



# **AGENDA**

## ***Transit Committee Meeting***

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### **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, September 9, 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](http://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/>





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## **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](mailto: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 Chaffee

### **1. Public Comments**

### **Special Calendar**

There are no Special Calendar matters.

### **Consent Calendar (Items 2 through 6)**

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

### **2. Approval of Minutes**

Approval of the minutes of the Transit Committee meeting of August 12, 2021.





**3. Grant Award Acceptance for the 2022 Orange County Fair Express Bus Service**

Jennifer Haith Farinas/Kia Mortazavi

**Overview**

The Mobile Source Air Pollution Reduction Review Committee awarded the Orange County Transportation Authority \$289,054 in competitive Major Event Center Transportation Program funding. The grant award will support the 2022 Orange County Fair Express Bus Service.

**Recommendation**

Authorize the Chief Executive Officer, or designee, to accept the Mobile Source Air Pollution Reduction Review Committee Major Event Center Transportation Program award for \$289,054, and to negotiate and execute grant-related agreements and documents with the Mobile Source Air Pollution Reduction Review Committee.

**4. October 2021 Bus Service Change**

Jorge Duran/Kia Mortazavi

**Overview**

In anticipation of increased demand due to the return of in-person learning for most schools, colleges, and universities, Orange County Transportation Authority implemented a service change on August 15, 2021. The proposed October 2021 bus service change will provide more service to address expected ridership increases related to the return of in-person learning and work trips for most sectors of the economy, including the resurgence of hospitality industry activities.

**Recommendation**

Receive and file as an information item.





**5. Metrolink Fiscal Year 2020-21 Performance Report**

Alexis Murillo Felix/Jennifer L. Bergener

**Overview**

The Southern California Regional Rail Authority is a five-member joint powers authority that operates the 400-mile commuter rail service known as Metrolink. A report on Metrolink ridership, revenue, and on-time performance for service in Orange County covering fiscal year 2020-21 is provided for consideration by the Board of Directors.

**Recommendation**

Receive and file as an information item.

**6. Agreement for Compressed Natural Gas Fueling Facility Operation and Maintenance**

Dayle Withers/Jennifer L. Bergener

**Overview**

On May 10, 2021, the Board of Directors approved the release of a request for proposals for the operation and maintenance of compressed natural gas fueling facilities located at the Anaheim, Garden Grove, and Santa Ana bases. Proposals were received in accordance with the Orange County Transportation Authority procurement procedures for professional and technical services. Staff is requesting Board of Directors' approval to award an agreement for these services

**Recommendations**

- A. Approve the selection of Trillium USA Company, LLC, doing business as Trillium, as the firm to provide compressed natural gas fueling facility operation and maintenance.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-1-3317 between the Orange County Transportation Authority and Trillium USA Company, LLC, doing business as Trillium, in the amount of \$1,845,540, to provide compressed natural gas fueling facility operation and maintenance for a three-year initial term beginning December 1, 2021, with two, one-year option terms.





## **Regular Calendar**

**7. Agreement for OC ACCESS Paratransit and OC Flex Microtransit Services**

Jack Garate/Jennifer L. Bergener

### **Overview**

The Orange County Transportation Authority requires the services of a firm to manage, operate, and maintain the OC ACCESS paratransit and the OC Flex microtransit services. A competitive procurement was conducted, and offers were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services.

### **Recommendations**

- A. Approve the selection of First Transit, Inc., as the firm to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2150 between the Orange County Transportation Authority and First Transit, Inc., in the amount of \$242,579,221, to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services for an initial four-year term commencing on January 1, 2022, with two, two-year option terms.

## **Discussion Items**

**8. OC Bus and OC ACCESS Services Update**

Johnny Dunning, Jr./Jennifer L. Bergener

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

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

**10. Committee Members' Reports**





**11. Closed Session**

There are no Closed Session items scheduled.

**12. Adjournment**

The next regularly scheduled meeting of this Committee will be held at **9:00 a.m. on Thursday, October 14, 2021**, at the Orange County Transportation Authority Headquarters, Conference Room 07, 550 South Main Street, Orange, California.





**Committee Members Present**

Tim Shaw, Chairman

**Committee Members Present  
Via Teleconference**

Harry S. Sidhu, Vice Chairman

Doug Chaffee

Andrew Do

Steve Jones

Tam Nguyen

Vicente Sarmiento

**Staff Present**

Darrell E. Johnson, Chief Executive Officer

Jennifer L. Bergener, Deputy Chief Executive Officer

Allison Cheshire, Clerk of the Board Specialist, Senior

Gina Ramirez, Clerk of the Board Specialist, Senior

**Via Teleconference**

James Donich, General Counsel

OCTA Staff

**Committee Members Absent**

None

**Call to Order**

The August 12, 2021, regular meeting of the Transit Committee (Committee) was called to order by Committee Chairman Shaw at 9:01 a.m.

**Roll Call**

The Clerk of the Board Specialist, Senior (COB), conducted an attendance roll call and announced a quorum of the Committee.

**Pledge of Allegiance**

Committee Vice Chairman Sidhu led in the Pledge of Allegiance.

**1. Public Comments**

The COB noted that the COB Department received public comments on August 10, 2021, at 10:22 p.m. from Rhonda Shader, Councilmember with the City of Placentia. On August 12, 2021, at 6:52 a.m. from Angel Torres. The public comments were emailed to the Transit Committee Members on August 12, 2021, at 8:22 a.m. The public comments would be retained as part of the Transit Committee meeting record.

Chairman Shaw reminded Committee Members to review the public comments submitted.

**Special Calendar**

There were no Special Calendar matters.



## **Consent Calendar (Items 2 and 3)**

### **2. Approval of Minutes**

A motion was made by Committee Vice Chairman Sidhu, seconded by Director Nguyen, and following a roll call vote, declared passed 7-0, to approve the minutes of the Transit Committee meeting of July 8, 2021.

### **3. SB 1 (Chapter 5, Statutes of 2017) State of Good Repair Program Recommendations for Fiscal Year 2021 22 Funds**

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

- A. Approve Resolution No. 2021-063 authorizing the use of fiscal year 2021-22 SB 1 State of Good Repair Program funding, which is estimated to provide approximately \$6.4 million, for the Transit Security and Operations Center Project.
- B. Authorize staff to make all necessary amendments to the Federal Transportation Improvement Program, and execute any necessary agreements to facilitate the above recommendation.

## **Regular Calendar**

### **4. Contract Change Orders for Construction of the OC Streetcar Project**

Ross Lew, Senior Program Manager of the OC Streetcar Project, reported that staff was seeking approval for contract change orders to address additional removal and disposal of contaminated materials and removal of buried man-made materials in the project area.

Director Do inquired if the contractor is moving expeditiously on the project.

Mr. Lew responded that there had not been any delays. The vendor is proactive about not impeding the project and noted that in cases of clear and large change orders associated with utilities or unknown utilities. There is a requirement for a pause and an order which determines who the owners are, what the utilities are, and how best to handle them. If abandoned, the process allows for removal. Still, if relocation is needed, it must be coordinated with the utility owner, or modifications must be made through project design to keep the utilities in place. Utilities generally may cause a delay due to unknown circumstances, including unknown utilities, that may be encountered.



**4. (Continued)**

Director Do stated his concerns about these delays for unknown utilities and requested clarification of the specific items at hand and what is being done presently.

Mr. Lew responded that OCTA staff have been proactive regarding the segments scheduled to be excavated and have initiated mini-trench work to excavate a two-foot wide area to help the contractor complete the full excavation on the site. The objects that could be encountered solely require that the contractor have equipment that breaks up concrete and disposes of contaminants, which with the appropriate equipment, could be done expeditiously. The process remains similar for man-made materials, and there is a workplan in place for which landfills particular material and waste can go.

Darrell E. Johnson, Chief Executive Officer (CEO), further clarified that man-made material, utilities, and/or contaminants relatively have no issues. Difficulties tend to arise regarding track work and more technical items, and this is where delay tends to be had due to the varying complexity of these more specialized items.

Committee Vice Chairman Sidhu inquired about how OCTA is doing on the contingency funding margin in this particular contract and the projections of those margins.

Mr. Johnson, CEO, stated that in March 2021, there was a request for supplemental contingency for the project based on the current rate and unknown issues that arose within the project. It was also stated then that there were plans for budget reassessment with the Federal Transit Administration (FTA), and it would be returning to the Board at a later date. In the fall, it is projected that staff will bring the FTA review and any modifications to the schedule or costs in the fall, forward to the Board of Directors (Board). The Board can expect an update on levels of contingency, schedule estimation, and time of completion in the fall.

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

- A. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 3.2 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$1,100,000, for additional removal and disposal of contaminated materials within the Orange County Transit District-owned Pacific Electric Right-of Way and other project areas.



**4. (Continued)**

- B. Authorize the Chief Executive Officer to negotiate and execute Contract Change Order No. 18.1 to Agreement No. C-7-1904 with Walsh Construction Company II, LLC, in the amount of \$300,000, to increase the allowance for removal of buried man-made objects.

**5. Agreement for OC ACCESS Paratransit and OC Flex Microtransit Services**

Jack Garate, Manager of Paratransit Services, provided a PowerPoint presentation on this item.

Discussion ensued among the Committee Members and staff regarding the following:

- Retention of contracted employees when transitioning to a new vendor;
- Services provided to OCTA and performance history by both First Transit, Inc. and MV Transportation;
- How vendor transition would be handled due to serving a sensitive population;
- How disruption in service would be handled;
- Qualifications of each firm;
- How wages and benefits were addressed in the proposal assessment process;
- Consideration of past requests for amendments to contracts for wage and cost increases;
- Additional vetting of the proposals and extra time to review;
- How transition of service would be affected if a decision on this item is delayed one month;
- Service requirements prescribed by the Federal Transit Administration; and
- Parameters defined by the Americans with Disabilities Act for service delivery, compliance, performance standards, route efficiencies, and key performance metrics; and

A motion was made by Director Do, seconded by Director Chaffee, and following a roll call vote, declared passed 6-0, to continue this item to the next regularly scheduled meeting of the Transit Committee on September 9, 2021.

Committee Vice Chairman Sidhu was not present to vote on this item.



## **Discussion Items**

### **6. OC Bus and OC ACCESS Services Update**

Johnny Dunning, Jr., Department Manager, Scheduling and Bus Operations Support, and Ryan Maloney, Section Manager, Marketing and Customer Service, provided a PowerPoint presentation.

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

### **7. Chief Executive Officer's Report**

Darrell Johnson, CEO, reported the following:

#### **August Service Change**

- A special August service change goes into effect on Sunday, August 15, to help increase ridership by providing additional service, schedule adjustments, and other improvements.
- A close eye will be kept on ridership levels, and plans for the October service change have begun.

#### **Bipartisan Infrastructure Bill**

- CEO email was sent out on Tuesday, August 10, following the Senate's bipartisan infrastructure bill.
- This legislation would provide \$550 billion in infrastructure spending above current levels, almost half of which will benefit transportation over the next five years.
- The bill now heads to the House of Representatives, which is not scheduled to resume floor votes until September 20.
- There is close monitoring of the bill's status, and there will be continued reports on any updates to the full Board.

#### **Interstate 5 (I-5) South County Improvements Project**

- Tonight, August 12, at 5:30 p.m., staff will host a Zoom meeting for the I-5 South County Improvements Project, stretching from the State Route 73 to El Toro Road.
- Staff will be discussing Stage 1 demolition of the Los Alisos Boulevard overcrossing and provide an overview of Segment 3 from Alicia Parkway to El Toro Road.

### **8. Committee Members' Reports**

Committee Chairman Shaw commented that he has a video from his recent visit to Colorado that shows their light rail system and intends to show it at the next Transit Committee meeting.





**8. (Continued)**

Director Nguyen gave kudos to the OCTA Outreach teams' recent community event in Garden Grove and thanked staff for the recent tour he participated in of the Garden Grove bus base operations.

**9. Closed Session**

There were no Closed Session items scheduled.

**10. Adjournment**

The meeting adjourned at 10:21 a.m.

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

ATTEST

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Tim Shaw  
Committee Chairman

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Allison Cheshire  
Clerk of the Board Specialist, Senior





**September 9, 2021**

**To:** Transit Committee

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

**Subject:** Grant Award Acceptance for the 2022 Orange County Fair Express Bus Service

### **Overview**

The Mobile Source Air Pollution Reduction Review Committee awarded the Orange County Transportation Authority \$289,054 in competitive Major Event Center Transportation Program funding. The grant award will support the 2022 Orange County Fair Express Bus Service.

### **Recommendation**

Authorize the Chief Executive Officer, or designee, to accept the Mobile Source Air Pollution Reduction Review Committee Major Event Center Transportation Program award for \$289,054, and to negotiate and execute grant-related agreements and documents with the Mobile Source Air Pollution Reduction Review Committee.

### **Background**

The Mobile Source Air Pollution Reduction Review Committee (MSRC), in partnership with the South Coast Air Quality Management District (SCAQMD), makes grants available to local agencies for programs to seek cost-effective opportunities to reduce automobile trips and associated emissions by shifting attendees of major events out of their personal automobile and into zero and near-zero emission transportation alternatives.

On April 5, 2019, MSRC made available \$6.5 million in 2019-21 Major Event Center Transportation Program (Program) funding. On September 4, 2020, this Program was extended one year to allow events to continue through the end of the calendar year 2022 due to the coronavirus pandemic.



The Program provides funding to support the operation of transit services at major event venues experiencing high levels of traffic congestion in the SCAQMD region to reduce the number of vehicles traveling to the center.

The Program requires utilizing the cleanest, commercially available zero and/or near-zero emission vehicles to provide alternative transportation service for major events. In March 2021, the Orange County Transportation Authority (OCTA) submitted an application requesting \$289,054 to support the Orange County Fair Express Bus Service (service) operations for the 2022 season. The service will utilize eight hydrogen fuel cell electric buses in support of the Program's requirement to utilize the cleanest vehicles available.

OCTA has partnered with the Orange County Fair and Event Center since 2006 to provide public transportation to the OC Fair. When the service began in 2006, there were 1,579 boardings, and in 2019 that had grown to nearly 83,000 boardings, demonstrating the success of the service. The service provides direct connections to the OC Fair from nine transit facilities throughout Orange County. Each of the nine routes provides direct intermodal connectivity to OC Bus, Metrolink and Amtrak services, carpools, and other transit services provided by neighboring counties.

### ***Discussion***

On June 4, 2021, the SCAQMD awarded OCTA \$289,054 Program grant funding, representing 40 percent of the total cost of the service. The Program requires that OCTA provide the remaining 60 percent of the total project cost in in-kind match, or \$433,581, for a total cost of \$722,635.

With OCTA Board of Directors' (Board) authorization, staff will implement the service in 2022 in anticipation that demand will return to pre-pandemic levels. The service will provide an opportunity to introduce and welcome back OC residents and visitors to the OC Bus transit service and encourage riders to become comfortable with riding public transit.

Staff is requesting the Board authorize acceptance of this grant and further authorize the Chief Executive Officer to negotiate and enter into a contract with MSRC, allowing OCTA to seek reimbursement for the costs for the future 2022 service.



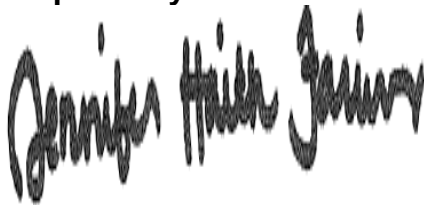
***Summary***

The MSRC awarded OCTA \$289,054 to support operations of the OC Fair Express Bus Service for the 2022 season. Board authorization is requested to receive the grant. As part the grant acceptance, OCTA would provide an in-kind match contribution of \$433,581 toward the total project cost of \$722,635.

***Attachment***

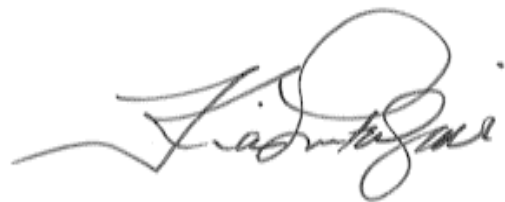
None.

**Prepared by:**



Jennifer Haith Farinas  
Senior Transportation  
Funding Analyst  
(714) 560-5392

**Approved by:**



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





**September 9, 2021**

**To:** Transit Committee

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

**Subject:** October 2021 Bus Service Change

### **Overview**

In anticipation of increased demand due to the return of in-person learning for most schools, colleges, and universities, the Orange County Transportation Authority implemented a special service change on August 15, 2021. The proposed October 2021 bus service change will provide additional service to further address anticipated ridership increases related to the return of in-person learning and work trips for most sectors of the economy, including 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. The next bus service change is scheduled for implementation on October 10, 2021.

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.

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.

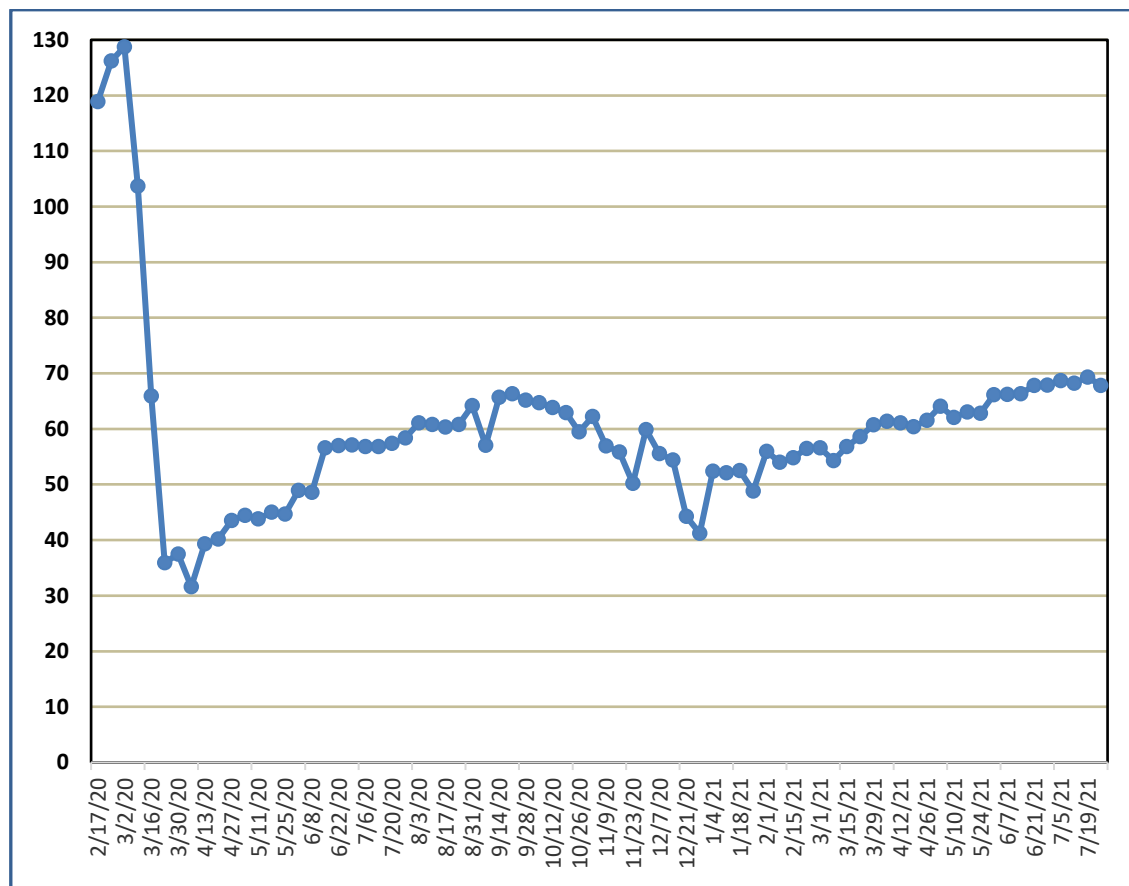


On February 22, 2021, the Board of Directors (Board) directed staff to implement a public outreach program to comply with the FTA requirement and to solicit feedback for the planned restoration of bus service. Per OCTA's policy, a public outreach program was conducted and concluded with a public hearing at the April 26, 2021 Board meeting. Staff began incorporating public input in the recently implemented June and August 2021 bus service changes to improve bus service and will continue to consider this feedback in upcoming service changes.

### ***Discussion***

COVID-19 has had a significant impact on transit ridership nationwide. OC Bus ridership decreased from approximately 125,000 average weekday boardings to the low 30,000s in April 2020. Ridership has recently rebounded to about 70,000 average weekday boardings. The chart below shows the average weekday ridership, by week, from mid-February 2020 through the end of July 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. Between the June 2020 and June 2021, OCTA operated an enhanced Saturday service schedule on weekdays and a regular schedule on Saturdays and Sundays. In June 2021, OCTA began adding service, focusing on improving frequency and service hours of operation on many OC bus routes. An additional 103,000 annual revenue vehicle hours (RVH) were added in August 2021, and a 40,700 RVH increase is planned for October 2021, which will increase service to 1.35 million annual RVH. This is a three percent increase in service over August 2021 levels and about 17 percent below pre-COVID-19 levels.

The proposed October 2021 service change will improve service on 23 of the 52 OCTA bus routes currently operated. The changes were developed to accommodate the anticipated increase in demand as the economy continues to reopen and schools and universities return to in-person instruction and also considered public input. These changes include:

- Improving service frequency on five bus routes,
- Expanding hours of operation earlier in the morning and/or later in the evening on 13 bus route,
- Schedule adjustments on ten bus routes to improve on-time performance;
- Adjusting schedules on five bus routes due to changes to Metrolink schedule, and,
- Reinstating Route 59 service to the University of California, Irvine.

OCTA will continue the suspension of six bus routes until the demand for service rebounds. The recommendations are detailed in Attachment A and shown in attachments B, C, D, and E.

Following the implementation of the service improvements, staff will assess the service based on key variables, such as customer demand, service performance, and the latest developments regarding COVID-19. Preliminary plans for February or June 2022 could increase service by approximately 100,000 annual RVH to a total of 1,450,000 annual RVH or about 11 percent below pre-COVID-19 service levels, consistent with the approved OCTA Fiscal Year 2021-22 Budget. Staff will present the February 2022 changes to the Board in November 2021.

### ***Summary***

The proposed October 2021 bus service change will increase transit service in response to customer requests and anticipated ridership increases. Route improvements include more frequent service, expanded hours of operations, schedule adjustments, and other changes. Customers will be notified of the changes three weeks prior to implementation.

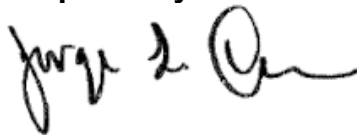


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**Attachments**


- A. October 2021 Bus Service Change: Bus Route Recommendations
- B. October 2021 Bus Service Change System Map, Routes with Frequency Improvements
- C. October 2021 Bus Service Change System Map, Routes with Span Improvements
- D. October 2021 Bus Service Change System Map, Routes with Improved On-Time Performance
- E. October 2021 Bus Service Change System Map, Routes Continue Suspended
- F. October 2021 Bus Service Change System Map, Routes with No Changes

**Prepared by:**



Jorge Duran  
Service Planning Analyst, Principal  
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**Approved by:**



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



## October 2021 Service Change: Bus Route Recommendations

Route	Route Description	Recommendation	CHANGE IN SERVICE			
			Daily RVH	Annual RVH	Peak Vehicles	Daily Trips
1	Long Beach - San Clemente	Implement winter schedule	(7.3)	(1,269)	-1	-
25	Fullerton - Huntington Beach	Improve span	8.4	2,146	-	5
26	Fullerton - Yorba Linda	No change	-	-	-	-
29	La Habra - Huntington Beach	No change	-	-	-	-
30	Cerritos - Anaheim	Improve frequency; Improve span	12.9	3,277	-2	8
33	Fullerton - Huntington Beach	Improve span	8.6	2,185	-	7
35	Fullerton - Costa Mesa	Improve frequency; Improve span	23.4	5,959	1	9
37	La Habra - Fountain Valley	No change	-	-	-	-
38	Lakewood - Anaheim Hills	No change	-	-	-	-
42	Seal Beach - Orange	No change	-	-	-	-
43	Fullerton - Costa Mesa	No change	-	-	-	-
46	Los Alamitos - Orange	Improve span	4.6	1,160	-	3
47	Fullerton - Balboa	Implement winter schedule	(5.8)	(1,015)	-1	-
50	Long Beach - Orange	Improve OTP	1.5	387	-	-
53	Orange - Irvine	No change	-	-	-	-
54	Garden Grove - Orange	Add three short trips to connect to Metrolink	0.8	208	1	3
55	Santa Ana - Newport Beach	Improve OTP	3.5	893	1	-
56	Garden Grove - Orange	Improve OTP	0.1	21	-	-
57	Brea - Newport Beach	No change	-	-	-	-
59	Anaheim - Irvine	Improve frequency; Improve span; Reinstate service to UCI	32.2	8,203	3	10
60	Long Beach - Tustin	Improve OTP	5.0	1,284	-	-
64	Huntington Beach - Tustin	No change	-	-	-	-
66	Huntington Beach - Irvine	No change	-	-	-	-
70	Sunset Beach - Tustin	No change	-	-	-	-
71	Yorba Linda - Newport Beach	Improve span	5.6	1,415	-	3
72	Sunset Beach - Tustin	No change	-	-	-	-
76	Huntington Beach-JWA via Talbert/MacArthur	Improve OTP	(0.3)	(72)	-	-
79	Tustin - Newport Beach	Improve span	4.4	1,122	-	3
82	Foothill Ranch - Rancho Santa Margarita	No change	-	-	-	-
83	Anaheim - Laguna Hills	Improve OTP	11.0	2,805	2	-
85	Mission Viejo - Laguna Niguel	No change	-	-	-	-
86	Costa Mesa - Mission Viejo	No change	-	-	-	-
87	Rancho Santa Margarita - Laguna Niguel	No change	-	-	-	-



## October 2021 Service Change: Bus Route Recommendations

Route	Route Description	Recommendation	CHANGE IN SERVICE			
			Daily RVH	Annual RVH	Peak Vehicles	Daily Trips
89	Mission Viejo - Laguna Beach	Improve frequency; Improve span; Implement winter schedule	18.4	4,692	2	17
90	Tustin - Dana Point	Improve OTP	0.1	17	-	-
91	Laguna Hills - San Clemente	Improve span	18.9	4,807	1	9
123	Anaheim - Huntington Beach	No change	-	-	-	-
129	La Habra - Anaheim	Improve span	1.1	285	-	1
143	La Habra - Brea	Improve span	6.1	1,560	-	5
150	Santa Ana - Costa Mesa	No change	-	-	-	-
153	Brea - Anaheim	Improve span	2.0	519	-	2
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	Metrolink schedule adjustment	(0.3)	(68)	1	-
463	The Depot at Santa Ana - Hutton Center	Metrolink schedule adjustment	0.0	4	-	-
472	Tustin Station - Irvine Business Complex	Metrolink schedule adjustment	0.2	55	-	-
473	Tustin Station - UCI	Metrolink schedule adjustment	0.5	123	-	-
480	Irvine Station - Lake Forest	Metrolink schedule adjustment	0.0	9	-	-
529	Fullerton - Huntington Beach Express	Continue suspension	-	-	-	-
543	Fullerton - Santa Ana	No change	-	-	-	-
560	Santa Ana - Long Beach	No change	-	-	-	-
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	No change	-	-	-	-
<b>Total</b>			<b>155.6</b>	<b>40,709</b>	<b>8</b>	<b>85</b>

### Acronyms

JWA - John Wayne Airport  
OTP - On-Time Performance

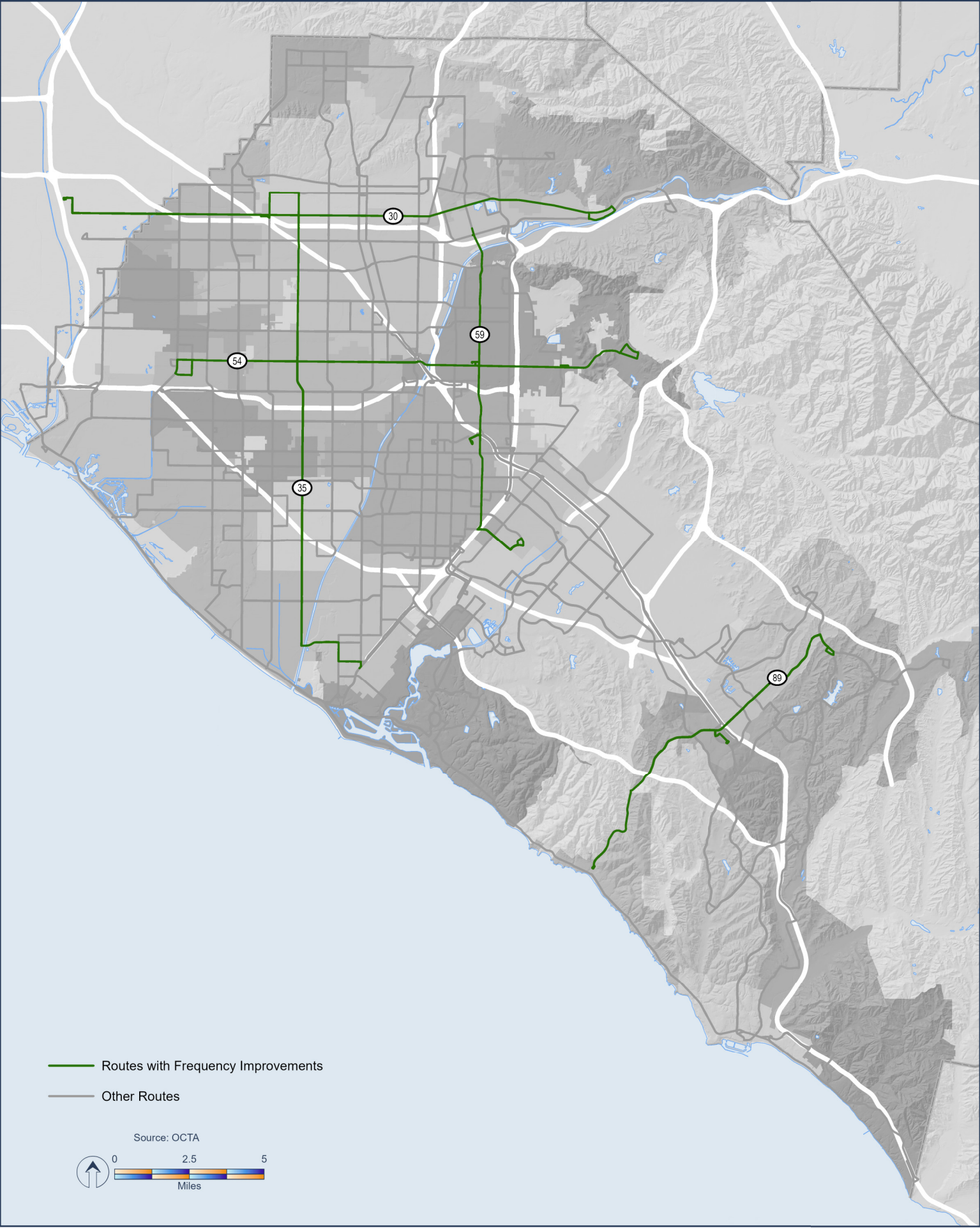
RVH - Revenue Vehicle Hours  
UCI - University of California, Irvine



# October 2021 Bus Service Change System Map

## Routes with Frequency Improvements

ATTACHMENT B



- Routes with Frequency Improvements
- Other Routes

Source: OCTA

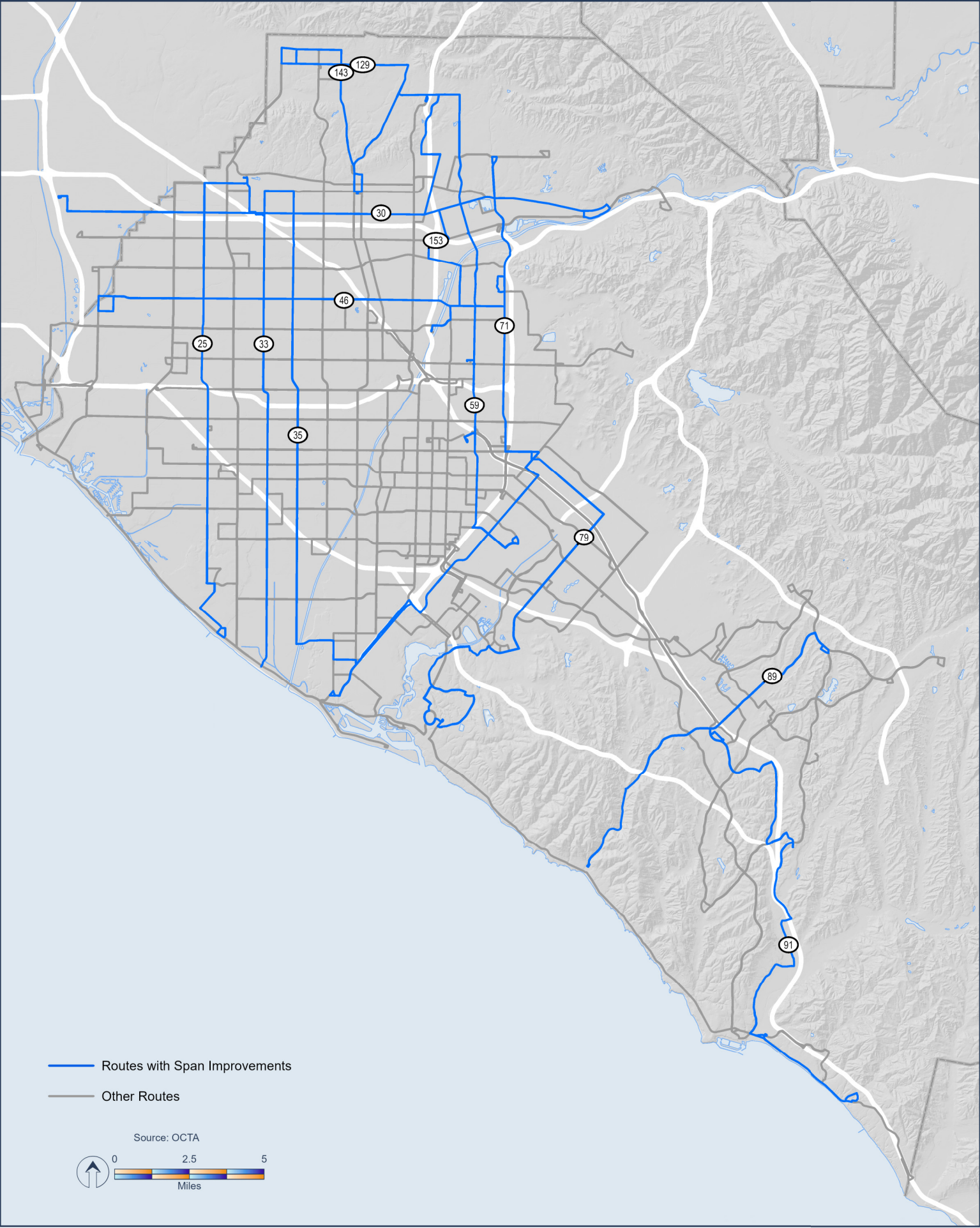




# October 2021 Bus Service Change System Map

## Routes with Span Improvements

ATTACHMENT C



- Routes with Span Improvements
- Other Routes

Source: OCTA

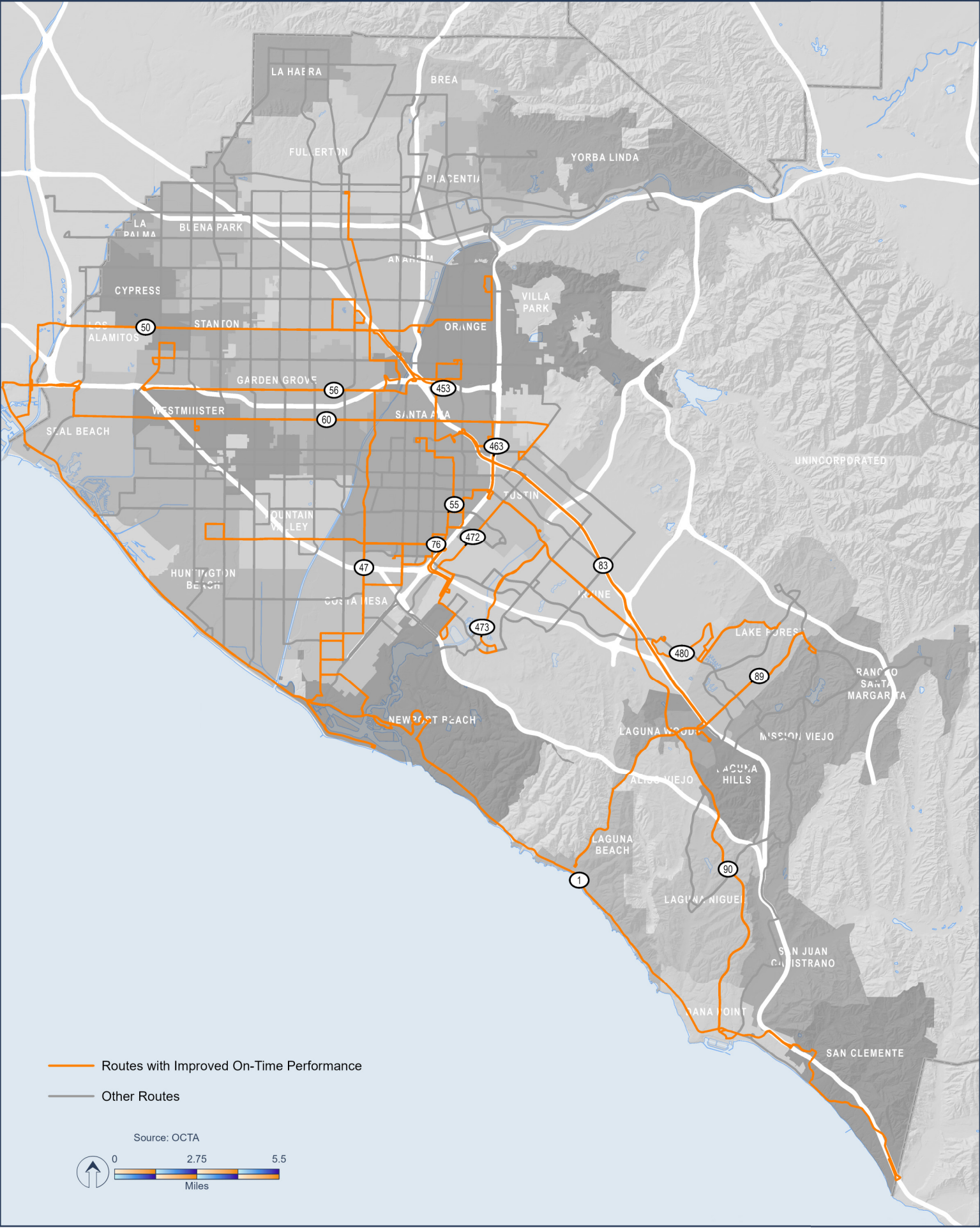




# October 2021 Bus Service Change System Map

## Routes with Improved On-Time Performance

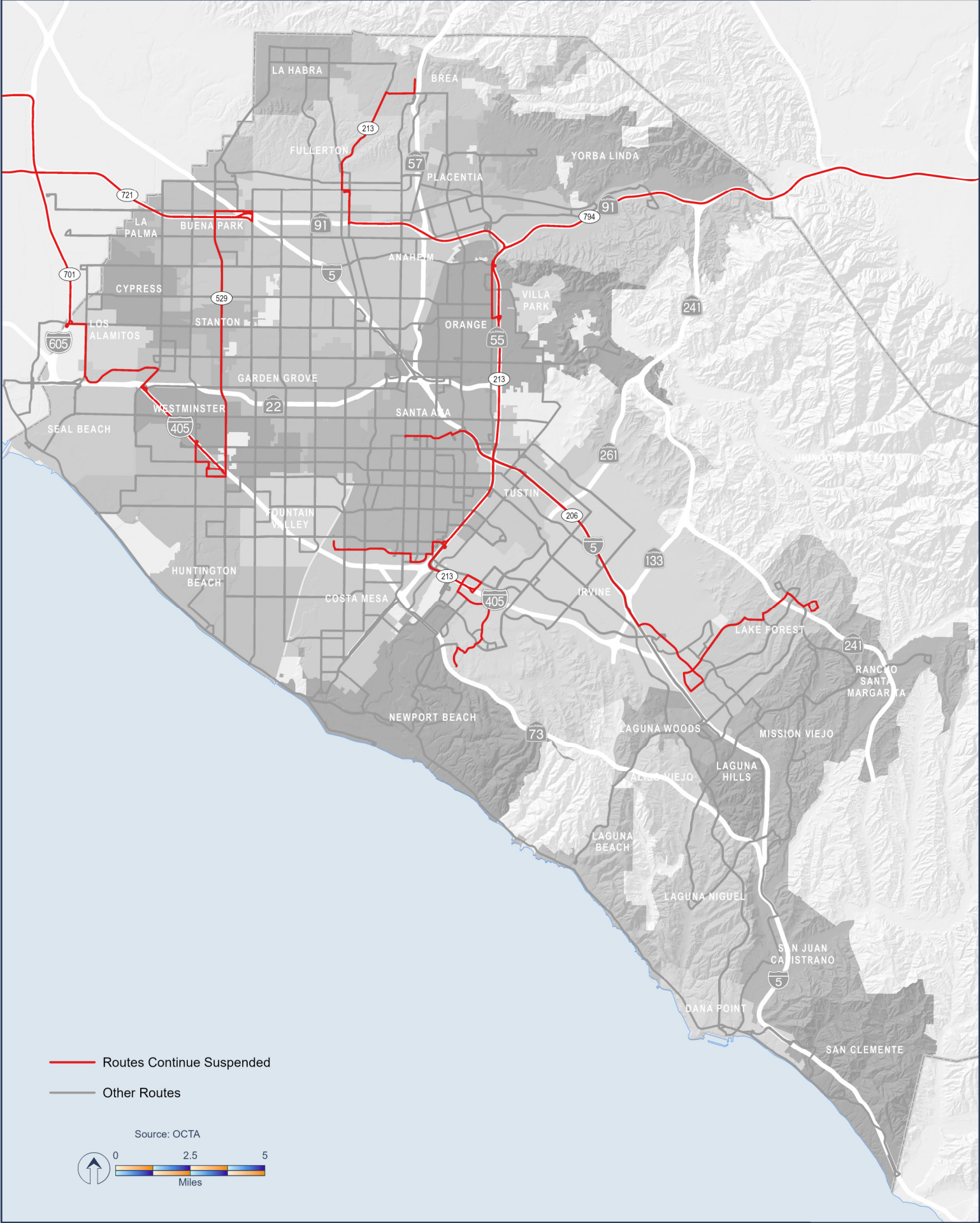
ATTACHMENT D





# October 2021 Bus Service Change System Map

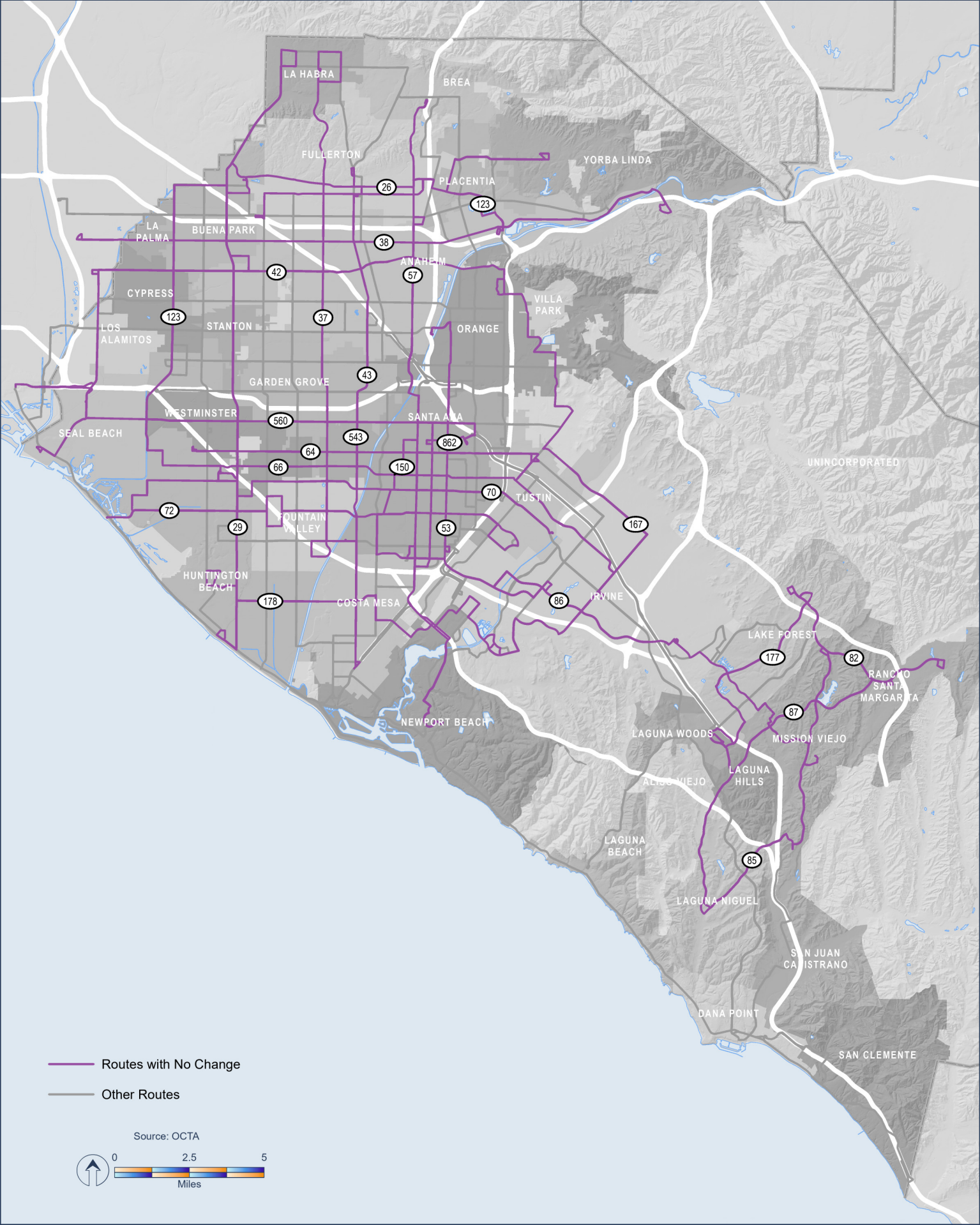
## Routes Continue Suspended





# October 2021 Bus Service Change System Map

## Routes with No Changes







**September 9, 2021**

**To:** Transit Committee

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

**Subject:** Metrolink Fiscal Year 2020-21 Performance Report

### **Overview**

The Southern California Regional Rail Authority is a five-member joint powers authority that operates the 400-mile commuter rail service known as Metrolink. A report on Metrolink ridership, revenue, and on-time performance for service in Orange County covering fiscal year 2020-21 is provided for consideration by the Board of Directors.

### **Recommendation**

Receive and file as an information item.

### **Background**

The Southern California Regional Rail Authority's (Metrolink) member agencies include the Los Angeles County Metropolitan Transportation Authority (LA Metro), the Orange County Transportation Authority (OCTA), the Riverside County Transportation Commission, the San Bernardino County Transportation Authority, and the Ventura County Transportation Commission (VCTC). Metrolink serves 62 stations in six Southern California counties, offering trips on seven lines.

Service and ridership were severely impacted by the coronavirus (COVID-19) pandemic and, as a result, a temporary service reduction of 30 percent was implemented systemwide by Metrolink in March 2020. Service was further reduced in November 2020. Following both temporary service reductions, weekday trains were reduced by 36.1 percent, from 169 to 108 weekday trains systemwide. These changes resulted in a 23.2 percent reduction of service on the three lines that serve Orange County (OC Metrolink). Metrolink is working with member agencies to assess future demand and determine when and how service will be reinstated.



In addition to fare revenue, Metrolink is funded by its member agencies. Each agency's contribution is derived through formula which is based upon several factors covering each aspect of capital, maintenance, operations, rehabilitation. However, Coronavirus Aid, Relief, and Economic Security Act funds were utilized for Metrolink operations to supplement the loss of fare revenue during fiscal year (FY) 2020-21.

OC Metrolink is outlined as follows, with pre-COVID-19 pandemic and current service levels following the temporary service reductions:

- Orange County (OC) Line:
  - Oceanside to Los Angeles via Anaheim
  - Established in 1994
  - 27 daily trains (17 trains post service reduction)
- Inland Empire – Orange County (IEOC) Line:
  - San Bernardino to Oceanside via Orange
  - Established in 1995
  - 16 daily trains (14 trains post service reduction)
- 91/Perris Valley (91/PV) Line:
  - Perris to Los Angeles via Fullerton
  - Established in 2002
  - 11 daily trains (ten trains post service reduction)

Metrolink trains serve 11 OC stations daily and carry an average of 2,882 daily passengers on OC Metrolink. Weekend service is offered on all three lines, with 16 trips on Saturday and Sunday; these trips were not included as part of the service reductions.

Metrolink service along portions of each line in OC shares a corridor with the state-supported intercity passenger rail service known as the Amtrak Pacific Surfliner, managed by the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.

The Rail 2 Rail (R2R) Program, which began in 2003, allows Metrolink monthly passholders the option of riding Amtrak Pacific Surfliner trains at no additional charge to the rider, if they travel within the stations identified on their monthly pass. Amtrak Pacific Surfliner monthly pass holders may also ride any Metrolink train within the station pairs of their monthly pass. The R2R Program is fully funded by the three member agencies that benefit from the program: LA Metro, VCTC, and OCTA, with OCTA contributing 66 percent.



### Discussion

This report provides an update on Metrolink weekday and weekend ridership, revenue, and on-time performance (OTP) for FY 2020-21 by line. Performance data is further detailed in Attachment A and is obtained directly from Metrolink, unless otherwise noted.

### Ridership

#### Total Ridership

Weekday and weekend ridership combined for FY 2020-21 for OC Metrolink was 797,722, which represents a 79.4 percent decrease compared to the previous FY, as shown in the following table.

Total Boardings			
Line	FY 2019-20	FY 2020-21	Percent Change
OC Line	2,158,259	352,757	-83.7%
IEOC Line	1,015,806	273,710	-73.1%
91/PV Line	700,553	171,255	-75.6%
OC Metrolink	3,874,618	797,722	-79.4%
Systemwide	9,357,013	2,102,141	-77.5%

A quarterly ridership breakdown for OC Metrolink is provided below to reflect the impact of the COVID-19 pandemic on ridership, which shows ridership has been incrementally recovering since the onset of the COVID-19 pandemic the prior FY, which occurred during the fourth quarter. Ridership increased by 142 percent in the fourth quarter of FY 2020-21, more than doubling when compared to the prior year, indicative of ridership recovery.

Line	Quarter	FY 2019-20	FY 2020-21	Percent Change
OC Metrolink	Q1	1,329,985	163,761	-87.7%
	Q2	1,277,507	179,733	-85.9%
	Q3	1,153,217	178,571	-84.5%
	Q4	113,909	275,650	142.0%
	Total	3,874,618	797,722	-79.4%

#### Average Weekday Ridership

As Southern California's commuter rail system, weekday commuters are Metrolink's key market, and schedules are optimized to serve that market. In FY 2020-21, there were 2,882 combined average weekday boardings on



OC Metrolink, representing a decline of 80.4 percent compared to the prior FY. The following table shows the change in average weekday station boardings in FY 2019-20 compared to FY 2020-21. The OC Metrolink lines, stations, and boardings changes are geographically portrayed in Attachment B

<b>Average Weekday Station Boardings</b>			
<b>Orange County Station</b>	<b>FY 2019-20</b>	<b>FY 2020-21</b>	<b>Percent Change</b>
Anaheim	423	70	-83.4%
Anaheim Canyon	240	71	-70.4%
Buena Park	462	76	-83.6%
Fullerton	1,269	178	-86.0%
Irvine	1,074	153	-85.7%
Laguna Niguel/Mission Viejo	263	48	-81.7%
Orange	504	127	-74.8%
San Clemente (North Beach)	74	23	-68.8%
San Juan Capistrano	111	34	-69.4%
Santa Ana	629	125	-80.1%
Tustin	922	140	-84.8%

In addition to local OC Bus routes that connect to rail stations, OCTA operates StationLink and iShuttle routes that are designed to meet certain trains. These rail feeder buses provide a commuter link to major employment centers at no additional cost with valid Metrolink fare. The StationLink service averaged 206 weekday boardings this FY, the previous FY there was an average of 459 weekday boardings, which represents a decline of 55.1 percent. The City of Irvine suspended iShuttle service when Metrolink implemented the COVID-19 pandemic-related service reductions. The iShuttle suspension was in effect from March 2020 to June 2021, and service was restored in July 2021. The iShuttle service averaged 27 weekday boardings for the month of July 2021.

OCTA also provides the OC Flex microtransit service that serves the Laguna Niguel/Mission Viejo Station. Connections to OC Flex service are free with valid Metrolink fare. A total of 360 riders transferred from Metrolink to OC Flex this FY, and the previous FY there were a total of 869 riders that transferred, a decline of 59 percent.

#### Weekend Ridership

Metrolink weekend service began in 2006 with two roundtrips on the OC Line. There are currently four weekend roundtrips on the OC Line, two on the IEOC Line, and two on the 91/PV Line. Weekend service on the 91/PV Line extension began in October 2019.



Combined weekend ridership on OC Metrolink lines in FY 2020-21 reached approximately 86,497 boardings. This represents a decrease of 74.3 percent compared to FY 2019-20. Currently, weekend ridership is recovering at a faster rate than weekday ridership through the COVID-19 pandemic. To encourage weekend ridership recovery, OCTA continues to promote Metrolink weekend service through Metrolink weekend campaigns, which feature exclusive deals and travel itineraries. The following table details weekend ridership by line.

<b>Total Weekend Ridership</b>			
<b>Line</b>	<b>FY 2019-20</b>	<b>FY 2020-21</b>	<b>Percent Change</b>
OC Line	166,930	39,914	-76.1%
IEOC Line	112,005	33,222	-70.3%
91/PV Line	56,986	13,361	-76.6%
OC Metrolink	335,921	86,497	-74.3%
Systemwide	770,579	141,395	-81.7%

### Revenue

Systemwide fare revenue for FY 2020-21 was \$16.1 million, a 74.1 percent decrease from FY 2019-20. Annual revenue for OC Metrolink totaled \$5.8 million, which represents a 78.6 percent decrease from the previous FY, due to the COVID-19 pandemic. Revenue for OC Metrolink is 36.3 percent of the systemwide total of \$16.1 million.

Passenger fare revenue covers roughly half of Metrolink operating expenses, with the remainder covered by other revenues and member agency subsidies. The OC Line consistently has the highest farebox recovery rate, for FY 2020-21 projected farebox recovery was 17.1 percent as noted in Metrolink's FY 2020-21 Adopted Budget, exceeding the systemwide projection of 10.4 percent. Given the demographics of the OC Line, a slower progression of ridership and revenue recovery has been observed when compared to other Metrolink lines. A summary of Metrolink revenue is depicted in the following table.

<b>Metrolink Total Revenue</b>			
<b>Line</b>	<b>FY 2019-20</b>	<b>FY 2020-21</b>	<b>Percent Change</b>
OC Line	\$ 16,901,989	\$ 2,994,578	-82.3%
IEOC Line	\$ 5,839,660	\$ 1,534,393	-73.7%
91/PV Line	\$ 4,548,926	\$ 1,320,017	-71.0%
OC Metrolink	\$ 27,290,575	\$ 5,848,988	-78.6%
Systemwide	\$ 62,018,826	\$ 16,092,578	-74.1%

### OTP

Trains can be delayed for a variety of reasons, including equipment issues,



unscheduled delays (or meets) with other trains, delays from other operators utilizing the same tracks, construction or track maintenance, and incidents. Metrolink's OTP goal is 95 percent. A train is defined as on-time if it arrives at its destination within five minutes of its scheduled arrival time. In FY 2020-21, Metrolink operated at a 94.4 percent systemwide on-time performance, a 0.7 percentage point decrease from the prior year. The OC, IEOC, and 91/PV lines averaged 95.6, 93.4, and 95.3 percent OTP, respectively, for FY 2020-21. OTP improved significantly at the onset of the FY and held steady through the remainder of the year.

### Key Initiatives FY 2020-21

Metrolink undertook several efforts to enhance service during the year. The following list highlights some of these efforts:

- Smarter. Better. Essential. Campaign: Metrolink launched a clean commute campaign in response to the COVID-19 pandemic, by increasing the cleaning and safety procedures on board and at stations.
- The Metrolink Recovery Plan Framework was designed to protect employees and customers against the spread of COVID-19, while taking a phased approach to emerging from the pandemic as a smarter and better passenger train service. This plan encompasses several campaigns and efforts, notably:
  - Metrolink conducted a survey that revealed that 85 percent of riders working from home will return to riding Metrolink trains post-COVID-19 pandemic.
  - The plan set a roadmap for various campaigns that showcased Metrolink's enhanced cleaning protocols and commitment to keep transit safe and slow the spread of the COVID-19 pandemic. Metrolink also took the American Public Transportation Association Health and Safety Commitments Program pledge to increase riders' confidence and ensure they feel safe while riding.
  - In August 2020, the Metrolink Board of Directors approved two new fare products (5-Day Flex Pass & Kids Ride Free on Weekends) to encourage riders to return to taking the train. Since the 5-Day Flex Pass went on sale on August 24, 2020, a total of 7,940 passes were sold this FY. Following the launch of the Kids Ride Free weekend promotion, kids ridership more than tripled, from 157 average weekend rides in August 2020 to 546 in July 2021.
  - Metrolink created the SoCal Explorer loyalty program in October 2020. The program rewards riders with points for traveling on Metrolink. As of August 2021, the program has over 16,000 members.



- Climate Action Plan: Metrolink adopted a Climate Action Plan in March 2021 that charts a course toward a greener future for the agency. The plan addresses climate change, air quality, and other pressing sustainability issues.

**Summary**

This report provides an update on OC Metrolink commuter rail ridership, revenue, and OTP for FY 2020-21. Total ridership was 767,722 boardings, a 79.4 percent decrease over the prior year, with the COVID-19 pandemic impacting both weekday and weekend ridership. Annual revenue for OC Metrolink totaled \$5.8 million, which represents a 78.6 percent decrease from the previous FY. The OC, IEOC, and 91/PV lines averaged 95.6, 93.4, and 95.3 percent OTP, respectively, for the period covered in this report.

**Attachments**

- A. Metrolink Fiscal Year 2020-21 Performance Report
- B. Percentage Change in Average Metrolink Boardings, FY 2019-20 v. FY 2020-21

**Prepared by:**

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(714) 560-5958

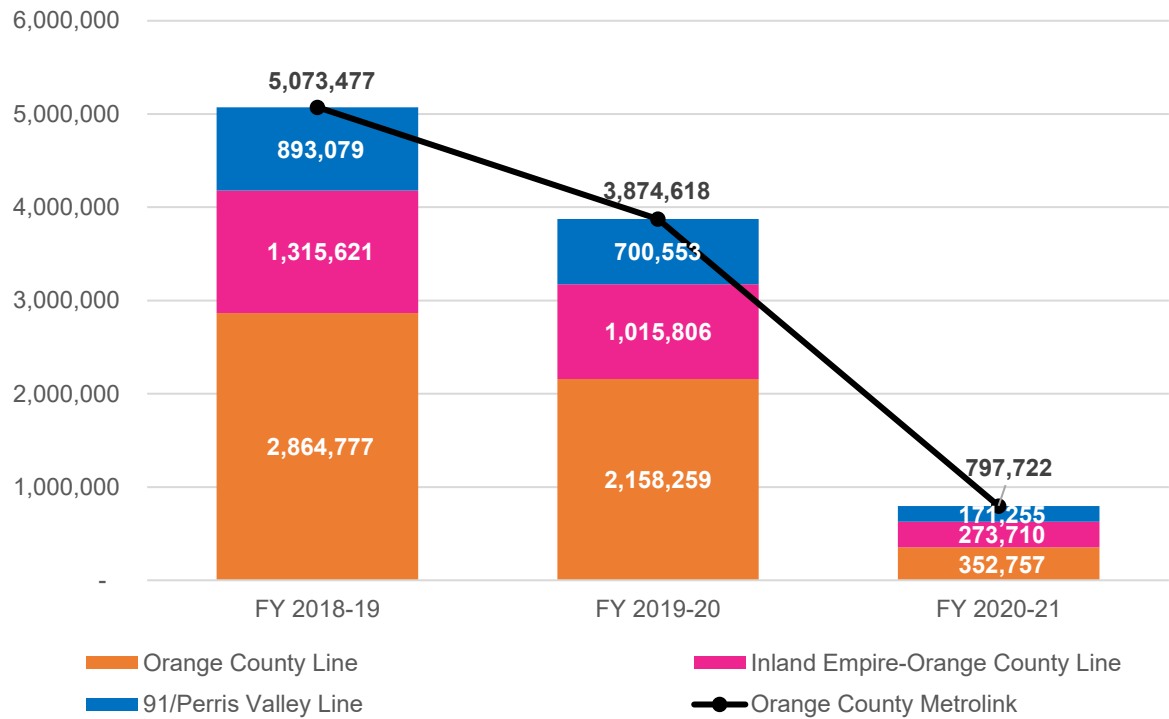
**Approved by:**

Jennifer L. Bergener  
Chief Operating Officer, Operations/  
Deputy Chief Executive Officer  
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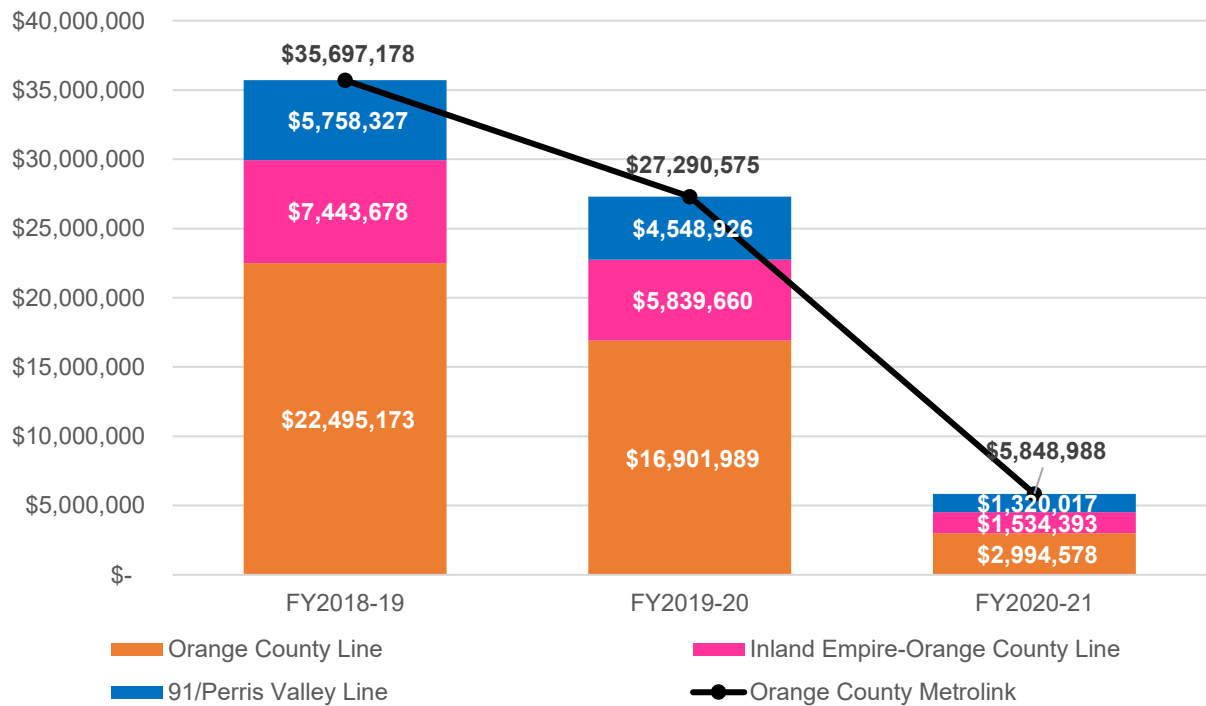


Metrolink Fiscal Year 2020-21 Performance Report

Ridership – Total Boardings

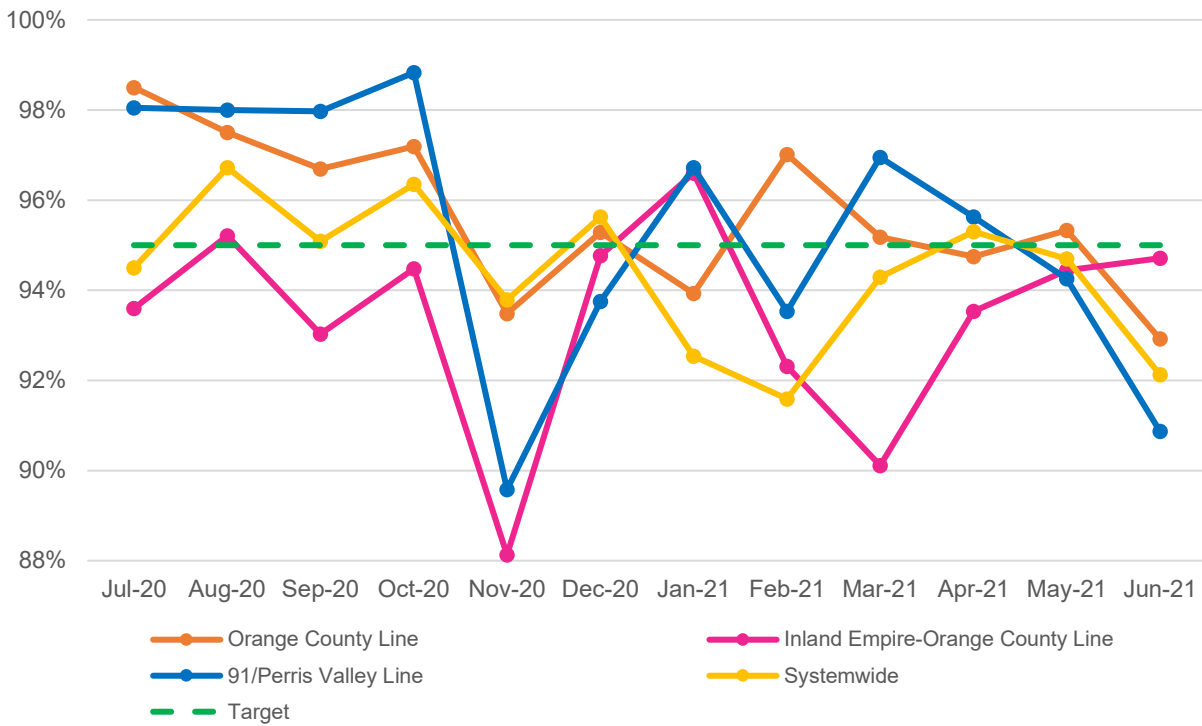


Total Revenue



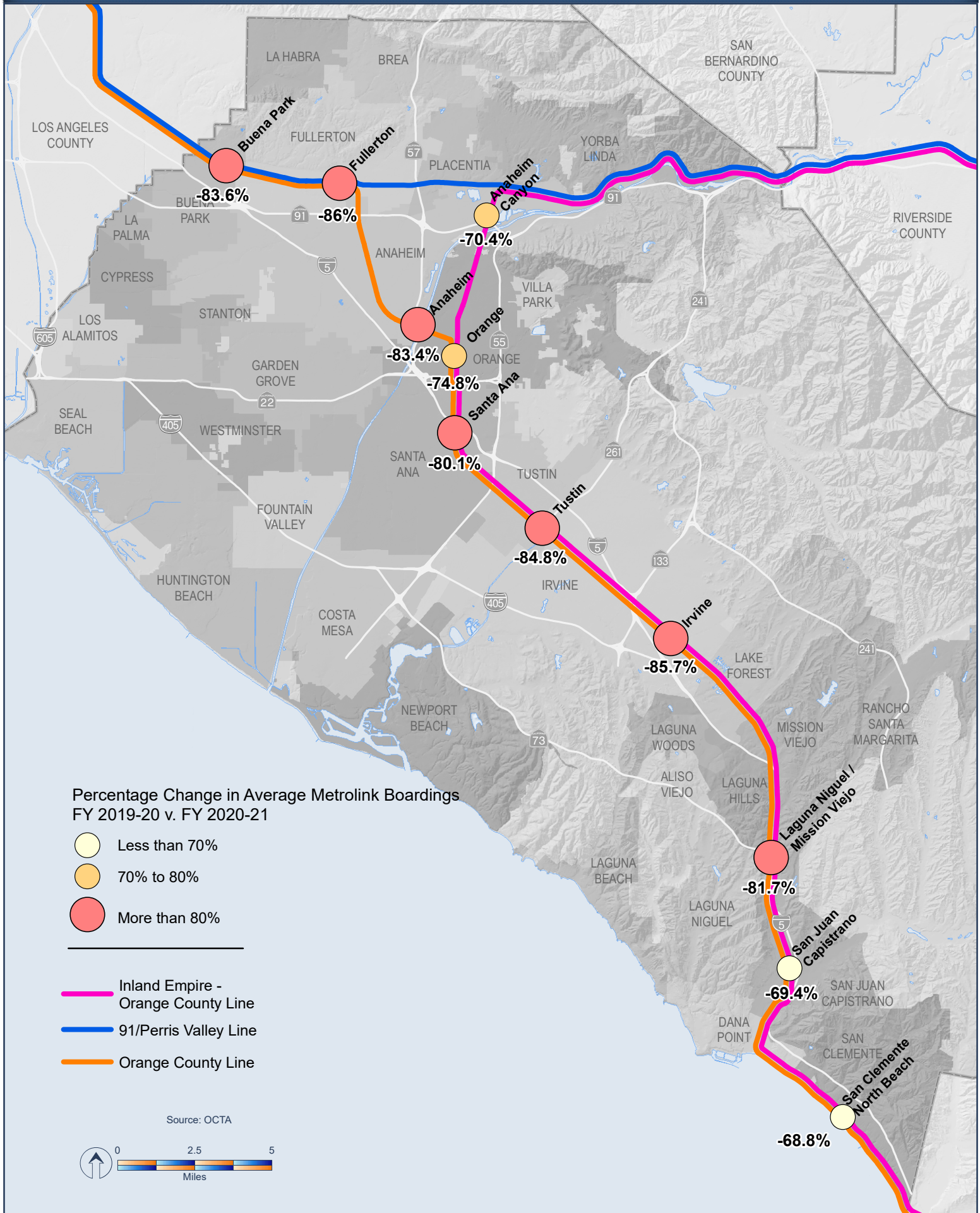


## On-Time Performance





# Percentage Change in Average Metrolink Boardings FY 2019-20 v. FY 2020-21







**September 9, 2021**

**To:** Transit Committee

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

**Subject:** Agreement for Compressed Natural Gas Fueling Facility Operation and Maintenance

### **Overview**

On May 10, 2021, the Board of Directors approved the release of a request for proposals for the operation and maintenance of compressed natural gas fueling facilities located at the Anaheim, Garden Grove, and Santa Ana bases. Proposals were received in accordance with the Orange County Transportation Authority procurement procedures for professional and technical services. Staff is requesting Board of Directors' approval to award an agreement for these services.

### **Recommendations**

- A. Approve the selection of Trillium USA Company, LLC, doing business as Trillium, as the firm to provide compressed natural gas fueling facility operation and maintenance.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-1-3317 between the Orange County Transportation Authority and Trillium USA Company, LLC, doing business as Trillium, in the amount of \$1,845,540, to provide compressed natural gas fueling facility operation and maintenance for a three-year initial term beginning December 1, 2021, with two, one-year option terms.

### **Discussion**

The Orange County Transportation Authority (OCTA) currently operates a fleet of 484 compressed natural gas (CNG)-powered buses in fixed-route service. In order to meet the daily fueling demand of these buses, each fixed-route base is equipped with a CNG fueling station. Natural gas is provided to OCTA's four fixed-route bases by Southern California Gas Company, where it is then



compressed and dispensed into high pressure tanks on board CNG buses. The CNG compression and dispensing equipment operation and maintenance (O&M) is provided under contract at each fixed-route base. OCTA is responsible for providing the natural gas, electrical power, and personnel (direct and contracted) for dispensing fuel into the buses. The fixed-route bases at the Anaheim, Garden Grove, and Santa Ana bases are contracted under one agreement, and the base at the Irvine Sand Canyon is contracted under a separate agreement. The procurement discussed herein is for the O&M of the CNG equipment at the Anaheim, Garden Grove, and Santa Ana fixed-route bases.

The scope of work for the O&M agreement requires the firm to furnish qualified personnel, parts, and materials sufficient to operate and maintain the CNG fueling stations in accordance with all federal, state, and local regulatory agencies, while providing capabilities to fuel the OCTA fleet per established specifications.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. In addition to cost, other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as qualifications, prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On May 10, 2021, the Board approved the evaluation criteria and weightings and authorized the release of Request for Proposals (RFP) 1-3317 to select a firm to provide CNG fueling facility O&M services. The RFP was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on May 12 and May 17, 2021. A pre-proposal conference was held on May 18, 2021, with six attendees representing two firms. A job walk was held on June 3, 2021, with five attendees representing two firms. Three addenda were issued to provide a copy of the pre-proposal and job walk sign-in sheets and respond to questions related to the RFP.

On June 28, 2021, two proposals were received. Both firms were responsive with the three percent Disadvantaged Business Enterprise goal. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Maintenance, Capital Programs, as well as Health Safety and Environmental Compliance departments met to review the submitted proposals.



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

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 30 percent |
| • Staffing and Project Organization | 15 percent |
| • Work Plan                         | 25 percent |
| • Cost and Price                    | 30 percent |

Several factors were considered in developing the criteria weights. A higher level of importance was assigned to the qualifications of the firm to emphasize the importance of the proposing firms' related experience in CNG fueling facility O&M services, with a proven history in successfully providing similar services. Staffing and project organization was assigned a 15 percent weighting to ensure the proposed staff is knowledgeable and experienced in preventative maintenance and other requested services. The work plan was weighted at 25 percent to ensure the proposing firms demonstrated understanding and approach to accomplish the work specified in the scope of work. Cost and price, weighted at 30 percent, was also a critical requirement for firms to demonstrate competitive pricing to carry out the required turn-key services.

On July 8, 2021, the evaluation committee reviewed both proposals based on the evaluation criteria. The firms are listed below in alphabetical order:

**Firm and Location**

Clean Energy (CE)  
Newport Beach, California

Trillium USA Company, LLC,  
doing business as Trillium (Trillium)  
Houston, Texas

On July 15, 2021, the evaluation committee interviewed the firms to assess their project understanding and approach to the scope of work. Each firm had an opportunity to present its qualifications, approach for accomplishing the requested services, and respond to evaluation committee questions. The evaluation committee asked specific clarifying questions related to each firm's proposal, including emergency response times and the logistics of responding to a widespread outage among all three fixed-route bases.



After considering information obtained through interviews, the evaluation committee made adjustments to preliminary scores. However, the ranking of the firms remained unchanged.

Based on the evaluation of written proposals, information obtained from interviews, as well as cost and price, it is recommended that Trillium be selected to provide CNG fueling facility O&M services at the Anaheim, Garden Grove, and Santa Ana bases.

#### Qualifications of the Firm

Both firms are established companies with experience in providing CNG fueling facility O&M services.

Trillium was founded in 1994 and is headquartered in Houston, Texas. The firm has been providing relevant O&M services for more than 27 years. Trillium has experience in fueling station operation, design and construction, as well as O&M services. Trillium designed and built OCTA's Anaheim, Garden Grove, and Santa Ana CNG fueling facilities and is currently maintaining the three stations. Some of Trillium's transit customers include Pennsylvania Department of Transportation, Riverside Transit Agency, North County Transit District, and Visalia Transit.

CE was founded in 1996 and is headquartered in Newport Beach, California. CE has experience in fueling station O&M, station design, engineering and construction, performing facility modifications, as well as supplying renewable fuel to customers. CE maintains and operates fueling facilities for transit properties across the nation including Los Angeles County Metropolitan Transportation Authority, Foothill Transit, Nassau Inter-County ExpressBus, and Washington Metropolitan Area Transportation Authority. CE is also the current contractor providing O&M services to OCTA's CNG fueling facility at the Irvine Sand Canyon base. During the interview, CE demonstrated experience with OCTA's CNG equipment, preventative maintenance requirements and both scheduled and unscheduled maintenance repair services.

Both firms received favorable references from customers where CE and Trillium have operated and maintained the facilities for more than ten years.

#### Staffing and Project Organization

Both CE and Trillium proposed experienced project teams with relevant experience in CNG fueling facility O&M services.



The team proposed by Trillium is highly experienced in the O&M of CNG facilities, including eight local mechanics that will be the primary response team for the three OCTA facilities, with six additional mechanics providing support, as needed. Trillium's project manager has over 21 years of experience building and operating fueling stations. Trillium proposed the same project team that is currently providing CNG facility O&M services at OCTA's Anaheim, Garden Grove and Santa Ana facilities. Trillium's project team provided detailed and complete responses to all questions asked during the interview.

CE proposed a team that has extensive experience in the O&M of CNG facilities. The project manager has over 23 years of management experience with O&M. In addition, there would be two technicians who would be dedicated to OCTA's facilities, with additional support from the rest of the technician team. Both proposed technicians are currently the on-call technicians servicing OCTA's Irvine Sand Canyon base. During the interview, CE's project team demonstrated knowledge in successfully providing CNG fueling facility O&M services to various transit agencies, including OCTA. In addition, the CE team demonstrated a high level of commitment to the success of this project and presented detailed responses to each question from the evaluation committee.

#### **Work Plan**

Trillium's work plan demonstrated a thorough approach to carry out and maintain high-level service standards at each facility. The work plan demonstrates an understanding of OCTA's requirements, including routine and scheduled maintenance, remote monitoring and support 24 hours per day, seven days per week, comprehensive station reporting, and parts availability on mechanics' vehicles who service the facilities. Trillium's remote monitoring and support team have the ability to access each facility remotely to assess the situation and dispatch a mechanic, if needed. Trillium also provides a website customized to OCTA's facilities, where OCTA can monitor how many vehicles have been fueled, the duration of fills, how many skids are running, and if there have been any alarms at the station. During the interview, Trillium was asked how the firm will respond in the event of a widespread outage covering multiple facilities. Trillium responded that all available staff is pulled in and one person would be placed at each facility to ensure bus rollout. The dedicated person would remain at the station even after bus pullout to ensure the station is back in normal operation. In a major emergency situation, technicians from other parts of the country would be pulled in as well.

CE demonstrated an understanding of the requested services specified in the RFP. CE's work plan outlines a station takeover plan to be implemented upon award, to assess facility operations, purchase spare parts, and ensure no lapse



in fueling or service. The work plan also presents an approach and understanding of OCTA's requirements, including proactive and scheduled maintenance, emergency maintenance and response, remote station monitoring, reporting and safety training of personnel, and local parts availability. CE's remote station monitoring center oversees real-time station status and performance 24 hours per day, seven days per week, and can detect any faults or alarms that may occur. The monitoring center has the ability to reset alarms quickly and dispatch technicians as necessary. CE also has weekly and monthly checklists to track maintenance as well as an online customer portal, where reports and invoices can be downloaded, and currently scheduled and completed maintenance can be viewed. During the interview, CE was asked how the firm will respond in the event of a widespread outage covering multiple facilities. CE responded that OCTA's generators and possibly portable generators would be utilized and there would be no issue with staff availability, as there are technicians around Orange and Los Angeles counties that can respond.

#### **Cost and Price**

Firms were asked to provide firm-fixed per therm cost based on various throughput ranges. The proposed per therm rate was scored based on using 200,000 therms per month, which is the actual monthly per station throughput average over the past two years. Pricing scores were based on a formula which assigned the higher score to the lower total pricing and scored the other proposal's total pricing based on the relation to the lower total pricing. While both firms demonstrated a thorough understanding of the project, Trillium proposed the lower per therm rates resulting in the lower total pricing.

<b>Firm</b>	<b>Initial Term Cost Per Therm Year One</b>	<b>Initial Term Cost Per Therm Year Two</b>	<b>Initial Term Cost Per Therm Year Three</b>	<b>Option Year One Cost Per Therm</b>	<b>Option Year Two Cost Per Therm</b>
Trillium	\$0.083	\$0.083	\$0.083	\$0.083	\$0.083
CE	\$0.102	\$0.105	\$0.107	\$0.110	\$0.113

Based on forecasting using factors such as service levels in OCTA's Comprehensive Business Plan, the average per base therm usage in fiscal years 2019 and 2020, as well as the proposed cost per therm pricing, OCTA is requesting \$1,845,540 to cover the anticipated costs for the initial term of the agreement.



**Procurement Summary**

Based on the evaluation of written proposals, the firms' qualifications, information obtained from the interviews, as well as cost and price, the evaluation committee recommends contract award to Trillium. The firm demonstrated a thorough understanding of OCTA's requirements for CNG fueling facility O&M and submitted a comprehensive proposal that is responsive to all requirements of the RFP.

**Fiscal Impact**

Funds for these services are included in OCTA's Fiscal Year 2021-22 Budget, Operations Division/Maintenance Department, accounts 2166-7611-D3103-F59 and 2166-7611-D3107-F59, which are partially funded with Federal Transit Administration Formula 5337, State of Good Repair Grants Program.

***Summary***

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-1-3317 with Trillium USA Company, LLC, doing business as Trillium, in the amount of \$1,845,540, to provide CNG fueling facility operation and maintenance, for a three-year initial term beginning December 1, 2021, with two, one-year option terms.



***Attachments***

- A. Review of Proposals RFP 1-3317, Compressed Natural Gas Fueling Facility Operations and Maintenance
- B. Proposal Evaluation Criteria Matrix, RFP 1-3317 Compressed Natural Gas Fueling Facility Operations and Maintenance
- C. Contract History for the Past Two Years, RFP 1-3317 Compressed Natural Gas Fueling Facility Operations and Maintenance

**Prepared by:**

**Approved by:**



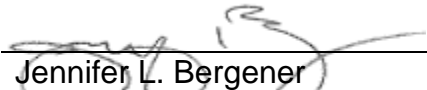
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Manager, Maintenance  
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**Review of Proposals RFP 1-3317**  
**Compressed Natural Gas Fueling Facility Operations and Maintenance**  
Presented to the Transit Committee - September 9, 2021  
**2 proposals were received, 2 firms were interviewed, 1 firm is being recommended.**

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Three-Year Initial Term
1	91	Trillium USA Company, LLC doing business as Trillium  Houston, Texas	Local Power Washers	Excellent qualifications and experience in compressed natural gas (CNG) facility operations and maintenance (O&M). Demonstrated a thorough understanding of the service requirements and commitment to success of the project. Strong project team with extensive experience. Presented a thorough work plan and emergency outage response. References provided excellent comments and feedback. Currently provides O&M services at Orange County Transportation Authority's (OCTA) Anaheim, Garden Grove and Santa Ana facilities. Provides OCTA access to remote monitoring website. Proposed lower pricing.	Estimated usage of 617,650.50 therms x 36 months at an avg cost of \$0.083/therm:  \$1,845,540
2	82	Clean Energy  Newport Beach, California	Mr. Detail	Very good overall proposal.  Excellent qualifications and experience in CNG facility O&M. Demonstrated a full comprehension of service and project requirements. Experienced project team. Currently provides O&M services at OCTA's Irvine Sand Canyon facility. Provided a good work plan and approach addressing all elements of the scope of work and transition plan. Proposed competitive price.	Estimated usage of 617,650.50 therms x 36 months at an avg cost of \$0.105/therm:  \$2,334,719

<u>Evaluation Panel:</u>	<u>Proposal Criteria</u>	<u>Weight Factors</u>
Contracts Administration and Materials Management (1)	Qualifications of the Firm	30%
Facilities Maintenance (1)	Staffing and Project Organization	15%
Health Safety and Environmental Compliance (1)	Work Plan	25%
Maintenance, Bus Operations (1)	Cost and Price	30%
Facilities Engineering (1)		



**PROPOSAL EVALUATION CRITERIA MATRIX**  
**RFP 1-3317 Compressed Natural Gas Fueling Facility Operations and Maintenance**

<b>FIRM: Trillium USA Company, LLC doing business as Trillium</b>						<b>Weights</b>	<b>Overall Score</b>
<b>Evaluator Number</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>		
Qualifications of Firm	4.0	4.5	4.5	4.0	4.5	6	25.8
Staffing/Project Organization	4.0	4.5	4.5	4.5	4.5	3	13.2
Work Plan	4.0	4.5	4.5	4.0	4.5	5	21.5
Cost and Price	5.0	5.0	5.0	5.0	5.0	6	30.0
<b>Overall Score</b>	<b>86.0</b>	<b>93.0</b>	<b>93.0</b>	<b>87.5</b>	<b>93.0</b>		<b>91</b>
<b>FIRM: Clean Energy</b>						<b>Weights</b>	<b>Overall Score</b>
<b>Evaluator Number</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>		
Qualifications of Firm	4.0	4.5	4.5	4.5	4.5	6	26.4
Staffing/Project Organization	4.0	4.0	4.0	4.5	4.0	3	12.3
Work Plan	4.0	4.0	4.0	3.5	4.0	5	19.5
Cost and Price	3.9	3.9	3.9	3.9	3.9	6	23.4
<b>Overall Score</b>	<b>79.4</b>	<b>82.4</b>	<b>82.4</b>	<b>81.4</b>	<b>82.4</b>		<b>82</b>



## CONTRACT HISTORY FOR THE PAST TWO YEARS

### RFP 1-3317 Compressed Natural Gas Fueling Facility Operations and Maintenance

Prime and Subcontractor	Contract No.	Description	Contract Start Date	Contract End Date	Subcontractor Amount	Total Contract Amount
<b>Clean Energy</b>  Contract Type: Time and Expense Subcontractor: Diana Prince Construction, Inc.						
	C71930	Agreement for CNG Facility Operation and Maintenance	March 1, 2018	February 28, 2022	\$40,000	\$ 677,160
<b>Sub Total</b>						<b>\$677,160</b>
<b>Trillium USA Company, LLC</b>  Contract Type: Time and Expense Subcontractors: Amtek Construction						
	C60890	Agreement for CNG Facility Operation and Maintenance	June 29, 2007	November 30, 2021		\$ 32,710,958
Contract Type: Time and Expense Subcontractors: Air Products	C71577	Agreement for Hydrogen Facility Operation and Maintenance	January 4, 2018	June 30, 2022		\$ 7,956,737
<b>Sub Total</b>						<b>\$40,667,695</b>





**September 9, 2021**

**To:** Transit Committee

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

**Subject:** Agreement for OC ACCESS Paratransit and OC Flex Microtransit Services

### **Overview**

The Orange County Transportation Authority requires the services of a firm to manage, operate, and maintain the OC ACCESS paratransit and the OC Flex microtransit services. A competitive procurement was conducted, and offers were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services.

### **Recommendations**

- A. Approve the selection of First Transit, Inc., as the firm to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2150 between the Orange County Transportation Authority and First Transit, Inc., in the amount of \$242,579,221, to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services for an initial four-year term commencing on January 1, 2022, with two, two-year option terms.

### **Discussion**

The Americans with Disabilities Act (ADA) requires agencies that operate fixed-route bus service to provide complementary paratransit service for individuals with disabilities who are unable to use the fixed-route system. To comply with the ADA, the Orange County Transportation Authority (OCTA) implemented the OC ACCESS service in 1993. OC ACCESS service is different



from traditional fixed-route service, requiring passengers to complete an in-person assessment to become eligible to ride, and requiring an advance reservation.

MV Transportation, Inc., (MV) has provided the administration, operation, and maintenance of OC ACCESS service since July 2013. The original agreement included an initial term of four years, with two, two-year option terms. The agreement was most recently amended to extend the term through December 31, 2021, to allow time for staff to evaluate the impact of the coronavirus (COVID-19) pandemic on the OC ACCESS service, to make appropriate adjustments to the scope of work and independent cost estimate to reflect changes in anticipated demand, and to refine the service delivery model to incorporate new work practices such as the use of personal protective equipment and updated vehicle cleaning protocols.

The original operating and maintenance agreement for the OC Flex on-demand microtransit service pilot program was awarded to Keolis Transit Services, LLC (Keolis) in 2018 for a one-year initial term with two, one-year option terms. In September 2019, the first option term was exercised, extending the agreement with Keolis through October 14, 2020. In May 2020, Keolis informed OCTA that it would cease all Orange County operations effective May 31, 2020, due to impacts from the COVID-19 pandemic. At that time, Keolis submitted a formal request to OCTA to utilize the assignment provision included in the agreement to assign all rights, title, interest, obligations, and liability under the agreement to MV, the existing provider of OC ACCESS service. Through mutual agreement and to minimize disruption to passengers, the operation and maintenance agreement for the OC Flex microtransit service was assigned from Keolis to MV for a one-year term effective June 1, 2020 through May 31, 2021. In November 2020, the OCTA Board of Directors (Board) approved a seven-month extension of this agreement through December 2021 to align the agreement with the OC ACCESS agreement and extend the pilot project, as the COVID-19 pandemic made it challenging to evaluate OC Flex performance and determine a path forward.

Aligning the OC ACCESS and OC Flex terms allowed staff to incorporate the two services into one agreement going forward to provide economies of scale and to ensure continuity of operations for OC Flex service until staff can further evaluate the applicability of microtransit service in Orange County and develop a more comprehensive service plan that complements the OC Bus service.

Under this agreement, the selected firm will be required to provide all management, operation, and maintenance to deliver service and manage a



dedicated fleet of OCTA-owned paratransit and microtransit vehicles. OCTA will provide the facility (base) and fuel for these services.

OC ACCESS service will continue to include a fixed- and variable-rate structure, in alignment with previous agreements; however, the variable rate has been changed to a per-trip rate for both dedicated and subcontracted services. In previous agreements, the variable compensation rate for OC ACCESS service was based on a per-revenue vehicle hour basis, and the OC ACCESS subcontracted service using taxi vehicles, was compensated on a per-revenue vehicle mile basis. The change to a flat per-trip rate was recommended following an OCTA staff and external consultant evaluation of paratransit service delivery models and contract structures of peer agencies. Moreover, the last 20 years of service provision under the ADA, many similar paratransit services have moved from revenue vehicle hour rates to per-trip rates, as services have matured, and demand has stabilized. It was found that this type of cost structure helped transportation agencies better project and manage service costs relative to anticipated demand. The rate modification will provide OCTA the opportunity to better control the growth of service versus cost over the term of the agreement, as well as improve the customer experience as the rate structure incentivizes the operator to implement the most efficient routing solution for requested trips. The OC Flex microtransit service will continue as a fixed- and per-revenue vehicle hour variable rate structure as service levels have not normalized, and it allows staff the opportunity to measure the productivity of the service against OC Bus more closely.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's Board-approved policies and procedures for professional and technical services. In addition to cost, many other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience performing similar projects, staffing and project organization, work plan, as well as cost and price.

On December 14, 2020, the Board approved the release of Request for Proposals (RFP) 0-2150, which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on December 14 and December 21, 2020, and a pre-proposal conference was held on January 6, 2021. Five addenda were issued to make available the pre-proposal conference registration sheets and presentation, as well as respond to questions and address administrative matters related to the RFP.



On March 8, 2021, seven proposals were received. A responsiveness evaluation was conducted on all proposals and two firms, All-Ways Transport LLC (All-Ways Transport) and National Transportation, Inc. (NTI), were found to be non-responsive for failure to demonstrate responsiveness to the five percent Disadvantaged Business Enterprise (DBE) goal required for consideration of award. All-Ways Transport and NTI were determined to be non-responsive for failing to document eligible commitments to DBE-certified firms sufficient to meet the five percent DBE contract goal at the time of proposal submission or by failing to provide documentation to support adequate good-faith efforts as required by the Federal Transit Administration, which provides funding for these services. As such, the proposals from All-Ways Transport and NTI were not included as part of the evaluation process.

An evaluation committee comprised of OCTA staff from the Contracts Administration and Materials Management, Paratransit Services, Financial Planning and Analysis, Scheduling and Bus Operations Support, and Maintenance departments, as well as a representative from the Los Angeles Access Services, met to review the remaining five proposals. The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 20 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan                         | 30 percent |
| • Cost and Price                    | 20 percent |

Qualifications of the firm was weighted at 20 percent to ensure the firm has prior experience providing similar services. Staffing and project organization was weighted at 30 percent to emphasize the importance that the firm's key personnel demonstrated relevant experience as they are critical to the successful operation of the OC ACCESS paratransit and OC Flex microtransit services. Work plan was weighted at 30 percent as the firm needed to demonstrate its technical approach to managing and operating specialized services. Cost and price was weighted at 20 percent to ensure OCTA receives competitive pricing.

On March 30, 2021, the evaluation committee reviewed the five proposals based on the evaluation criteria, and short-listed the three most qualified firms listed below in alphabetical order:



Firm and Location

First Transit, Inc. (First Transit)  
Cincinnati, Ohio

MV  
Dallas, Texas

Transdev Services, Inc. (Transdev)  
Lombard, Illinois

On April 14 and April 15, 2021, the evaluation committee conducted interviews with the three short-listed firms. The interviews consisted of a presentation to discuss the firms' qualifications and proposed team. In addition, the firms' key team members had an opportunity to present their qualifications and respond to evaluation committee questions. Questions were asked relative to the firms' approach to training staff, meeting on-time performance, addressing violations, managing subcontractors, reporting data, and improving OC Flex productivity. Furthermore, each firm was asked specific clarification questions related to their proposal. At the conclusion of the interviews, a request for a best and final offer (BAFO) was sent to the three short-listed firms to seek additional clarifications and final pricing.

After considering responses to the questions asked during the interviews, as well as information provided in the BAFO, the evaluation committee reviewed the preliminary ranking of the three firms and made adjustments to individual scores. As a result, First Transit remained as the top-ranked firm with the highest cumulative scores.

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

**Qualifications of the Firm**

The three short-listed firms demonstrated relevant prior experience and qualifications related to paratransit and microtransit services.

Founded in 1955, First Transit has over 65 years of transit operations, maintenance, and management experience and has provided paratransit services since 1985. The firm currently provides paratransit services for public transit agencies across the country, including the San Diego Metropolitan



Transportation System, San Mateo County Transit District, Pierce Transit, New Jersey Transit Corporation, Pace Paratransit Services, and Houston Metropolitan Transit Authority. First Transit has managed 22 successful transitions in the past two years, including at Visalia Transit and Transit Joint Powers Authority for Merced County. The firm also has experience with microtransit services as it operates microtransit services for Omnitrans. The proposed subcontractors on the project demonstrated experience within their respective fields. First Transit's references reported that they were satisfied with the firm's performance.

MV was founded in 1975 and has been managing and operating the OC ACCESS service since 2013 and assumed responsibility of the OC Flex microtransit service in 2020. The firm provides paratransit services for public transit agencies across the country, including the Los Angeles Access Services, King County Metro Paratransit Services, City of Phoenix, Valley Transportation Authority, and Access Lynx Central Florida Regional Transportation Authority. The proposed subcontractors on the project have experience within their respective fields. MV's references reported that they were satisfied with the firm's performance.

Transdev has been in business for over 100 years and provides paratransit services for public transit agencies across the country, including the Central Contra Costa Transit Authority County Connection, Denver Regional Transportation District, San Francisco Municipal Transportation Agency, Maryland Transit Administration, and Washington Metropolitan Area Transportation Authority. The two subcontractors proposed on the project have experience within their respective fields, and the proposal highlights Transdev's ability to provide the services outlined in the scope of work. Transdev's references reported that they were satisfied with the firm's performance; however, one reference provided adverse feedback regarding staffing and communication.

#### **Staffing and Project Organization**

All three short-listed firms proposed experienced key personnel with relevant expertise performing similar work.

First Transit proposed a strong project team with extensive experience managing paratransit services. The project manager has 20 years of transportation experience and previously served as assistant general manager of the OC ACCESS service from 2013 to 2019. The project manager is currently serving as general manager at First Transit's Omnitrans location overseeing all operations and maintenance, as well as safety, and is proposed to transfer to



OCTA's project on a full-time basis should the firm be awarded this contract. While the operations manager has eight years of transit operations management experience, the operations manager has managed a Transportation Network Company fleet of over 50 dedicated wheelchair accessible vehicles along with 200 non-dedicated vehicles in support of a paratransit service contract. The maintenance manager has more than 25 years of maintenance experience, and the safety manager has nearly 20 years of experience in safety and training. With 21 years of experience working with public transit operations across North America, the information technology manager has previously worked for Trapeze and brings extensive experience with the Trapeze software currently used for OC ACCESS service for scheduling, dispatch, and reservations. First Transit's proposal demonstrated how the project manager and key personnel will respond immediately to issues related to the service, as well as described the process by which it will recruit and retain staff, including a comprehensive wage and benefits package for all employees. Additionally, First Transit is proposing a director of quality assurance with over 24 years of paratransit experience, and the local team is supported by a strong regional management team. During the interview, the project team discussed their respective roles and demonstrated a comprehensive understanding of OCTA's requirements.

MV proposed a qualified project team with extensive expertise and experience managing paratransit services. With 25 years of experience, the project manager has been managing the OC ACCESS service since 2018 and previously served as assistant general manager for the Regional Transportation Commission of Southern Nevada's fixed-route service. The operations manager has 20 years of operations management experience and currently manages the day-to-day operations of the OC ACCESS service. The maintenance manager and safety manager each have over 16 years of experience, while the information technology manager has nearly 25 years of experience with the Trapeze software. MV described the process by which it will attract and retain staff; however, it only provided a management absentee coverage plan to demonstrate the ability of the project manager and key personnel to respond immediately to issues, which was not sufficient. During the interview, the project team discussed their respective roles and provided clear responses to the evaluation committee questions that demonstrated a comprehensive understanding of OCTA's requirements.

Transdev proposed experienced key personnel with extensive and relevant expertise performing similar work. The project manager has 25 years of paratransit experience including oversight of several large paratransit systems located in the cities of Las Vegas, San Diego, and Seattle. The project manager is currently serving as a division manager for Transdev's San Diego Metropolitan



Transit System location and was proposed to be fully dedicated to the project. The operations manager has more than 20 years of operations management experience and has worked alongside the project manager for nearly a decade. The maintenance manager has 17 years of maintenance experience, including nine years overseeing maintenance for a large paratransit fleet in Seattle. Additionally, the safety manager and information technology manager have extensive experience in their respective fields. Transdev described the process by which it will attract and retain staff and demonstrated the ability of the project manager and key personnel to respond immediately to issues, and a detailed explanation of the health and welfare benefits package that will be offered to employees was submitted. The local team is supported by an experienced regional management team. Transdev's interview supported the team's relevant experience, staffing, and project understanding as the team provided clear responses to the evaluation committee questions.

#### **Work Plan**

The work plans proposed by the three short-listed firms provided an approach to managing, operating, and maintaining the OC ACCESS paratransit and OC Flex microtransit services.

First Transit provided a comprehensive plan for service operations that addressed day-to-day operational considerations, personnel recruitment processes, and procedures for handling emergencies and unforeseen situations. Additionally, First Transit provided service enhancement recommendations, such as increasing on-time performance by adding supervisors to improve accountability, implementing operator incentives for attendance and performance, and utilizing new technological tools, such as the First Analytics system for advanced metrics and data to monitor service delivery in real-time and for planning into the future, streamline road supervisor observations and assistance of operators in the field, and customize training. For personnel training and testing, First Transit described how continuous training will be provided to drivers, call center personnel, mechanics, and other support staff through classroom training and online courses available through its First America University program. The firm also addressed its process for collecting and reporting operational and maintenance data, including the use of its proprietary Management Information Dashboard for increased reporting capabilities and real-time graphical information and operational data to allow the management team to monitor and ensure compliance of key performance indicators. Furthermore, the proposed transition plan identified key tasks and a detailed timeline that demonstrated First Transit's capability to complete service start-up activities in time to commence service operations on January 1, 2022. First Transit also included detailed plans for scheduling, safety, and vehicle and



facility maintenance plan, as well as a comprehensive subcontractor oversight program to ensure compliance with OCTA requirements for vehicle maintenance, in-field observations, and staff training. In addition, First Transit is dedicating additional road supervisors to the oversight of their subcontractor operations to ensure quality of service. For special issues or problems that are likely to be encountered during the project and how these would be addressed, First Transit provided a very thorough response that identified recovery from the COVID-19 pandemic, cleanup of the subscription database, staggering vehicle arrival times to minimize dwell time, and training staff on OCTA's transition from a revenue vehicle hour to a per-trip rate contract. During the interview, First Transit provided detailed and thorough responses to the evaluation committee questions. In addition, the firm adequately addressed community outreach and engagement with adult day centers, community programs, and senior centers returning to in-person services, as well as strategies to be implemented to ensure on-time performance metrics are met.

MV provided a comprehensive plan for service operations that addressed day-to-day operational considerations, personnel recruitment processes, and procedures for handling emergencies and unforeseen situations. For personnel training and testing, MV detailed its training programs for service delivery, including descriptions of training, hours, and testing requirements. The firm also addressed its process for collecting and reporting operational and maintenance data, as well as demonstrated its understanding of various daily data collection activities and reporting requirements. MV included detailed plans for scheduling, safety, and vehicle and facility maintenance, as well as a comprehensive subcontractor oversight program to ensure OCTA's requirements are met regarding vehicle maintenance, in-field observations, and staff training. For special issues or problems that are likely to be encountered during the project and how these would be addressed, MV only addressed recovery from the COVID-19 pandemic and no additional special issues or problems were identified by MV that could impact the services moving forward. During the interview, MV's responses to questions regarding the strategies they planned to use to build on staff's understanding of ADA paratransit service, as well as community outreach and engagement, lacked detail and specifics.

Transdev provided a comprehensive plan for service operations and placed emphasis on various technological tools to provide service enhancements. The firm addressed procedures for handling emergencies and unforeseen situations and detailed its training programs for service delivery, including descriptions of training, hours, and testing requirements. The firm also addressed its process for collecting and reporting operational and maintenance data, as well as demonstrated its understanding of various daily data collection activities and reporting requirements. Transdev included detailed plans for scheduling, safety,



and vehicle and facility maintenance; however, the subcontractor oversight program lacked detail on the plan to oversee the subcontractor vehicle fleet. The proposed transition plan identified key tasks and a detailed timeline that demonstrated Transdev's capability to complete service start-up activities in time to commence service operations on January 1, 2022. For special issues or problems that are likely to be encountered during the project and how these would be addressed, Transdev identified driver shortage, improved safety performance, focus on scheduling procedures, and recovery from the COVID-19 pandemic. During the interview, Transdev provided detailed responses to the evaluation committee questions; however, the firm's responses to questions about the subcontractor-proposed maintenance and vehicle storage plan did not address an adequate oversight program by Transdev to ensure quality of service.

#### **Cost and Price**

Cost was weighted at 20 percent of the overall score. The three firms submitted the detailed price proposals for the initial and option terms of the contract, as required by the terms of the RFP. However, contract award is being made for the price of the initial term only. Option terms will be presented to the Board at a future date.

While the three firms assumed a different number of trips, it is necessary to standardize the trip assumptions for all three firms to evaluate cost and price in a fair and consistent manner. As such, OCTA multiplied the cost per trip proposed by the three firms to a projected number of trips that OCTA assumed in the Comprehensive Business Plan to determine the total cost and price for each firm.

Scores were based on a formula that assigned the highest score to the firm with the lowest total price and scored the other proposals total price based on their relation to the lowest total price. The pricing received for the initial term was reviewed relative to the OCTA project manager's independent cost estimate (ICE) for the same term. Total price is summarized below:

<b>Firm</b>	<b>Initial Term</b>	<b>Option Term 1</b>	<b>Option Term 2</b>	<b>Total Price</b>
First Transit	\$242,579,221	\$139,288,693	\$153,100,618	\$534,968,532
MV	\$236,663,592	\$132,629,932	\$146,987,922	\$516,281,446
Transdev	\$276,791,080	\$159,552,130	\$175,745,719	\$612,088,929
OCTA ICE	\$215,038,673	\$119,624,745	\$128,096,574	\$462,759,992

While the price proposed by First Transit after the BAFO was \$5,915,629, or approximately 2.5 percent higher than MV's price for the initial term and



\$18,687,086, or approximately 3.6 percent higher than MV's price for the entire eight-year term, the firm's proposed staffing and approach to managing and operating the OC ACCESS and OC Flex services support the higher price. First Transit's proposed price for the initial term was approximately 12.8 percent above OCTA's ICE of \$215,038,673; however, it should be noted that all three firms submitted pricing that are higher than the ICE due to higher annual growth rates assumed by each of the firms when compared to the growth rates used to develop the ICE.

First Transit's proposed price is inclusive of all requirements of the RFP and considered fair and reasonable as it is approximately 2.5 percent higher than MV's price for the initial term and it is competitive based on the pricing received from all the firms.

#### Procurement Summary

Based on the evaluation of the written proposals, firm qualifications, as well as the information obtained from the interviews and BAFOs, the evaluation committee recommends the selection of First Transit as the top-ranked firm to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services. First Transit delivered a proposal and interview that were responsive to all the requirements of the RFP.

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

- First Transit's local team is highly qualified and supported by a strong regional management team.
- First Transit proposed an additional key staff position for the director of quality assurance with over 24 years of paratransit experience.
- First Transit proposed service enhancement recommendations, such as increasing on-time performance by adding new staff positions to improve accountability.
- First Transit emphasized utilizing new technological tools, such as the Management Information Dashboard for increased real-time reporting capabilities and the First Analytics system designed to assist with visualizing and translating historical performance data, assessing departmental performance, and giving managers and staff the opportunity to impact operations proactively throughout the day.
- First Transit highlighted strategies to be implemented to ensure performance metrics are met.



**Fiscal Impact**

Funds for this service are included in the OCTA Fiscal Year 2021-22 Budget, Operations Division, Paratransit Services Department, account nos. 2136-7311-D1208-8LA, 2136-7311-D1208-8LB, 2136-7312-D1208-AVH, 2136-7613-D1208-OGP, 2136-7831-A3227-RKK, 2135-7613-D2132-0GQ, 2149-7317-D2161-N97, and 2149-7317-A2362-N97, and will be funded through the Local Transportation Fund and federal funds.

***Summary***

Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2150 between the Orange County Transportation Authority and First Transit, Inc., in the amount of \$242,579,221, to provide OC ACCESS paratransit and the OC Flex microtransit services for an initial four-year term commencing on January 1, 2022, with two, two-year option terms.



***Attachments***

- A. Review of Proposals, RFP 0-2150 OC ACCESS Paratransit and OC Flex Microtransit Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms) – RFP 0-2150: OC ACCESS Paratransit and OC Flex Microtransit Services
- C. Contract History for the Past Two Years, RFP 0-2150 OC ACCESS Paratransit and OC Flex Microtransit Services

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**Review of Proposals**  
**RFP 0-2150 OC ACCESS Paratransit and OC Flex Microtransit Services**  
Presented to Transit Committee - August 12, 2021  
**7 proposals were received, 5 proposals were evaluated, 3 firms were interviewed, 1 firm is being recommended**

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Initial Term Price
1	84	<b>First Transit, Inc.</b> Cincinnati, Ohio	SMS Transportation Services, Inc. Global Paratransit, Inc. JCM & Associates, Inc./Blue Goose ISLA Tires, Inc. Butterfli, Inc. Primetime Shuttle, Inc.	Demonstrated relevant prior experience and qualifications. Has managed 22 successful transitions in the past two years. Proposed subcontractors have experience within their respective fields. Proposed project manager has 20 years of transportation experience and previously served as assistant general manager of the OC ACCESS service. Proposed experienced managers for all key positions, including operations, maintenance, safety, call center, information technology, driver trainer, customer relations, human resources, and accounting. Proposed a director of quality assurance with over 24 years of paratransit experience, and the local team is supported by a strong regional management team. Demonstrated a comprehensive understanding of the requirements included in the scope of work. Provided a comprehensive plan for service operations, training, data collection, transition, scheduling, safety, vehicle and facility maintenance, and subcontractor oversight program. Provided service enhancement recommendations, such as utilizing new technological tools (First Analytics, Management Information Dashboard). Identified various special issues or problems that are likely to be encountered during the project and how they would be addressed. Provided detailed and thorough responses to the evaluation committee's questions. Received positive responses from references. Proposed a competitive total price.	\$242,579,221
2	81	<b>MV Transportation, Inc.</b> Dallas Texas	Cabco Yellow, Inc. RideCo, Inc. AAMCOM Metro Towing, Inc. Regali, Inc. Jamison Professional Services, LLC	Demonstrated relevant prior experience and qualifications. Has been managing and operating the OC ACCESS service since 2013 and assumed responsibility of the OC Flex service in 2020. Proposed subcontractors have experience within their respective fields. Proposed project manager has 25 years of transportation experience and has been managing the OC ACCESS service since 2018. Proposed experienced managers for all key positions, including operations, maintenance, safety, call center, information technology, driver trainer, customer relations, human resources, and accounting. Demonstrated a comprehensive understanding of the requirements included in the scope of work. Provided a comprehensive plans for service operations, training, data collection, transition, scheduling, safety, vehicle and facility maintenance, and subcontractor oversight program. Identified only one special issue or problem that is likely to be encountered during the project and how it would be addressed. Responses to questions regarding the strategies it will pursue to build on staff's understanding of ADA paratransit service as well as community outreach and engagement lacked detail and specifics. Received positive responses from references. Proposed the lowest estimated total price.	\$236,663,592
3	79	<b>Transdev Services, Inc.</b> Lombard, Illinois	Big Star Transit, LLC SMS Transportation Services, Inc. JCM & Associates, Inc./Blue Goose	Demonstrated relevant prior experience and qualifications. Proposed subcontractors have extensive experience within their respective fields. Proposed project manager has 25 years of transportation experience. Proposed experienced managers for all key positions, including operations, maintenance, safety, call center, information technology, driver trainer, customer relations, human resources, and accounting. Demonstrated a comprehensive understanding of the requirements included in the scope of work. Provided a comprehensive plan for service operations, training, data collection, transition, scheduling, safety, vehicle and facility maintenance, but lacked a complete subcontractor oversight program. Provided service enhancement recommendations, such as utilizing new technological tools. Identified various special issues or problems that are likely to be encountered during the project and how they would be addressed. Responses to questions about their subcontractors' proposed maintenance and vehicle storage plan did not address an adequate oversight program. Received positive responses from all but one reference. Proposed a competitive total price.	\$276,791,080

**Evaluation Panel: (6 members)**

*Internal*

Contracts Administration and Materials Management (1)  
Paratransit Services (1)  
Financial Planning and Analysis (1)  
Schedule and Bus Operations Support (1)  
Contracted Services (1)

*External*

Los Angeles Access Services (1)

**Proposal Criteria**

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

**Weight Factors**

20%  
30%  
30%  
20%



**ATTACHMENT B**

**PROPOSAL EVALUATION CRITERIA MATRIX (Short-Listed Firms)**  
**RFP 0-2150: OC ACCESS Paratransit and OC Flex Microtransit Services**

First Transit, Inc.							Weights	Overall Score
Evaluator Number	1	2	3	4	5	6		
Qualifications of Firm	4.5	4.5	4.0	4.5	4.5	4.5	4	17.7
Staffing/Project Organization	4.0	4.0	3.5	3.5	4.0	4.0	6	23.0
Work Plan	4.0	4.0	4.0	4.0	4.0	4.0	6	24.0
Cost and Price	4.83	4.83	4.83	4.83	4.83	4.83	4	19.3
Overall Score	85.3	85.3	80.3	82.3	85.3	85.3		84

MV Transportation, Inc.							Weights	Overall Score
Evaluator Number	1	2	3	4	5	6		
Qualifications of Firm	4.5	4.5	4.5	4.5	4.5	4.5	4	18.0
Staffing/Project Organization	3.5	3.5	4.0	3.5	4.0	3.5	6	22.0
Work Plan	3.5	3.5	3.5	3.5	3.5	3.5	6	21.0
Cost and Price	5.00	5.00	5.00	5.00	5.00	5.00	4	20.0
Overall Score	80.0	80.0	83.0	80.0	83.0	80.0		81

Transdev Services, Inc.							Weights	Overall Score
Evaluator Number	1	2	3	4	5	6		
Qualifications of Firm	4.5	4.5	4.0	4.0	4.0	4.0	4	16.7
Staffing/Project Organization	4.0	4.0	4.0	4.0	4.0	4.5	6	24.5
Work Plan	3.5	3.5	3.5	3.5	3.5	3.0	6	20.5
Cost and Price	4.22	4.22	4.22	4.22	4.22	4.22	4	16.9
Overall Score	79.9	79.9	77.9	77.9	77.9	77.9		79

The scores for the two non-short-listed firms were 8 and 40.



**CONTRACT HISTORY FOR THE PAST TWO YEARS**  
**RFP 0-2150 OC ACCESS Paratransit and OC Flex Microtransit Services**

Prime and Subconsultants	Contract No.	Description	Contract Start Date	Contract End Date	Subconsultant Amount	Total Contract Amount
<b>First Transit, Inc.</b>						
Contract Type: Firm-Fixed Monthly and Variable Rate	C-4-1737	Contracted Fixed-Route Operation	July 1, 2015	June 10, 2023		\$ 315,856,805
Subconsultants:						
All Petro Resources					\$ 190,200.00	
First Fuel, Inc.					\$ 82,800.00	
J.C.M. Associates, Inc.					\$ -	
Lone Star Handicap Vans					\$ 72,000.00	
National Tour Integrated					\$ -	
REM Services, Inc.					\$ 918,247.00	
Strategic Tire Solutions, Inc.					\$ 16,800.00	
Contract Type: Firm-Fixed Price	C-0-2503	Bus Production Inspection Services	September 2, 2020	December 31, 2021	N/A	\$ 53,964
Subconsultants: None						
<b>Subtotal:</b>						<b>\$ 315,910,769</b>
<b>MV Transportation, Inc.</b>						
Contract Type: Revenue Vehicle Hour Rate	C-2-1865	OC ACCESS Paratransit Services	July 1, 2013	December 31, 2021		\$ 375,620,065
Subconsultants:						
Cabco Yellow, Inc.						
Contract Type: Revenue Vehicle Hour Rate	C-7-0252	OC Flex Microtransit Services	July 1, 2020	December 31, 2021		\$ 2,693,699
Subconsultants:						
Via Transportation, Inc.						
<b>Subtotal:</b>						<b>\$ 378,313,764</b>
<b>Transdev Services, Inc.</b>						
Contract Type: N/A	None	N/A	N/A	N/A	N/A	\$ -
Subconsultants: None						
<b>Subtotal:</b>						<b>\$ -</b>





**Agreement for OC ACCESS Paratransit  
and OC Flex Microtransit Services**





# BACKGROUND

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## OC ACCESS

**July 2013** – contract starts

**June 2017** – contract amended through June 2019

**September 2018** – contract amended through June 2021

**September 2020** – contract extended for additional six months, through December 2021

## OC Flex

**October 2018** – contract starts

**September 2019** – contract amended through October 2020

**May 2020** – contract amended through May 2021

**November 2020** – contract amended through December 2021, to align with the term of the OC ACCESS agreement





# PROCUREMENT PROCESS

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- The Board of Directors (Board) approved Request for Proposals (RFP) 0-2150 release on December 14, 2020
- A virtual pre-proposal meeting was held on January 6, 2021
- Seven proposals were received
- Evaluate proposals, interview firms, and requested Best and Final Offers from all firms
- Evaluation committee consisted of six members including internal and external participants





# SCOPE OF WORK ELEMENTS

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- **OC ACCESS Service**
  - Fixed cost and per-trip rate
  - Key staffing requirements and performance metrics
- **OC Flex Microtransit**
  - Fixed cost and per vehicle-revenue-hour rate
  - Ensures continuity of operations





## BOARD-APPROVED EVALUATION CRITERIA

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- Qualifications of the Firm 20 percent
- Staffing and Project Organization 30 percent
- Work Plan 30 percent
- Cost and Price 20 percent





## SHORT-LISTED-FIRMS

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- First Transit, Inc. (First Transit) – Cincinnati, Ohio
- MV Transportation, Inc. (MV) – Dallas, Texas
- Transdev Services, Inc. (Transdev) – Lombard, Illinois





# EVALUATION CRITERIA HIGHLIGHTS

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## **Qualifications of the Firm**

- All firms demonstrated the ability to operate and maintain the service as required.

## **Staffing/Project Management**

- First Transit and MV teams had extensive knowledge and experience working on OC ACCESS service.
- First Transit proposed more staff to perform contract and service delivery quality assurance.

## **Work Plan**

- All three firms provided a comprehensive work plan.
- First Transit proposed the addition of technological tools to provide service enhancements and identified risks and strategies related to the current operating environment.

## **Cost and Price**

- Thorough analysis was conducted on all cost proposals.





## EVALUATION SCORING SUMMARY

EVALUATION CRITERIA	FIRST TRANSIT	MV	TRANSDEV
Qualifications of the Firm	17.7	18.0	16.7
Staffing and Project Organization	23.0	22.0	24.5
Work Plan	24.0	21.0	20.5
<i>Subtotal</i>	<i>64.7</i>	<i>61.0</i>	<i>61.7</i>
Cost and Price	19.3	20	16.9
<b>Grand Total</b>	<b>84.0</b>	<b>81.0</b>	<b>78.6</b>





## CONTRACT COST ELEMENTS

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- OC ACCESS Fixed Cost – approximately 4 percent
- OC ACCESS Variable Cost – approximately 93 percent
- OC Flex Fixed and Variable Cost – approximately 3 percent



## VARIABLE COST PER TRIP

FIRM	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8
First Transit	\$ 39.22	\$ 40.89	\$ 42.26	\$ 43.63	\$ 45.32	\$ 46.99	\$ 48.75	\$ 50.42
MV	\$ 40.25	\$ 40.54	\$ 41.23	\$ 42.24	\$ 43.63	\$ 44.77	\$ 47.04	\$ 48.89
Transdev	\$ 45.34	\$ 47.06	\$ 48.60	\$ 50.17	\$ 51.93	\$ 54.20	\$ 56.09	\$ 58.07





## OVERVIEW OF COST

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FIRM	FOUR-YEAR INITIAL TERM	FOUR-YEAR COST DIFFERENCE	EIGHT-YEAR CONTRACT	EIGHT-YEAR COST DIFFERENCE
MV	\$236,663,592		\$516,281,446	
First Transit	\$242,579,221	\$5,915,629	\$534,968,532	\$18,867,096
Transdev	\$276,791,080	\$40,127,488	\$612,088,929	\$95,807,483





## EVALUATION COMMITTEE RECOMMENDATION: FIRST TRANSIT

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- Local team is highly qualified and supported by a strong regional management team
- Proposed an additional key staff position for the director of quality assurance with over 24 years of paratransit experience
- Proposed service enhancement recommendations
- Emphasized utilizing new technological tools for increase real-time reporting capabilities and to assist with visualizing and translating historical performance data, assess performance, and give managers and staff the opportunity to impact operations proactively throughout the day
- Highlighted strategies to be implemented to ensure performance metrics are met





## STAFF RECOMMENDATION

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- Approve the selection of First Transit, Inc., as the firm to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services
- Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2150 between the Orange County Transportation Authority and First Transit, Inc., in the amount of \$242,579,221, to provide the management, operations, and maintenance of the OC ACCESS paratransit and OC Flex microtransit services for an initial four-year term commencing on January 1, 2022, with two, two-year option terms





## NEXT STEPS

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- Finalize contract and issue notice to proceed
- Meet with the selected firm, review transition schedule, determine milestones, and schedule regular transition meetings
- Coordinate meeting with the selected firm and the current service provider
- Implement a communication strategy regarding the transition of service provider for OC ACCESS riders and programs that rely on OC ACCESS for program attendees



# OC Bus and OC ACCESS Services Update



- **Ridership**
  - Average weekday boardings and productivity as measured by boardings per revenue vehicle hour
- **On-Time Performance**
  - Measuring service quality as impacted by the coronavirus (COVID-19) pandemic
- **Customer Comments**
  - Trends, feedback, and issues reported



# OC BUS RIDERSHIP AND PRODUCTIVITY

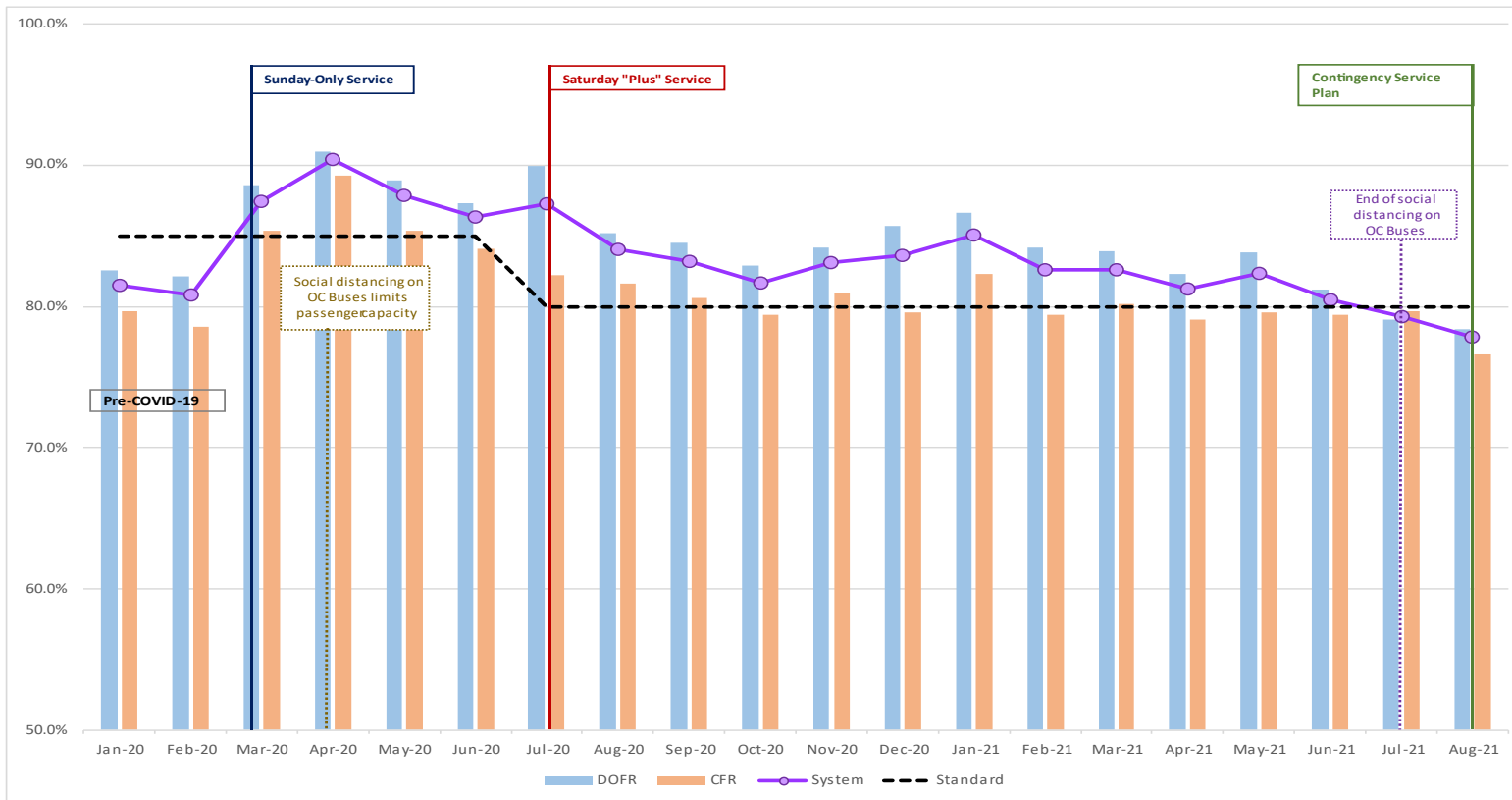
(AVERAGE WEEKDAY)





# OC BUS ON-TIME PERFORMANCE

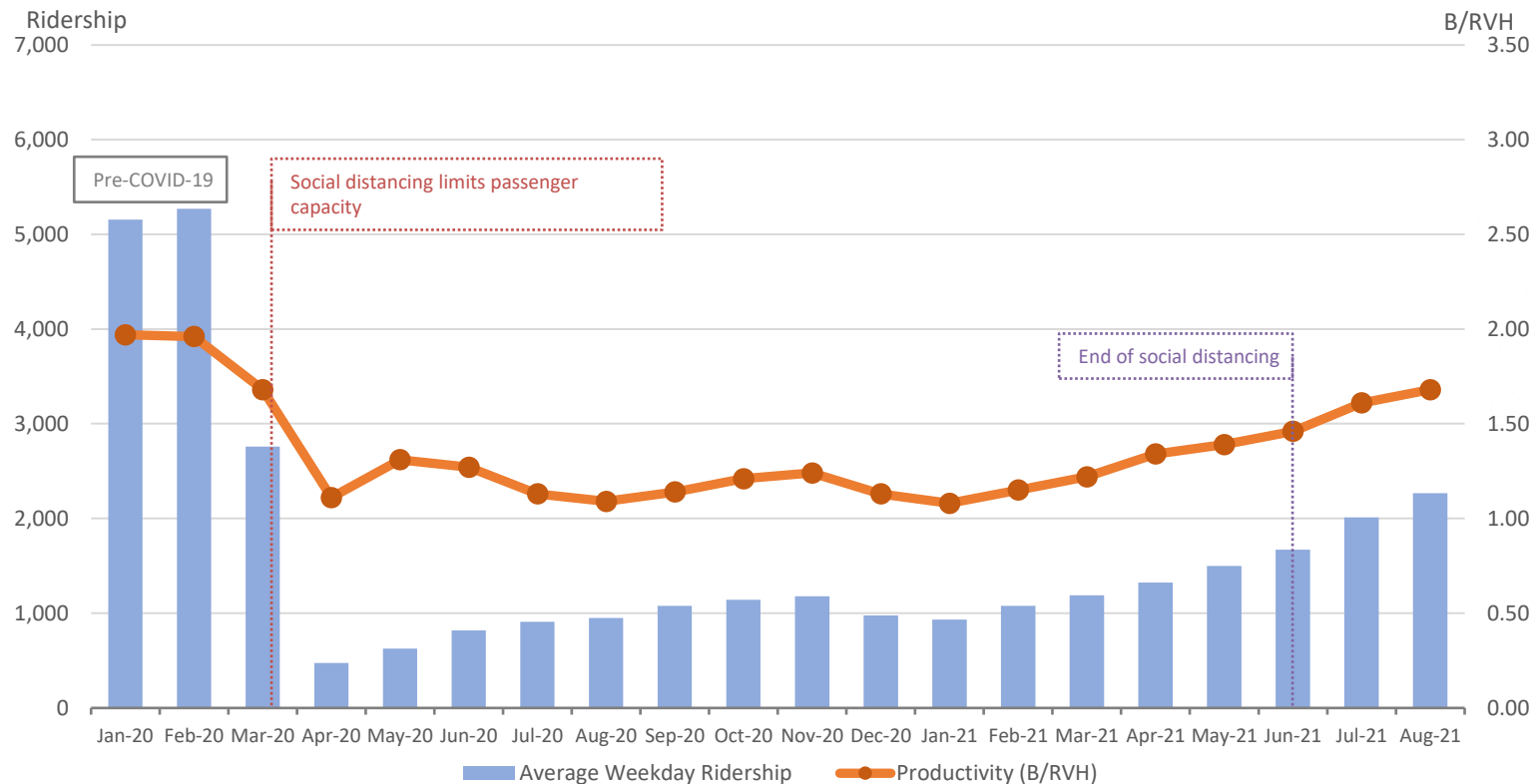
(AVERAGE WEEKDAY)





# OC ACCESS RIDERSHIP AND PRODUCTIVITY

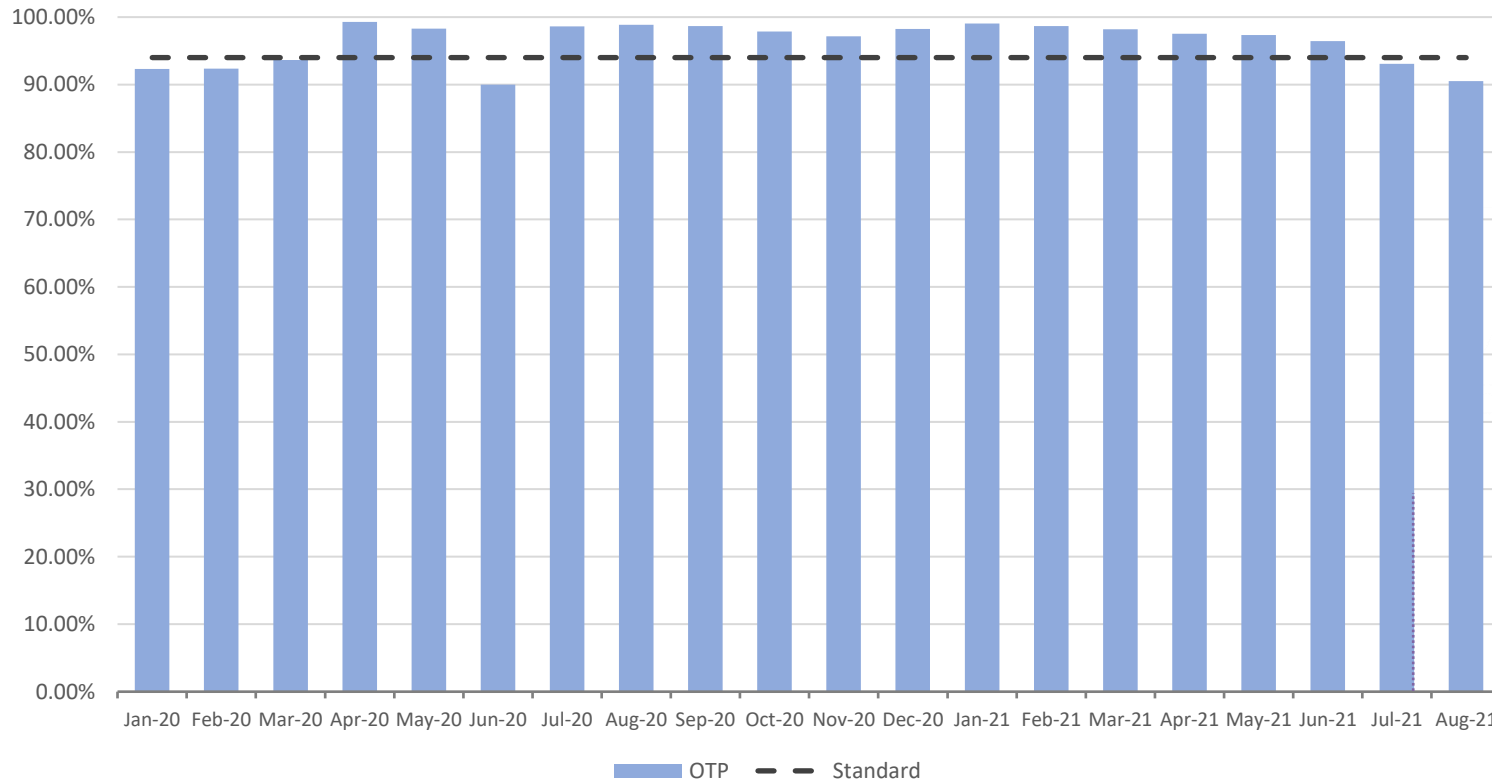
(AVERAGE WEEKDAY)





# OC ACCESS ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)



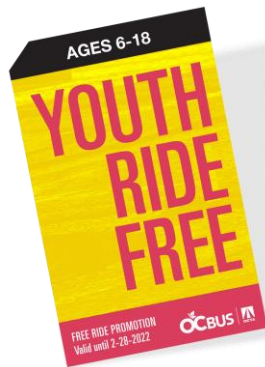


# CUSTOMER COMMUNICATION AND FEEDBACK

## COVID-19 Safety Measures

### Safety/Customer Communications

The OC Bus Comeback Campaign continues to reinforce ongoing safety messages. As part of the campaign, the Welcome Pass, College Pass, and Youth Ride Free programs were initiated last month. August Service Change customer communications also supported rider safety messages.



## Customer Comments

### Bus Pass-bys

- Complaints on pass-bys decreased to an average of three complaints per week in August compared to four complaints per week in July.

### Overcrowding

- Passenger overcrowding complaints decreased slightly to an average of 0.75 complaints per week in August compared to 1.25 complaints per week in July.





## NEXT STEPS

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- Continue to track service performance and COVID-19 impacts
  - Ridership impacts of schools and marketing campaigns
  - On-time performance impacts due to increased ridership, traffic, and construction detours
- Upcoming service changes
  - October 10, 2021 – Regular service change (address any on-time performance, ridership trends as necessary)