Enhanced Mobility for Seniors and Disabled Grant Program augments existing OC Bus fixed-route service, OC ACCESS, and the Senior Mobility Program in Orange County. The Board of Directors is requested to approve the guidelines and release the 2021 Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.

Recommendations

- A. Approve the guidelines for the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.
- B. Direct staff to issue the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects using up to \$4 million in local funding.



Regular Calendar

9. OC Streetcar Project Quarterly Update

Ross Lew/James G. Beil

Overview

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report provides an update on OC Streetcar project activities from April 2021 through June 2021.

Recommendation

Receive and file as an information item.

10. Contract Change Order for Exploratory Potholing Allowance for the Construction of the OC Streetcar Project

Ross Lew/James G. Beil

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar project. A contract change order is required for work to address exploratory potholing.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 56.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,100,000, for additional exploratory potholing allowance for the construction of the OC Streetcar project.



11. OC Flex Microtransit Service Pilot Program Update

Jack Garate/Jennifer L. Bergener

Overview

In October 2018, the Orange County Transportation Authority initiated a microtransit service pilot program, branded as OC Flex, operating in two areas of Orange County where transit demand does not support traditional fixed-route service. The pilot program is intended to match resources with changing demand, increasing the efficiency and effectiveness of the Orange County transit system. This report provides an overview of the OC Flex demand and performance during the third year of operation and highlights challenges faced due to the coronavirus pandemic.

Recommendation

Receive and file as an information item.

12. Youth Ride Free Promotional Pass Expanded to Include 18 and Under

Ryan Maloney/Maggie McJilton

Overview

The Orange County Transportation Authority plans to launch a promotional free pass for youth ages 13 and under in September 2021, funded by Low Carbon Transit Operation Program grant funds. Based on feedback from the Board of Directors, staff is recommending expanding the eligible age of the pass to include ages 18 and under. The revised promotional “Youth Ride Free” pass would be available to all youth riders (six to 18 years old), from September 2021 to February 2022.

Recommendations

- A. Expand the eligible age of the current “13 and Under Ride Free” youth fare promotion from six to 13 years old to include ages 14 to 18 years old.
- B. Authorize staff to make all necessary amendments, as well as execute any necessary agreements to facilitate the above recommendation.



Discussion Items

13. OC Bus Service Update

Johnny Dunning, Jr./Jennifer L. Bergener

Staff will provide an update on the OC Bus Service.

14. Future of Transit Workshop 2 Preview

Kurt Brotcke/Kia Mortazavi

The second workshop will focus on specific corridors for capital and other improvements that would reduce passenger travel time and increase ridership. Staff will provide a brief outline of topics for the workshops.

15. Chief Executive Officer's Report

16. Committee Members' Reports

17. Closed Session

There are no Closed Session items scheduled.

18. Adjournment

The next regularly scheduled meeting of this Committee will be held at **9:00 a.m. on Thursday, August 12, 2021**, at the Orange County Transportation Authority Headquarters, Conference Room 07, 550 South Main Street, Orange, California.



MINUTES

Transit Committee Meeting

Committee Members Present

Via Teleconference

Tim Shaw, Chairman
Harry S. Sidhu, Vice Chairman
Doug Chaffee
Andrew Do
Steve Jones
Tam Nguyen
Vicente Sarmiento

Staff Present

Jennifer L. Bergener, Deputy Chief Executive Officer
Sahara Meisenheimer, Deputy Clerk of the Board
Gina Ramirez, Deputy Clerk of the Board

Via Teleconference

Darrell E. Johnson, Chief Executive Officer
Cassie Trapesonian, Assistant General Counsel

Committee Members Absent

None

Call to Order

The June 10, 2021 regular meeting of the Transit Committee (Committee) was called to order by Committee Chairman Shaw at 9:01 a.m.

Roll Call

The Deputy Clerk of the Board conducted an attendance roll call and announced a quorum of the Committee.

Pledge of Allegiance

Director Nguyen led the Pledge of Allegiance.

1. Public Comments

No public comments were received.

Special Calendar

There were no Special Calendar matters.

Calendar (Items 2 through 7)

2. Approval of Minutes

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to approve the minutes of the Transit Committee meeting of May 13, 2021.

3. Award of Agreement for the Purchase of Battery Chargers for 40-Foot Plug-In Battery-Electric Buses

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to:

- A. Find La Marche Manufacturing Co. and Siemens Industry Inc., the apparent low bidders, as non-responsive for failure to bid on approved equipment that meets the technical specifications as identified in the invitations for bid.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2731 between the Orange County Transportation Authority and One Source Distributors, in the amount of \$863,079, to provide ten battery chargers for 40-foot plug-in battery-electric buses.

4. Amendment to Agreement for 40-Foot Compressed Natural Gas-Powered Buses

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 1 to Agreement No. C-9-1836 between the Orange County Transportation Authority and GILLIG LLC, in the amount of \$1,486,105, for configuration changes on up to 165, 40-foot compressed natural gas-powered buses with an option to purchase up to 134 additional buses. This will increase the maximum obligation of the agreement to a total contract value of \$101,857,705.

5. Joint Agreement with the County of Orange for the Operation, Maintenance, and Financial Management of the Orange County 800 Megahertz Countywide Coordinated Communications System

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3535 between the Orange County Transportation Authority and the County of Orange, in the amount of \$90,315, to share in the cost of the operation, maintenance, and repair of the Orange County Transportation Authority equipment used on the system, equipment replacement, and financial management of the Countywide Coordinated Communications System for fiscal year 2021-22. Amendments for each subsequent fiscal year budget will be brought forth to the Board of Directors for consideration on an annual basis.

6. Federal Transit Administration Program of Projects for Federal Fiscal Year 2020-21, Federal Coronavirus, Response and Relief Supplemental Appropriations Act of 2021 and American Rescue Plan Act of 2021 Transit Funding

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to:

- A. Approve the federal fiscal year 2020-21 Federal Transit Administration Section 5307 Urbanized Area Formula, Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities, Section 5337 State of Good Repair, and Section 5339 Bus and Bus Facilities Program of projects, including federal and local funds, and the use of match credit for projects included in this report.
- B. Approve the five-year programming plans for Federal Transit Administration Sections 5307, 5310, 5337, and 5339.
- C. Authorize the acceptance and use of \$1.207 million in Federal Transit Administration Section 5339 Bus and Bus Facilities Competitive Program funds and \$0.386 million of local match funds for rehabilitation and renovation projects at the Orange County Transportation Authority bus facilities.
- D. Authorize the use of \$43.489 million in Coronavirus Response and Relief Supplemental Appropriations Act of 2021 (Public Law 116-260) funds and \$186.658 million in American Rescue Plan Act of 2021 (Public Law 117-2) funds for bus and rail operating expenses.
- E. Authorize staff to adjust individual project funding consistent with final apportionments and eligibility determinations through the Fixing America's Surface Transportation Act, and direct staff to include updated numbers in grant and programming status reports.
- F. Authorize the Chief Executive Officer to submit the Federal Transit Administration grant applications required for the recommendations above to the Federal Transit Administration.
- G. Authorize staff to process all necessary amendments to the Federal Transportation Improvement Program and execute or amend all necessary agreements to facilitate the above actions.

7. Amendments to Cooperative Agreements with Special Agencies for the Provision of Transportation Services

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to:

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No C-8-1917 between the Orange County Transportation Authority and North County Senior Services, LLC, doing business as Acacia Adult Day Services, for continued services and to adjust the per trip rate to \$16.55, effective July 1, 2021 through June 30, 2022. This increase in rate will not change the current contract maximum obligation of \$1,302,621 due to sufficient underruns that cover the projected expenses due to the coronavirus pandemic.
- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-8-1918 between the Orange County Transportation Authority and Alzheimer's Family Center for continued services and to adjust the per trip rate to \$16.55, effective July 1, 2021 through June 30, 2022. This increase in rate will not change the current contract maximum obligation of \$1,343,599 due to sufficient underruns that cover the projected expenses due to the coronavirus pandemic.
- C. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-8-1919 between the Orange County Transportation Authority and Alzheimer's Orange County for continued services and to adjust the per trip rate to \$16.55, effective July 1, 2021 through June 30, 2022. This increase in rate will not change the current contract maximum obligation of \$566,323, due to sufficient underruns that cover the projected expenses due to the coronavirus pandemic.
- D. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-8-1920 between the Orange County Transportation Authority and Community SeniorServ, doing business as Meals on Wheels Orange County, for continued services and to adjust the per trip rate to \$16.55, effective July 1, 2021 through June 30, 2022. This increase in rate will not change the current contract maximum obligation of \$1,362,793, due to sufficient underruns that cover the projected expenses due to the coronavirus pandemic.

7. (Continued)

- E. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Cooperative Agreement No. C-8-1921 between the Orange County Transportation Authority and Orange County Adult Achievement Center, doing business as My Day Counts, for continued services and to adjust the per trip rate to \$16.18, and the Regional Center of Orange County pass-through per trip rate to \$6.18, for continued services effective July 1, 2021 through June 30, 2022. This increase in rate will not change the contract maximum obligation of \$3,111,668, due to sufficient underruns that cover the projected expenses due to the coronavirus pandemic.

Regular Calendar

8. Amendment to Agreement for the Design of the OC Streetcar Project

Ross Lew, Senior Program Manager of the OC Streetcar Project, reported on the following:

- Overview of HNTB Corporation and the design support they have provided during the construction of the OC Streetcar Project.
- Examples of the complexities of the OC Streetcar Project and the areas that require an unanticipated increased effort including: utility conflicts and the discovery of unsuitable materials and treated wood waste.
- The budget for the construction services will be depleted by the end of July and Amendment No. 11 is required to continue services and not delay construction. The amendment will also extend the terms of the agreement by six months.

A discussion ensued regarding the funding for this project. It will be funded through local Measure M2 and federal Congestion Mitigation and Air Quality (CMAQ) funds. The Orange County Transportation Authority (OCTA) utilizes the federal funds first before utilizing Measure M2 funds. There is a match requirement on federal CMAQ funds and the Measure M2 funds matches that requirement.

A motion was made by Director Do, seconded by Director Sarmiento, and following a roll call vote, declared passed 7-0, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 11 to Agreement No. C-5-3337 between the Orange County Transportation Authority and HNTB Corporation, in the amount of \$2,500,000, and extend the agreement term through September 30, 2022, for continued OC Streetcar project design support services during construction. This will increase the maximum cumulative obligation of the agreement to a total contract value of \$26,083,841.

9. Bus Operations Performance Measurements Report for the Third Quarter of Fiscal Year 2020-21

Johnny Dunning, Jr., Department Manager of Scheduling and Bus Operations Support, provided a PowerPoint presentation.

A lengthy discussion ensued regarding:

- The disparity between the directly-operated fixed-route and contracted fixed-route based on the number of preventable accidents. The contractor is running a lower number of revenue vehicle miles and they have a lower number of passengers.
- There is a number of contracted fixed route services that have longer routes which means more miles in areas of the county that have less traffic.
- Director Do requested that an explanation be added for different route profiles and Darrell E. Johnson, Chief Executive Officer (CEO), stated that staff can provide some narratives in the future.
- The farebox recovery requirement and the many discussions about reduced fares, free fares, or fareless transit. The Transportation Development Act reform task force is underway.

Following the discussion, no action was taken on this receive and file information item.

10. Amendment to the Agreement with First Transit, Inc., for the Provision of Contracted Fixed-Route Service

Eileen Bruggeman, Section Manager of Contracted Services and Operations, reported on the following:

- Overview of the recommendation.
- This item originally went to the May 13, 2021 Transit Committee and Mr. Johnson, CEO, commented that the table on page six of the staff report required a line of additional information which does not alter the maximum obligation requested in the original staff report.
- After adding the additional line of information to the table on page six of the staff report, it impacted the other numbers in the report so staff took the responsibility to be transparent and revise the entire staff report.
- Explanation of the revised staff report and adjusted table with corrected numbers for the estimated costs associated with the option term.
- First Transit, Inc. has not routinely met performance standards but they have been responsive and have taken a number of steps to remedy their performance.

10. (Continued)

A motion was made by Committee Chairman Shaw, seconded by Committee Vice Chairman Sidhu, and following a roll call vote, declared passed 7-0, to authorize the Chief Executive Officer to negotiate and execute Amendment No. 14 to Agreement No. C-4-1737 between the Orange County Transportation Authority and First Transit, Inc., in the amount of \$69,714,520, to exercise the second two-year option term to provide contracted fixed-route services through May 31, 2023, with adjustment of the end date to June 10, 2023, and permit reimbursement of First Transit, Inc. expenses related to maintaining a state of readiness and eligible for federal funding at amounts not to exceed \$5,000,000 for the first and \$3,000,000 for the second year of the option term, increasing the maximum obligation of the agreement to a total contract value of \$315,856,805.

Discussion Items

11. Fiscal Year 2021-22 Budget Workshop Follow-up

Anthony Baruch, Section Manager of Financial Planning and Analysis, stated that this item previously went to the Finance and Administration Committee on April 28th. The Budget Workshop was held at the May 10th Board of Directors' (Board) meeting and several questions were raised at each of the meetings, those answers are answered in a handout. One-on-one meetings are offered to any of Board members for further discussion. On Monday, June 14th the Public Hearing on the budget will be held and the Board will be asked to approve the budget for Fiscal Year 2021-22.

12. Chief Executive Officer's Report

Mr. Johnson, CEO, reported on the following:

- On Tuesday, June 8th, the independent Taxpayer Oversight Committee (TOC) held its annual Measure M public hearing. The TOC found the OCTA in compliance with the ordinance for the 30th year in a row. He stated that staff takes this role of overseeing the use of Measure M funds very seriously and are pleased to be keeping their promises to Orange County voters.
- OCTA continues to advance the South Orange County Multimodal Transportation Study. OCTA will host a series of meetings, including:
 - Next Tuesday, June 15th at 9:00 a.m. an elected official roundtable via Zoom;
 - On Thursday, June 17th from 5:30 p.m. to 6:30 p.m., a telephone townhall. The townhall will be simulcast in Spanish and a recording of the presentation will be made available at octa.net/southocstudy following the meeting, and



12. (Continued)

- On Wednesday, June 23rd, at 9:00 a.m., a stakeholder roundtable via Zoom.
- OCTA will launch a virtual meeting room that would stay open through July 12th for people to learn more about the study and provide their feedback. For more information, please visit octa.net/southocstudy.

13. Committee Members' Reports

There were no Committee Members' Reports.

14. Closed Session

There were no Closed Session items scheduled.

15. Adjournment

The meeting adjourned at 9:32 a.m.

The next regularly scheduled meeting of this Committee will be held at **9:00 a.m. on Thursday, July 8, 2021**, at the Orange County Transportation Authority Headquarters, Conference Room 07, 550 South Main Street, Orange, California.

ATTEST

Tim Shaw
Committee Chairman

Sahara Meisenheimer
Deputy Clerk of the Board



July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Cooperative Agreement with the Southern California Regional Rail Authority for the Irvine Station Improvements Project

Overview

The Orange County Transportation Authority, in coordination with the Southern California Regional Rail Authority, is working in cooperation to implement improvement at the Irvine Station. A cooperative agreement is necessary to define roles, responsibilities, and funding for the preliminary engineering and environmental phase of the Irvine Station Improvements Project.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3425 between the Orange County Transportation Authority and the Southern California Regional Rail Authority for the preliminary engineering and environmental phase of the Irvine Station Improvements Project.

Discussion

The Orange County Transportation Authority (OCTA), in coordination with the Southern California Regional Rail Authority (SCRRA), is working to advance the Irvine Station Improvements Project (Project). Improvements include reconfiguring the Irvine Metrolink Station (Station) including rail infrastructure to support future expansion of passenger service as part of SCRRA's Southern California Optimized Rail Expansion (SCORE) Program. The project definition report (PDR) was completed in June 2019 by SCRRA, and OCTA is advancing the Project into the preliminary engineering and environmental phase.

The Station is served by Amtrak's Pacific Surfliner intercity passenger rail and Metrolink's Orange County and Inland Empire-Orange County commuter rail services. The Project improvements identified in the PDR include the addition of third and fourth tracks between Milepost (MP) 184 and MP 186.7 (approximately

2.7 miles), as well as station reconfiguration to allow for enhanced transfer times and improved accessibility. The existing Station configuration currently includes two main tracks and side platforms. The existing platforms have limited capacity due to their size and accessibility, and do not allow for operating more passenger train service at the Station or more frequent headways.

The Project requires a cooperative agreement between OCTA and SCRRA to define roles, responsibilities, and funding. OCTA will be the lead on the preliminary engineering and environmental phase and will coordinate this work with SCRRA and the City of Irvine. The cost for OCTA's work on the environmental phase of the Project is estimated to be \$5,500,000, and will be funded through Transit and Intercity Rail Capital Program (TIRCP) grant funds awarded by the California State Transportation Agency (CalSTA) through SCRRA's SCORE Program.

SCRRA will provide design support, including right of entry permits, safety training, flagging, and other services as needed for the Project. The cost for SCRRA's work on this phase of the Project is estimated to be \$830,000, and will be funded through TIRCP grant funds granted by CalSTA through SCRRA's SCORE Program.

On behalf of OCTA, SCRRA will formally request that OCTA become the implementing agency of TIRCP funds, in the amount of \$6,330,000, with the provision that SCRRA invoice the California Department of Transportation (Caltrans) directly for its portion of the services.

The OCTA Board of Directors (Board) approved the release of Request for Proposals 0-2604 on October 26, 2020, to procure a consultant for preliminary engineering and environmental services related to the Project. A separate item will be presented to the Board seeking approval of the consultant selection for the services.

Fiscal Impact

The Project is included in the OCTA Fiscal Year 2021-22 Budget, Capital Programs Division, Account No. 0018-7831-TR215-0SV, and will be funded with TIRCP grant funds awarded by CalSTA through SCRRA's SCORE Program and allocated to the Project by the California Transportation Commission.

Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Cooperative Agreement No. C-1-3425 with the Southern California Regional Rail Authority for the preliminary engineering and environmental phase of the Irvine Station Improvements Project.

Attachment

A. Project Location Map

Prepared by:



Jason Lee
Project Manager
714-560-5833



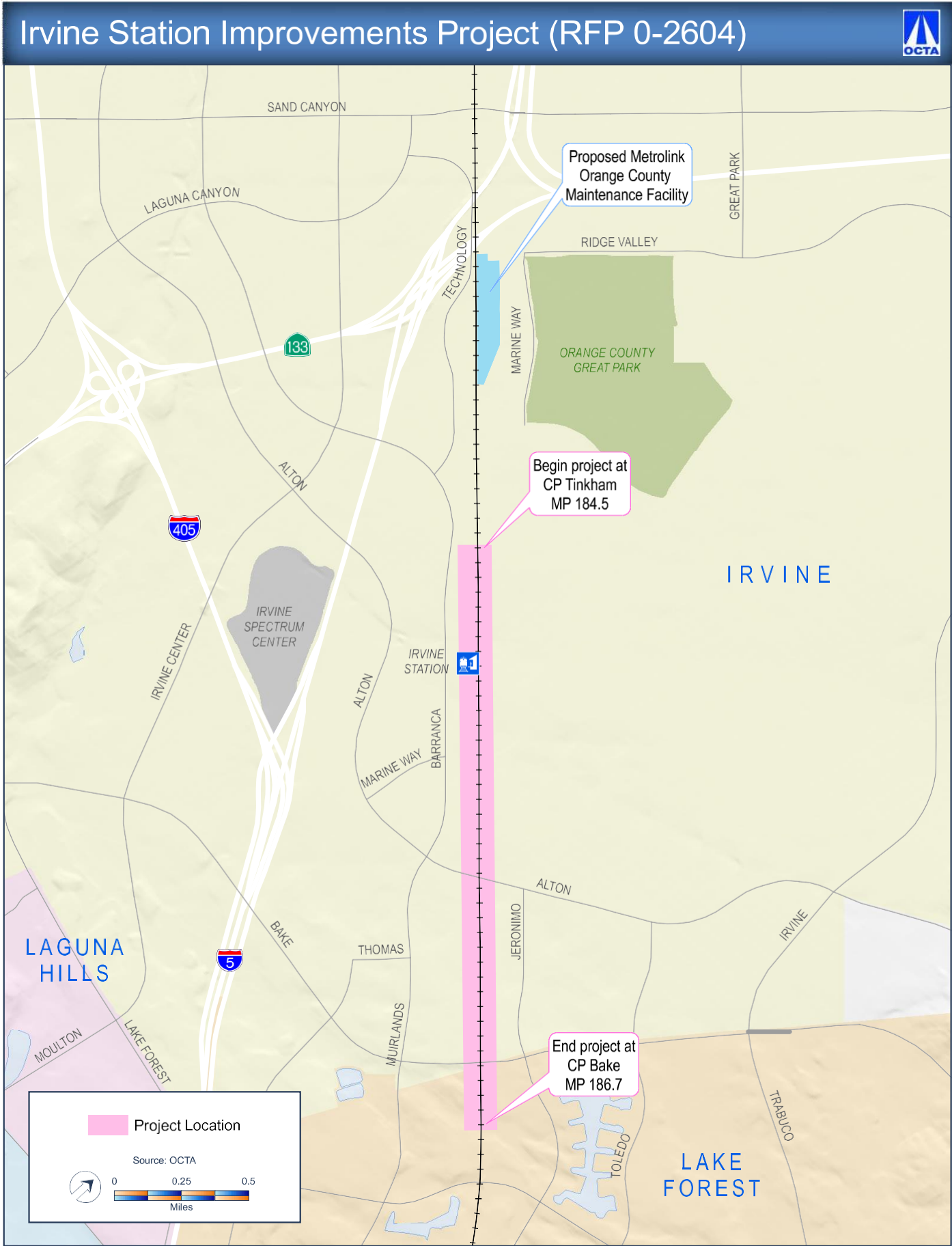
Pia Veasapen
Director, Contracts Administration and
Materials Management
714-560-5619

Approved by:



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

Project Location Map





July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

Overview

On October 26, 2020, the Orange County Transportation Authority Board of Directors approved the release of a request for proposals for preliminary engineering and environmental services for the Irvine Station Improvements Project. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of AECOM Technical Services, Inc., as the firm to provide preliminary engineering and environmental services for the Irvine Station Improvements Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2604 between the Orange County Transportation Authority and AECOM Technical Services, Inc., for preliminary engineering and environmental services for the Irvine Station Improvements Project.

Discussion

The Orange County Transportation Authority (OCTA), in coordination with the Southern California Regional Rail Authority (SCRRA), is working to advance the Irvine Station Improvements Project (Project). Improvements include reconfiguring the Irvine Metrolink Station (Station) with additional rail infrastructure to support future expansion of passenger service as part of SCRRA's Southern California Optimized Rail Expansion (SCORE) Program. The Project Definition Report (PDR) was completed in June 2019 by SCRRA, and the Project is ready to advance into the environmental phase. A multidisciplinary firm is needed to complete the environmental phase which includes the preparation of preliminary engineering (PE) and environmental documentation.

The Station is served by Amtrak's Pacific Surfliner intercity passenger rail and Metrolink's Orange County and Inland Empire-Orange County commuter rail services. The railroad corridor south of the City of Laguna Niguel is generally constrained by the availability of the railroad right-of-way (ROW); therefore, the service growth envisioned in the SCORE Program is north of the Laguna Niguel/Mission Viejo Metrolink Station. The Project improvements identified in the PDR include the addition of third and fourth tracks between Milepost (MP) 184 and MP 186.7 (approximately 2.7 miles), and station reconfiguration to allow for better-timed transfers and improved accessibility. The existing Station configuration with two main tracks and side platforms has limited capacity due to the depth of the platforms and ROW constraints which do not allow for operating more passenger train service at the Station with more frequent headways.

Cooperative Agreement No. C-1-3425 between OCTA and SCRRA, which defines roles and responsibilities of the agencies related to the Project, will provide grant funding through Transit and Intercity Rail Capital Program (TIRCP) funds granted by the California State Transportation Agency (CalSTA) through SCRRA's SCORE Program. OCTA will be the lead on the preliminary engineering and environmental phase of the Project and will coordinate this work with SCRRA and the City of Irvine (City).

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for architectural and engineering (A&E) services that conform to both state and federal laws. Proposals are evaluated and ranked in accordance with the qualifications of the firm, staffing and project organization, and work plan approach. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. Evaluation of the proposals was conducted based on overall qualifications to develop a competitive range of offerors. The highest-ranked firm is requested to submit a cost proposal, and the final agreement is negotiated. Should negotiations fail with the highest-ranked firm, a cost proposal will be solicited from the second-ranked firm in accordance with the Board-approved procurement policies.

On October 26, 2020, the Board authorized the release of Request for Proposals (RFP) C-0-2604, which was electronically released on OCTA's CAMM NET system. The Project was advertised on November 18 and November 23, 2020, in a newspaper of general circulation. A pre-proposal conference was held on November 9, 2020, with 34 attendees representing 21 firms. Five addenda were issued to make available the pre-proposal conference registration sheets, provide responses to questions received, and handle administrative issues related to the RFP.

On December 18, 2020, five proposals were received. An evaluation committee consisting of members from OCTA's Planning and Contracts Administration and Materials Management departments, the Capital Programs Division, and external representatives from SCRRA and the City met to review all submitted proposals. The proposals were evaluated utilizing the following Board-approved evaluation criteria and weightings:

- Qualifications of the Firm 20 percent
- Staffing and Project Organization 40 percent
- Work Plan 40 percent

In developing the criteria and weightings, several factors were considered. The firms' qualifications and experience in performing relevant work of similar scope and size is important to the success of the Project. Staffing and project organization of the firm was assigned a weighting of 40 percent, as the qualifications of the project manager and other key personnel are important to the successful and timely delivery of the Project. Similarly, high importance was given to the work plan criterion to emphasize the importance of the team's understanding of the Project, its challenges, and its approach to implementing the various elements of the scope of work. The technical approach to the Project is critical to a firm's successful performance.

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

Firm and Location

AECOM Technical Services, Inc. (AECOM)
Orange, California

STV Incorporated (STV)
Irvine, California

T.Y. Lin International (TYLI)
Los Angeles, California

On February 3, 2021, the evaluation committee interviewed the three short-listed firms. The interviews consisted of a presentation where each team presented its qualifications, highlighted its proposal, and responded to questions from the evaluation committee. Each firm also discussed its staffing plan, work plan, and perceived Project challenges. Each firm was asked general questions related to qualifications, relevant experience, proposed project organization, and approach to the work plan. Each firm was asked questions specific to proposals for its team's

approach to the requirements of the scope of work, management of the Project, coordination with various agencies, experience with similar projects, and the proposed solutions toward achieving the Project's goals. After considering responses to the questions asked during the interviews, the evaluation committee adjusted the preliminary scores of the firms, resulting in AECOM as the top-ranked firm with the highest cumulative score.

Based on the evaluation of written proposals and information obtained during the interviews, staff recommends AECOM as the top-ranked firm to provide preliminary engineering and environmental services for the Project. AECOM received the highest ranking due to its relevant experience managing projects of similar scope and scale, familiarity with SCRRA requirements, comprehensive understanding of the Project objectives and constraints, and presentation of technical solutions that considered both time and cost-saving improvements to lessen impacts to rail operations. The firm demonstrated a clear understanding of the Project requirements and presented a detailed work plan addressing key issues that are critical to the success of the Project. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

All short-listed firms are well established with recent and relevant experience and are qualified to perform the services.

AECOM, founded in 1927, specializes in preliminary and final design, construction management and program management services for transportation projects on a local and global level. AECOM has successfully delivered environmental and design services on rail and station improvement projects throughout California for state and local government agencies, including OCTA, SCRRA, Los Angeles County Metropolitan Transportation Authority (LA Metro), San Diego Association of Governments (SANDAG), California High-Speed Rail Authority (CHSRA), and Bay Area Rapid Transit (BART). The firm has five offices throughout Southern California, including an office in the City of Orange which is comprised of 500 staff members. AECOM's relevant firm experience in the Project Approval/Environmental Document (PA/ED) phase includes the SCORE Phase 1 Orange Subdivision PDR for this Project, the Madera Station Relocation Environmental Clearance, and the Burbank Safety Corridor projects in the PA/ED phase, while its experience working from the conceptual through final design phases includes SCRRA's Empire Avenue railroad realignment, grade separation, and railroad underpass, along with work on over 200 on-call design tasks for SCRRA. The firm proposed to utilize four subconsultants in a wide range of disciplines to provide required services, all of which have experience working with AECOM on past projects.

STV, founded in 1912, is a local and national transportation planning and design firm providing a wide range of services for transportation agencies, including conducting alternatives analysis, preparing preliminary engineering plans, reports, and studies, and conducting environmental analyses. The firm has 41 offices in North America, 2,200 employees nationwide, and has three offices in Southern California comprised of 140 employees, located in the cities of Irvine, Los Angeles, and Rancho Cucamonga. STV's relevant firm experience includes LA Metro's Brighton to Roxford Double Track PA/ED, the Anaheim Canyon Station Improvements PA/ED for OCTA, the Perris Valley Line in the PA/ED and plans, specifications, and estimates (PS&E) phases for the Riverside County Transportation Commission (RCTC), and having worked on over 48 SCRRA rail station on-call projects. The firm proposed to utilize ten subconsultants in a wide range of disciplines to provide required services who have experience working with STV on past projects.

TYLI, founded in 1954, is an international infrastructure engineering firm that provides planning, project studies, design, engineering, inspection, and construction and program management services. The firm has 2,900 employees and 50 offices nationwide. TYLI's California operations consist of the firm's headquarters office in the City of San Francisco and eight other offices with a California staff of over 280 employees. TYLI's relevant firm experience includes the PE and PS&E for Poinsettia Station Improvements and Tracks for SANDAG, the Carlsbad Village Station PA/ED and PS&E, and the Encinitas Railroad Grade Separations and Pedestrian Underpasses PE. The firm proposed to utilize 11 subconsultants working together on various transportation projects similar to the scope of work.

Staffing and Project Organization

All three firms proposed qualified project managers, key personnel, and subconsultants with relevant PA/ED experience to complete the environmental phase of the Project.

AECOM proposed a cohesive qualified project team with relevant experience and a comprehensive understanding of the Project issues, risks, and challenges. The team is proficient in the various disciplines required for the Project and has extensive recent OCTA, SCRRA, and other public agency experience. The team has demonstrated experience working on projects of similar size and scope. The proposed project manager (PM) has 38 years of experience managing, planning, and successfully delivering various transportation projects from preliminary studies through final design for both rail and roadway projects. The PM has successfully performed in the project management role and completed various phases of transportation projects, including the Grade Crossing Rail Corridor Project Study Report (PSR) with LA Metro, the Burbank Corridor Safety Improvements PA/ED

with SCRRA, the Grade Crossing Improvements PS&E with the City of Glendale, and served as PM and quality manager on the SCORE Phase I Orange Subdivision PDR with SCRRA. The proposed design and engineering lead has 23 years of experience with large-scale multi-disciplinary projects for various rail transportation agencies. Recent experience includes the Link Union Station Project, the Burbank Safety Corridor Project, and technical lead for the SCORE Phase I Orange Subdivision PDR with SCRRA.

The proposed environmental lead has 29 years of experience in transportation project environmental assessment and documentation and specializes in environmental clearance and planning for multimodal transportation projects. Recent projects include the Orange County Maintenance Facility Project for OCTA, San Joaquin Joint Powers Authority (SJJPA) Madera Station Relocation environmental clearance, and the LA Metro Gold Line Foothill Phase 2B Project.

STV proposed a qualified project team with relevant experience and understanding of the Project issues, risks, and challenges. The team, including subconsultants, are experienced in the various disciplines required for the Project and have relevant experience in transportation projects in Southern California. The proposed PM has 30 years of experience providing design services for rail transit, roadway, and infrastructure projects for government and public agencies, including SCRRA. The proposed PM has design lead experience in various phases of transportation projects but limited experience as a PM. Recent projects include the Placentia Metrolink Station Phase I and II, LA Metro Orange and Purple Line extensions design-build, and the Vermont Avenue Bridge Overcrossing Widening – United States (US) 101 Freeway PA/ED and PS&E. The proposed design lead has 25 years of experience providing design and planning of various types of railroad and civil public works projects in all project phases and capacities. Recent projects include OCTA PA/ED services for the Anaheim Canyon Station Expansion, LA Metro Brighton to Roxford Double Track project, CHSRA Burbank-Anaheim Corridor project, and RCTC Perris Valley Line. The proposed environmental lead has 19 years of experience managing and directing the preparation of alternatives analysis and feasibility studies for projects throughout California and the Pacific Northwest.

TYLI proposed a project team and subconsultants with relevant experience with transportation projects in Southern California. The proposed PM has 40 years of experience managing commuter, freight, high-speed, and light rail transit projects. The proposed PM also has track design management experience overseeing various phases of transportation projects. Although the PM's recent projects include the PS&E for San Onofre to Pulgas Double Track, PE and PS&E for Seattle to Everett Capacity Improvement Project, and Mid-Coast Corridor Transit Project, the PM demonstrated limited experience with environmental phase projects. The proposed structures lead identified in the technical proposal had 24 years of bridge

design experience on railroad, transit, pedestrian, and highway structures and served in key roles on transit rail projects.

Recent projects for the structures lead include the Surfside Inn Pedestrian Bridge PE and PS&E over the Los Angeles-San Diego-San Luis Obispo (LOSSAN) Corridor for Orange County Public Works and LA Metro Portal Widening and Turnback Facility Project. The proposed environmental lead has 35 years of experience in environmental assessments and 17 years of experience working on OCTA transportation projects and is knowledgeable of requirements set by the Federal Transit Administration, Federal Highway Administration, and California Department of Transportation. Recent projects include OCTA's Transit Security and Operations Center in the City of Anaheim, Interstate 5 Widening Project between Interstate 405 and State Route 55, and the Poinsettia Lane Bridge Widening over the LOSSAN corridor in the City of Carlsbad.

Work Plan

All short-listed firms met the requirements of the RFP, and each firm adequately discussed its approach to the Project.

AECOM presented a detailed and viable work plan that demonstrated an understanding of the Project design requirements, constraints, challenges, and risks. AECOM identified potential impacts to the Station's bus drop-off area based on the design alternative selected and proposed to design the reconfiguration of the bus drop-off area to minimize the reduction of parking spaces and maintain pedestrian access and bus operations during construction. The work plan proposed minimizing operational impacts to the Station during construction of the pedestrian underpass by using the jack and bore method, which utilizes hydraulic jacks to move pre-cast concrete box sections into place under the tracks to shorten the construction duration. AECOM detailed a construction phasing approach to minimize ROW, rail, and facility operational impacts, and enhancements to the proposed pedestrian underpass with openings to provide daylight and improve air flow, while also including steps, ramps, seating areas, bicycle parking, and landscaping at the entrance of the underpass.

The overall approach to Project execution described in the work plan and presented during the interview identified potential risks, which were accompanied by design alternative and operational impact discussions and construction phasing approaches. The interview confirmed the technical knowledge and expertise of the AECOM team, as well as its comprehensive understanding of the Project risks, challenges, and requirements. The AECOM team presented a clear vision on Project approach and demonstrated in-depth knowledge of the scope of work by providing detailed Project-specific responses to all interview questions with participation from all team members present.

STV presented a comprehensive work plan that demonstrated an understanding of the Project design requirements, constraints, challenges, and risks. The work plan identified solutions to potential issues which could result in construction cost and schedule savings, as well as reduce property impacts by minimizing the reconstruction of the existing bus turnaround area. STV proposed two types of underpass structures, a reinforced concrete box and a railroad bridge, and described the advantages and disadvantages for each, including constructability, maintainability, and cost. The work plan identified the potential need for level boarding to comply with the Americans with Disabilities Act.

The overall approach described in the STV work plan and presented during the interview identified solutions to potential Project risk, constructability issues, and impacts to construction cost and schedule. The STV team was responsive to the evaluation committee's interview questions; however, the proposed PM was not able to articulate and demonstrate a full understanding of Project issues and deferred to other team members to respond to interview questions.

TYLI presented a work plan identifying issues, recommendations, challenges, and potential solutions that demonstrated an understanding of the scope of work and risks associated with the Project. To save costs, TYLI proposed shifting the existing two bridges at Borrego Wash rather than demolishing and rebuilding them to make room for two additional new railroad bridges. The work plan proposed an approach to minimize impacts to bus operations and Station users in the construction phase.

The overall approach to Project execution described in the work plan and presented during the interview demonstrated an understanding of the scope of work, challenges, risks, and Project requirements. The TYLI team was responsive to the evaluation committee's interview questions; however, the team demonstrated limited in-depth understanding of the complexity of the Project, and the PM was unable to articulate important aspects of the Project, only providing general responses to interview questions.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, work plan approach, and information obtained during the interviews, the evaluation committee recommends the selection of AECOM as the top-ranked firm to provide preliminary engineering and environmental services for the Project. AECOM delivered a comprehensive proposal which addressed all the requirements of the RFP.

Fiscal Impact

The Project is included in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, Account No. 0018-7519-TR215-0SV, and will be funded with TIRCP grant funds awarded by CalSTA through SCRRA's SCORE Program.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-0-2604 with AECOM Technical Services, Inc., as the firm to provide preliminary engineering and environmental services for the Irvine Station Improvements Project.

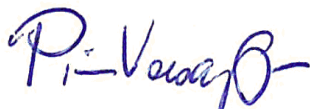
Attachments

- A. Review of Proposals, RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project
- C. Contract History for the Past Two Years, RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

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Review of Proposals
RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project
Presented to the Transit Committee - July 8, 2021

5 proposals were received, 3 firms were interviewed, 1 firm is being recommended

Overall Ranking	Overall Score	Firm & Location	Subcontractors	Evaluation Committee Comments
1	84	AECOM Technical Services, Inc. Orange, California	Leighton Group, Inc. Moffatt & Nichol Rail Surveyors & Engineers, Inc. Value Management Services, Inc.	Firm has recent and relevant experience managing and delivering transportation projects of similar size and scope. Qualified cohesive team, with comprehensive understanding of project issues, including project manager, key personnel, technical staff, and subconsultants with experience working together on recent preliminary engineering and environmental (PA/ED) projects. Project manager has demonstrated experience planning, managing and successfully delivering transportation projects from preliminary studies through final design. Detailed work plan identifying key issues, providing sound recommendations, and viable solutions. Proposed a detailed construction phasing approach to minimize right-of-way, rail, and facility operational impacts. Comprehensive team presentation and interview with project specific responses to all questions.
2	82	STV Incorporated Irvine, California	Arellano Associates Coast Surveying, Inc. Epic Land Solutions, Inc. Group Delta Consultants, Inc. HNTB Corporation LSA Associates, Inc. NUVIS Safeprobe, Inc. Safety Environmental Consulting Value Management Strategies, Inc.	Firm has recent and relevant experience managing and delivering transportation projects of similar size and scope. Qualified team, with understanding of the Project issues, including project manager, key personnel, and subconsultants working together on recent PA/ED projects. Project manager is qualified with relevant experience providing design services for rail, transit, roadway, and infrastructure projects, but limited experience as a project manager. Comprehensive work plan that demonstrated an understanding of the project design requirements, constraints, challenges, and risk. Proposed two types of underpass structures and described the pros/cons for each, including constructability, maintainability, and cost. Detailed team presentation and interview with responsive answers to all questions.
3	77	T.Y. Lin International Los Angeles, California	Bargas Environmental Consulting Earth Mechanics, Inc. Epic Land Solutions, Inc. Group Delta Consultants, Inc. Gruen Associates Kimley-Horn & Associates, Inc. Kal Kasishman Consulting Services, Inc. Krebs Corporation LSA Associates, Inc. Value Management Strategies, Inc. Wagner Engineering & Survey, Inc.	Firm has recent and relevant experience managing and delivering transportation projects of similar size and scope. Qualified experience team, including project manager, key personnel, and subconsultants with relevant experience working together on recent PA/ED projects. Project manager is qualified with relevant experience managing and providing commuter, high-speed, and rail transit projects, but limited experience as a project manager for environmental projects. Work plan identified key issues, recommendations, challenges and potential solutions that demonstrated an understanding of the scope of work. Proposed a viable construction phasing approach that identified steps on the construction of each phase to mitigate impacts to station operations. The proposed structure lead presented in the interview was different than the one identified in the technical proposal. Thorough team presentation and interview with general responses to interview questions.

Evaluation Panel: 6 Members

Internal:
Contracts Administration and Materials Management (1)
Capital Programs (2)
Planning (1)
External:
City of Irvine (1)
Southern California Regional Rail Authority (SCRRA) (1)

Evaluation Criteria:

Qualifications of the Firm
Staffing and Project Organization
Work Plan

Weight Factors

20%
40%
40%

PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed)
RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

AECOM Technical Services, Inc.								
Evaluator Number	1	2	3	4	5	6	Weights	Criteria Score
Qualifications of Firm	4.00	4.00	4.00	4.00	4.50	4.00	4	16.3
Staffing/Project Organization	4.50	4.50	4.00	4.50	4.50	4.00	8	34.7
Work Plan	4.00	4.00	4.50	4.00	4.00	4.00	8	32.7
Overall Score	84	84	84	84	86	80		84
STV Incorporated								
Evaluator Number	1	2	3	4	5	6	Weights	Criteria Score
Qualifications of Firm	4.50	3.50	4.00	4.50	4.50	4.50	4	17.0
Staffing/Project Organization	4.00	3.50	4.00	4.00	4.00	4.00	8	31.3
Work Plan	4.50	4.50	4.00	4.50	4.00	4.00	8	34.0
Overall Score	86	78	80	86	82	82		82
T.Y. Lin International								
Evaluator Number	1	2	3	4	5	6	Weights	Criteria Score
Qualifications of Firm	4.50	4.00	4.00	4.00	4.50	4.50	4	17.0
Staffing/Project Organization	3.50	3.50	3.50	4.00	3.50	3.50	8	28.7
Work Plan	4.00	4.00	3.50	4.00	4.00	4.00	8	31.3
Overall Score	78	76	72	80	78	78		77

The range of scores for the non-short-listed firms was 69-72.

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
AECOM Technical Services, Inc.						
Contract Type: Firm-Fixed Price	C-3-1433	Project Report and Environmental Document for the Interstate 5 (I-5) Improvement Project from north of Interstate 405 (I-405) to State Route 55 (SR-55)	May 8, 2014	December 31, 2020		\$ 7,463,942
Subconsultants:						
					\$ 263,257.00	
					\$ 230,485.00	
					\$ 159,455.00	
					\$ 136,508.00	
					\$ 144,173.00	
					\$ 1,671,786.00	
					\$ 76,554.00	
					\$ 358,437.00	
					\$ 42,474.00	
					\$ 26,000.00	
Contract Type: Time and Expense	C-0-2582	Construction Management Support Services for the SR-55 Improvement Project between I-405 and I-5	TBD	TBD		TBD
Subconsultants:						
Contract Type: Firm-Fixed Price	C-0-2637	Plans, Specifications, and Estimate for the I-5 Widening Project Between I-405 and Yale Avenue	TBD	TBD		TBD
Subconsultants:						
Total						\$7,463,942

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

T.Y. Lin International						
		Design and Construction Support Services for the Preparation of Plans, Specifications, and Estimate for the State Route 91 Improvement Project Between Acacia Street and La Palma Avenue				
Contract Type: Firm-Fixed Price	C-0-2073		November 30, 2020	December 31, 2028		\$8,709,608
Subconsultants:						
					\$ 664,142	
					\$ 363,622	
					\$ 2,371,706	
					\$ 165,051	
					\$ 247,596	
		Consultant Services for the Preparation of Plans, Specification, and Estimate for High-Occupancy Vehicle Improvements Project Between SR-55 and State Route 57				
Contract Type: Firm-Fixed Price	C-4-1778		June 30, 2015	March 31, 2021		\$3,765,988
Subconsultants:						
					\$932,622	
					\$181,110	
					\$228,868	
					\$332,364	
					\$77,765	
		Project Study Report/Project Development Support Document for I-5 Widening from Avenida Pico to the San Diego County Line				
Contract Type: Firm-Fixed Price	C-5-3676		June 28, 2016	November 30, 2020		\$518,482
Subconsultants:						
					\$14,078	
					\$109,615	
					\$23,805	
					\$68,929	
					\$7,938	
Total						\$12,994,078
STV Incorporated						
		On-Call Design and Construction Support Services for Facility Modification Projects				
Contract Type: Firm-Fixed Price	C-4-1927		December 9, 2015	December 31, 2021		\$520,350
Subconsultants:						

CONTRACT HISTORY FOR THE PAST TWO YEARS

RFP 0-2604 Preliminary Engineering and Environmental Services for the Irvine Station Improvements Project

Contract Type: Firm-Fixed Price	C-6-1108	Preliminary Engineering and Environmental Clearance Services for the Transit Security and Operations Center	June 13, 2017	September 30, 2020		\$1,080,578
Subconsultants:						
Arellano & Associates					\$38,524	
Coast Surveying, Inc.					\$17,452	
Hinman Consulting Engineers					\$88,043	
Jacobus & Yuang					\$37,761	
Lin Consulting, Inc.					\$33,315	
LSA Associates, Inc.					\$299,879	
Ninyo & Moore					\$26,410	
Rincon Consultants, Inc.					\$60,290	
Spectrum ITC Group					\$34,005	
Contract Type: Firm-Fixed Price	C-9-0969	Consultant Services to Develop a Public Transportation Agency Safety Plan	April 4, 2019	July 31, 2020		\$149,325
Subconsultants:						
None						
Total						\$1,750,253



July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Award of Sole Source Agreement for the Purchase of Bus Engines

Overview

The Orange County Transportation Authority operates a fleet of 173 New Flyer Xcelsior compressed natural gas-powered buses, model year 2016, that are due for midlife overhaul maintenance, which includes engine replacement. The proposed replacement engine has been certified by the California Air Resources Board as a near-zero-emission engine, which will further decrease the emissions profile of the entire bus fleet. Only one engine manufacturer is certified to meet these emissions standards. Board of Directors' approval is requested to execute a sole source agreement.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C-1-3417 between the Orange County Transportation Authority and Cummins Pacific, LLC, in the amount of \$12,525,823, for the purchase of 173 Cummins L9N, 8.9-liter, compressed natural gas-powered engines.

Discussion

The New Flyer Xcelsior fleet of 173 buses is comprised of 157 40-foot buses and 16 60-foot articulated buses. These buses operate an average of approximately 50,000 miles per year, and midlife overhaul maintenance is typically completed at 300,000 miles. As such, seven buses will exceed 275,000 miles and will be within the manufacturer-recommended engine replacement mileage by early 2022, with the remainder of the fleet closely following.

The California Air Resources Board (CARB) has certified only one engine to meet standard, the Cummins L9N, 8.9-liter, compressed natural gas (CNG)-powered engines. This replacement engine is ten times cleaner in terms of emissions than the engine being replaced. The current engine produces 0.2

grams of oxides of nitrogen (NOx) per brake horsepower-hour (g/bhp-hr) and the replacement engine is rated at 0.02 grams of NOx per g/bhp-hr. These reductions in emissions contribute to the Orange County Transportation Authority's (OCTA) goal of operating zero or near-zero-emissions vehicles for a healthy community.

As there is only one manufacturer with engines certified by CARB for use in transit buses and a sole source agreement is required to proceed with the engine replacement. The recommended engine purchase includes a two-year, 100,000-mile all-inclusive engine warranty, which includes all of the electronic modules, sensors, and emission controls. The estimated useful life of the new engine is six years, or 300,000 miles of operation, which coincides with the Federal Transit Administration-defined minimum useful life of the asset.

Procurement Approach

The procurement was handled in accordance with OCTA Board of Directors-approved policies and procedures for a sole source procurement.

Cummins engines are the only approved and CARB-certified engines with near-zero-emissions for transit buses in California, and Cummins Pacific, LLC (Cummins) is the sole supplier and distributor. Therefore, the procurement meets the guidelines for a sole source purchase as the engines are only available from one responsible source, and no other supplier can meet the requirements.

Cummins provided pricing to OCTA for 173 Cummins L9N, 8.9-liter CNG-powered engines, with a standard two-year, or 100,000-mile, all-inclusive base warranty and two Installation Quality Audits for two pilot engines, at a firm-fixed price in the amount of \$12,552,823, including sales tax. Cummins' proposal was reviewed by staff from the Contracts Administration and Materials Management (CAMM) and Transit Technical Services departments to ensure compliance with the contract terms and conditions, as well as the technical requirements.

In accordance with the OCTA sole source procurement procedures, a sole source agreement over \$50,000 requires the OCTA Internal Audit Department (Internal Audit) to conduct an independent pre-award price review of Cummins' proposed pricing. The CAMM department used recommendations from Internal Audit as the basis for negotiations with Cummins. As a result of negotiations, Cummins submitted lower pricing, resulting in a cost savings of approximately \$27,000 of the amount initially quoted. In addition, the price is

lower than the OCTA project manager's independent cost estimate; therefore, CAMM determined the price to be fair and reasonable. Based on the above, this award is recommended to Cummins.

Fiscal Impact

The project was included in the approved OCTA Fiscal Year 2021-22 Budget, Transit Technical Services, accounts 2114-9024-D2108-0PB and 2114-9024-D2108-02A.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Purchase Order No. C13417 between the Orange County Transportation Authority and Cummins Pacific, LLC, in the amount of \$12,525,823, for the purchase of 173, Cummins L9N, 8.9-liter, compressed natural gas-powered engines.

Attachment

None.

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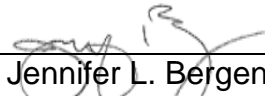
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July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Measure M2 Community-Based Transit Circulators Program
Project V Ridership Report

Overview

Measure M2 includes a program to fund Community-Based Transit Circulators known as Project V. The goal of the program is to provide local transit services designed to complement regional transit services. Funding is awarded to local jurisdictions through a competitive call for projects and local jurisdictions then implement the awarded services. Ridership reports for Project V-funded services are presented to the Board of Directors twice annually. This item provides the ridership report for the second and third quarters of fiscal year 2020-21, from October 2020 through March 2021. It also provides a brief update on Project V program-related activities.

Recommendations

- A. Receive and file Project V Ridership Report as an information item.
- B. Release contingency for the award of \$171,810 in M2 Project V capital funds for Dana Point's replacement vehicle.

Background

The Measure M2 (M2) Community-Based Transit Circulators Program, known as Project V, is a competitive grant program, which provides funding to develop and implement local transit services. Currently, funded service types include community-based circulators, shuttles, trolleys, and demand-responsive services intended to complement regional transit, while also better meeting specific local needs.

Project V services are required to adhere to established minimum performance standards, which originally required achieving six boardings per revenue vehicle hour (B/RVH) by the end of the first year of service, maintaining six B/RVH and going up to ten B/RVH by the end of the second year of service, and then maintaining ten B/RVH for the remainder of the grant term; however, these

standards were modified by the Board of Directors (Board) in January 2021 to address the impacts of the coronavirus (COVID-19) pandemic. Specifically, the Board approved a change requiring each service to meet a maximum cost per boarding.

This report spans the second and third quarters of fiscal year (FY) 2020-21, with the original performance requirement in place through the end of January 2021, and the updated performance requirement in place from the end of January to March 31, 2021 and provides information on both of these measures for all active services. This report also provides a brief update on Project V Program-related activities.

Discussion

Ridership Report

For this reporting period, the COVID-19 pandemic and associated social distancing requirements significantly impacted both service delivery and ridership. Only three services were operational during the reporting period. These services included:

- Anaheim's Canyon Circulator – Metrolink connector service,
- Orange County's – OC RanchRide Local Circulator and Special Event Service, and
- San Clemente's – SCRides demand-responsive service.

These services met the required minimum performance standards for the reporting period, and productivity information for these services is provided in Attachment A. The other 20 Project V services listed in Attachment A were either suspended or not initiated by local jurisdictions due to the COVID-19 pandemic and its associated impacts.

Current Activities

As restrictions imposed by the pandemic have begun to subside, services are slowly being reinstated. During the fourth quarter, Project V services resumed in the cities of Dana Point, Laguna Beach (Summer Breeze), Newport Beach, San Clemente, and San Juan Capistrano.

A second wave of services is anticipated to resume during the summer and fall. Currently, these services are expected to include Irvine's iShuttle services, Mission Viejo's Community Circulator service, Laguna Beach's Off-Season Weekend Circulator service, and La Habra's Special Event service.

A third group of recently awarded projects, including Laguna Niguel's Summer Trolley and Huntington Beach's Southeast Rideshare Pilot Program are anticipated to begin service in 2022.

Ridership from these and all other active services will continue to be monitored by staff quarterly and reported on in regular semi-annual updates to the Board.

Project V Program-Related Activities Update

A summary of several Project V program updates related to recent Board actions is provided below.

- The City of Dana Point's (City) 2020 Project V capital grant award - As part of the 2020 Project V call for projects (call), the City was requested to compare the purchase of a replacement trolley vehicle to leasing a used Orange County Transportation Authority (OCTA) vehicle. The City provided this documentation, and OCTA concurs with the City's assessment that purchasing a replacement vehicle is consistent with the City's long-term service objectives, and therefore, supports the use of previously programmed Project V funds to purchase a replacement vehicle. Upon Board approval of Recommendation B, staff will develop a cooperative agreement to support both the implementation of the 2020 Project V grant award and the purchase of the replacement vehicle.
- Project V Program Adjustments – OCTA has been working with local jurisdictions to amend existing Project V cooperative agreements in order to implement recent Board-approved adjustments to the Project V program. These adjustments include.
 - Revising the program's minimum performance standards from a B/RVH basis to a cost per boarding basis,
 - Allowing for escalation of annual funding caps and the Project V subsidy amount to address inflationary costs,
 - Initiating customer satisfaction and on-time performance reporting requirements, as applicable,
 - Modifying grant expiration dates to reflect Board-approved COVID-19-related scheduling adjustments, and
 - Implementing various other grant adjustments related to COVID-19 that were approved by the Board through previous semi-annual review cycles.
- OCTA is also continuing to monitor the latest developments with respect to best practices for transit passenger safety and vehicle capacity. As applicable new information becomes available, staff will continue

sharing this information with local jurisdictions to assist them with service planning and re-initiation efforts.

Next Steps

In the coming months, OCTA will continue monitoring and working on the activities described in this report, as well as working to support local jurisdictions as they resume, and initiate services and begin adhering to the program's new minimum performance standards. Staff will also continue providing twice-yearly Project V updates to the Board, with the next update scheduled to occur in early 2022.

Summary

A ridership and status report on Project V services is provided for the Board's information. Staff will continue working with local jurisdictions to monitor COVID-19-related issues, support them as they resume services, and implement recently approved Project V programmatic changes. A status update on these efforts will continue to be provided to the Board semi-annually, with the next scheduled update occurring in early 2022.

Attachment

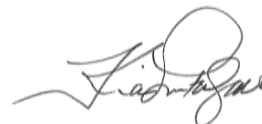
- A. Project V Services – Ridership Report

Prepared by:



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Approved by:



Kia Mortazavi
Executive Director, Planning
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Project V Services – Ridership Report

Reporting Period: Q2 of FY 2020-21 and Q3 of FY 2020-21

Agency	Service Description	Measure M2 Project V Funds	Service Type	Service Start Month/Year	Boardings Per Revenue Vehicle Hour (B/RVH) ¹	Cost Per Boarding	Notes
Anaheim	Anaheim Canyon Circulator	\$ 1,141,864	Commuter Service	July 2020	3	\$13.91	Under the previous minimum performance requirements, which were in place through late January, the service had through June 30, 2021 to achieve six boardings per revenue vehicle hour. However, under the new minimum performance requirements, the service is performing well below the \$20.10 maximum cost per boarding, and is therefore not currently subject to city council disclosure requirements.
Dana Point	Dana Point Trolley	\$ 2,456,511	Seasonal Service	June 2015	N/A	N/A	This service did not operate during the reporting period. However, service was resumed on May 28, 2021, and is operating at a reduced level in order for the city to evaluate ridership and evaluate potential reimbursement concerns. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Dana Point	Dana Point Trolley Expansion	\$ 905,968	Seasonal Service	June 2017	N/A	N/A	This service did not operate during the reporting period. However, service was resumed on May 28, 2021, and is operating at a reduced level in order for the City to evaluate ridership and evaluate potential reimbursement concerns. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Dana Point	Dana Point Trolley Continuity	\$ 1,745,065	Seasonal Service	September 2019	N/A	N/A	This service did not operate during the reporting period. However, service was resumed on May 28, 2021, and was implemented at a reduced level in order for the City to evaluate ridership and evaluate potential reimbursement concerns. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Dana Point	Dana Point Trolley Continuity (2020 Call for Projects)	\$ 2,209,739	Seasonal Service	TBD	N/A	N/A	This grant was awarded funds during the 2020 Project V call for projects (call) and funds the extension of the City's original Project V grant. Accordingly, this grant will be implemented at a later date, once the original Project V grant expires.
Huntington Beach	Huntington Beach Special Events	\$ 93,287	Special Event	July 2014	N/A	N/A	This service did not operate during the reporting period.
Huntington Beach	Huntington Beach Southeast Rideshare Pilot Program (2020 Call for Projects)	\$ 806,240	Shared-Ride Hailing Service	TBD	N/A	N/A	This service was awarded funds during the 2020 Project V call. However, it is not anticipated to be initiated until 2022.
Irvine	Irvine iShuttle Route E - Irvine Station - East	\$ 2,705,984	Commuter Service	February 2019	N/A	N/A	This service did not operate during the reporting period. However, OCTA-led service for Route E is planned to resume in October 2021.
Irvine	Irvine iShuttle Route F - Tustin Station - Irvine Business Complex	\$ 2,712,258	Commuter Service	February 2019	N/A	N/A	This service did not operate during the reporting period. However, OCTA-led service for Route F is planned to resume in July, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
La Habra	Special Event Service	\$ 96,810	Special Event	November 2016	N/A	N/A	This service did not operate during the reporting period. The City is planning to resume special event service in fall 2021 via its 2020 grant (see below).
La Habra	Community Special Event Service	\$ 66,234	Special Event	TBD	N/A	N/A	This service was awarded funds during the 2020 Project V call. However, it has not been initiated yet. The City plans to start this non-OCTA-led service in fall 2021.
Laguna Beach	Summer Breeze Bus Service	\$ 634,357	Seasonal Service	June 2018	N/A	N/A	This service did not operate during the reporting period. However, service was resumed on June 26, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Laguna Beach	Off-Season Weekend Trolley Service (2020 Call for Projects)	\$ 3,850,000	Seasonal and Special Event Service	TBD	N/A	N/A	This service was awarded funds during the 2020 Project V call. However, it has not been initiated yet. The City is planning to start this service in September 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Laguna Niguel	Laguna Niguel Summer Trolley - Southern Section	\$ 886,082	Seasonal Service	TBD	N/A	N/A	The service was awarded funds in 2019. However, it is not anticipated to be initiated until 2022.
Mission Viejo	Local Community Circulator	\$ 3,332,879	Local Circulator	October 2016	N/A	N/A	The service did not operate during the reporting period. The City is planning to resume service in August 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.

Project V Services – Ridership Report

Reporting Period: Q2 of FY 2020-21 and Q3 of FY 2020-21

Agency	Service Description	Measure M2 Project V Funds	Service Type	Service Start Month/Year	Boardings Per Revenue Vehicle Hour (B/RVH) ¹	Cost Per Boarding	Notes
Newport Beach	Balboa Peninsula Seasonal Trolley	\$ 685,454	Seasonal Service	June 2017	N/A	N/A	This service did not operate during the reporting period. However, service resumed on June 26, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Newport Beach	Balboa Peninsula Seasonal Trolley Expansion	\$ 278,400	Seasonal Service	August 2018	N/A	N/A	The service did not operate during the reporting period. However, ridership resumed on June 26, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
Orange County	Local Circulator and Special Event Service (OC RanchRide)	\$ 2,041,547	Local Circulator and Special Event	June 2017	52	\$5.06	Special event service was reinitiated in February, with one special event being conducted.
San Clemente	Summer Weekend Trolley and Seasonal Service	\$ 1,181,393	Seasonal and Special Event	May 2017	N/A	N/A	This service did not operate during the reporting period. However, service at a reduced level was resumed on May 14, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
San Clemente	Summer Weekday Trolley and Seasonal Service Expansion	\$ 1,537,200	Seasonal and Special Event	July 2018	N/A	N/A	This service did not operate during the reporting period. However, service at a reduced level was resumed on May 14, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.
San Clemente	Downtown Route (2020 Call for Projects)	\$ 969,536	Seasonal and Special Event	TBD	N/A	N/A	This grant was awarded funds during the 2020 Project V call and funds the extension of the City's original Project V grant. Accordingly, this grant will be implemented at a later date, once the original Project V grant expires.
San Juan Capistrano	Special Event and Weekend Summer Trolley Service	\$ 958,642	Seasonal and Special Event	July 2018	N/A	N/A	The service did not operate during the reporting period. However, service resumed on June 4, 2021. Ridership and cost per boarding reporting will be provided in the next semi-annual update to the Board.

Agency	Service Description	Measure M2 Project V Funds	Service Type	Service Start Month/Year	Boardings Per Hour of Service (B/HOS) ¹	Cost Per Boarding	Notes
San Clemente	On-Demand	\$ 914,400	Ride Hailing	October 2016	9	\$6.34	The service was active, but only offered single rides during the reporting period due to the coronavirus.

1. Rounded to the next whole number.

N/A - No service hours during reporting period (service was either seasonal and/or impact by the coronavirus).

ACRONYMS

Board- Board of Directors

B/RVH- Boardings/Revenue Vehicle Hour

FY - Fiscal year

N/A - Not applicable

OCTA - Orange County Transportation Authority

Q2 - Quarter 2 (October - December 2020)

Q3 - Quarter 3 (January - March 2021)

TBD - To be determined

NOTE: Services below the minimum performance standard are shaded

Minimum Performance Standards for B/RVH through January 2021

- Six passenger B/RVH by end of year one (12 months from the first day of operating the service).
- Maintain six B/RVH and meet or exceed ten B/RVH by end of year two.
- Ten B/RVH must then be maintained every year thereafter.

Minimum Performance Standards for Cost/Boarding effective January 2021

- Upon the service cost exceeding \$20.10, OCTA provides written notice to the local jurisdiction.
- Local jurisdiction is required to disclose this finding to its city council/Board of Supervisors within 60 days of receipt of the OCTA notice.
- Local jurisdiction's city council/Board of Supervisors determines if it wishes continue, restructure, or cancel the service.
- Local jurisdiction's final determination is made via city council/Board of Supervisors action and must be reported back to OCTA within 45 days.



July 8, 2021

To: Transit Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: August 2021 Bus Service Change

Overview

California is emerging from the coronavirus pandemic and the stay-at-home orders that were put in place to protect public health are being phased out. The return of economic activity is expected to increase demand for bus transit service. In response, the Orange County Transportation Authority is implementing a mid-summer service change. The proposed August 2021 bus service change represents the largest increase in service since the start of the pandemic. The additional service is intended to address expected ridership increases related to the return of in-person instruction for schools, colleges, and universities, and the resurgence of hospitality industry activities.

Recommendation

Receive and file as an information item.

Background

The Orange County Transportation Authority (OCTA) implements regular schedule and route revisions to selected OC Bus routes three times a year, in February, June, and October.

OCTA implemented an emergency service change on March 23, 2020, which reduced service levels to balance a reduction in demand for transit service resulting from the federal and state emergency declarations including California's stay-at-home order to help reduce the spread of the coronavirus (COVID-19) while still providing vital transportation services. Based on these factors, service levels were adjusted to provide a baseline level of service for customers needing to make essential trips. Bus service was subsequently adjusted as demand increased and to help ensure social distancing for passengers and OCTA coach operators.

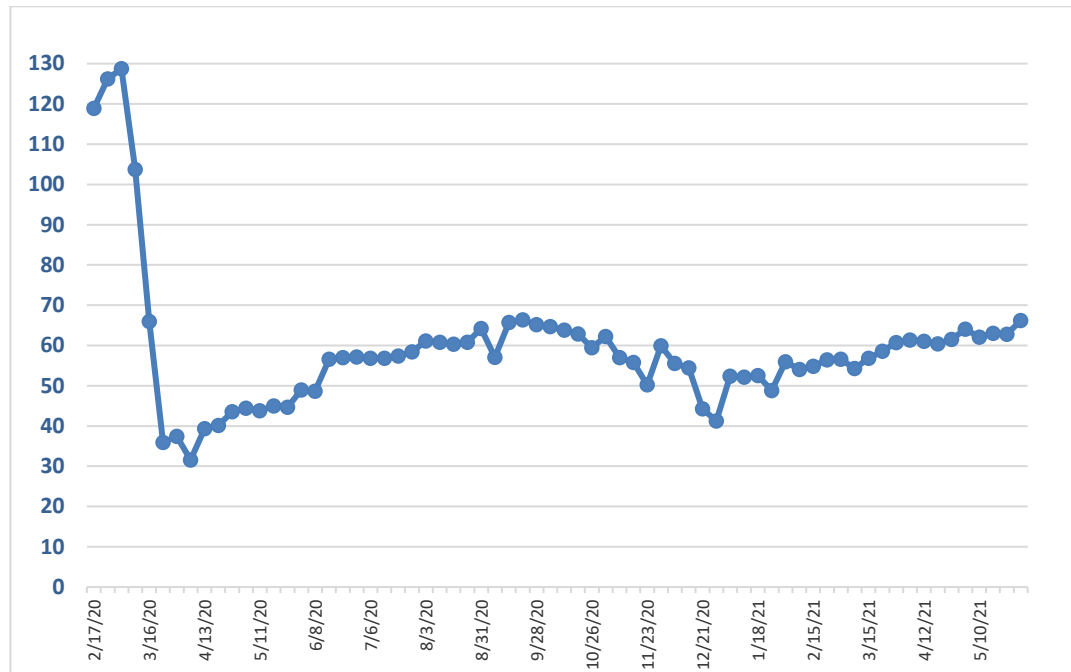
OC Bus routes have been operating under a public health emergency since the initial service changes went into effect in March 2020. The Federal Transit Administration (FTA) requires that, pursuant to Title VI, any major service change that lasts longer than 12 months include a service equity analysis to determine if there are disparate impacts on minority and/or low-income populations who rely on bus service. As a result, OCTA was required to perform a service equity analysis, conduct public outreach, and hold a public hearing. On February 22, 2021, the Board of Directors (Board) directed staff to implement a Public Outreach Program to comply with the FTA requirement and to solicit feedback for the planned restoration of bus service. Per OCTA's policy, a Public Outreach Program was conducted and concluded with a public hearing at the April 26, 2021 Board meeting. This effort resulted in the receipt of 2,262 questionnaires and comments. Staff began incorporating public input in the recently implemented June 2021 bus service change and will continue to incorporate this feedback in upcoming service changes.

The State's plan to reopen businesses to full capacity and the return of in-person instruction for Kindergarten through 12 schools, colleges, and universities is expected to result in increased demand for transit service. Further, the anticipated rebound in the hospitality sector will likely contribute to demand for public transit. In response, a mid-summer service change is proposed to increase service frequency and service span and reinstate some suspended routes. Staff recommends implementing this service change on August 15, 2021. The proposed August service change does not alter plans for the regularly scheduled October 2021 service change, which could include additional bus service changes based on ridership trends through the summer period and seasonal adjustments.

Discussion

After the implementation of California's stay-at-home order in March 2020, weekday OC Bus ridership dropped significantly, from approximately 125,000 average weekday boardings to the low 30,000s in April 2020. Ridership rebounded to over 60,000 average weekday boardings in fall 2020 and spring 2021. The chart below shows the average weekday ridership from mid-February 2020 through early June 2021.

Average Weekday Boardings by Week (in Thousands)



On March 23, 2020, in direct response to the dramatic decrease in demand, OCTA reduced fixed-route bus service approximately 40 percent by implementing Sunday service schedules on all routes, seven days a week. Starting with the June 2020 service change and continuing with subsequent service changes in October 2020, February 2021, and June 2021, an enhanced Saturday service schedule on weekdays and a regular schedule on Saturdays and Sundays has been in operation. With implementation of the proposed August 2021 service change, service levels are projected to increase by approximately 103,400 annual revenue vehicle hours (RVH), from 1,200,000 to 1,303,400, which is a nine percent increase in service over June 2021 levels. Additionally, with the re-opening of the State on June 15, capacity limitations on buses have been lifted allowing OCTA to accommodate growing demand within available resources.

The proposed August 2021 service change will improve service on 20 of the 50 bus routes currently operated based on public feedback and anticipated increase in demand as the economy continues to reopen and schools return to in-person instruction. These changes include.

- Improving service frequency on 14 bus routes,
- Improving Bravo! service on two routes with offsetting adjustments on the underlying local routes,
- Expanding hours of operation earlier in the morning and/or later in the evening on 19 bus routes, and
- Reinstating two bus routes that were suspended during the pandemic.

OCTA will continue the suspension of six bus routes. The recommendations are detailed in Attachment A and shown in attachments B, C, D, E, F, and G.

Staff anticipates that ridership demand for OC Bus service will remain steady during the summer and increased ridership resulting from schools re-opening will be accommodated with the changes proposed for August. After implementation, staff will assess the service change based on key variables, such as customer demand and workforce availability. Contingent on increasing demand, the October 2021 service change will build on the proposed August 2021 service change based on these variables in addition to public input received. Preliminary plans for October 2021 could increase service by approximately 40,000 annual RVH to a total of 1,350,000 annual RVH or about 17 percent below pre-COVID-19 service levels, consistent with the proposed OCTA Fiscal Year (FY) 2021-22 Budget. Staff will inform the Board prior to implementation.

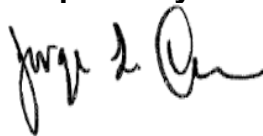
Summary

Staff recommends the Board approve the proposed August 2021 bus service change and continue to use the public feedback received to develop the FY 2021-22 Bus Service Plan. With Board approval, staff will begin implementing the recommendations for the August 2021 bus service change. Customers will be notified of the changes three weeks prior to implementation.

Attachments

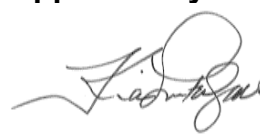
- A. August 2021 Bus Service Change
- B. August 2021 Bus Service Change System Map, Routes with Frequency Improvements
- C. August 2021 Bus Service Change System Map, Routes with Frequency Reductions
- D. August 2021 Bus Service Change System Map, Routes with Span Improvements
- E. August 2021 Bus Service Change System Map, Routes to be Reinstated
- F. August 2021 Bus Service Change System Map, Routes Continue Suspended
- G. August 2021 Bus Service Change System Map, Routes with No Changes

Prepared by:



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August 2021 Bus Service Change

Route	Route Description	Service Improvement	Service Added	
			Annual RVH	Bus Trips
1	Long Beach - San Clemente	Improve frequency	1,092	2
25	Fullerton - Huntington Beach	No change	-	-
26	Fullerton - Yorba Linda	Improve frequency; Improve span	6,532	22
29	La Habra - Huntington Beach	Service reduction	(390)	(2)
30	Cerritos - Anaheim	No change	-	-
33	Fullerton - Huntington Beach	No change	-	-
35	Fullerton - Costa Mesa	No change	-	-
37	La Habra - Fountain Valley	Improve frequency; Improve span	6,758	16
38	Lakewood - Anaheim Hills	Improve frequency; Improve span	8,279	16
42	Seal Beach - Orange	Improve frequency; Improve span	6,197	12
43	Fullerton - Costa Mesa	Reduce frequency; Improve span	1,102	(4)
46	Los Alamitos - Orange	No change	-	-
47	Fullerton - Balboa	Improve frequency; Improve span	8,424	10
50	Long Beach - Orange	Improve frequency; Improve span	4,123	9
53	Orange - Irvine	Improve frequency; Improve span	5,449	21
54	Garden Grove - Orange	Improve span	3,467	9
55	Santa Ana - Newport Beach	Improve span	1,556	8
56	Garden Grove - Orange	Improve frequency; Improve span	6,250	20
57	Brea - Newport Beach	No change	-	-
59	Anaheim - Irvine	No change	-	-
60	Long Beach - Tustin	Reduce frequency	(15,593)	(31)
64	Huntington Beach - Tustin	Improve span	(128)	2
66	Huntington Beach - Irvine	Improve span	2,003	6
70	Sunset Beach - Tustin	Improve frequency; Improve span	2,100	10
71	Yorba Linda - Newport Beach	No change	-	-
72	Sunset Beach - Tustin	Improve frequency; Improve span	1,803	12
76	Huntington Beach-JWA via Talbert/MacArthur	No change	-	-
79	Tustin - Newport Beach	No change	-	-
82	Foothill Ranch - Rancho Santa Margarita	No change	-	-
83	Anaheim - Laguna Hills	Improve span	1,427	3
85	Mission Viejo - Laguna Niguel	No change	-	-
86	Costa Mesa - Mission Viejo	No change	-	-
87	Rancho Santa Margarita - Laguna Niguel	No change	-	-
89	Mission Viejo - Laguna Beach	No change	-	-
90	Tustin - Dana Point	Improve frequency; Improve span	8,317	16
91	Laguna Hills - San Clemente	No change	-	-
123	Anaheim - Huntington Beach	No change	-	-

August 2021 Bus Service Change

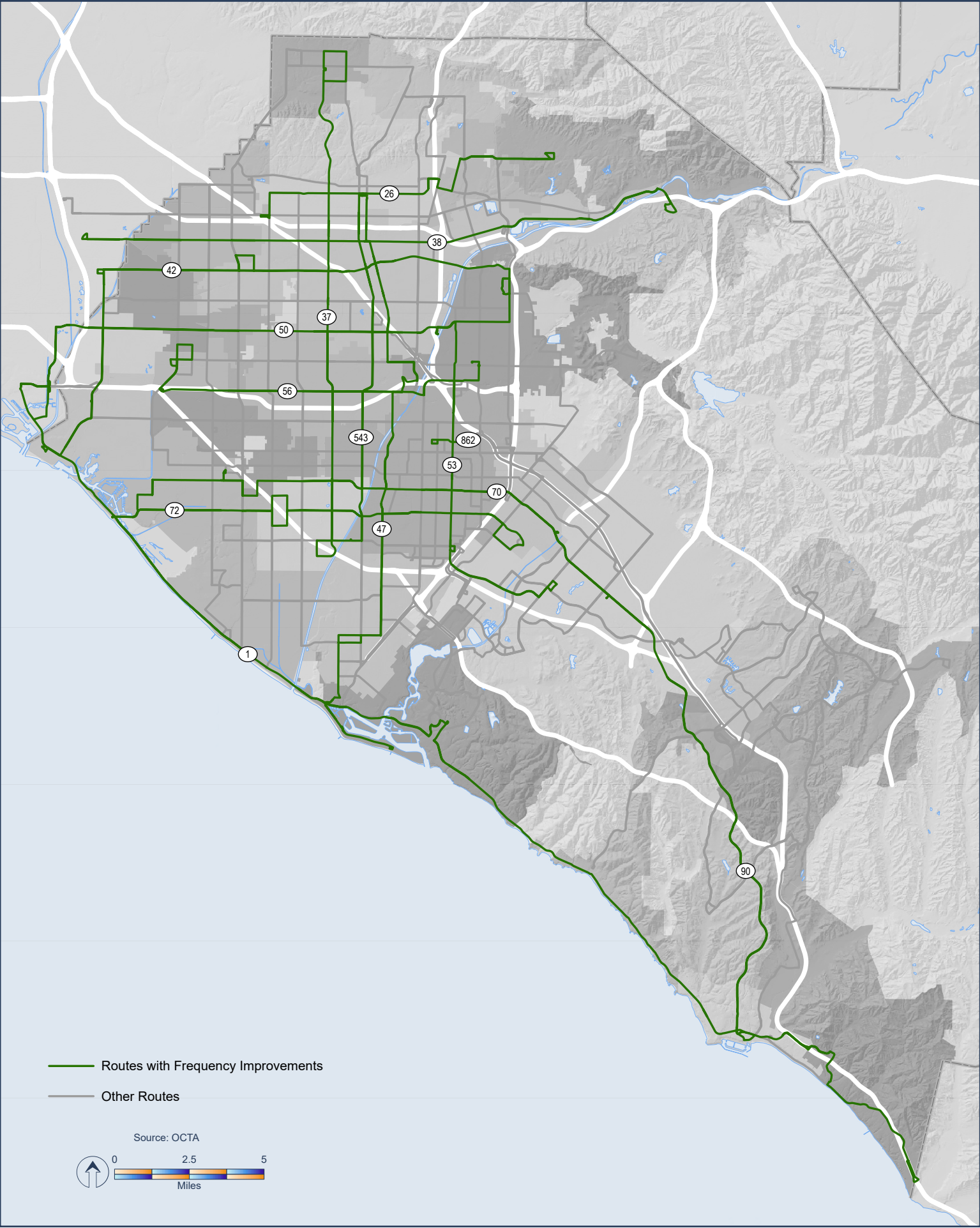
Route	Route Description	Service Improvement	Service Added	
			Annual RVH	Bus Trips
129	La Habra - Anaheim	No change	-	-
143	La Habra - Brea	No change	-	-
150	Santa Ana - Costa Mesa	Reinstate service	9,468	30
153	Brea - Anaheim	No change	-	-
167	Orange - Irvine	No change	-	-
177	Foothill Ranch - Laguna Hills	No change	-	-
178	Huntington Beach - Irvine	No change	-	-
206	Santa Ana - Lake Forest Express	Continue suspension	-	-
213	Brea - Irvine Express	Continue suspension	-	-
453	Orange Transportation Center - St. Joseph's Hospital	No change	-	-
463	The Depot at Santa Ana - Hutton Center	No change	-	-
472	Tustin Station - Irvine Business Complex	No change	-	-
473	Tustin Station - UCI	No change	-	-
480	Irvine Station - Lake Forest	No change	-	-
529	Fullerton - Huntington Beach Express	Continue suspension	-	-
543	Fullerton - Santa Ana	Improve frequency; Improve span	6,524	14
560	Santa Ana - Long Beach	Reinstate service	25,232	64
701	Huntington Beach - Los Angeles Express	Continue suspension	-	-
721	Fullerton - Los Angeles Express	Continue suspension	-	-
794	Riverside - South Coast Metro Express	Continue suspension	-	-
862	Downtown Santa Ana Shuttle	Improve frequency; Improve span	3,383	24
Total			103,374	289

Acronyms

RVH - Revenue Vehicle Hours

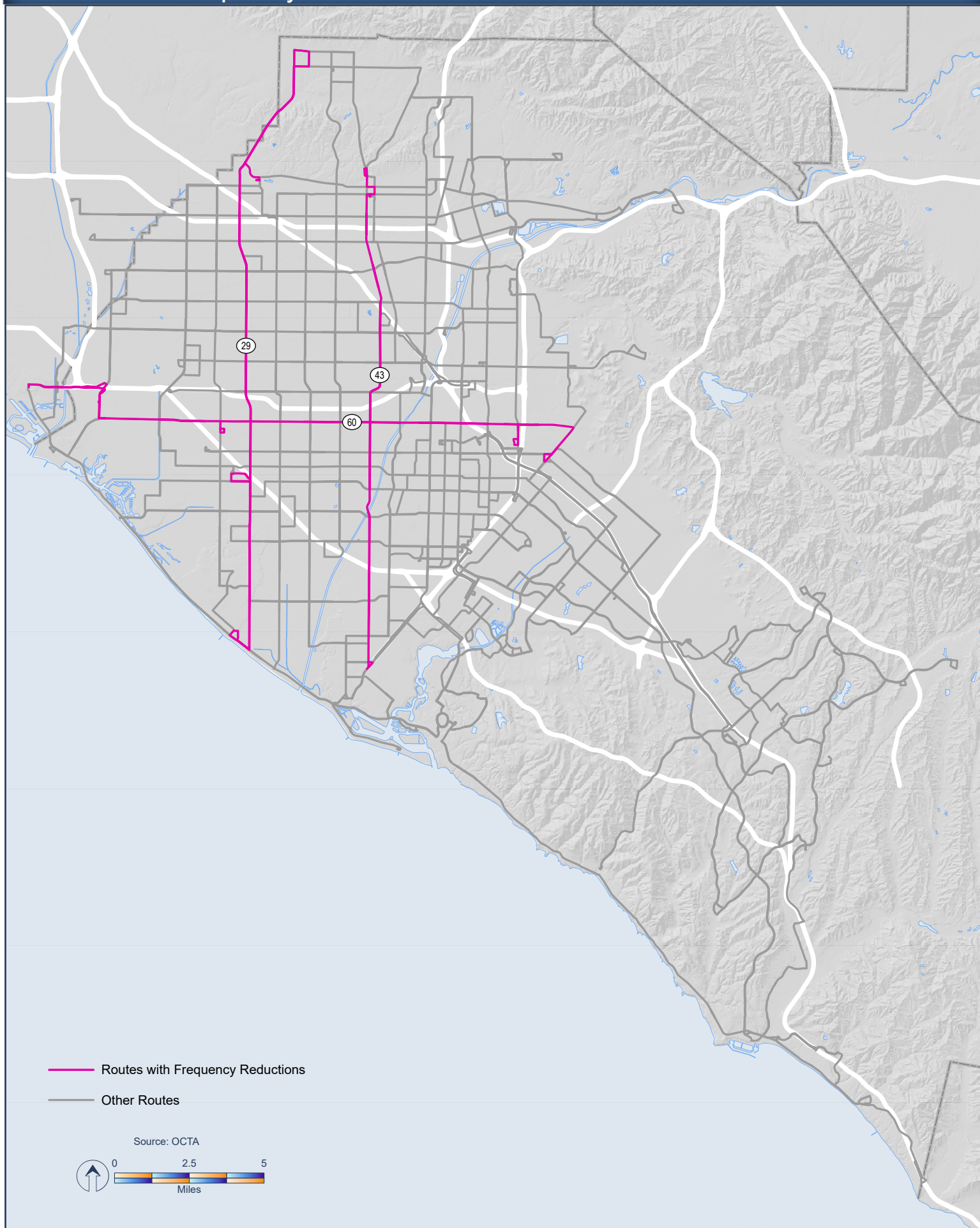
August 2021 Bus Service Change System Map

Routes with Frequency Improvements



August 2021 Bus Service Change System Map Routes with Frequency Reductions

ATTACHMENT C



— Routes with Frequency Reductions
— Other Routes

Source: OCTA



August 2021 Bus Service Change System Map

Routes with Span Improvements



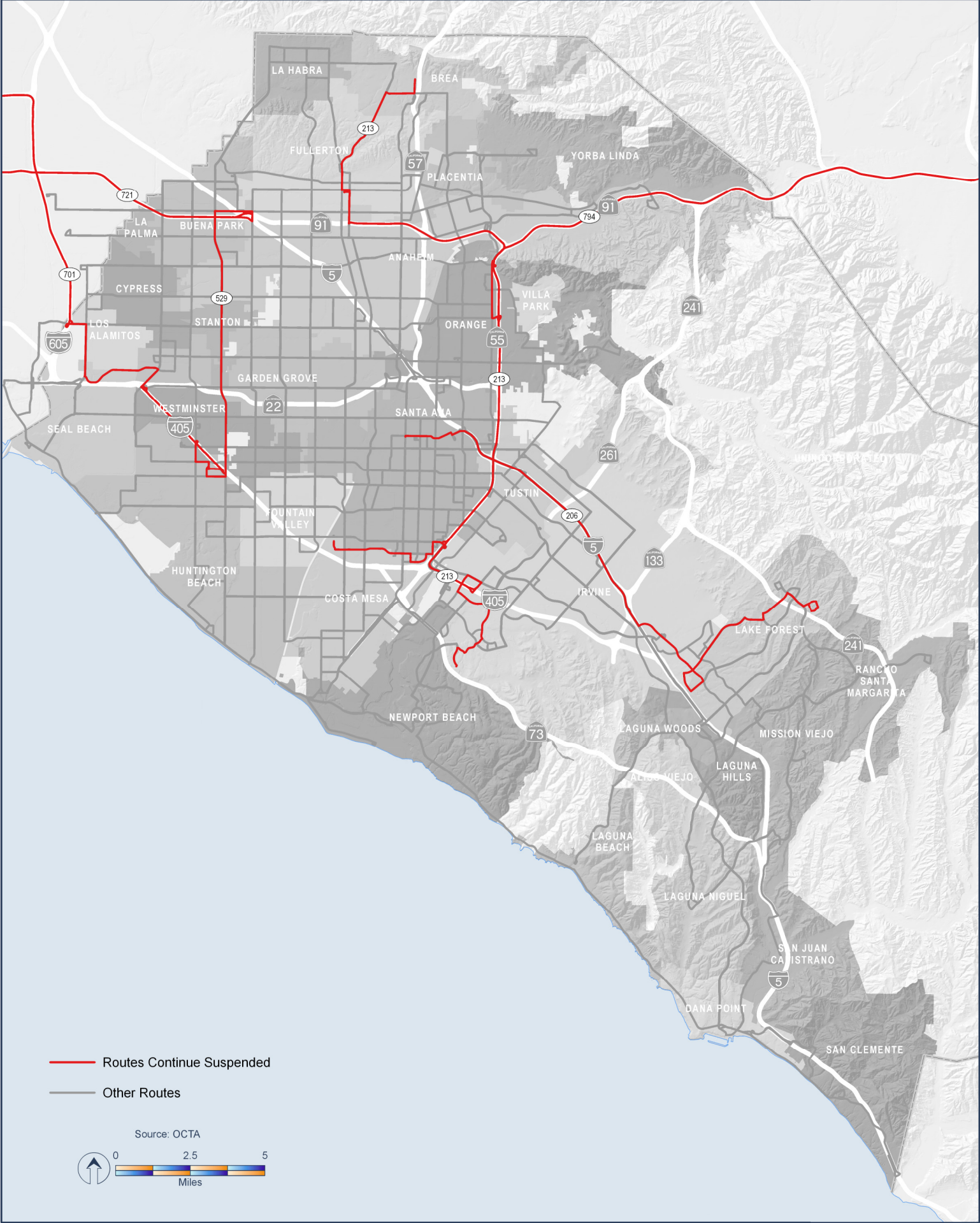
August 2021 Bus Service Change System Map

Routes to be Reinstated



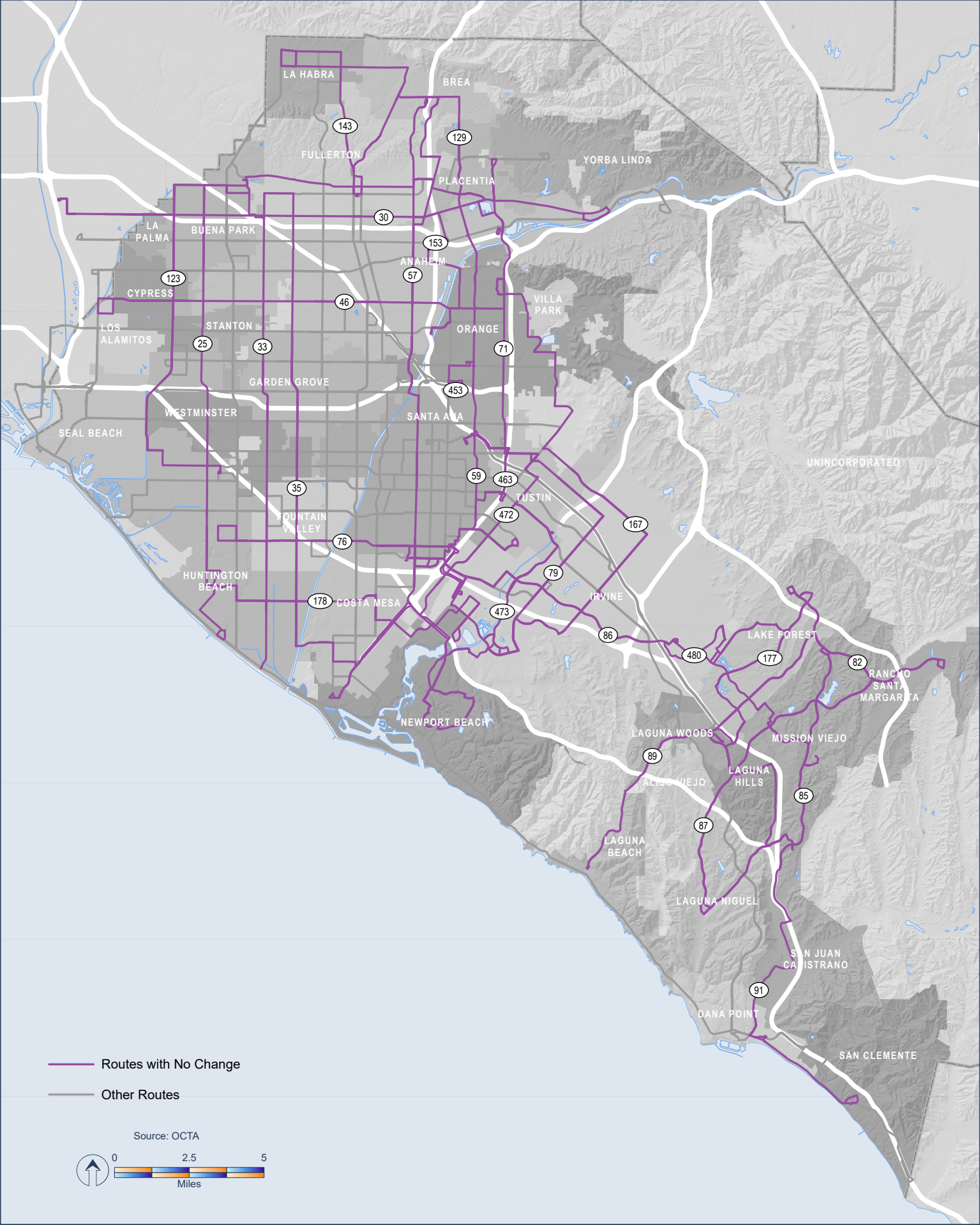
August 2021 Bus Service Change System Map

Routes Continue Suspended



August 2021 Bus Service Change System Map

Routes with No Changes





July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects

Overview

The Orange Transportation Authority offers grant opportunities to non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. The Enhanced Mobility for Seniors and Disabled Grant Program augments existing OC Bus fixed-route service, OC ACCESS, and the Senior Mobility Program in Orange County. The Board of Directors is requested to approve the guidelines and release the 2021 Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.

Recommendations

- A. Approve the guidelines for the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.
- B. Direct staff to issue the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects using up to \$4 million in local funding.

Background

Prior to fiscal year (FY) 2014, the Orange County Transportation Authority (OCTA) worked with the California Department of Transportation (Caltrans), the California Transportation Commission (CTC), and the Federal Transit Administration (FTA) to provide Federal Section 5310 (FTA 5310) funding through Caltrans to non-profit organizations and public agencies for the purchase and replacement of paratransit-type vehicles and related equipment to help meet the transportation needs of seniors and individuals with disabilities.

In FY 2015 and onward, Caltrans elected not to participate in this partnership citing significant cost increases in administration and staff time related to coordination with the large urban areas throughout the State, and inconsistencies in program delivery. In 2016, OCTA assumed the role of designated recipient for the FTA 5310 Program in Orange County to ensure funds are used effectively, efficiently, and consistently with federal requirements.

OCTA developed the Orange County Enhanced Mobility for Seniors and Disabled (EMSD) Grant Program, which, similar to FTA 5310, provides grant opportunities for non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. However, this local grant program replaces the FTA 5310 Program with local funds, which allows grantees to streamline project implementation. Further, this approach reduces the risk that a nonprofit or local agency may not be in non-compliance with federal requirements. Under this approach, OCTA develops and enters into funding agreements and provides oversight monitoring of EMSD grantees throughout the useful life of the grant-funded projects. In addition, OCTA retains the federal apportionment to support OC ACCESS service, consistent with Board of Directors (Board)-approved policies and prior actions.

As the regional transportation planning agency for Orange County, OCTA is responsible for conducting a call for projects (call) and allocating EMSD funds consistent with the priority strategies identified in the current Orange County Human Services Transportation Coordination Plan (Coordinated Plan), which was recently updated and approved by the Board on November 23, 2020.

Discussion

The 2020 update to the Coordinated Plan created funding priorities for the EMSD call, which include:

- Paratransit vehicle replacement and related equipment for existing vehicles that meet or exceed their useful life,
- New paratransit vehicles and related equipment that support the expansion of existing service,
- Expansion of existing transportation services that address the target population's transportation needs, which include expanding existing mobility management, and driver and travel training projects, and
- New transportation services that address the target population's unmet transportation needs, including new mobility management, and driver and travel training projects, and first- and last-mile trips.

Staff is recommending to make up to \$4 million in local transportation funds available for the 2021 EMSD call to fund transportation projects in FY 2021-22 through FY 2022-23. The funding level is consistent with the federal funding that OCTA receives and uses for ACCESS services under the FTA 5310 Program less ten percent for program administration.

Over the past seven months, staff has conducted extensive outreach to eligible applicants. Notification of funding availability and outreach efforts have included two guideline development workshops in April 2021, email notifications, surveys, phone calls, and an information hotline, in addition to presentations at the January 2021 and April 2021 Special Needs Advisory Committee meetings. Outreach efforts were intended to gather information on potential applicant needs that can be reflected in the call. Further, OCTA staff reached out to those non-profit organizations and local agencies that have not applied for EMSD funds in the past to gain an understanding of why they did not apply, and provide guidance as needed.

The April 2021 guideline development workshops were well-attended with approximately 40 attendees representing 33 agencies. Of these attendees, 24 agencies have not been funded by the grant in the past ten years, four were funded in 2011, one was funded in 2014, one was funded in 2016, and three were funded in 2018. Most of the attendee comments received related to requests to lower the local match requirement, as many applicants are currently facing operational difficulties due to impacts of the COVID-19 pandemic. OCTA incorporated this request into the proposed guidelines by reducing the local match requirement as further outlined below.

The Orange County EMSD Program Guidelines and Procedures (Guidelines) have been prepared for Board consideration in conjunction with the proposed 2021 EMSD call, as follows:

- Creation of a separate guideline document to support applicants in the application development process by providing information on goals, priorities, scoring criteria, requirements, and procedures (Attachment A).
- A temporary change to lower the capital match requirement from 20 percent to ten percent, and the operating assistance match requirement from 50 percent to 25 percent due to impacts from the COVID-19 pandemic. A reduction of the match requirement for mobility management, and driver and travel training projects under the operating category from 20 percent to ten percent to allow applicants to restore service and recover from the pandemic.

- A temporary change to lower the vehicle revenue hours from 20 hours to ten hours per week to allow applicants to restore service.
- Allow applicants to request funding to temporarily restore service to pre-COVID-19 levels for up to six months, and request funding to support COVID-19 response equipment to facilitate safe operations for their clients.
- Prioritization for applications that can demonstrate applicant outreach to senior and disabled patrons to ensure services are meeting their needs.
- The addition of timely use of funds provisions to encourage timely project implementation.
- Changes to the extension, scope change, and cost savings, invoicing, and reimbursement, and quarterly and final reporting processes to make the EMSD call consistent with other OCTA calls.

Issues and lessons learned from prior calls were also reviewed and considered. The proposed Guidelines were created to be more consistent and provide streamlining in the application process through project implementation.

The proposed Guidelines are being submitted to the Board for final consideration and approval. Authorization is also being requested to initiate the 2021 EMSD call, making \$4 million available in local funding to non-profit and local public agencies to help meet the transportation needs of their senior and disabled clients. The maximum award to any one applicant is \$600,000 to ensure equitable distribution of funds.

Next Steps

Staff is requesting approval to issue the 2021 EMSD call. With Board approval, staff will conduct additional outreach to ensure organizations are aware and notified of the call and assist with application submissions. OCTA will host an application development workshop to assist applicants in late July and conduct additional outreach with applicants as needed. Staff will convene an advisory panel to assist with the review and ranking of applications. The panel may include members that represent various disciplines within OCTA, as well as a representative from the OCTA Special Needs Advisory Committee and external agencies. Once the evaluation process is completed, staff anticipates returning to the Board with a list of recommended projects for consideration of funding.

The draft schedule for the call is as follows:

- July 12, 2021 – OCTA Board action considering the 2021 EMSD call,
- July 26, 2021 – OCTA applicant workshop to review the procedures and answer questions about the call,
- September 9, 2021 – applications due to OCTA,
- September – November 2021 – OCTA staff and EMSD advisory panel will review and rank the applications, and
- November 22, 2021 – Board consideration and approval of the program of projects.

Summary

Staff is requesting Board approval of the Guidelines and authorization release the 2021 EMSD call, providing up to \$4 million in FY 2021-22 and FY 2022-23 for projects to help meet the transportation needs of seniors and individuals with disabilities.

Attachment

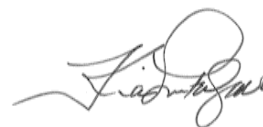
- A. 2021 Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects Orange County Transportation Authority Guidelines and Procedures

Prepared by:



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2021 Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects Orange County Transportation Authority Guidelines and Procedures

PURPOSE AND AUTHORITY

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

The goals of the EMSD Program are to:

- 1) Improve the mobility for seniors and individuals with disabilities in Orange County.
- 2) Support local agencies and non-profits providing service within their communities.
- 3) Augment the OCTA Senior Mobility Program, OC ACCESS, and OC Bus fixed-route service.
- 4) Provide seamless service through improved first- and last-mile connections.
- 5) Incorporate and encourage technology-based solutions to improve mobility options.
- 6) Promote non-profit and public agency outreach to seniors and disabled patrons with an emphasis in reaching disadvantaged, underrepresented, and/or diverse communities to ensure services are meeting their needs.
- 7) Prioritize funding for agencies that collaborate, which is demonstrated by:
 - Partnerships to create efficiencies and lower operating costs for service, and/or
 - Increasing vehicle revenue hours beyond the minimum ten hours.

BACKGROUND

Prior to 2014, the Federal Transit Administration Section 5310 (FTA 5310) Program was jointly administered by the Orange County Transportation Authority (OCTA) and the California Department of Transportation (Caltrans). In fiscal year (FY) 2015 and onward, Caltrans elected not to participate in this partnership, citing significant increases in administration and coordination with the large urban areas throughout the state. In 2016, OCTA assumed the role of designated recipient for the FTA 5310 Program in Orange County to ensure funds are used effectively, efficiently, and consistently with federal requirements.

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

As the regional transportation planning agency for Orange County, OCTA is responsible for conducting a call and allocating EMSD funds consistent with the priority strategies identified in the current Orange County Human Services Transportation Coordination Plan (Coordinated Plan).¹ In addition, OCTA has taken on the responsibility of developing and administering funding agreements and providing oversight monitoring of EMSD grantees throughout the useful life of the grant-funded projects.

2021 CALL

The EMSD call will provide up to \$4 million in local funds. Funding availability is based FTA 5310 amounts allocated to Orange County and is subject to change. All projects proposed and considered for funding must be included in the Coordinated Plan.

PROGRAM SCHEDULE²

July 12, 2021	Call for applications opens
July 26, 2021	Grant application workshop
September 9, 2021	Application due date
September-November 2021	Application reviews and scoring
November 22, 2021	OCTA Board of Directors (Board) consideration of EMSD funding recommendations
December 7, 2021	Awarded applicant workshop

¹ Coordinated Plan is available at: <http://www.octa.net/pdf/HumanServicesTransportation.pdf>

² Please note this schedule is subject to change.

Funding Priorities (in order of priority)

- 1) Paratransit vehicle replacement and related equipment for existing vehicles that meet or exceed their useful life.
- 2) New paratransit vehicles and related equipment that support the expansion of existing service.
- 3) Expansion of existing transportation services that address the target population's transportation needs, which include expanding existing mobility management, and driver and travel training projects.
- 4) New transportation services that address the target population's unmet transportation needs, including new mobility management, and driver and travel training projects, and first and last-mile trips.

Eligible Applicants

- Private non-profit organizations, and
- Public agencies where private non-profits are not readily available to provide the proposed service (a public hearing is required as documentation).

Eligible Project Categories and Availability of Funds

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

Project Category	Funding Availability³
Capital	\$2,200,000 (minimum)
Operating	\$1,800,000 (maximum)
Total	\$4,000,000

Award Size and Matching Funds

Applicants may submit applications for both project categories. However, the total request per applicant may not exceed \$600,000 (excluding local match), as noted in the application and project type table below. The capital and operating project evaluation criteria and point distribution are provided in the Evaluation Criteria. Applicants must commit to cover any cost overruns.

³ Capital Projects will be awarded a minimum of \$2,200,000 under this Call if the \$4 million maximum is reached. Operating Projects will be awarded a maximum of \$1,800,000 under this Call.

Additional Guidance		
1.	Local match, match, or local matching funds, or any variation thereof, refers to the match funding that an agency is pledging through the competitive process. The match must be local agency contribution and may not be made up of soft match or in-kind services.	
2.	The local match has been temporarily reduced during the 2021 call to allow applicants to restore service and subsequently recover from the coronavirus (COVID-19) pandemic.	
Application and Project Type		Minimum Match Requirement
Capital: New or replacement vehicle purchases, leases, and supporting equipment (Stand Alone Application)		10%
Operating: Operating Assistance, COVID-19 Restoration of Service, and/or Expansion of Service, and/or first and last-mile trips		25%
Operating: Mobility Management, Driver/Travel Training, and/or COVID-19 Response Equipment (when combined with Operating Assistance in a single application)		10%
Operating: Mobility Management, Driver/Travel Training, and/or COVID-19 Response Equipment (Stand Alone Application)		10%

Additional Guidance	
<i>Capital Projects</i>	
1.	If capital purchases (vehicles, equipment, software, etc.) are purchased with EMSD funds, these items must be used for their entire useful life and/or through termination of the service or lease (see timely use of funds). If termination occurs prior to the completion of the capital item's useful life, lease, and/or grant term, the applicant shall repay OCTA the same percentage of the sale price [or estimated value of the asset(s)] based on straight line depreciation of the asset(s) consistent with the EMSD percentage of initial purchase. Useful life shall be based upon OCTA's policy for service life, where applicable.
2.	Leasing of vehicles will be allowed on a case-by-case basis. Applicants should submit a cost-benefit analysis demonstrating the cost of leasing the vehicle and associated equipment is the same cost or better.
3.	Awarded vehicles must be ADA accessible and provide a minimum of 10 hours of service per week per vehicle or more by the awarded applicant or in coordination with other agencies.
4.	A vehicle proposed for replacement must meet or exceed its useful life and be actively in service during the applicant's normal days and hours of operation.

Additional Guidance	
Capital Projects	
COVID-19 Response Equipment eligible projects include personal protective equipment, sanitization products, and plexiglass barriers to ensure adequate social distancing and safe operations.	
Operating Projects	
1.	For applicants requesting funds to expand existing and ongoing service, applicants must be able to document that the proposed service will serve additional persons or trips, expand the service area or hours, and/or increase the number or frequency of trips beyond the service that is already being provided. Applicants must explain basis for growth and trip projections.
2.	Potential awards for COVID-19 Restoration of Service will only support service for up to six months. Documentation of the reduction of service is required to be attached to the application.

EVALUATION CRITERIA

Capital and operating projects will be scored using the evaluation criteria and point distributions shown below.

Capital Projects	Points	Bonus Points⁴
A. Goals and Objectives – Project is consistent with overall EMSD Program goals and objectives and meets all consideration factors.	16	-
B. Ability of Applicant - Evidence of the applicant's experience providing existing transportation service or social services for elderly or disabled individuals. Scored questions will also include points for agency programs/plans including driver/travel training ⁵ , dispatching, California Highway Patrol Inspections, annual budget/fund sources, and proposed budget.	20	-

⁴ Bonus points are in addition to the maximum total in each category. If bonus points are awarded, the application score will not exceed a maximum of 100 points.

⁵ Travel training is one-on-one individualized training that gives people with seniors and individuals with disabilities the skills required to travel safely on fixed-route public transportation.

Capital Projects	Points	Bonus Points
<p>C. Coordination Planning - Assessment of available services that (1) meet the needs of seniors and disabled individuals and (2) identify gaps in service or equipment needs. Scored questions will ask how the applicant provides strategies, activities, and projects to identify these gaps and achieve efficiencies in service. There are also specific questions on coordination planning with other agencies.</p> <p><i>Five bonus points are available for partnerships that create efficiencies in lowering operating costs.</i></p>	12	Up to 5
<p>D. Outreach and Feedback - Assessment of how the applicant has conducted outreach with senior and disabled clients to ensure their needs are being met and adjustments to service are made accordingly.</p>	10	-
<p>E. Transportation Service - Evaluation will be based on project type - replacement, expansion vehicles, and/or equipment. Replacement and expansion vehicles will receive ratings based on mileage, service hours per week, and number of people served. Equipment will be scored based on number of vehicles within the fleet which are coordinated and service efficiency enhancement with the new equipment.</p> <p><i>Five bonus points available (scaled) for applicants that increase vehicle revenue hours beyond the minimum ten hours.</i></p>	32	Up to 5
<p>F. Emergency Planning and Preparedness – Evaluation is based on standards for emergency planning and preparedness, extent to which emergency plans and drill activities are provided, and whether applicant is included in County Office of Emergency Services (OES) response plan.</p>	10	-
Total Points	100	10

Operating Projects		Points
A.	Goals and Objectives – Project’s consistency with overall EMSD program goals and objectives and meets all consideration factors.	20
B.	Project Implementation – Extent to which applicant provides a well-defined and detailed operations plan with defined routes, schedules, current/project ridership, key personnel, and marketing strategies with supporting documentation for carrying out the project.	30
C.	Program Performance Indicators – Extent to which applicant provides clear, measurable, and outcome-based performance measures and indicators, which show a logical, reasonable, and quantifiable methodology to track the effectiveness of the project.	20
D.	Coordination, Outreach, and Sustainability – Extent to which applicant identifies communications and outreach plans and goals to target populations that benefit from EMSD program. Evaluation also based on applicant’s efforts and accomplishments in coordination with other transportation and/or social services in the project area and extent to which applicant identifies plans to sustain the program beyond the two-year funding cycle.	20
E.	Emergency Planning and Preparedness – Extent to which applicant identifies standards for emergency planning and preparedness and provides emergency plans and drill activities, and whether applicant is included in County Office of Emergency Services (OES) response plan.	10
Total Points		100

PROVISIONS OF USE CRITERIA

- Upon approval by OCTA’s Board, awarded applicants will be notified and will be required to enter into an agreement with OCTA to start the project and receive funding. The agreement will remain in effect throughout the project’s service period or the equipment’s useful life.
- Grantees are responsible for the proper use, operating costs, and maintenance of all vehicles and project equipment, and must be prepared to comply with all applicable regulations and requirements.
- Applicants must have management oversight and control over the operations of contracted service and purchased equipment. Backup documentation must also be maintained and provided upon request during the project term and the extended audit period.
- For non-profit applicants, non-profit status must be documented as “active.”
- Public agencies are required to complete a public hearing prior to the application deadline of September 9, 2021.

TIMELY-USE OF FUNDS

Applicants may request programming funds for FY 2021/22 or FY 2022/23 (ending June 30).

For **Capital** projects, applicants will be required to award a contract or execute a purchase order by June 30 of the programmed FY. Applicants would then have 24 months from the award, or purchase order to receive and/or install the equipment. The contract award or purchase order date will serve as the start of the 24-month period of performance.

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

For all project types, funds are required to be expended within 24 months to be eligible for reimbursement. Applicants may request a one-time extension not exceeding a total of 12 months per project grant. Scope changes and extension requests must be received no less than ninety (90) calendar days prior to the OCTA cooperative agreement deadline.

EXTENSION REQUESTS, SCOPE CHANGES AND COST SAVINGS

Scope changes and extension requests are considered on a case-by-case basis and requests must be submitted via email to Jennifer Farinas at jfarinas@octa.net. Scope change and extension request templates will be made available on the [EMSD website](#) following project award. Applicants must provide an explanation and justification for the change. Please note that project extensions are not guaranteed, and OCTA encourages awarded applicants to complete projects within the original period of performance of the grant.

OCTA will complete a thorough evaluation of the scope change and/or extension request and the potential impact to the project score prior to making a recommendation. Major scope changes which significantly impact the application score will require approval by the OCTA Board of Directors.

Cost Savings. If the applicant reduces the scope of an approved project or if the project experiences cost savings, a reduction in EMSD funds must be applied proportionally to maintain the approved local match percentage. Scope reductions are not considered cost savings.

INVOICES AND REIMBURSEMENTS

Applicants are expected to finance their projects as they proceed. Costs will be administered on a reimbursement basis, with exception to vehicle purchases over \$100,000 as noted in the table below. Reimbursements will be dispersed upon review and approval of a complete expense report, performance report, and consistency with the cooperative agreement requirements and specifications. Invoices must be submitted no later than 30 days after the end of the month in which the expenditure occurred, with the exception to vehicle purchases over \$100,000 as noted below.

Applicants must submit a final invoice within 90 days of project completion.

Project Type	Reimbursement Process
Capital: Vehicles \$100,000 or more	OCTA pays 65% of the award amount (OCTA's share) of the cost up front, based on verifiable purchase order. Remaining 35% will be paid upon applicant's delivery and acceptance of the vehicle. Applicants must submit an invoice no later than 30 days after the end of the month following vehicle acceptance.
Capital: Vehicles less than \$100,000 and Equipment	Applicants incur the expense and request reimbursement from OCTA once the vehicles and/or equipment have been delivered and accepted at the agency.
Operating: Operating Assistance (including COVID-19 Restoration of Service and Expansion of Service), Mobility Management, Driver/Travel Training, COVID-19 response equipment, and/or first and last-mile connections.	Applicants submit invoices to OCTA on a monthly basis, less required match.

If awarded, successful applicants will enter into a cooperative agreement with OCTA specifying all regulations and requirements of the grant.

QUARTERLY AND FINAL REPORTING

Awarded applicants will be required to submit a quarterly report to allow OCTA to monitor progress on the project and ensure that the project will be completed within the period of performance of the grant. Quarterly reporting forms will be available on the [EMSD website](#) following the project award. Forms will request monthly data to be submitted on a quarterly basis. Reports should be submitted according to the reporting schedule below:

Performance Period	Quarterly Report Due Date
Q1: January-March	April 30 th
Q2: April-June	July 30 th
Q3: July-September	October 30 th
Q4: October-December	January 30 th

Once the project is complete, the applicant must submit a final report package 90 days following issuance of final payment. Final report templates and instructions will be available on the [EMSD website](#) following the project award.

SUBMITTAL REQUIREMENTS

A completed application will contain the following documents:

- 1) Completed capital and/or operating application with corresponding attachments;
- 2) Non-profits must submit a private nonprofit status inquiry;
- 3) Local cities or county agencies must submit documentation of public hearing;
- 4) Resolution from governing body or similar confirming match commitment and legal authority to submit.
- 5) Any other required documents, such as documentation of reduced service (if applicable), most recent financial statement/single audit, vehicle photos, etc. (refer to application for required documents).

Incomplete applications will not be considered for funding, so please ensure that all submittals contain all the required documentation.

The following documents are available on the [EMSD website](#):

- Fact Sheet
- Capital Project Application Instructions
- Capital Project Application
- Capital Project Scoring Sheet
- Operating Project Application Instructions
- Operating Project Application
- Operating Project Scoring Sheet

Online applications for the EMSD program must be received by OCTA no later than 4:00 PM on Thursday, **September 9, 2021**, via the [EMSD website](#).

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

Although online submittal is preferred, applicants may submit hard copy applications. Three unbound hardcopies of the application and any supporting documentation must be submitted if electing to submit in person or by mail, along with an electronic copy (USB or Dropbox). Applications sent by mail and hand delivered ***must be received by 4:00 PM on September 9, 2021***, at the following address (postmarks will not be accepted):

Mailing Address:

OCTA

Attention: Jennifer Farinas

550 S. Main Street

P.O. Box 14184

Orange, CA 92863-1584

Hand-delivered hardcopy applications may be delivered to:

OCTA

Attention: Jennifer Farinas

600 S. Main Street

Orange, CA 92868

After the applications are reviewed by OCTA for eligibility, an advisory panel will review and rank projects. A recommended priority list of projects will be developed and forwarded to the OCTA Board for consideration in late fall 2021.

OCTA CONTACTS

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(714) 560-5660



July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: OC Streetcar Project Quarterly Update

Overview

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report provides an update on OC Streetcar project activities from April 2021 through June 2021.

Recommendation

Receive and file as an information item.

Background

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

Construction of the 4.15-mile project line involves complex and specialized work, including the installation of embedded track in existing streets, an overhead contact system (OCS) to supply power to the vehicles, stops with canopies, bridges, and a maintenance and storage facility (MSF).

The Project includes ten streetcar stops in each direction (four shared center platforms and six side platforms in each direction, for a total of 16 platforms). Each stop includes a canopy, benches, leaning rails, trash cans, lighting,

variable message signs, video cameras, a public address system, and ticket vending machines, which will be procured separately. Platforms will be 14 inches high to enable level boarding to streetcar vehicles. Furthermore, the installation of new traffic signals and transit signal priority at intersections along the route is also included.

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

On March 26, 2018, the Board of Directors (Board) awarded a contract to Siemens Mobility, Inc., (Siemens) for the manufacture and delivery of eight modern streetcar vehicles, spare parts, and special tools. On September 24, 2018, the Board awarded the project construction contract to Walsh Construction Company II, LLC (Walsh). On November 30, 2018, the Federal Transit Administration (FTA) executed the Full Funding Grant Agreement (FFGA), securing \$149,000,000 in federal New Starts discretionary funding for the Project. In February 2019, the FFGA was funded through the FTA Transit Award Management System, which was the final step necessary to begin the drawdown of federal funding. Through June 4, 2021, \$71,295,408 has been drawn down on the FFGA.

Discussion

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

Construction

In the Pacific Electric Right-of-Way (PEROW), Walsh continues to install OCS pole foundations, duct banks, and foundation and block for three soundwalls. The Fairview grade crossing was completed with installation of rail and crossing panels, while preparations began for the Fifth Street crossing. Construction of the Westminster Bridge and Santa Ana River Bridge (SARB) is substantially complete, and work is underway to prepare for rail installation on both bridges. A quality issue at the SARB has been identified in regard to installation of the deck. The Project team is working with Walsh to resolve this issue, and staff will report back with the resolution in next quarter's report.

Double-sided station platforms at Fairview Street and Raitt Street are under construction, and conduits are being installed at the Harbor Station. Electrical conduits are being placed to serve traction power substations near Westminster Avenue and at the northwest corner of the MSF.

Construction of the MSF is critical to the Project schedule, as it is needed to accept delivery and conduct final acceptance testing for the eight vehicles being manufactured by Siemens. OCTA continues to coordinate with the FTA and the Most Likely Descendant on the reinterment of the Native American cultural remains encountered during excavations at the MSF site in fall 2020. Construction work continues on the site utilities, foundation slab, wheel-truing pit, service and inspection pits, and perimeter block wall, and the storm drainage infiltration basin was installed. While there were some construction delays at the MSF while waiting for design and material procurement for cathodic and stray current protection, the majority has been installed and placement of reinforced concrete and vapor barrier continues. MSF yard utilities and the car wash building slab have also been completed. Staff will be seeking Board approval of a construction change order (CCO) to compensate Walsh for changes to the MSF plans associated with building permit design compliance requirements in the third quarter of 2021.

Construction of westbound track on Santa Ana Boulevard between Bristol Street and Raitt Street is complete. Construction of eastbound track within the same limits is underway. On Santa Ana Boulevard between French Street and Parton Street Walsh encountered conflicting utilities within the excavation for track construction, which was addressed by employing a re-designed track slab to avoid the utilities, reducing the overall depth of excavation and allowing construction to advance. Track was also placed on Santa Ana Boulevard across the Main Street and Broadway intersections, as well as along the north-south running Mortimer Street from Fourth Street to Sixth Street, with street paving planned in this location in mid-June.

To better assist in detecting utility conflicts, Walsh is utilizing ground penetrating radar equipment to provide additional data on utilities and identify other potential unknown or unmarked utilities. Other significant construction activities in the quarter include continued installation of OCS and traffic signal pole foundations, reconstruction of impacted sidewalks and curb ramps, and inspection of special track work at the fabrication site.

During the reporting quarter, the construction management team worked on preparation of additional CCOs, including additional funding for exploratory potholing allowance, which staff will seek Board approval for in July 2021. Other CCOs planned for Board approval in the third quarter of 2021 include design modifications to the traction power substations, traffic signal interconnects, additional removal and disposal of contaminated soil in the PEROW and treated

wood waste, and installation of a fiber optic backbone network system redundancy.

Vehicle and Operations

Siemens continues production of eight S700 streetcar vehicles. OCTA has an on-site resident inspector at the Siemens facility to oversee the vehicle manufacturing process and ensure compliance with the technical specifications. Currently, cars 1-7 are in final stages of equipping with installation of the last remaining vehicle components. Car 8 is in final assembly and is anticipated to begin static and dynamic testing in the next quarter. Static testing is when the vehicle is stationary inside the facility to verify functionality of the components in a controlled environment. Dynamic testing is performed on the test track when the vehicle is in motion and allows the vehicle manufacturer to observe the functional behavior of the vehicle, monitor system functionality and performance in vehicle operation, and verify response time.

During the reporting period, a First Article Inspection (FAI) was conducted to observe the Computer Aided Dispatching (CAD) and Automated Vehicle Location (CAD/AVL) systems in a simulated environment at the manufacturer's facility. The CAD system monitors the OC Streetcar systems' schedule adherence performance, provides communications between the Operations Control Center (OCC)/dispatcher and streetcar operator, as well as real-time communication between streetcar vehicles to ensure adequate headways. The Automated Vehicle Location system feeds information to the CAD system and provides data to the OCC for the location of each streetcar vehicle on the OC Streetcar system. During the FAI, staff witnessed the systems pass multiple performance tests. In conjunction with the FAI for CAD/AVL, staff also witnessed the OC Streetcar vehicle Automated Passenger Counter. FAIs are a contract requirement and a critical component of the manufacturing process to ensure that each component is built according to specifications and quality control measures are met.

Ongoing coordination with Siemens on the design features and FAIs of multiple vehicle components, as well as extended testing efforts for the vehicle door, energy absorbing bumper, and emergency battery drive, has impacted the anticipated dates for delivery of the S700 vehicles. Staff is in negotiations with Siemens on an updated master program schedule, including options for vehicle storage to align with the availability of the project infrastructure that is needed to accept and test the vehicles. Staff will return to the Board later this year with any contract amendments required for Siemens as a result of these discussions.

Last quarter, it was reported that staff would seek Board approval in June 2021 for a rail tow vehicle contract award. That procurement was subsequently cancelled as a result of only receiving one bid that didn't meet federal

requirements. After further review, it was determined that a 16-ton boom truck, which was already planned for OCS and system maintenance, can also serve the same function as the rail tow vehicle. The boom truck can tow a streetcar vehicle in the unlikely event that it would not be able to move either under its own power or with the assistance of another streetcar vehicle. Work was completed during the quarter for the technical specifications to support this procurement.

The limited Notice to Proceed (NTP) for the operations and maintenance (O&M) contractor, Herzog, began in May 2021. The general manager has been coordinating with staff on several processes which will be performed by the O&M contractor during system integration testing, pre-revenue operations, and revenue operations. The full NTP will be issued to Herzog pending discussions related to the revised revenue service date with FTA and OCTA later this year.

Public Outreach

OCTA outreach staff continued to provide door-to-door construction notifications to residents and businesses regarding nearby activities. Electronic and social media posts supported and amplified the messaging to use detours to avoid specific activities.

During the reporting period, there were full closures of two busy intersections, Santa Ana Boulevard at Main Street and Broadway, for track installation activities. In addition to electronic and social media, a targeted flyer for Hall of Administration stakeholders was developed and distributed through the County of Orange distribution channels. The flyer directed staff to a route that provided them access to all parking structures.

OCTA and City staff continue to meet and discuss the needs of the visitors and businesses along Segment 4 (Fourth Street between Parton Street and Mortimer Street). The contractor has identified the two subsegments where they plan to initiate the work. The outreach team developed and distributed a bilingual postcard identifying the detours available when the traffic control is set. In addition, a flyer detailing track installation activities was also distributed. There will be additional door-to-door outreach prior to the work beginning.

Outreach staff presented a project update to the City's Environment and Transportation Committee and attended a field meeting with Communication Linkage Forum (Com-Link) committee members to discuss project activities in Segment 2 (Santa Ana Boulevard between Raitt Street and Bristol Street). Com-Link partners with the City to promote the exchange of ideas and information between neighborhoods and community leaders.

Outreach staff continues to brief the business associations at its meetings to keep the stakeholders informed of Walsh's preparations and plans for work in the Downtown Santa Ana segment.

OCTA's Eat Shop Play program has expanded to 54 participants, exceeding the goal of 40 businesses. Targeted social media campaigns and biweekly newsletters continue to feature businesses and include information about local community events.

Cost and Schedule

As discussed with the Board in March 2021, the Project cost and schedule to complete the Project is under review by OCTA and FTA, considering the challenges encountered and outstanding project risks. Staff will return to the Board on or before November 2021 to present the results of FTA's risk analysis, as well as recommendations for the cost and schedule adjustments needed to complete the Project.

Next Steps

Construction activities in the next quarter will focus on completing the floor slabs in the MSF building, installation of embedded track in the street and ballasted track in the PEROW, installing OCS poles, delivering the traction power substations, and constructing station stop platforms. Next steps for vehicles include finalizing design for remaining vehicle components, as well as continued production, assembly, and ongoing static and dynamic testing. Upcoming outreach activities include ongoing coordination with the construction team and the City regarding traffic control measures that are needed for the in-street embedded track installation, particularly along Fourth Street where businesses are more prevalent.

Summary

An OC Streetcar project update covering April 2021 through June 2021 is provided for the Orange County Transportation Authority Board of Directors' review.

Attachments

None.

Prepared by:

A handwritten signature in black ink, appearing to read "Ross Lew".

Ross Lew, P.E.
Program Manager, Senior
(714) 560-5775

Approved by:

A handwritten signature in blue ink, appearing to read "James G. Beil".

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

OC Streetcar Project Quarterly Update

Construction—Segment 1



- Pacific Electric Right-of-Way (PEROW)
 - Installation of overhead contact system (OCS) pole foundations, communication duct banks, and foundation for three soundwalls
 - Fairview Street grade crossing completed, and preparations began for Fifth Street grade crossing
 - Electrical conduits installed near Westminster Avenue to serve traction power substations

Westminster Bridge



- Substantially complete, preparations underway for rail installation.

Santa Ana River Bridge



- Substantially complete, preparations underway for rail installation.

Station Stops



Fairview Crossing and Station Stop



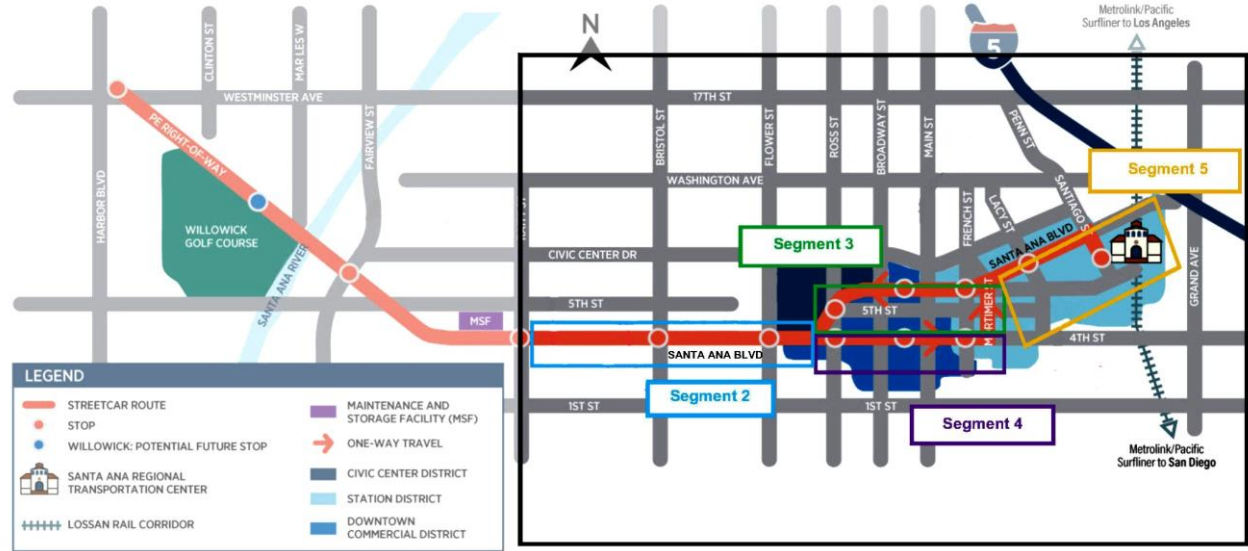
Raitt Station Stop

Maintenance and Storage Facility (MSF)



- On-site utilities, foundation slab, wheel truing and service and inspection pits.
- Car wash building slab completed.

Construction—Segments 2 Through 5

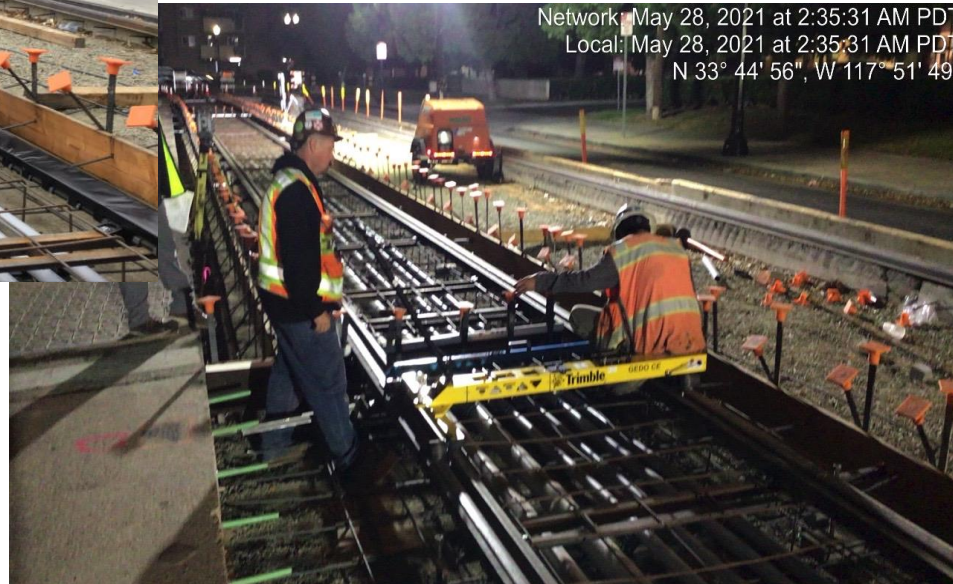


- Construction of westbound embedded track on Santa Ana Boulevard between Bristol Street and Raitt Street is complete.
- Construction of eastbound embedded track on Santa Ana Boulevard between Raitt Street and Bristol Street is underway.
- Embedded track placed on Santa Ana Blvd intersections across Broadway and Main Street, and along Mortimer Street from Fourth to Sixth Streets.

Track Installation



Mortimer Street



Mortimer Street

Raitt Street Crossing



Upcoming Construction Milestones

- In-street embedded track
- PEROW ballasted track
- OCS and traffic signal pole foundations
- MSF slabs and walls
- Station stop platforms
- Delivery and placement of traction power substations

Vehicles

- Cars 1-7 of the eight S-700 streetcar vehicles are undergoing final equipping of remaining vehicle components.
- Car 8 is in final assembly and then will proceed to static and dynamic testing.
- First article inspection conducted for the Computer Aided Dispatching/Automated Vehicle Location system.
- Negotiations are ongoing with Siemens regarding options for vehicle storage to align with the availability of the project infrastructure needed to accept and test the vehicles.



Vehicle Interior



Outreach

- Bilingual Door-to-Door Notices
- Field Meetings
- Downtown Business Associations
- Eat Shop Play



CONSTRUCTION ALERT

WHAT: Full closure of two, two-block segments on 4th Street. Drivers will be detoured; however, sidewalks will be open to access all businesses.

WHEN: Stage 1 is starting as early as June 2021. Crews will be working from 7 a.m. to 7 p.m., but detours will be in place during the day and night.

WHERE: On 4th Street, from Mortimer Street to Ross Street.

- Stage 1: From Mortimer Street to Spurgeon Street and from Main Street to Broadway
- Stage 2: From Spurgeon Street to Main Street and from Broadway to Ross Street

OCTA's Eat Shop Play program supports businesses located along the future OC Streetcar route. We offer marketing assistance to increase exposure and foot traffic during construction. Participation is free, please reach out to us to participate.

We apologize for any inconveniences and appreciate your understanding. For any questions about the OC Streetcar project, please contact us.

Celene's Bridal offers beautiful gowns and suits for those special, once-in-a-lifetime moments!

222 W 4th St, St B, Santa Ana, CA 92701 | (714) 277-8162

OC STREETCAR OCTA
octa.net/eatshopplay

EAT SHOP PLAY

Breakfast served all day at Café Cultura. Place an online order now!

(714) 662-2002 | <http://cafecitocultura.com/>
324 W 4th St, B, Santa Ana, CA 92701



CONSTRUCTION ALERT

WHAT: Full intersection closures for track construction. Access to Hall of Administration and Board of Supervisors parking will be maintained at all times, there will be no impact to employees entering and exiting the Hall of Administration parking. Please see map on the second page of this notice.

WHEN: The closure will begin Friday, May 14, at 7 a.m. and end on Monday, May 17 at 5 a.m. Construction schedules depend on weather and may be subject to change.

WHERE: The following intersections will be closed:

- Santa Ana Boulevard and Broadway
- Santa Ana Boulevard and Main Street

For any questions about the OC Streetcar project, please contact OCstreetcar@octa.net or (844) 746-6272.

CLOSURE AREA





July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Contract Change Order for Exploratory Potholing Allowance for the Construction of the OC Streetcar Project

Overview

On September 24, 2018, the Orange County Transportation Authority Board of Directors authorized Agreement No. C-7-1904 with Walsh Construction Company II, LLC, for construction of the OC Streetcar project. A contract change order is required for work to address exploratory potholing.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 56.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,100,000, for additional exploratory potholing allowance for the construction of the OC Streetcar project.

Discussion

On September 24, 2018, the Orange County Transportation Authority (OCTA) Board of Directors (Board) awarded the contract to construct the OC Streetcar project (Project) to Walsh Construction Company II, LLC (Walsh). The Notice to Proceed with construction was issued to Walsh on March 4, 2019. Since then, the Project has progressed with several milestones having been achieved. Recent construction milestones include the substantial completion of the Santa Ana River and Westminster bridges, as well as the installation of embedded track on Santa Ana Boulevard from Raitt Street to Bristol Street, from Parton Street to Ross Street at the Broadway Street and Main Street intersections, and on Mortimer Street from Fourth Street to Sixth Street. Potholing is a construction method that uses small excavations for the purpose of obtaining visual confirmation of utilities and underground obstructions near the planned work. The intent of potholing is to test for utility conflicts before the actual contract excavation begins. While potholing is required in the contract, the extent to which it is needed was beyond what is contractually anticipated.

As previously discussed with the Board, Walsh continues to encounter many unknown utilities during the waterline, sewer, and storm drain work that are neither shown on the contract plans or on City of Santa Ana and private utility record maps. Additionally, Walsh continues to encounter underground utilities that are not in the locations reflected in utility records and contract plans. While Walsh has been compensated through previous CCOs approved by the Board for additional potholing to accommodate waterline, sewer, and storm drain relocations, the same exploratory potholing was needed in other Project elements, including track bed excavations. Within track beds, additional rounds of potholing were required at multiple locations to find clear solutions for avoiding utility obstructions. To advance the Project without further delay, it was prudent to proceed with interim Contract Change Order (CCO) No. 56, in the amount of \$200,000, to develop a mechanism to pay for field-directed exploratory potholing within the track beds in segments 2A and 3, as shown in Attachment A and currently in construction.

The additional rounds of exploratory potholing will exhaust the current allowance, requiring this CCO No. 56.1, in the amount of \$1,100,000, to continue utility exploratory potholing within the track beds for the current Segments 2A and 3, as well as the remaining Segments 2B, 4, and 5. An independent cost estimate has been determined by the construction management (CM) team to be \$1,100,000. This CCO will be paid on a time and expense basis to the contractor after labor and equipment quantities are confirmed through daily extra work reports prepared by Walsh and approved by the CM team. The CCO may need to be supplemented again if further rounds of potholing are required to resolve utility conflicts.

The cost of the work associated with CCO No. 56.1 will be funded from the Project supplemental contingency as approved by the Board on March 22, 2021.

Procurement Approach

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

Proposed CCO No. 56.1, in the amount of \$1,100,000, will increase the cumulative value of the contract to \$244,151,051, as shown in Attachment B. Board approval is required for CCO No. 56.1, pursuant to the State of California Public Contracting Code Section 20142.

Fiscal Impact

The additional work for this Project is included in OCTA's Fiscal Year 2021-22 Budget, Capital Programs Division, Account No. 0051-9017-TS010-Z13, and is funded with Federal Transit Administration Section 5309 New Starts and local Measure M2 funds.

Summary

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 56.1 to Agreement No. C-7-1904 between the Orange County Transportation Authority and Walsh Construction Company II, LLC, in the amount of \$1,100,000, for utility exploratory potholing.

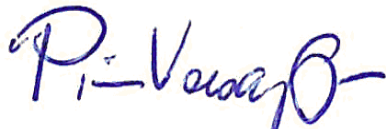
Attachment

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

Prepared by:



Ross Lew
Program Manager, Senior
(714) 560-5775



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

Approved by:

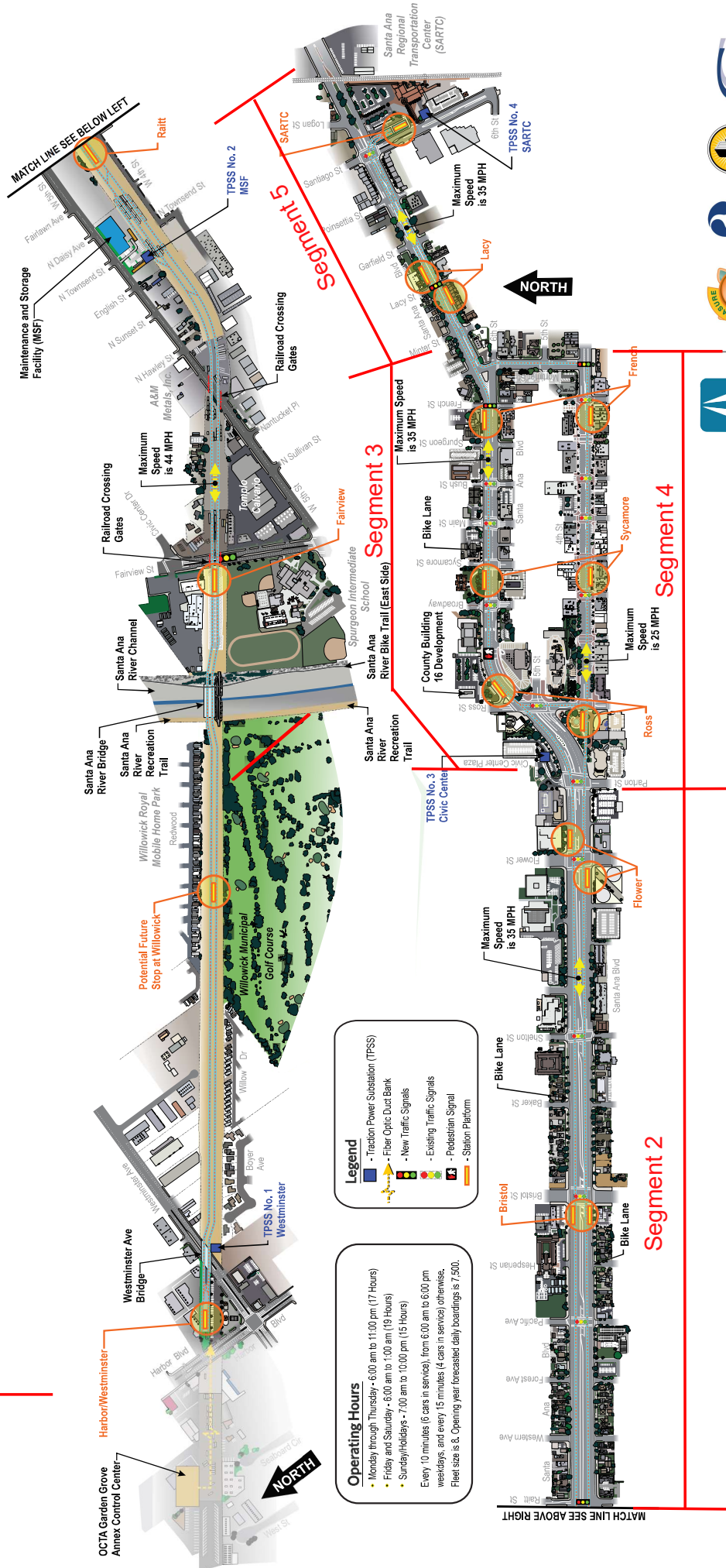


James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646

Project Map



Segment 1



Segment 2

Operating Hours

- Monday through Thursday - 6:00 am to 11:00 pm (17 Hours)
- Friday and Saturday - 6:00 am to 1:00 am (19 Hours)
- Sunday/Holidays - 7:00 am to 10:00 pm (15 Hours)

Every 10 minutes (6 cars in service), from 6:00 am to 6:00 pm weekdays, and every 15 minutes (4 cars in service) otherwise. Fleet size is 8. Opening year forecasted daily boardings is 7,500.

Legend

- Traction Power Substation
- Fiber Optic Duct Bank
- New Traffic Signals
- Existing Traffic Signals
- Pedestrian Signal

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

CCO No.	Title	Status	Date Executed	Cost
1	Demolition, Removals, and Disposal at the Maintenance and Storage Facility (MSF) Property	Approved	6/20/2019	\$199,749.00
1.1	Demolition, Removals, and Disposal at the MSF Property Additional Funding	Approved	6/25/2019	\$113,884.77
1.2	Time Impact Evaluation (TIE) I - Schedule Impacts Associated with Change Directive (CD)-001 and CD-003	Approved	6/17/2020	\$0.00
2	Removal and Disposal of Contaminated Materials at the MSF Property	Approved	6/25/2019	\$200,000.00
2.1	Removal and Disposal of Contaminated Materials at the MSF Property Additional Funding	Approved	8/15/2019	\$160,000.00
2.3	MSF Removal of Additional Hazardous Materials	Pending		\$0.00
3	Removal and Disposal of Contaminated Materials within the Orange County Transit District-Owned Pacific Electric Right-of-Way (PEROW)	Approved	9/12/2019	\$1,600,000.00
3.1	Removal and Disposal of Contaminated Materials Within the Orange County Transit District-Owned PEROW and Other Project Areas	Approved	2/25/2020	\$7,278,795.00
4	Required Work to Address Utility Conflicts	Approved	8/27/2019	\$200,000.00
4.1	Required Work to Address Utility Conflicts Additional Funding	Approved	2/25/2020	\$833,300.00
4.2	Required Work to Address Utility Conflicts Additional Funding	Approved	6/9/2020	\$2,426,000.00
4.3	Required Work to Address Utility Conflicts Additional Funding	Pending		\$2,000,000.00
5	Tree Removal and Trimming	Approved	6/9/2020	\$129,215.52
7	Orange County Sanitation District Specifications Revisions	Approved	6/9/2020	\$82,445.00
8	Maintenance Path Profile	Approved	6/9/2020	\$6,055.00
9	Vapor Barrier Installation	Approved	12/22/2020	\$395,717.00
10	Ultrasonic Testing	Approved	6/9/2020	\$0
11	Opticom Vehicles	Approved	6/9/2020	\$40,120.00
12	Santa Ana River Bridge Precast Girders	Approved	8/27/2020	\$88,877.00
13	Retaining Wall 544 Reinforcing Steel	Approved	9/3/2020	\$2,321.30
14	MSF Retaining Wall 508	Approved	12/14/2020	\$125,341.00
15	Overhead Contact System (OCS) and Traffic Signal Utility Conflicts	Approved	6/17/2020	\$195,723.00
16	Hand digging and Survey for OCS and Traffic Signal Pole Foundation	Approved	6/23/2020	\$198,808.00
16.1	Hand digging and Survey for OCS, Traffic Signal, and Streetlight Pole Foundations	Approved	6/26/2020	\$1,400,000.00
16.2	Hand digging and Survey for OCS, Traffic Signal, and Streetlight Pole Foundations	Approved	4/15/2021	\$1,400,000.00
17	Westminster Bridge OCS Diaphragm	Approved	10/30/2020	\$1,682.00
18	Removal of Man-Made Objects	Approved	11/23/2020	\$300,000.00
19	Removal of Boulders	Approved	11/17/2020	\$160,000.00
20	Removal of Chain Link Fence	Approved	3/9/2021	\$7,316.90


21	Changes to Turnout Geometry	Approved	10/5/2020	\$0
22	Railroad Crossing Gate Bells	Approved	10/5/2020	\$0
23	Santa Ana River Bridge, OCS Pole, and OCS Down Guy Diaphragms	Approved	1/19/2021	\$7,419.00
24	OCS Sectionalization – Siemens portion	Approved	10/5/2020	\$158,941.01
24.1	OCS Sectionalization	Approved	4/27/2021	\$722,253.92
26	Revisions to Station Color Schedule, Glass and Pylon	Approved	4/19/2021	\$176,419.84
27	Street Lighting	Approved	11/19/2020	\$12,347.91
28	Extension of Time- TIE 004 and 007	Approved	12/8/2020	\$0.00
29	Santa Ana River Bridge (SARB) OCS Pole and OCS Down Guy Diaphragms	Approved	11/19/2020	\$34,216.80
30	Electrical Continuity Testing	Approved	2/1/2021	\$23,928.10
30.1	Electrical Continuity Testing	Approved	3/16/2021	\$320,164.40
32	Asbestos Survey	Approved	2/1/2021	\$25,000.00
35	No Sunshade for Variable Message Sign	Approved	12/22/2020	\$0.00
37	Station Platform Power	Approved	5/18/2021	\$58,414.15
38	Modify OCS Foundation Schedule	Approved	6/15/2021	\$32,733.04
39	OCS Revisions Based on Field Walks	Approved	6/17/2021	\$28,088.32
40	MSF Remote Yard Gates	Pending		\$32,307.66
43	End of Life Equipment	Approved	5/3/2021	\$372,136.38
44	Design of Temporary Traffic Signals Segment 2A 1 and 2	Approved	4/26/2021	\$41,967.00
45	Thickened Asphalt Concrete (AC) Pavement	Approved	1/19/2021	\$60,000.00
46	MSF Video Servers from Garden Grove	Pending		\$40,267.30
47	Archaeological Security and Data Recovery at MSF	Approved	1/19/2021	\$110,000.00
48	Thickened AC Pavement	Approved	4/27/2021	\$1,177,362.00
49	Retaining Wall 501 Encroachment	Approved	6/17/2021	\$181,802.77
52	Over Excavation of Unsuitable Soils	Pending		\$209,500.00
52.1	Over Excavation of Unsuitable Soils	Pending		\$540,000.00
53	SARB Bridge Decking	Approved	6/17/2021	\$9,002.94
56	Exploratory Potholing Allowance	Approved	4/26/2001	\$200,000.00
56.1	Exploratory Potholing Allowance	Pending		\$1,100,000.00
59	Direct Fixation Fasteners	Approved	6/7/2021	\$0.00
60	Base Contract Utility Credits Binder	Approved	5/25/2021	(\$1,842,680.00)
63	Graffiti Removal	Approved	5/18/2021	\$100,000.00
64	Southern California Edison Meter Switchgear Engineering and Submittal Costs	Approved	5/18/2021	\$17,618.00
65	Additonal Environmental Soil Investigation on W. Santa Ana Boulevard/Bristol Street Station Stop (Stage 1)	Approved	5/18/2021	\$9,840.60
66	Ground Penetrating Radar Investigation	Pending		\$90,000.00
68	Ross Intersection Traffic Signal Conduit Installation	Approved	6/7/2021	\$18,000.00

Subtotal Executed CCOs	\$19,600,326.67
Subtotal Pending CCOs	\$4,012,074.96
TOTAL CCOs	\$23,612,401.63
ORIGINAL VALUE	\$220,538,649.00
PROPOSED REVISED VALUE	\$244,151,050.63



July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: OC Flex Microtransit Service Pilot Program Update

Overview

In October 2018, the Orange County Transportation Authority initiated a microtransit service pilot program, branded as OC Flex, operating in two areas of Orange County where transit demand does not support traditional fixed-route service. The pilot program is intended to match resources with changing demand, increasing the efficiency and effectiveness of the Orange County transit system. This report provides an overview of the OC Flex demand and performance during the third year of operation and highlights challenges faced due to the coronavirus pandemic.

Recommendation

Receive and file as an information item.

Background

In 2015, the Orange County Transportation Authority (OCTA) Board of Directors (Board) endorsed a comprehensive action plan known as OC Bus 360° to match resources with changing demand for public transportation. One of the strategies identified in this plan was the potential role that microtransit would play in Orange County. On October 15, 2018, OCTA launched a one-year pilot program to explore the merits of a microtransit service in select areas that historically have not supported productive fixed-route bus service. OCTA's version of microtransit service, branded as OC Flex, provides on-demand service that uses technology for flexible, real-time scheduling and dispatching of accessible transit vans. The OC Flex pilot program began with two zones, which included parts of the cities of Huntington Beach and Westminster to the southwest core of Orange County, and parts of the cities of Aliso Viejo, Laguna Niguel, and Mission Viejo in south Orange County. OC Flex is a curb-to-curb service with in-app virtual hubs to direct customers to board or alight at operationally safe and efficient locations. The technology supporting the

operation to schedule and dispatch trips, as well as collect pertinent data, provides customers with the use of a mobile app to schedule rides and pay fares, similar to ride-hailing services. OC Flex is a turnkey service, with operations and maintenance provided by a contractor.

The Board approved five primary goals and performance metrics to evaluate the pilot program:

- Provide public transit mobility in lower-demand areas: measured by ridership and productivity
- Reduce total operating and capital costs: measured by subsidy per boarding
- Reduce vehicle miles traveled: measured by percentage of shared rides performed
- Extend the reach of OC Bus and Metrolink services: measured by connecting transit trips
- Meet customer needs: measured by customer satisfaction

Discussion

In the initial year of the pilot program, OC Flex performance was positive, exceeding three of the five performance targets and trending favorably in the remaining two. Given the trends, in January 2020, staff recommended an extension of the pilot program to October 2020. The intent of the extension was to implement strategies to improve performance and allow for greater service establishment and awareness. These strategies included an adjustment of the two zones to add adjacent areas and remove areas with low activity, an adjustment to the span of service hours, and the increase of the number of virtual stops, or hubs, to improve service response time. A promotional campaign was also proposed to offer discounted group rides and offer free rides for referrals.

After Board approval, the strategies were implemented in February 2020. However, staff was unable to adequately measure the effectiveness of the improvement strategies due to the impacts of the coronavirus (COVID-19) pandemic, including the State's stay-at-home order and requirements related to vehicle occupancy and social distancing. Service demand dropped by 70 percent, leading to the need to make service adjustments, including the temporary suspension of the Blue Zone, which includes parts of the cities of Huntington Beach and Westminster. The number of vehicles operating in the Orange Zone, which includes parts of the cities of Aliso Viejo, Laguna Niguel, and Mission Viejo, was reduced from four to two due to decreased demand.

In November 2020, staff sought Board approval for an extension of the pilot program period for an additional 14 months beyond October 2020 and the elimination of the Blue Zone. The 14-month extension would provide staff with the opportunity to make necessary service adjustments and to evaluate the performance of the OC Flex pilot program service through and beyond the COVID-19 pandemic.

In December 2020, the Board approved the release of the OC ACCESS paratransit service request for proposals, which included the OC Flex service. The intent of this procurement strategy is to ensure continuity of the program while the long-term planning process for the service continues. Staff's assessment of the budget need for the new OC Flex agreement focused on service recovery in the first year of operation. Subsequent years account for the addition of a new zone and overall service growth that may come with future marketing campaigns.

A recent assessment of service trends during the months of December 2020 and January 2021 identified unserved demand in the afternoons and longer than normal wait times during peak hours. As a result, staff opted to add a third vehicle into service on April 1, 2021, which has led to an increase in boardings and a reduction in peak hour wait times.

Key Performance Metrics

Below is a summary of each of the established performance metrics as related to the program goals.

- **Productivity** – As of April 2021, OC Flex ridership has steadily increased to 1,620 monthly boardings. While this is a 15 percent increase from the mid-COVID-19 pandemic plateau of 1,380, ridership is still 50 percent less than peak monthly ridership in February 2020. April 2021 productivity was 1.6 boardings per revenue vehicle hour (B/RVH), down from the 2.5 B/RVH reported in February 2020.
- **Cost Effectiveness** – Cost effectiveness is measured by subsidy per boarding, calculated as the ratio of actual direct costs of the service less fare revenue and divided by total boardings. In February 2020, the subsidy per boarding had reached the lowest point throughout the pilot program duration, at \$19.35. Due to the COVID-19 pandemic, service adjustments, and decreased demand, subsidy per boarding as of April 2021 was \$35.75.
- **Shared Rides** – Shared rides are the number of trip bookings that share a vehicle, including group trips. The performance target is 25 percent. In April 2021, the shared rides accounted for 11 percent of trip bookings

due to the constraints placed on vehicle occupancy in compliance with social distancing guidelines.

- Connecting Transit Trips – This measure is represented by the percentage of trips to or from transit hubs, specifically the Laguna Niguel-Mission Viejo Metrolink Station. In April 2021, the percentage of total trips transferring to or from the OC Bus or Metrolink services was 22 percent, three percentage points less than the target of 25 percent.
- Customer Satisfaction – This metric is tracked by measuring the percentage of passengers satisfied with the service. The targeted level for customer satisfaction is 85 percent. Staff did not conduct a customer satisfaction survey during the COVID-19 pandemic but found that customers rated the service at five out of five stars when using the in-app rating system.

Summary

Throughout the COVID-19 pandemic, productivity, shared rides, and subsequently, the cost effectiveness of the OC Flex microtransit pilot program were hindered due to capacity constraints on vehicles in compliance with social distancing guidelines and reduced demand. While the performance metrics are skewed, staff finds the recent increase in demand and the stability of the connecting transit trips metric to be encouraging trends. This indicates that service recovery of the program is likely, and that the service continues to be a resource for the key demographic of essential workers throughout the COVID-19 pandemic.

Attachment

None.

Prepared by:



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Approved by:



Johnny Dunning, Jr.
Department Manager, Scheduling and
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714-560-5710



Jennifer L. Bergener
Deputy Chief Executive Officer/
Chief Operating Officer, Operations
714-560-5462



Microtransit Service Pilot Program Update



As part of the OC Bus 360° Program, OC Flex was launched in 2018 as a microtransit pilot program intended to evaluate the effectiveness of a technology-driven on-demand solution in areas that cannot efficiently support fixed-route bus service.

OC Flex provides:

- Rides anywhere within the defined zones
- First/last mile connections
- Shared rides
- Wheelchair accessible service
- Flexible booking and payment options



OCTA identified five goals for the micro-transit service:

1. Provide public transit mobility in low-demand areas
2. Reduce total operating and capital costs
3. Reduce vehicle miles traveled
4. Extend the reach of the OC Bus and Metrolink services
5. Meet customer needs



OCTA identified five key performance metrics of success:

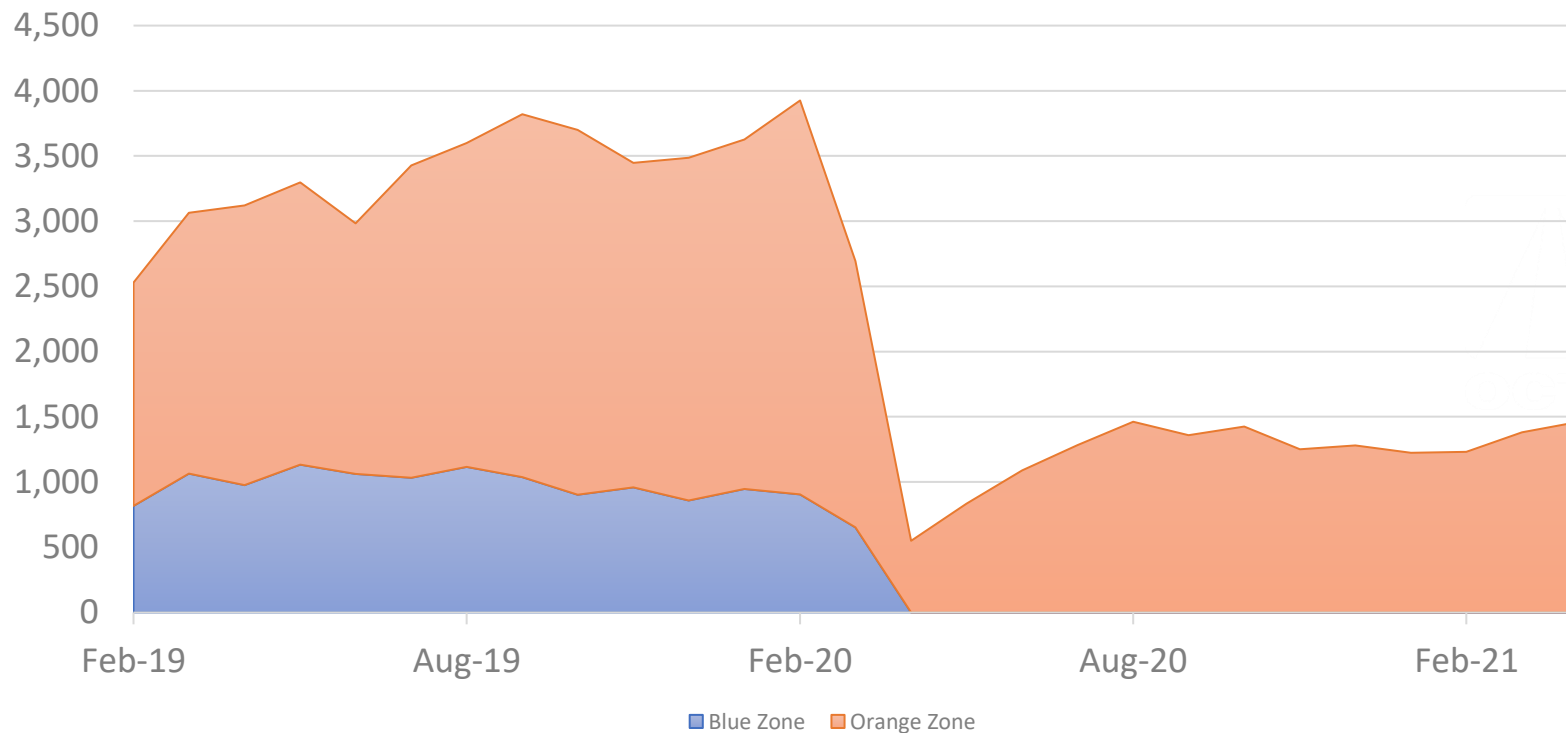
- Productivity
- Cost Effectiveness
- Shared Rides
- Connecting Transit Trips
- Customer Satisfaction



OC Flex performance was positive but needed more time. The Board of Directors (Board) approved an extension of the pilot program through October 2020 to implement strategies to improve performance.

- Changes to zone boundaries
- Increased virtual stops
- Operational efficiencies
- Promotions

RIDERSHIP TREND



Contractual Adjustments

- Due to the impact of the coronavirus (COVID-19) pandemic, the existing contractor ceased all operations in Orange County

COVID-19 Mitigation Strategies

- Instituted a maximum vehicle occupancy

Decreased Ridership

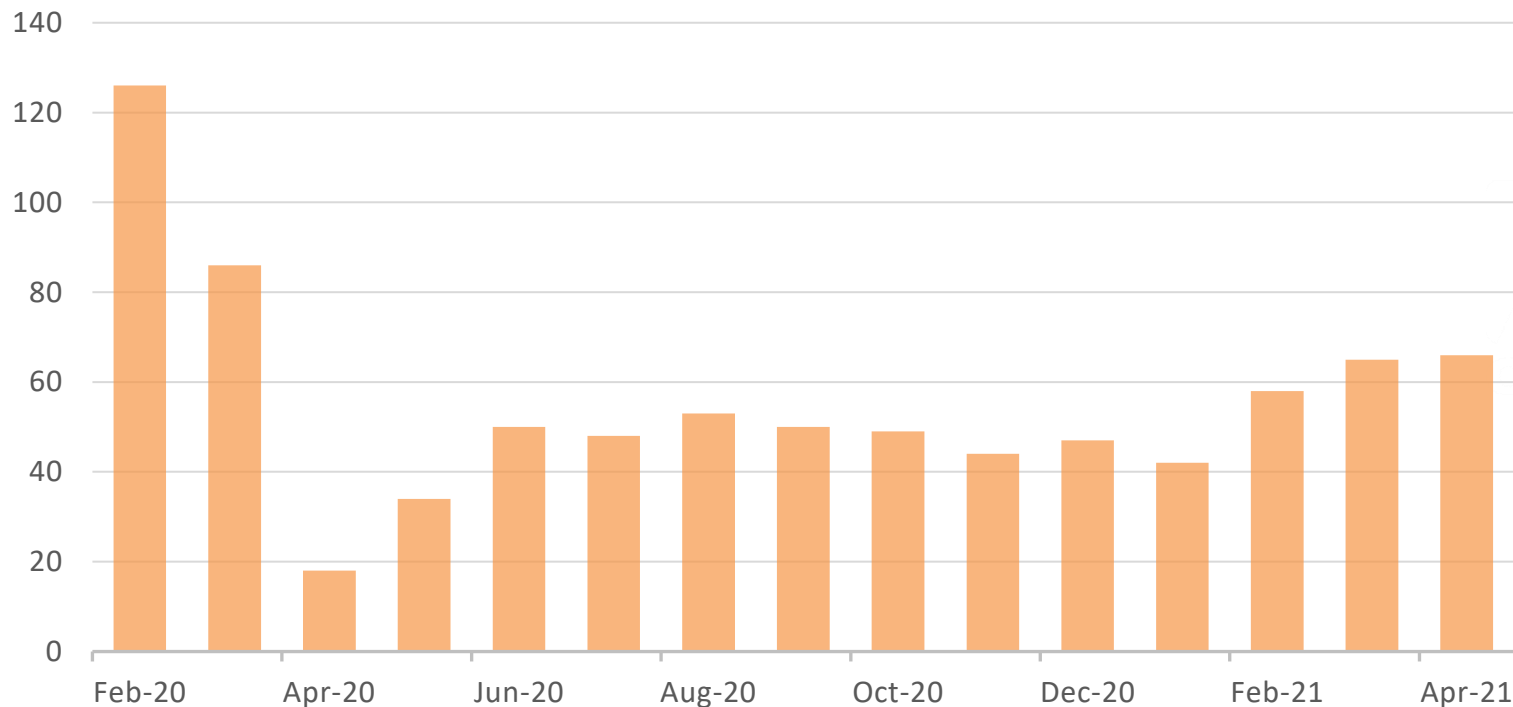
- Temporary suspension of the Blue Zone

KEY PERFORMANCE METRICS



Board-Adopted Goals	Target	Feb 2020	Apr 2021
Productivity (Boardings per Revenue Vehicle Hour)	6	2.5	1.6
Cost Effectiveness (Subsidy per Boarding)	\$9.00	\$19.35	\$35.75
Shared Rides (% of Bookings sharing a vehicle)	25%	43%	11%
Connecting Transit Trips (% of transfer trips)	25%	24%	22%
Customer Satisfaction (by survey)	85%	91%	-

AVERAGE WEEKDAY BOARDINGS



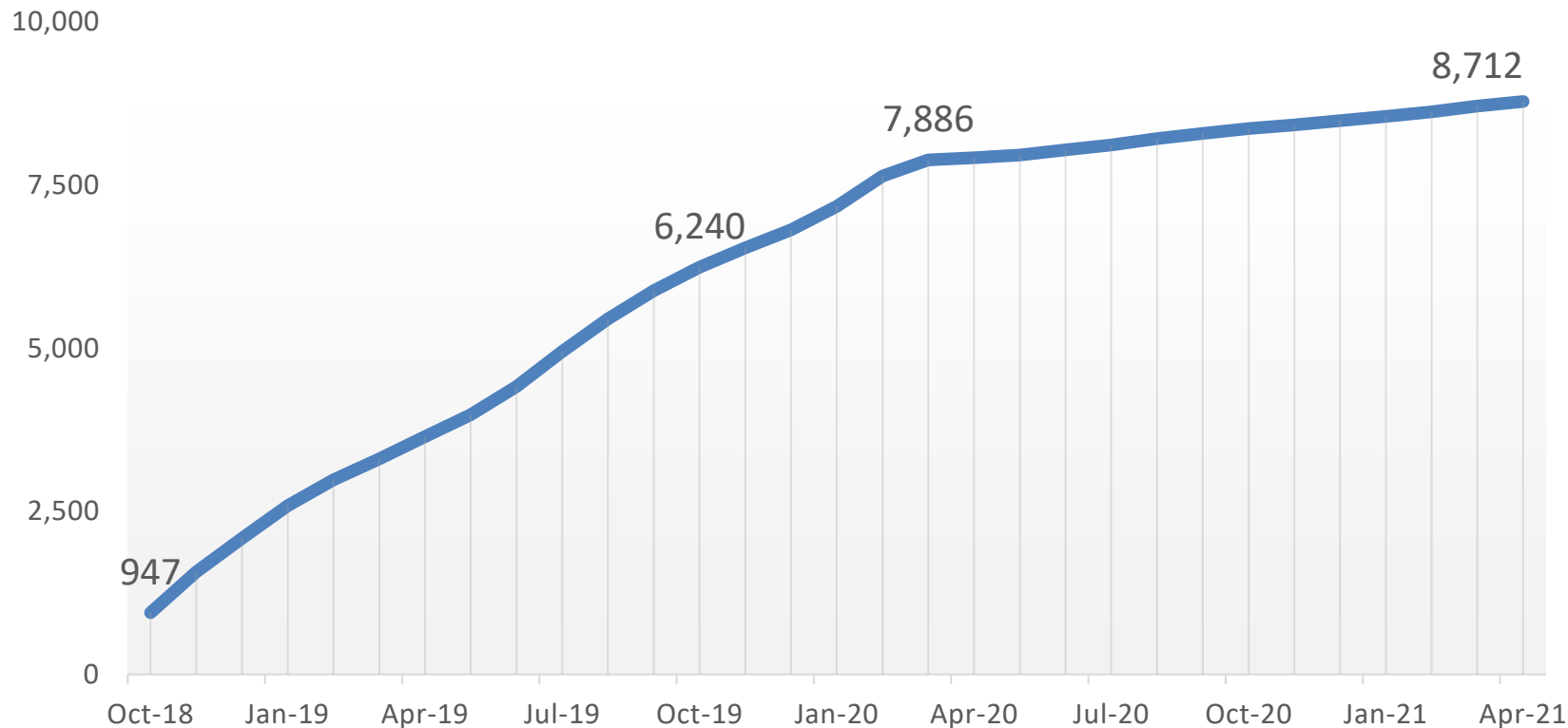
Service Change

- Permanent termination of the Blue Zone

Contract Structure

- Incorporation of the OC Flex service into the OC ACCESS request for proposals
- Budget assumes addition of a new zone in the second year, and 20 percent growth in the service year-over-year

ACCOUNT GROWTH





July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Youth Ride Free Promotional Pass Expanded to Include 18 and Under

Overview

The Orange County Transportation Authority plans to launch a promotional free pass for youth ages 13 and under in September 2021, funded by Low Carbon Transit Operation Program grant funds. Based on feedback from the Board of Directors, staff is recommending expanding the eligible age of the pass to include ages 18 and under. The revised promotional “Youth Ride Free” pass would be available to all youth riders (six to 18 years old), from September 2021 to February 2022.

Recommendations

- A. Expand the eligible age of the current “13 and Under Ride Free” youth fare promotion from six to 13 years old to include ages 14 to 18 years old.
- B. Authorize staff to make all necessary amendments, as well as execute any necessary agreements to facilitate the above recommendation.

Background

Staff has developed a phased customer comeback program to help address reductions in OC Bus ridership caused by the coronavirus (COVID-19) pandemic. This program was presented to the Board of Directors in May 2021. As part of this program, a “Welcome Back” promotional discounted fare was included in a campaign highlighting the benefits and safety of public transit to encourage riders to return, in addition to attracting new OC Bus riders.

The “13 and Under Ride Free” program, which is set to be launched at the same time as the comeback program, has been under development since early 2021 and was delayed in being implemented due to the COVID-19 pandemic. This program would provide a free promotional pass to Orange County youth ages six to 13 years old, as OC Bus already allows up to three children five years old or younger to ride for free with each paying customer. Grant funds for the program

were previously approved as a discounted age-based fare program in the Fiscal Year 2019-20 Low Carbon Transit Operations Program (LCTOP) funding recommendations approved by the Board of Directors (Board) on March 23, 2020.

Based on Board feedback to explore the opportunities of discounted or free fares for additional groups of riders, including high school-aged students, staff has developed an expanded youth ride free program for Board consideration.

Discussion

Staff has explored various options to determine an effective recommendation for a discounted or free pass program for high school-aged students.

The considerations for developing a program included:

- A discounted or free pass program would help support the economic recovery of Orange County and help mitigate the financial impacts from the COVID-19 pandemic on low income and diverse populations who represent the majority of OC Bus riders.
- The youth market has consistently been identified as a key transit market; attracting youth riders early helps develop long-term riders.
- Due to COVID-19 impacts, OC Bus service has available capacity to accommodate an increase in youth ridership.
- A targeted fare promotion would demonstrate the value of public transit and provide important usage data for future program development.

After exploring several options and addressing the considerations above, staff recommends expanding the current “13 and Under Ride Free” program to include ages 14 to 18 years old. This would provide a limited term “Youth Ride Free” promotional pass available to youth between the ages of six to 18 years old.

The proposed “Youth Ride Free” pass would continue to be supported using existing LCTOP funds that were allocated for the “13 and Under Ride Free” program. The promotional pass will be limited to six months to meet the Federal Transit Administration Title VI guidelines for the maximum length of a promotional or temporary fare adjustment. The cost of the “Youth Ride Free” pass could potentially exceed available LCTOP funding, which would result in a loss of fare revenue to OCTA. However, given the impacts of the pandemic to ridership, the likelihood of a potential loss in fare revenue is low. If the promotional pass program proves successful, staff will seek additional funding sources and utilize the findings of the promotion to develop future youth pass programs.

Next Steps

With Board approval, staff will work with the California Department of Transportation (Caltrans), which administers the LCTOP grant funds, to take necessary action to expand the eligible ages for the “Youth Ride Free” program. Subject to Board, Caltrans, and California Air Resources Board approval, staff will take appropriate actions to implement the program.

Summary

A promotional “13 and Under Ride Free” program funded by LCTOP grant funds was planned for implementation in September 2021. Based on Board direction and in response to a known transportation need, staff recommends the expansion of the “13 and Under Ride Free” program to include ages 14 to 18 years old. If approved, the resulting “Youth Ride Free” promotional fare would be available to ages six to 18 beginning in September 2021, providing free youth fares until February 28, 2022.

Attachment

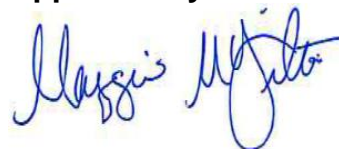
None.

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Youth Ride Free Promotional Pass Expanded to Include 18 and Under

OC Bus Customer Comeback Campaign

Customer Comeback Campaign includes:

- Discounted Welcome Back Pass
- “13 and Under Ride Free” Program
- College Pass Program



“13 and Under Ride Free” – Expanded



- “13 and Under Ride Free” program
- Funded by Low Carbon Transit Operations Program (LCTOP)
- Recommend expanding the eligible ages to include ages 14 to 18 years old

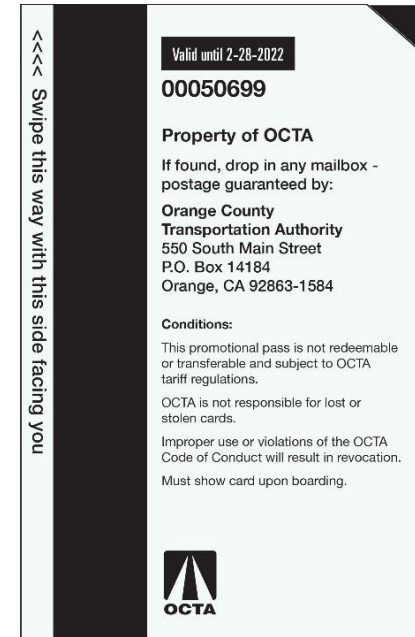
“Youth Ride Free” Promotional Pass

Program Overview

- Six-month Promotional Pass
 - Within FTA promotional fare restriction
- Available to youth (ages six to 18 years old)
- Promotion from September 2021 to February 28, 2022

Distribution

- Available as magnetic stripe physical pass;
Distributed in partnership with K-12 schools
- Schools to collect / store Parental Request Form
- Also available at OCTA Store / website



Next Steps

July 2021	Caltrans and CARB Approvals Anticipated
July – August 2021	School Outreach and Marketing
September 2021	Promotion Start
February 28, 2022	Program End / Evaluation

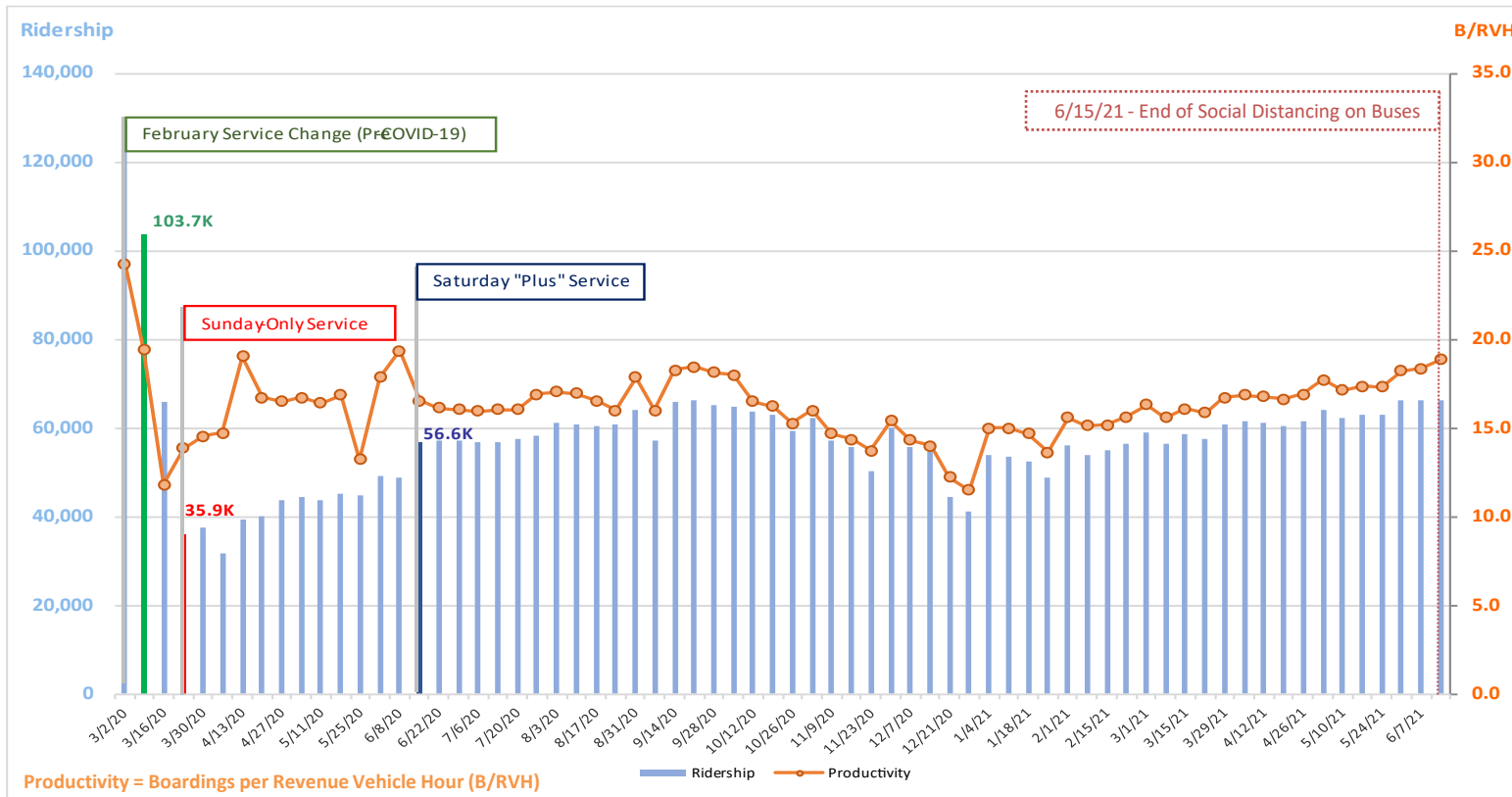
OC Bus Service Update

Key Metrics:

- **Ridership**
 - Trending at 66,000 average weekday riders (over half the pre-pandemic average of 120,000); productivity is above 18.0 boardings per revenue vehicle hour (b/rvh) or 72 percent of the pre-pandemic level of 25 b/rvh
- **Pass-Bys**
 - This occurred when passenger loads on a 40-foot bus reached 20 or more; the 20-passenger limit was eliminated on June 15th
- **Trippers**
 - Unscheduled trips dispatched to provide service to pass-bys created by overloads (20+ passengers)
 - Were deployed based on data, coach operator input, and customer comment
- **On-Time Performance**
 - Measuring service quality as impacted by the COVID-19 pandemic
- **Customer Comments**
 - Trends, feedback, and issues reported

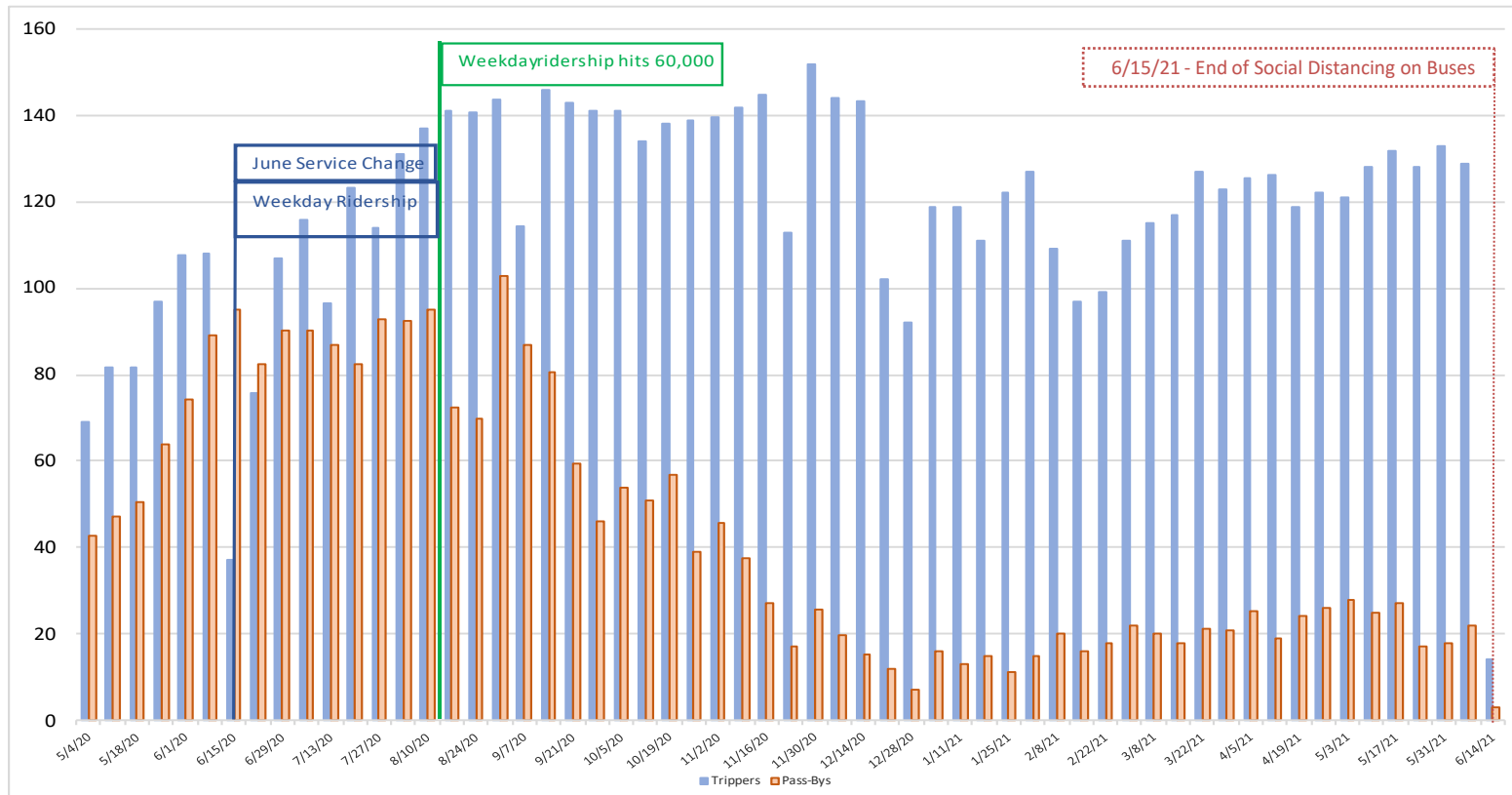
OC BUS RIDERSHIP AND PRODUCTIVITY

(AVERAGE WEEKDAY)



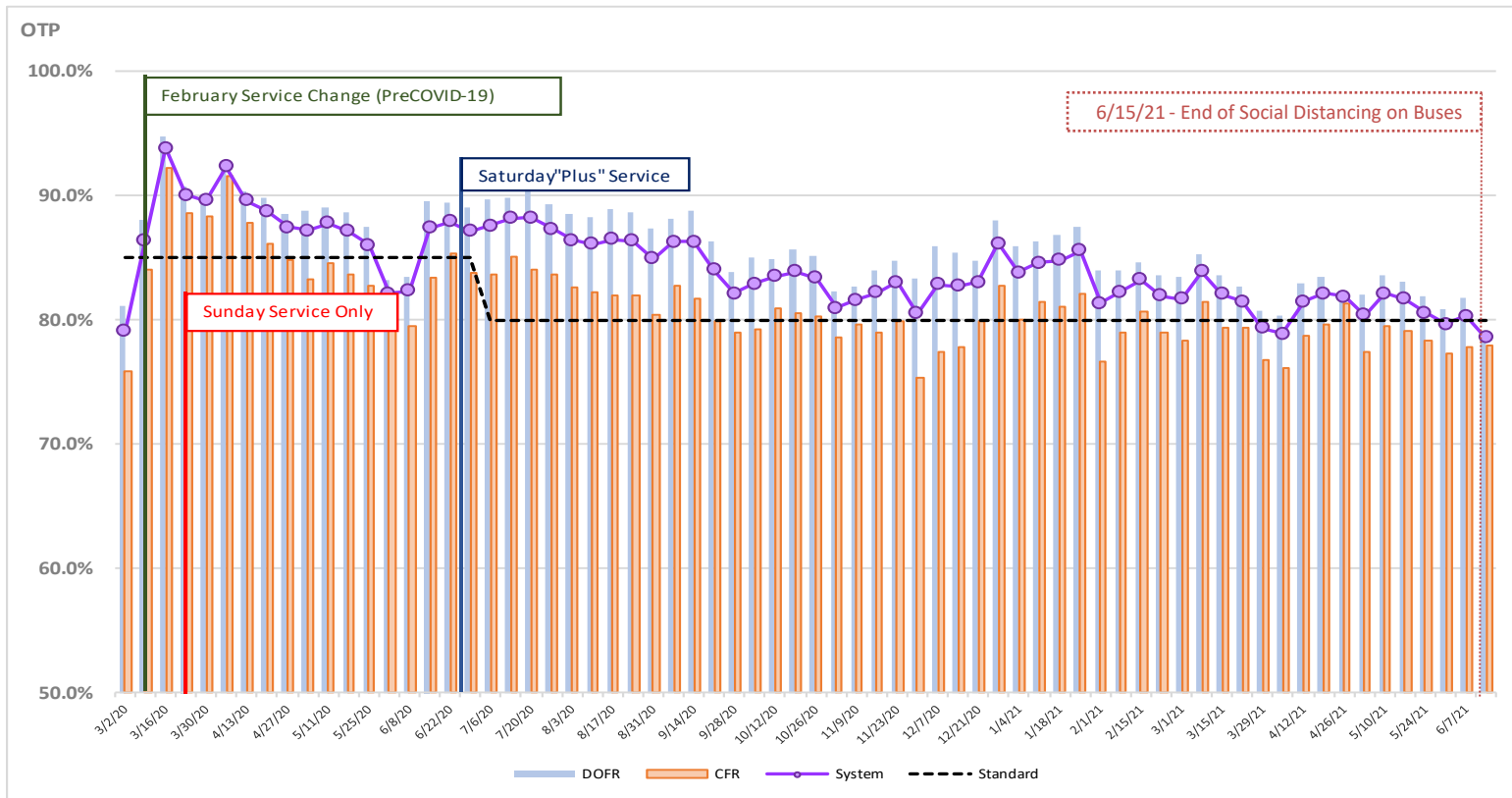
OC BUS TRENDS: TRIPPERS AND PASS-BYS

(AVERAGE WEEKDAY)



OC BUS TRENDS: ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)



CUSTOMER COMMUNICATION AND FEEDBACK

COVID-19 Safety Measures



Safety/Customer Communications

Multilingual customer communications about the June service change and safety enhancements. Tactics included online bus book, on-street signage, web page, email blast, social media, on-board flyer, and bus advertisements. Materials were distributed in English, Spanish, and Vietnamese.

Customer Comments

Bus Pass-bys

- Complaints on pass-bys decreased to an average of seven complaints per week in the first three weeks of June compared to 9.8 complaints per week in May.

Overcrowding

- Passenger overcrowding complaints decreased to an average of 0.67 per week in the first three weeks of June from one complaint per week in May.



NEXT STEPS

- Continue to track service performance and COVID-19 pandemic impacts
- Upcoming Service Changes
 - August 2021 – Schools return for on-site learning
 - October 2021 – Regular service change (address any on-time performance, ridership trends as necessary)

Future of Transit Workshop 2 Preview

Future of Transit Workshop Agendas

- Purpose: Preparation for future transit systems
- Workshop 1 Review (Board meeting - May 24)
 - “Transit 101”
 - Current conditions
- Workshop 2 (Board meeting - July 26)
 - OC Transit Vision
 - High-quality transit corridor planning and potential next steps
 - Bristol Street Transit Corridor Study
 - Harbor Boulevard Transit Corridor Study
 - Connect OC-LA Transit Study
 - Freeway BRT Concept Study
 - Seeking Board direction to move studies into environmental phase

