

2024 CTFP Guidelines (Project V) – Proposed Changes List				
No.	Chapter	Section	Page No.	Proposed Change
1	NA	Table of Contents	ii	Update to 2024 Project V Call for Projects
2	6	Program Revisions	6-1	Delete Program Revisions as the information is outdated. Information is incorporated into the Project Requirements section.
3	6	Overview	6-1	Clarify that Project V services cannot duplicate or compete with existing OC Bus services or other existing services.
4	6	General Program Objectives	6-1 to 6-2	Minor updates to objectives to emphasize financial sustainability and reliable and viable transit services.
	6	Eligible Service Categories	6-2	Establish definitions by specifying traditional Project V transit services and on-demand (mobility) services. Include footnotes describing on-demand service design.
5	6	Call Objective Priorities	6-3	Update call year and order objective priorities. Many objectives have been carried out such as continue to fund existing services, support new services, and allow for on-demand. Add new priorities to support expansion of existing services. Other call priorities are administrative objectives and include: consolidate continuing services into one grant and require competitive procurement.
6	6	Call for Projects	6-3	Remove outdated minimum performance standards. Updated footnote on performance to a cost of less than twice the per boarding subsidy consistent with January 25, 2021, Board action.
7	6	Call for Projects	6-3	Remove approximate funding allocated for the call. Funding information provided in the staff report to the Board for call issuance with up-to-date sales tax forecasts.
8	6	Applications	6-4	Updated application submittal contact information to Adrian Salazar, lead contact, for the 2024 call.
9	6	Applications	6-3	Decrease required hardcopy submittal from three (3) to one (1)
10	6	Application Process	6-3 to 6-4	Simplify application process section as many details are included in scoring criteria below (e.g., remove details for proposed and/or ongoing service and operations plan).
11	6	Application Process	6-4	Clarification requirement to demonstrate support of proposed Project V service(s) with other existing services.
12	6	Application Process	6-4 to 6-5	Include request to merge existing and or new grants, include a multi-year corresponding financial plan by year that shows the total combined revenues, expenditures, and revenue vehicle service hours by year.

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13	6	Application Guidelines	6-5	Ensure that all the required information listed under “application process” is included. Key elements must be clearly and concisely presented to enable timely and accurate assessment of applications.
14	6	Application Guidelines	6-6	Include statement that financial details must also include user fare subsidy paid by the City and intended for reimbursement through Project V.
15	6	Scoring Criteria	6-6	Update scoring criteria to include estimated capital, initial marketing, and continuing O&M costs; projected daily boardings with projection methodology fully presented; community outreach supporting the proposed service; and agency experience deploying comparable services.
16	6	Scoring Criteria	6-6 to 6-7	Updated operations plan section to include geocoded service area, projected annual revenue vehicle hours, ride hailing or ride request process; and ADA accommodations or comparable alternative.
17	6	Other Application Materials/Council Resolution	6-7	Clarified resolutions must include the estimated amount of matching funds to be provided by the agency.
		Other Application Materials	6-7	For operations plan expanded on required technical data needed for application including draft timetables, begin/end dates, vehicle specifications, vehicle maintenance plan, projected annual revenue vehicle hours, etc.
18	6	Other Application Materials	6-8	Add statement that OCTA is available to provide guidance upon request.
19	6	Application Review and Program Adoption	6-8	Update call year and call schedule as follows: <ul style="list-style-type: none"> • Board authorization to issue call: November 13, 2023 • Application submittal deadline: January 25, 2024 at 5:00 PM PST • Final adopted resolution (or minute action) deadline: Thursday, February 15, 2024 • Transit Committee/Board approval: spring 2024
20	6	Funding Information	6-9	State that FY 25 annual max funding for traditional Project V services is \$592,000 and \$296,000 for on-demand services to increase annually in accordance with Table 6-1. Local match for traditional Project V services is 10% and 50% for on-demand services. Add footnote to state annual maximums determined by reported costs per RVH form FY 22-23.

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21	6	Project Participation Categories – Planning for New Service	6-10	Removed planning for new service as available option for 2024 call in order to prioritize funding continuation and expansion of existing Project V services. May consider planning studies in a future call, contingent upon future cash flow assumptions.
22	6	Project Participation Categories – Capital	6-10	Specify bus/vehicle leases/purchases apply to Traditional Project V transit or micro transit service. Include major revenue service vehicle maintenance and repairs and service vehicle wraps as eligible items.
23	6	Project Participation Categories – Initial/Start-up Marketing Costs	6-11	Include print copy, digital artwork and identity creation as eligible items. Increase funding cap from \$50k to \$80k. Specify that OCTA will provide M2 (OC Go) logos for all traditional Project V and micro transit services, as needed.
24	6	Project Participation Categories – Operations and Maintenance	6-11 to 6-12	Clarification of eligible items. Removal of existing OCTA-led services and other flexible and innovative transit services as eligible item due to updated allowance of on-demand services stated in Call Objective Priorities section above. Include ongoing vehicle maintenance as eligible item. Add clarification on parking leases to be reimbursed according to proportional facility usage for Project V services. Increase reimbursement for regular and ongoing marketing efforts from \$15K to \$25K. Reiterate agencies using contracted service provide are required to competitively procure.
23	6	Project Participation Categories – O&M	6-12 to 6-13	Include additional information for O&M and on-demand services. On-demand information includes parameters for service design. Reiterate agencies using contracted service provider are required to competitively procure.
26	6	Ineligible Categories	6-13	Update of ineligible categories including. Micro mobility services (e.g., shared bicycle, scooters) are ineligible. New expansion of existing fixed-route services is eligible for the 2024 call, thus statement removed from the ineligible category.
27	6	Project Requirements	6-14	Removed planning for new service as available option for 2024 call in order to prioritize funding continuation and expansion of existing Project V services. May consider planning studies in a future call, contingent upon future cash flow assumptions.
28	6	Project Requirements – O&M	6-14 to 6-15	Include updated cost per boarding and match rate percentages.
29	6	Project Requirements – O&M	6-15	Include minimum performance standard language.

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30	6	Project Requirements – O&M	6-16	Include statement that OCTA will work with agencies to establish appropriate OTP and CS performance requirements.
31	6	Project Requirements – O&M	6-16	Clarification that monthly O&M costs and performance data submitted quarterly is anticipated to be provided to the OCTA Transit Committee on a semi-annual basis.
32	6	Project Requirements – O&M	6-16	Remove outdated minimum performance standards. Updated performance to a cost of less than twice the per boarding subsidy consistent with January 25, 2021, Board action.
33	6	Project Requirements – O&M	6-16	Clarify that OC ACCESS will be provided for Project V services in OCTA paratransit services areas. For Project V services that are not within OC ACCESS service area and for on-demand and ride-hailing services, the local agency will be required to provide ADA comparable services and include cost for service or a funding plan as part of the project application.
34	6	Project Requirements – O&M	6-17	Agencies receiving Project V funds are required to provide scheduling information in required format for GTFS.
35	6	Project Requirements – O&M	6-17	Ongoing or continuing services must re-bid through competitive procurement as soon as the current term expires or by June 30, 2026, whichever is earlier.
36	6	Agency Match Requirements	6-17	Include requirement that a minimum match of 50 percent is required for new on-demand services. Include excess match incentives for O&M for traditional Project V and on-demand services in addition to excess capital match incentives.
37	6	Agency Match Requirements	6-17	Updated cost per boarding subsidy consistent with January 25, 2021, Board action.
38	6	Eligibility Requirements	6-18	Update requirement for including information on ADA service.
39	6	Eligibility Requirements	6-19	Include requirement that vehicle types must have appropriate specifications and safety equipment for service type and anticipated passenger loads.
40	6	Eligibility Requirements	6-19	Include statement that project must demonstrate competitive procurement as noted under O&M in the Project Requirements section.
41	6	Reimbursements	6-19	Clarify that invoice and accompanying expense reports to be uploaded to OC Fund tracker. Update cost per boarding subsidy. Include 50 percent match for on-demand services.
42	6	Calculation of Payment	6-19 to 6-20	Update calculation of payment example with revised subsidy rate.

2024 CTFP Guidelines (Project V) – Proposed Changes List

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43	6	Project Cancellation	6-20	Clarify that projects deemed infeasible during the planning or implementation process will be cancelled and further expenditures will be prohibited except where necessitated to bring the current phase to a logical conclusion.
44	6	Project V Branding	6-20 to 6-21	Clarify that OC Go decals are used for fixed-route, community shuttles, seasonal services, and regular micro transit. Update M2 OC Go logo to incorporate OCTA logo. Clarify that OC Go logo is not intended to overpower local agency branding but to ensure transparency regarding local sales tax measure expenditures.
45	6	Table 6-2 Scoring Criteria	6-22	Added breakdown of scoring criteria for 2024 call, includes points possible and percentage distribution.
46	6	Exhibit 6-1 Point Breakdown & Application Checklist	6-25	Removed application breakdown and included a link to the OCTA Project V website where information will be posted. Currently being updated by staff and will be posted following call issuance.
47	6	Exhibit 6-2 Sample Resolution	6-27	Removed application breakdown and included a link to the OCTA Project V website where information will be posted. Currently being updated by staff and will be posted following call issuance.

Acronyms

ADA – Americans with Disabilities Act
 Board - Board of Directors
 CS - Customer Satisfaction
 CTFP - Comprehensive Transportation Funding Programs
 GTFS - General Transit Feed Specification
 M2 – Measure M2
 O&M - Operations and Maintenance
 OC – Orange County
 OCTA – Orange County Transportation Authority
 OTP - On Time Performance
 Project V - Community-Based Transit Circulators Program

Terms

Micro Transit
 Fixed Route
 Shared Ride-Hailing Service