



# Orange County Transportation Authority

## Transit Committee Agenda

Thursday, January 12, 2023 at 9:00 a.m.

Board Room, 550 South Main Street, Orange, California

### Committee Members

Steve Jones, Chairman

Tam Nguyen, Vice Chairman

Andrew Do

Patrick Harper

Fred Jung

Vicente Sarmiento

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the Orange County Transportation Authority (OCTA) Clerk of the Board's office at (714) 560-5676, no less than two business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.

### Agenda Descriptions

Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

### Public Availability of Agenda Materials

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

### Meeting Access and Public Comments on Agenda Items

Members of the public can either attend in-person or listen to audio live streaming of the Board and Committee meetings by clicking the link below:

<https://octa.legistar.com/Calendar.aspx>

Members of the public may address the Committee regarding any item two ways:

#### In-Person Comment

Members of the public may attend in-person and address the Board regarding any item. Please complete a speaker's card and submit it to the Clerk of the Board or notify the Clerk of the Board the item number on which you wish to speak. Speakers will be recognized by the Chairman at the time the agenda item is to be considered. A speaker's comments shall be limited to three minutes.

# TRANSIT COMMITTEE MEETING AGENDA

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## **Written Comment**

Written public comments may also be submitted by emailing them to ClerkOffice@octa.net, and must be sent by 5:00 p.m. the day prior to the meeting. If you wish to comment on a specific agenda item, please identify the item number in your email. All public comments that are timely received will be part of the public record and distributed to the Board. Public comments will be made available to the public upon request.

## **Call to Order**

## **Pledge of Allegiance**

Director Do

## **Special Calendar**

There are no Special Calendar matters.

## **Consent Calendar (Items 1 through 4)**

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

### **1. Approval of Minutes**

#### ***Recommendation***

Approve the minutes of the December 8, 2022 Transit Committee meeting.

### **2. Amendment to Agreement for Schedule Checking Services**

Jeffrey N. Tatro/Johnny Dunning, Jr.

#### ***Overview***

On January 14, 2019, the Board of Directors approved an agreement with National Data and Surveying Services, Inc., doing business as Southland Car Counters, to perform manual observation and collection of bus ridership and performance information for fixed-route services, referred to in the transit industry as schedule checking. This agreement has an initial term of three years and includes two, one-year option terms. The first option term expires January 31, 2023.

#### ***Recommendation***

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-8-1850 between the Orange County Transportation Authority and National Data and Surveying Services, Inc., doing business as Southland Car Counters, to exercise the second option term of the agreement, in the amount of \$164,212, to continue providing manual observation and collection of bus ridership and performance information for fixed-route services, referred to as schedule checking activities. This will increase the maximum obligation of the agreement to a total contract value of \$929,353.

## TRANSIT COMMITTEE MEETING AGENDA

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### 3. **Bus Operations Performance Measurements Report for the First Quarter of Fiscal Year 2022-23**

Kim Tucker/Johnny Dunning, Jr.

#### ***Overview***

The Orange County Transportation Authority operates fixed-route bus and demand-response paratransit service throughout Orange County and into neighboring counties. The established measures of performance for these services assess the safety, courtesy, reliability, and overall quality of the services. This report summarizes the performance of these services through the first quarter of fiscal year 2022-23.

#### ***Recommendation***

Receive and file as an information item.

### 4. **Measure M2 Community-Based Transit Circulators Program Project V Ridership Report**

Adrian Salazar/Kia Mortazavi

#### ***Overview***

Measure M2 includes a program to fund community-based transit circulators known as Project V. The goal of the program is to provide local transit services in areas not well-served by regional transit services. Funding is awarded to local jurisdictions through a competitive call for projects. Local jurisdictions then implement the awarded services and commit to meeting minimum performance standards including ridership metrics. The ridership information for these awarded services is presented to the Board of Directors twice annually. The ridership report from April 2022 through September 2022 is presented herein.

#### ***Recommendation***

Receive and file as an information item.

## **Regular Calendar**

### 5. **OC Streetcar Project Quarterly Update**

Ross Lew/James G. Beil

#### ***Overview***

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar project activities from October 2022 through December 2022.

#### ***Recommendation***

Receive and file as an information item.

## TRANSIT COMMITTEE MEETING AGENDA

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### Discussion Items

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

Kim Tucker/Johnny Dunning, Jr.

***Overview***

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

**7. Public Comments**

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

**9. Committee Members' Reports**

**10. Closed Session**

There are no Closed Session items scheduled.

**11. Adjournment**

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

**9:00 a.m. on Thursday, February 9, 2023**

OCTA Headquarters

Board Room

550 South Main Street

Orange, California





**Committee Members Present**

Steve Jones, Chairman  
Tam Nguyen, Vice Chairman  
Andrew Do  
Patrick Harper  
Fred Jung  
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  
Sahara Meisenheimer, Clerk of the Board Specialist  
Aaron Delgado, Employee Rotation Program  
James Donich, General Counsel  
OCTA Staff

**Committee Members Absent**

None

**Call to Order**

The December 8, 2022, regular meeting of the Transit Committee was called to order by Committee Chairman Jones at 9:03 a.m.

**Consent Calendar (Items 1 through 5)**

**1. Approval of Minutes**

A motion was made by Director Sarmiento, seconded by Director Do, and declared passed by those present to approve the minutes of the November 10, 2022 Transit Committee meeting.

**2. Approval of Minutes**

A motion was made by Director Sarmiento, seconded by Director Do, and declared passed by those present to approve the minutes of the October 13, 2022 Transit Committee meeting.

**3. Agreement for installation of Battery-Electric Bus Chargers at Garden Grove Bus Base**

A motion was made by Director Sarmiento, seconded by Director Do, and declared passed by those present, to authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-2853 between the Orange County Transportation Authority and Elegant Construction Inc., the lowest responsive, responsible bidder, in the amount of \$260,000, for the installation of battery-electric bus chargers at the Garden Grove Bus Base.

**4. Amendment to Agreement for On-Call Materials Testing and Inspection Services for Facilities Projects**

A motion was made by Director Sarmiento, seconded by Director Do, and declared passed by those present to authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-9-1356 between the Orange County Transportation Authority and Ninyo & Moore Geotechnical & Environmental Science Consultants, to exercise the two-year option term for continued on-call materials testing and inspection services for facilities projects, in the amount of \$331,420, and extend the term of the agreement through December 31, 2024. This will increase the maximum obligation of the agreement to a total contract value of \$861,885.

**5. February 2023 Bus Service Change**

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

**Regular Calendar****6. Zero-Emission Bus Pilot Update**

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

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

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

Kim Tucker, Department Manager, Scheduling and Bus Operations Support, and Ryan Maloney, Section Manager, Marketing and Customer Service, provided a presentation on this item.

Following the presentation, no action was taken on this item.

**8. Public Comments**

No public comments were received.

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

Darrell E. Johnson, Chief Executive Officer, reported on the following:

- Annual Stuff-a-Bus event
- Free bus service on New Year's Eve



**10. Committee Members' Reports**

There were no Committee Member's reports.

**11. Closed Session**

A Closed Session was not scheduled for this meeting.

**12. Adjournment**

The meeting adjourned at 9:53 a.m.

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

**9:00 a.m. on Thursday, January 12, 2023**

OCTA Headquarters

550 South Main Street

Orange, California.

ATTEST:

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Allison Cheshire  
Clerk of the Board Specialist, Senior



**January 12, 2023**

**To:** Transit Committee

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

**Subject:** Amendment to Agreement for Schedule Checking Services

**Overview**

On January 14, 2019, the Board of Directors approved an agreement with National Data and Surveying Services, Inc., doing business as Southland Car Counters, to perform manual observation and collection of bus ridership and performance information for fixed-route services, referred to in the transit industry as schedule checking. This agreement has an initial term of three years and includes two, one-year option terms. The first option term expires January 31, 2023.

**Recommendation**

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-8-1850 between the Orange County Transportation Authority and National Data and Surveying Services, Inc., doing business as Southland Car Counters, to exercise the second option term of the agreement, in the amount of \$164,212, to continue providing manual observation and collection of bus ridership and performance information for fixed-route services, referred to as schedule checking activities. This will increase the maximum obligation of the agreement to a total contract value of \$929,353.

**Discussion**

On January 14, 2019, the Orange County Transportation Authority's (OCTA) Board of Directors (Board) approved the selection of National Data and Surveying Services, Inc., doing business as Southland Car Counters, to perform manual observation and collection of bus ridership and performance information for fixed-route services, referred to in the transit industry as schedule checking.

One of the primary functions of the contract schedule checkers is to perform Federal Transit Administration (FTA)-required manual ridership tabulation to certify OCTA's Automatic Passenger Counting (APC) devices for use in National Transit Database (NTD) ridership reporting. Manual ridership tabulation is required for OCTA to continue to use APC data for NTD ridership reporting and remain eligible for federal funding. To perform this task, the contractor rides the bus and tabulates boardings at alightings at each stop, which are then compared to the APC system data and must be within a certain threshold for OCTA to continue to use the APC system for NTD reporting.

A second function performed by the contractor are special service checks. These are made at the request of OCTA Scheduling staff and are performance observations that supplement data collected through OCTA systems, such as on time performance (OTP) and boarding and alighting counts. For example, special service checks are done at the beginning of the school year to observe where students are boarding and alighting for school; information that would otherwise not be available through OCTA's farebox or APC systems, which collect ridership information. The contractor collects this type of information by riding the bus or standing at a bus stop and tallying the number of riders and documenting factors, such as weather or traffic congestion, that may impact service performance. Scheduling staff uses this information when developing bus schedules to ensure there is sufficient capacity on board buses for all passengers during school bell times.

Schedule checking services allow OCTA to maintain compliance with the FTA for use of APC data for NTD ridership reporting, and also allow for the collection of manual observations that Scheduling staff uses to supplement OTP and ridership data.

### ***Procurement Approach***

The original procurement was handled in accordance with OCTA's Board of Directors-approved policies and procedures for professional and technical services and was awarded on a competitive basis. The original agreement was awarded on January 14, 2019, in the amount of \$765,141, for an initial three-year term, and two, one-year option terms. This agreement has been previously amended as shown in Attachment A.

The proposed Amendment No. 2 is to exercise the second option term through January 31, 2024 and increase the maximum obligation in the amount of \$164,212, bringing the total contract value to \$929,353. The budget for this amendment is based on current and anticipated usage for this service.

The hourly rates will remain the same as originally negotiated for the second option term; therefore, they are deemed fair and reasonable.

Southland Car Counters has provided outstanding service to OCTA. Exercising the second option term will provide OCTA with continued fixed-route schedule checking services for system analysis to improve OC bus efficiency and customer experience.

#### **Fiscal Impact**

The project was approved in the OCTA Fiscal Year 2022-23 Budget, Operations Division, Scheduling and Bus Operations Support, Account No. 2128-7519-D4106-97S, and is funded through Local Transportation Funds.

#### ***Summary***

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-8-1850 with National Data and Surveying Services, Inc., doing business as Southland Car Counters, to exercise the second option term of the agreement, in the amount of \$164,212, to continue providing manual collection of bus ridership and performance information for fixed-route services, as known as schedule checking activities.

***Attachment***

- A. National Data and Surveying Services, Inc., doing business as Southland Car Counters, Agreement No. C-8-1850 Fact Sheet

**Prepared by:**



Jeffrey N. Tatro  
Section Manager, Scheduling and  
Bus Operations Support  
714-560-5865

**Approved by:**



Johnny Dunning, Jr.  
Chief Operations Officer, Operations  
714-560-5710



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

**National Data and Surveying Services, Inc.,  
doing business as Southland Car Counters,  
Agreement No. C-8-1850 Fact Sheet**

1. January 14, 2019, Agreement No. C-8-1850 for \$765,141, a three-year initial term, and two, one-year option terms approved by Board of Directors (Board).
  - National Data and Surveying Services, Inc. doing business as (dba) Southland Car Counters, fixed-route schedule checking services.
  - Initial term effective February 1, 2019, through January 31, 2022.
2. February 1, 2022, Amendment No. 1 to Agreement No. C-8-1850, \$0, approved by Contracts Administration and Materials Management Department.
  - Amendment to exercise the first option term and extend the agreement effective February 1, 2022, through January 31, 2023. No additional funds were added to the total contract amount.
3. January 23, 2023, Amendment No. 2 to Agreement No. C-8-1850, \$164,212, pending approval by the Board.
  - Amendment to exercise the second option term and extend the agreement effective February 1, 2023, through January 31, 2024.


Total committed to National Data and Surveying Services, Inc., dba Southland Car Counters, Agreement No. C-8-1850: \$929,353.





***January 12, 2023***

**To:** Transit Committee

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

**Subject:** Bus Operations Performance Measurements Report for the First Quarter of Fiscal Year 2022-2023

### ***Overview***

The Orange County Transportation Authority operates fixed-route bus and demand-response paratransit service throughout Orange County and into neighboring counties. The established measures of performance for these services assess the safety, courtesy, reliability, and overall quality of the services. This report summarizes the performance of these services through the first quarter of fiscal year 2022-23.

### ***Recommendation***

Receive and file as an information item.

### ***Background***

The Orange County Transportation Authority (OCTA) operates a countywide network of over 50 routes, including local, community, rail connector, and express bus routes serving over 5,000 bus stops. Fixed-route bus (OC Bus) service operates in a 798 square-mile area, serving more than three million residents in 34 cities and unincorporated areas, with connections to transit services in Los Angeles, Orange, and Riverside counties. OCTA provides these services through both directly operated fixed-route (DOFR) and contracted fixed-route (CFR) service. The contracted fixed-route service is provided by First Transit, Inc., (First Transit). OCTA also provides OC ACCESS, a federally mandated paratransit service, which is a shared-ride program available for people unable to use the OC Bus service because of functional limitations. OC ACCESS is also a contracted service operated by First Transit, Inc. Performance measures for OC Bus, OC ACCESS, and OC Flex services are summarized and reported quarterly (Attachment A).

### ***Discussion***

This report provides an update on the performance of the OC Bus and OC ACCESS services by presenting the current trends and comparisons with OCTA-established performance standards for transit system safety, courtesy, and reliability. OCTA counts preventable vehicle accidents to evaluate system safety, customer complaints to assess courtesy, and uses both on-time performance (OTP) and miles between road calls (MBRC) to measure service reliability.

This report includes performance through the first quarter of FY 2022-23. OCTA continues to operate a reduced level of service due to the prolonged impact of the COVID-19 pandemic. This is reflected in the performance to be discussed in this report. During this reporting period, increased ridership coupled with the challenges of driver availability negatively impacted the reliability and courtesy metrics for OC ACCESS. The ongoing procurement and replacement of OC ACCESS cutaway buses resulted in an improvement in MBRC. For OC Bus, the age of the fleet continued to result in MBRC not meeting the standard; this is expected to improve as OCTA receives replacement buses over the next year and completes mid-life engine replacements.

- Safety –CFR OC Bus service performed below the accident frequency standard of one preventable accident per 100,000 service miles. OCTA Operations and contracted staff continue to stress safety in the bus loading/unloading zones and vehicle operation that impacts passenger safety inside the vehicle (passenger falls). Training and discussions continue with coach operators emphasizing safety and identifying problem locations where fixed-object strikes frequently occur. Accident prevention is also reinforced during post-accident retraining and during annual refresher training. OC ACCESS also performed below the performance standard. First Transit launched a safety awareness campaign to mitigate common fixed object strikes.
- Customer Service – Customer service is measured by evaluating the number of valid customer complaints received compared to boardings. During the performance period, the DOFR and CFR modes of service performed above the respective standards. OC ACCESS fell below the standard, with service delays as the chief complaint. First Transit is actively recruiting employee resources and expanding use of subcontractors to increase capacity and minimize service delays.

- Reliability – Through the first quarter, the OTP for DOFR service met the standard while CFR service did not. OC ACCESS remained below standard due to increasing demand and driver shortages.
- MBRC – The MBRC for OC ACCESS met the standard while CFR and DOFR did not. OCTA is in the middle of a fixed-route bus replacement and MBRC should improve as OCTA replaces and retires older buses that have met their useful life.

The report also includes:

- An assessment of the efficiency of OCTA transit operations based on industry standards for ridership, productivity, farebox recovery, and cost per revenue vehicle hour;
- A review of contractor performance for CFR and OC ACCESS services;
- A route-level performance evaluation that includes subsidy per boarding, revenue per boarding, and resource allocation (buses); and
- A performance assessment of the OC Flex microtransit service and a report on the College Pass Program.

### ***Summary***

During the first quarter of FY 2022-23, DOFR and CFR OC Bus service exceeded the performance in the area of courtesy, and DOFR exceeded performance in the areas of safety and OTP. OC Bus MBRC did not meet the standard due to mechanical failures associated with the age of the fleet, which will be mitigated as OCTA continues to receive replacement buses. OC ACCESS exceeded the performance standard for MBRC but was below standard for courtesy, OTP, and safety. The contractor continues to focus on providing sufficient operator resources which will improve reliability as ridership continues to increase. OCTA staff continues to focus on strategies to improve safety and reliability, track the established key performance indicators, manage the service agreements pursuant to contract requirements, and work to identify other strategies to improve overall system performance.

***Attachment***

- A. Bus Operations Performance Measurements Report, Fourth Quarter,  
Fiscal Year 2021-22

**Prepared by:**



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Kim Tucker  
Manager, Scheduling and Bus  
Operations Support  
(714) 560-5715

**Approved by:**



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Johnny Dunning, Jr.  
Chief Operating Officer, Operations  
(714) 560-5710

# Fiscal Year 2022-23 First Quarter



## Bus Operations Performance Measurements Report

# About This Report

The Orange County Transportation Authority (OCTA) operates a countywide network of over 50 OC Bus routes including local, community, rail connector, and express bus routes serving over 5,000 bus stops. OCTA also operates OC ACCESS paratransit service, a shared-ride program available for people unable to use the standard OC Bus service because of functional limitations. OC Bus service is provided through both direct operations by OCTA referred to as directly operated fixed-route (DOFR) and contracted operations referred to as contracted fixed-route (CFR) service. The OC ACCESS service is a contract-operated demand-response service required by the Americans with Disabilities Act (ADA) that is complementary to the fixed-route service and predominately accounts for the overall paratransit services operated by OCTA. These services make up the bus transit system and are evaluated by the performance measurements summarized in this report.

This report tracks bus system safety, as measured by vehicle accidents, courtesy, as measured by customer complaints, and reliability, as measured by on-time performance (OTP) and miles between road calls (MBRC). Along with these metrics, industry-standard measurements are tracked to assess OCTA bus operations; these measurements include ridership, productivity, farebox recovery ratio (FRR), and cost per revenue vehicle hour (RVH). Graphs accompany the details of each indicator showing the standards or goals and the values for the current reporting period. The following sections provide performance information for OC Bus service, DOFR and CFR, and OC ACCESS service.

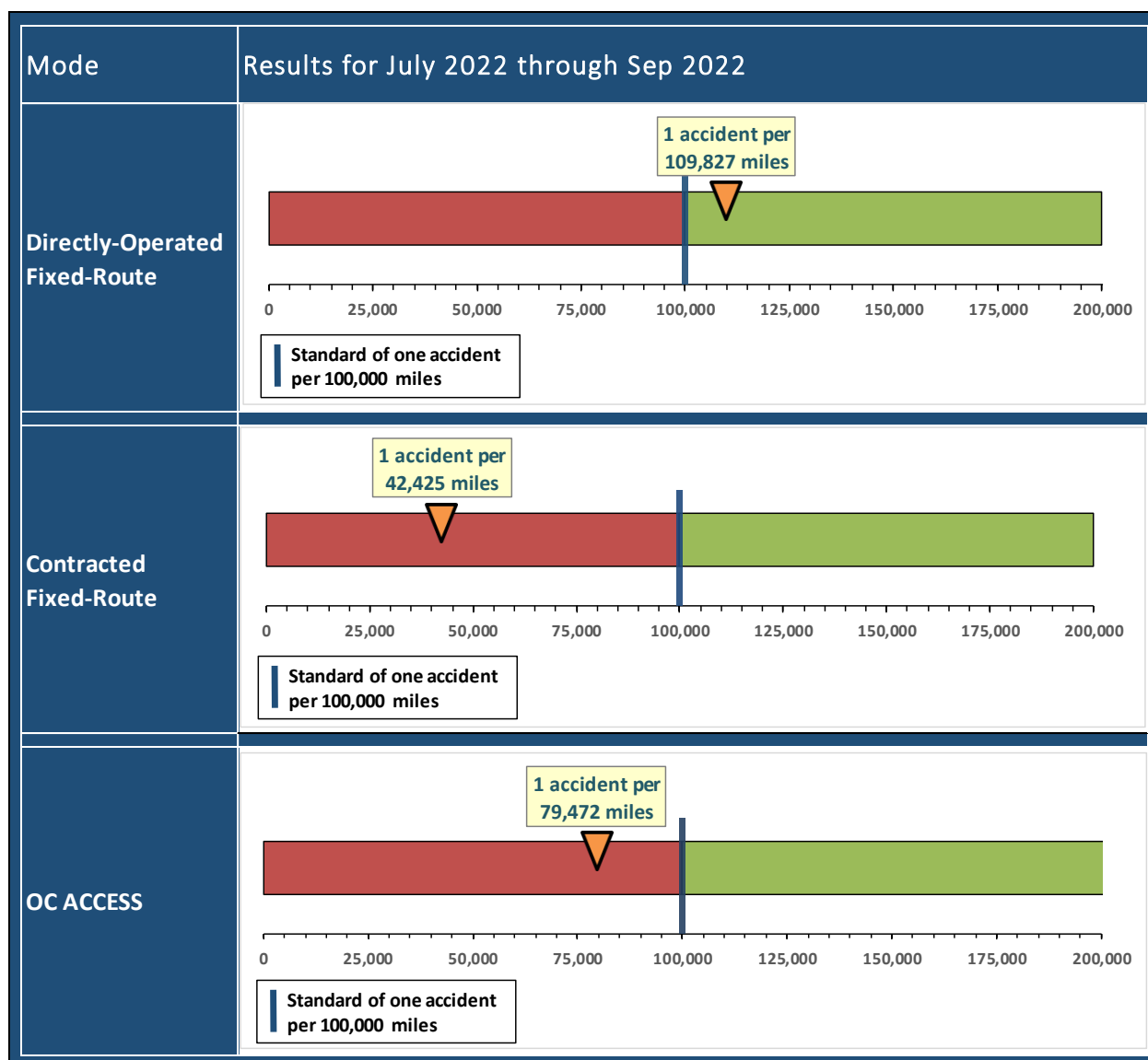
Through September 2022, OCTA continued to operate a reduced level of OC Bus service due to the prolonged impact of the coronavirus (COVID-19) pandemic and a shortage of coach operators as is being experienced throughout the country. This is reflected in the performance to be discussed in this report. During this reporting period, increased ridership coupled with driver availability continued to negatively impact OC ACCESS OTP and courtesy metrics. The ongoing procurement and replacement of OC ACCESS cutaway buses has resulted in an improvement in MBRC.

## **FY2022-23 Q1 SUMMARY**

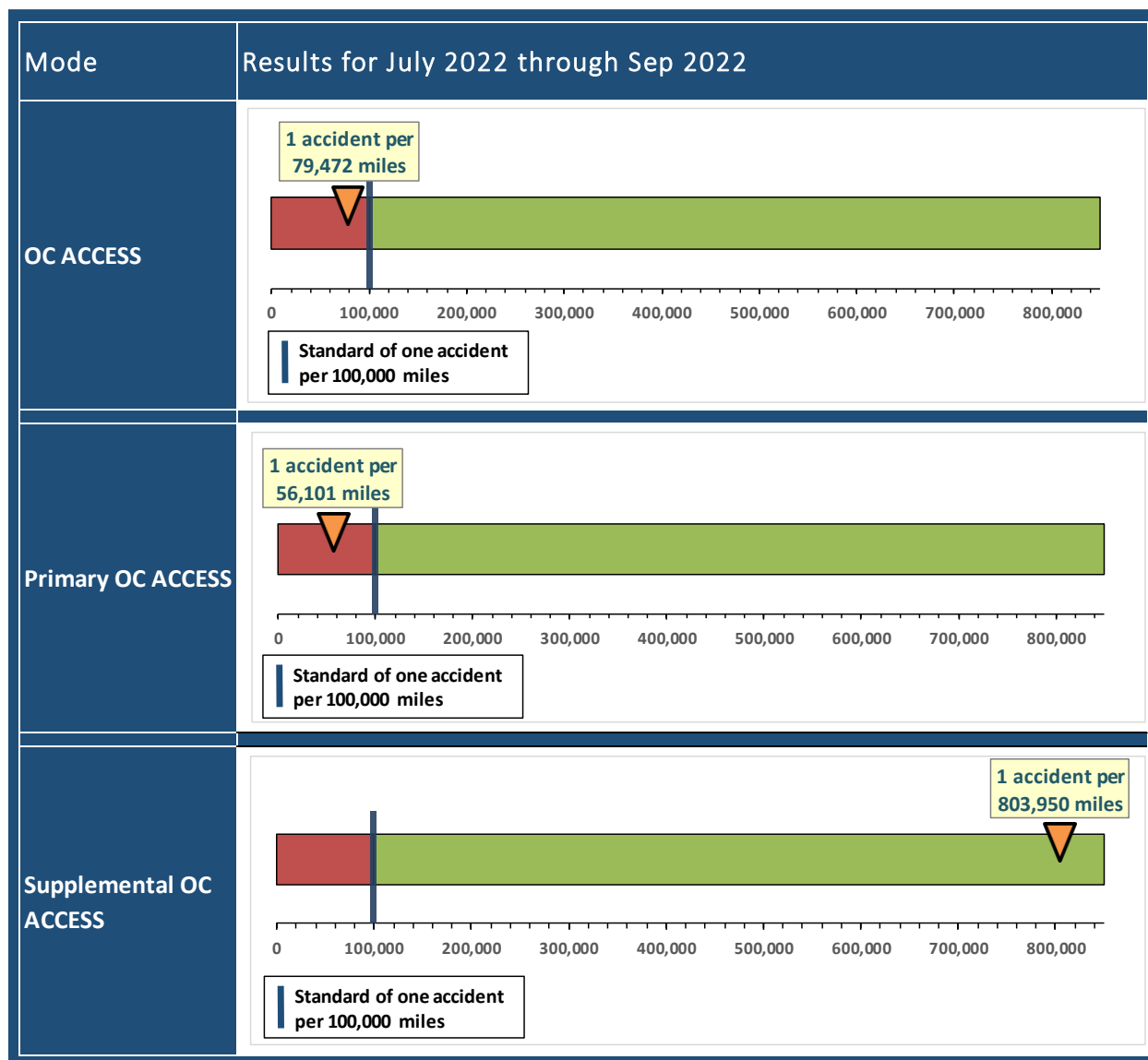
- **Safety:**
  - DOFR - ▲
  - CFR - ▼
  - OC ACCESS - ▼
- **Courtesy:**
  - DOFR - ▲
  - CFR - ▲
  - OC ACCESS - ▼
- **OTP:**
  - DOFR - ▲
  - CFR - ▼
  - OC ACCESS - ▼
- **MBRC:**
  - DOFR - ▼
  - CFR - ▼
  - OC ACCESS - ▲

## Safety: Preventable Vehicle Accidents

OCTA is committed to the safe delivery of the OC Bus service. The safety standard for DOFR, CFR, and OC ACCESS services is no more than one vehicle accident per 100,000 miles. Preventable vehicle accidents are defined as incidents when physical contact occurs between vehicles used for public transit and other vehicles, objects, or pedestrians, and where a coach operator failed to do everything reasonable to prevent the accident. On-board passenger falls on fixed-route service that are determined to be preventable are also included among these accidents. Through the first quarter (Q1) of fiscal year (FY) 2022-23, DOFR met the standard of operating more than 100,000 miles between preventable accidents while CFR did not.



For CFR, the number of miles between preventable accidents continues to be below the performance standard in Q1. The majority of preventable accidents are the result of the operator striking fixed objects (curb, sign, pole, parked vehicle). Staff continues working with the contractor to improve performance and reduce the number of preventable accidents.



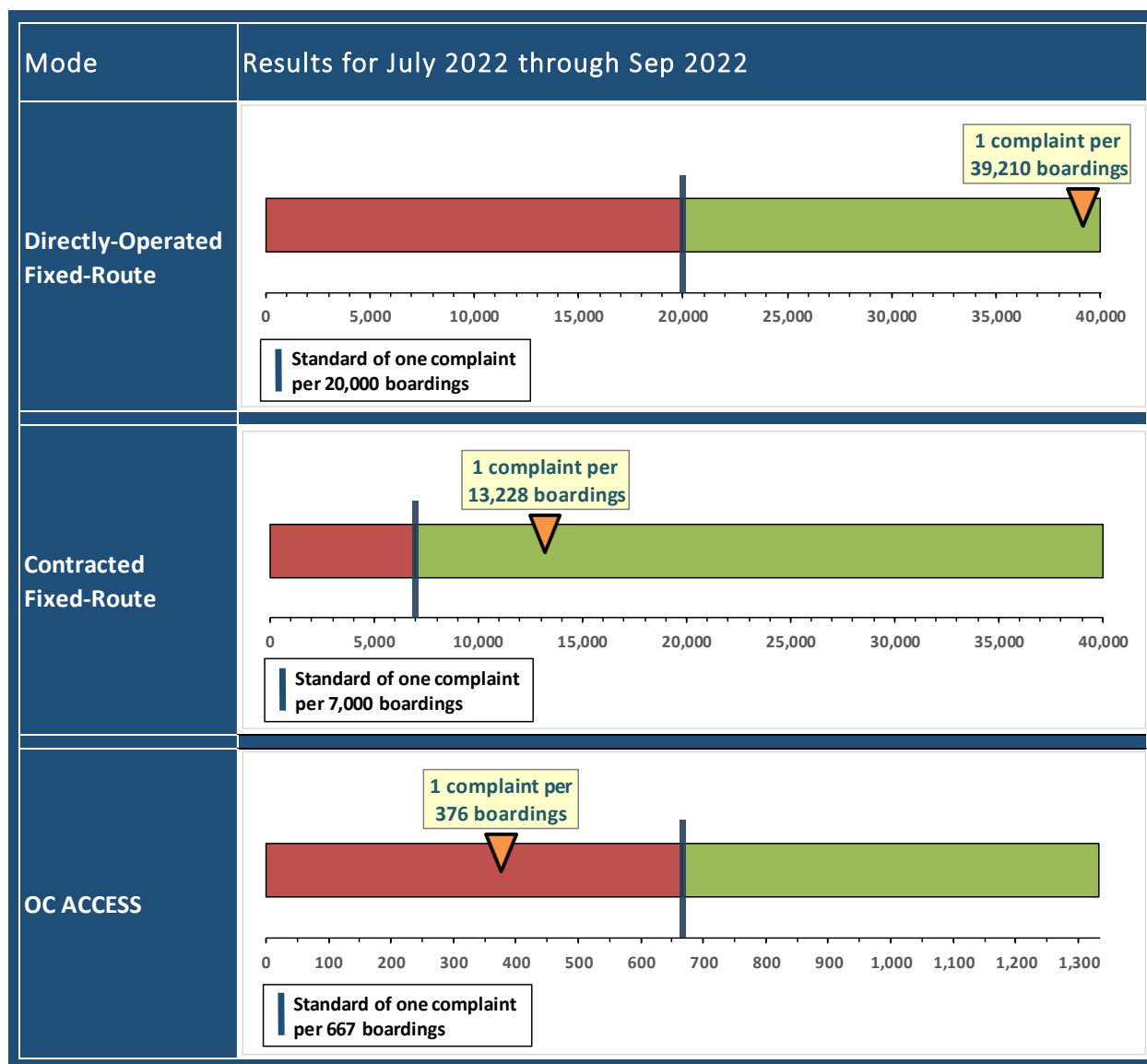
OC ACCESS is the combination of Primary OC ACCESS (operated by First Transit, Inc. [First Transit]) and Supplemental OC ACCESS (operated by First Transit's subcontractors) data. Primary OC ACCESS includes data for service provided by First Transit only. Supplemental OC ACCESS includes data for service provided by the subcontractors of First Transit only. Overall, OC ACCESS performed just below the standard, with Primary OC ACCESS below the standard while Supplemental OC ACCESS performed above the standard. Similar to fixed route, the primary cause of preventable accidents is fixed-object strikes. First Transit launched an awareness campaign to mitigate common fixed-object strikes, such as impacts with tree branches, through additional training during monthly safety meetings, and the addition of a checkpoint during pull out (before drivers begin service for the day) to reinforce the height of the vehicle.



## Courtesy: Customer Complaints

OCTA strives to achieve a high level of customer satisfaction in the delivery of OC Bus and OC Access services. The performance standard for customer satisfaction is courtesy as measured by the number of valid complaints received. Customer complaints are the count of incidents when a rider reports dissatisfaction with the service. The standard adopted by OCTA for DOFR OC Bus is no more than one customer complaint per 20,000 boardings; the standard for CFR OC Bus service is no more than one complaint per 7,000 boardings; and the contractual standard for OC ACCESS is no more than one complaint per 667 boardings.

Through Q1 of FY 2022-23, the DOFR and CFR modes of service continue to perform well, exceeding the courtesy standard with less than one valid complaint per 20,000 and 7,000 boardings, respectively, while OC ACCESS performed below standard.



For OC ACCESS, service delays were the chief complaint through Q1. First Transit is actively recruiting employee resources and expanding use of subcontractors to increase capacity and minimize service delays.

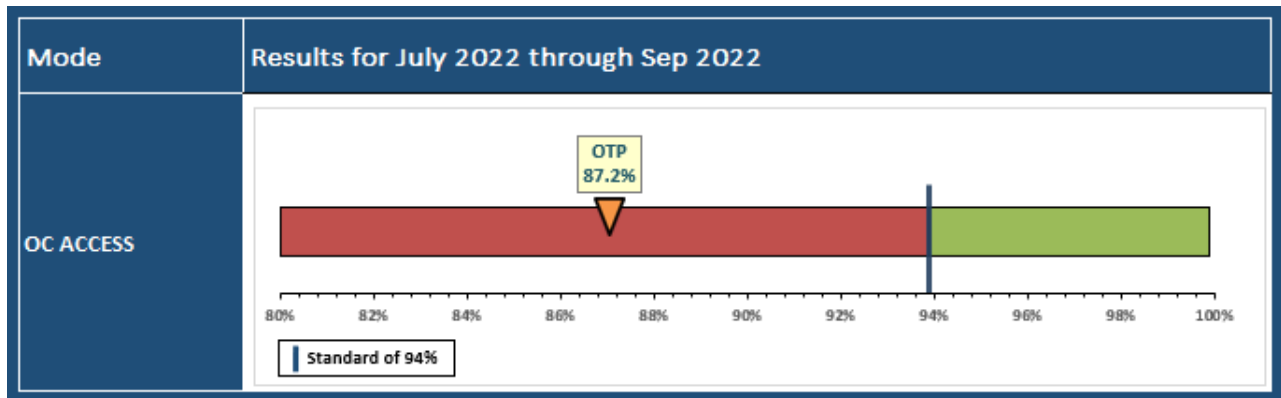
## Reliability: On-Time Performance

Reliability is vital to a successful transportation network. Reliability for OCTA is measured in part by OTP. OTP is a measure of performance which evaluates the schedule adherence of a bus operating in revenue service according to a published schedule. Schedule adherence is tracked by monitoring the departure of vehicles from time points, which are designated locations on a route used to control vehicle spacing as shown in the published schedule. For OC Bus service, a trip is considered on-time if it departs the scheduled time point from zero minutes before up to no more than five minutes after the time as printed on the bus route schedule. OCTA's fixed-route system standard for OTP is 80 percent. For OC ACCESS service, OTP is a measure of performance evaluating a revenue vehicle's adherence to a scheduled pickup time for transportation on a demand-response trip. A trip is considered on-time if the vehicle arrives within a 30-minute window. The OC ACCESS OTP standard is 94 percent.

Systemwide fixed-route OTP was 81.1 percent; the OTP for DOFR met the standard, operating at a rate of 82.9 percent. OC Bus operated by CFR and OC ACCESS services both fell below the respective standards during Q1 of FY 2022-23.

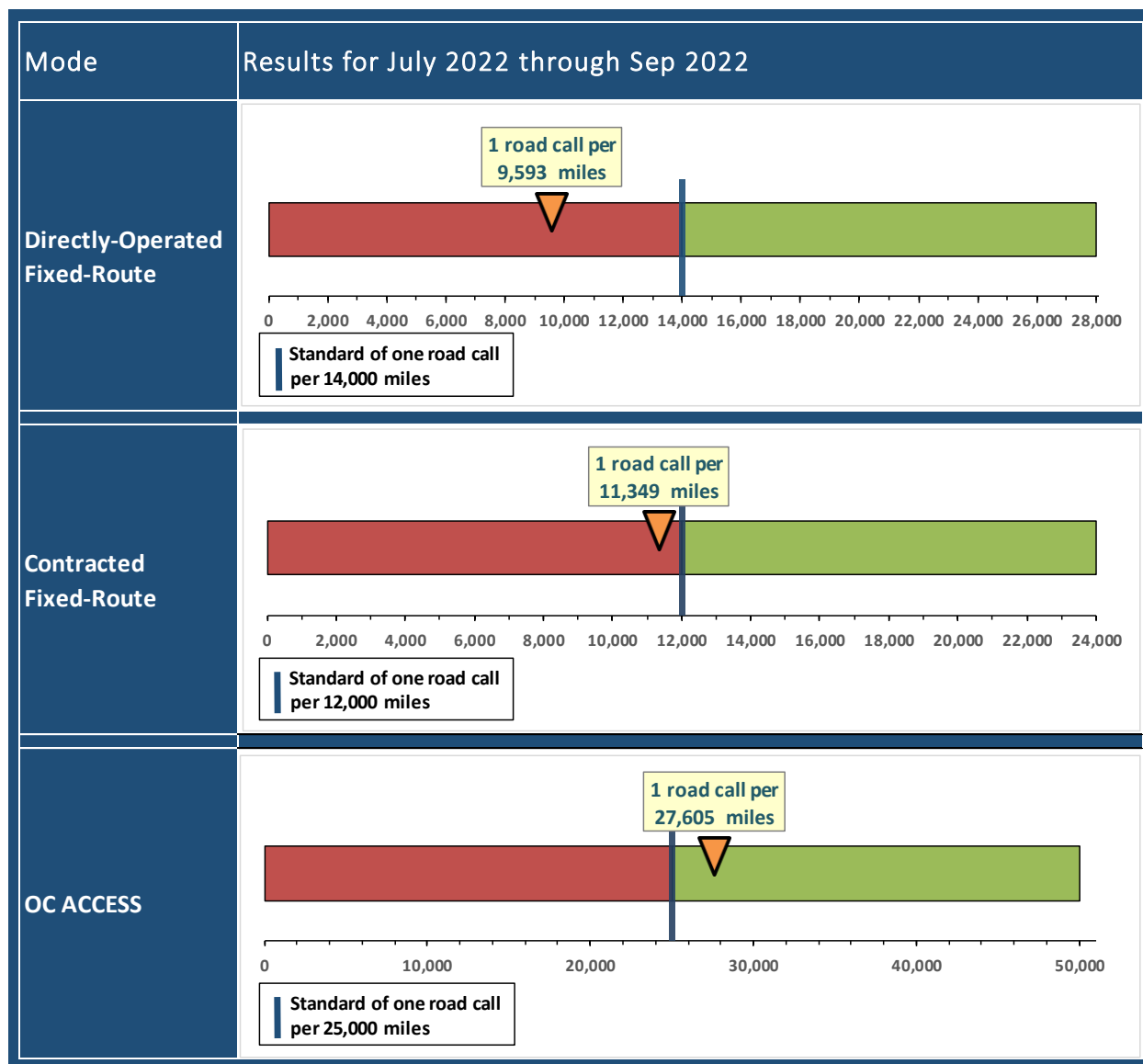


The OTP for OC ACCESS was below standard with a rate of 87.2 percent. The OC ACCESS contractor struggled to meet the OTP standard in Q1 due to continued increases in demand as adult day programs for seniors and individuals with disabilities throughout Orange County expanded their capacity for in-person services. Staff is working closely with the contractor to ensure appropriate operator resources, both employee and subcontracted, are in place to meet the increasing demand as ridership continues to recover to pre-pandemic levels.



## Reliability: Miles Between Road Calls

MBRC is a vehicle reliability performance indicator that measures the average distance in miles that a transit vehicle travels before failure of a vital component forces removal of the vehicle from service. OCTA has adopted standards for the MBRC for DOFR, CFR, and OC ACCESS services. These standards vary to align with the specific type of service being provided and to account for the variability inherent to each of these services including the vehicles assigned. The specific standards as adopted by OCTA are 14,000 MBRC for DOFR OC Bus service, 12,000 MBRC for CFR OC Bus service, and 25,000 MBRC for OC ACCESS.



Through Q1, the MBRC for DOFR and CFR were under the performance standard while OC ACCESS met the performance standard.

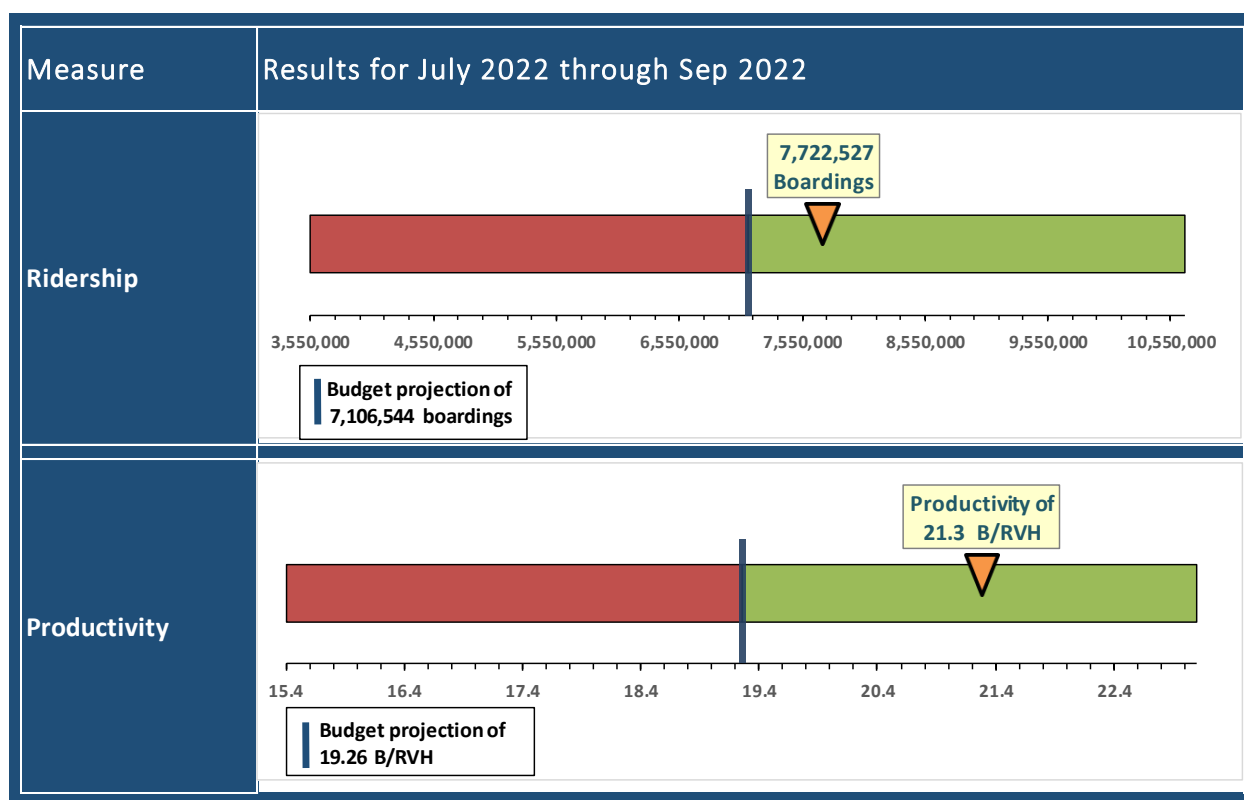
OCTA operates two primary fleets in fixed-route service: 2007/2008 New Flyer CNG Low Floor buses, and 2016 New Flyer Xcelsior CNG buses. The first fleet is now at the end of their designed useful life and is experiencing failures due to long-term wear and tear. A new bus procurement is in effect to replace the 2007/2008 buses. New buses have begun arriving and will continue over the next year. The 2016 buses are now due for a planned engine mid-life repower. OCTA is replacing the engines in the 2016 fleet with new near-zero emission engines. This will continue for the next 18 months and is expected to improve performance in terms of MBRC. Both CFR and DOFR are experiencing increased failures, including road calls, that can be expected considering the age and current condition of the two fleets.

MBRC for OC ACCESS for Q1 of FY 2022-23 met the performance standard. Performance improved this quarter with the replacement of 82 cutaway buses, which represents 33 percent of the paratransit bus fleet. Improvements continue as the remaining buses of a 117-bus procurement have been delivered and the old buses retired.

## Ridership and Productivity – OC Bus

Ridership (or boardings) is the number of rides taken by passengers using public transit and is influenced by the level of service provided, weather, the economy, and seasonal variations in demand. Productivity is an industry measure that counts the average number of boardings for each RVH that is operated. An RVH is any 60-minute increment of time that a vehicle is available for passengers within the scheduled hours of service, excluding deadhead (a non-revenue movement of a transit vehicle to position it for service). Boardings per RVH (B/RVH) is calculated by taking the boardings and dividing it by the number of RVH operated.

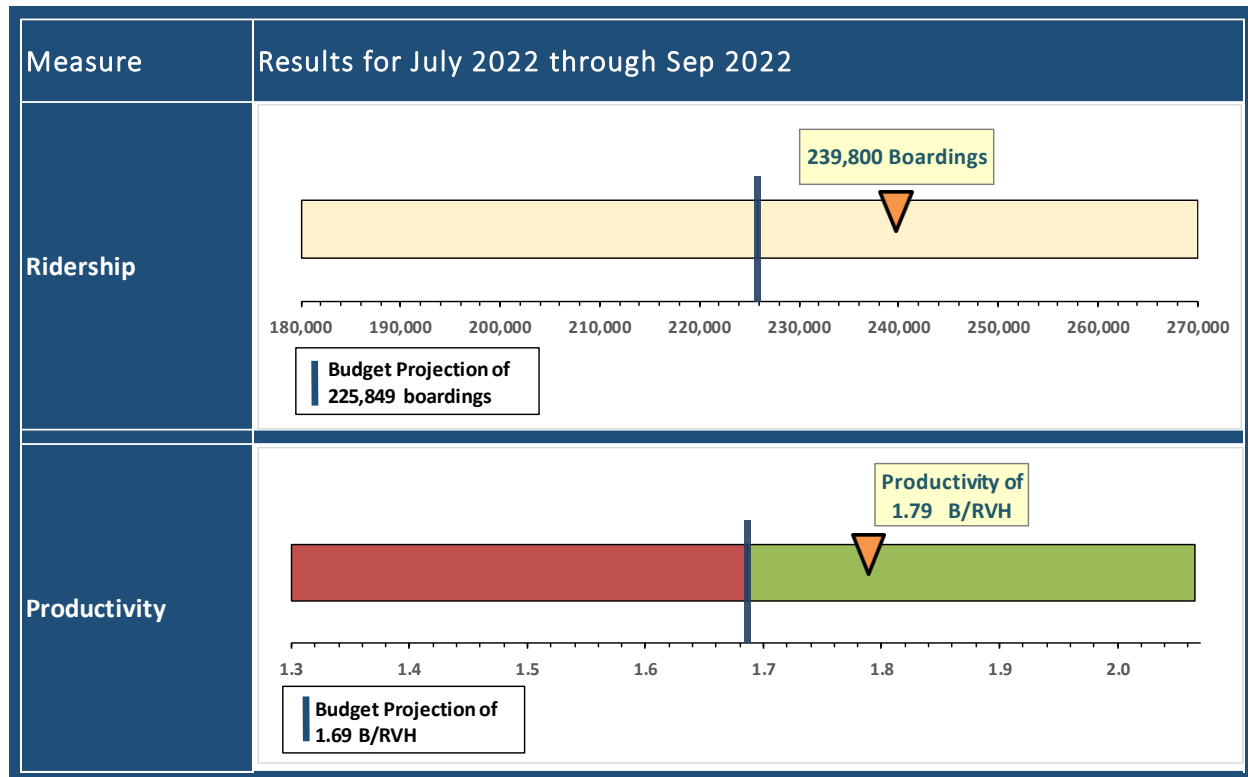
During Q1, ridership grew from a low point in July and then increased in mid-August and September as students returned to school. By the end of September, average weekday ridership was over 106,000 boardings, the highest level reached since the start of the pandemic. Productivity during the performance period was higher than the budgeted projection, trending at 21.3 boardings per RVH.



## Ridership and Productivity – OC ACCESS

### (Primary Service Provider and Supplemental Taxi Service)

Through Q1 of FY 2022-23, the total ridership was 239,800 and productivity was 1.79 B/RVH, exceeding the budgeted projections. Travel for eligible riders continued to increase as facilities and adult day programs for seniors and individuals with disabilities expanded their capacity for in-person services throughout Orange County.



## Contractor Performance: Fixed Route

Per Agreement No. C-4-1737 between OCTA and First Transit, additional measures are tracked to ensure the CFR OC Bus service meets specified standards for safety, customer service, and reliability. When the contractor's monthly performance exceeds the standard as set forth in the agreement, financial incentives are paid to First Transit; conversely, when the monthly performance of the contractor is below the standard as set forth in the agreement, penalties are assessed and are paid to OCTA by First Transit.

For Q1 of FY 2022-23, the overall performance of the contracted OC Bus service, as determined by the performance categories outlined in the contract, was below standard for on-time performance, unreported accident, road calls, and missed trips, which totaled \$390,000 in penalties. Incentives were assessed for valid complaints and accident frequency ratio, totaling \$28,400. There was an adjustment of \$5,600 in waived penalties for late report. The net amount of penalties assessed for Q1 is \$356,000.

Table 1:	Performance Categories	FY23 Q1	FY23 Q2	FY23 Q3	FY23 Q4	FYTD 23
Penalties	On-Time Performance	\$ (3,000)	\$ -	\$ -	\$ -	\$ (3,000)
	Valid Complaints: Per 7,000 boardings	\$ -	\$ -	\$ -	\$ -	\$ -
	Unreported Accident	\$ (15,000)	\$ -	\$ -	\$ -	\$ (15,000)
	Accident Frequency Ratio	\$ -	\$ -	\$ -	\$ -	\$ -
	Key Positions	\$ -	\$ -	\$ -	\$ -	\$ -
	CHP Terminal Inspections	\$ -	\$ -	\$ -	\$ -	\$ -
	Reports	\$ -	\$ -	\$ -	\$ -	\$ -
	Preventive Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -
	Road Calls	\$ (1,000)	\$ -	\$ -	\$ -	\$ (1,000)
	Vehicle Damage: Per vehicle per day	\$ -	\$ -	\$ -	\$ -	\$ -
	Missed Trips	\$ (371,000)	\$ -	\$ -	\$ -	\$ (371,000)
	<b>Total</b>	<b>\$ (390,000)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (390,000)</b>
Incentives	On-Time Performance	\$ -	\$ -	\$ -	\$ -	\$ -
	Valid Complaints: Per 7,000 boardings	\$ 13,400	\$ -	\$ -	\$ -	\$ 13,400
	Accident Frequency Ratio	\$ 15,000	\$ -	\$ -	\$ -	\$ 15,000
	<b>Total</b>	<b>\$ 28,400</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 28,400</b>
Adjustment	Unreported Accident (Prior Period)	\$ -	\$ -	\$ -	\$ -	\$ -
	Waived Penalties (On-Time Performance)	\$ -	\$ -	\$ -	\$ -	\$ -
	Waived Penalties (Key Position)	\$ -	\$ -	\$ -	\$ -	\$ -
	Waived Penalties (Late Report)	\$ 5,600	\$ -	\$ -	\$ -	\$ 5,600
	Waived Incentives	\$ -	\$ -	\$ -	\$ -	\$ -
	Missed Trips	\$ -	\$ -	\$ -	\$ -	\$ -
	Road Calls	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total</b>	<b>\$ 5,600</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 5,600</b>
<b>All</b>	<b>Total</b>	<b>\$ (356,000)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (356,000)</b>



## Contractor Performance: OC ACCESS

### (Primary Service Provider and Supplemental Taxi Service)

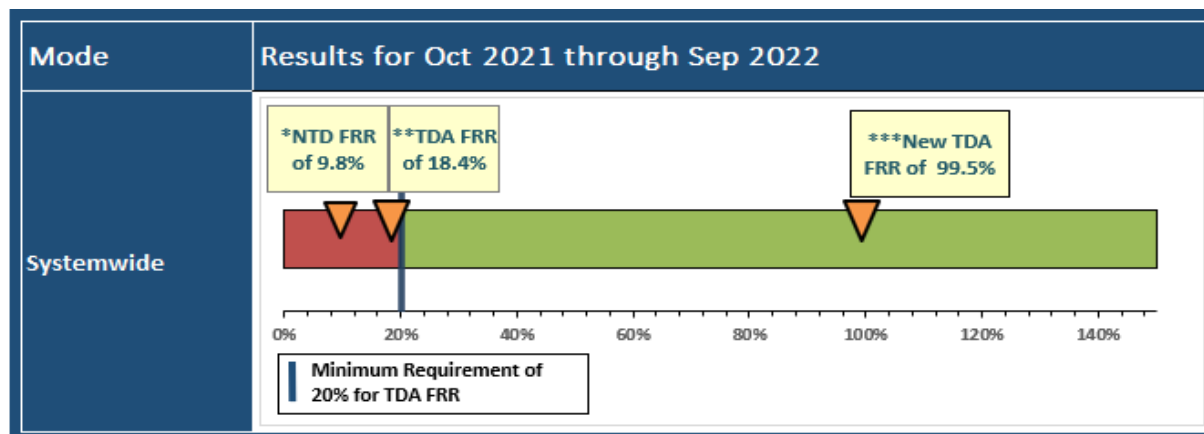
Like the CFR service, the contractor for OC ACCESS, First Transit (Agreement No. C-0-2150), is paid financial incentives or incurs penalties when monthly performance exceeds or comes in below the standard as set forth in the agreement. Financial incentives are paid to the contractor and assessed penalties are paid to OCTA by the contractor.

As presented in this report, First Transit struggled to meet performance standards in Q1 of FY 2022-23 across several indicators, and was assessed penalties totaling \$550,299. Of those penalties, \$12,706 were waived by staff, resulting in \$537,593 in total penalties.

Table 2:	Performance Categories	FY23 Q1	FY23 Q2	FY23 Q3	FY23 Q4	FYTD 23
<b>Penalties</b>	Pick-Up On-time Performance	\$ (70,000)	\$ -	\$ -	\$ -	\$ (70,000)
	Arrival On-Time Performance	\$ (87,000)	\$ -	\$ -	\$ -	\$ (87,000)
	Customer Complaints	\$ (27,900)	\$ -	\$ -	\$ -	\$ (27,900)
	Call Center Hold Times	\$ (2,000)	\$ -	\$ -	\$ -	\$ (2,000)
	Excessively Early Trips	\$ (5,000)	\$ -	\$ -	\$ -	\$ (5,000)
	Excessively Late Trips	\$ (30,000)	\$ -	\$ -	\$ -	\$ (30,000)
	Missed Trips	\$ (30,000)	\$ -	\$ -	\$ -	\$ (30,000)
	Accident/ Incident Notification	\$ (23,000)	\$ -	\$ -	\$ -	\$ (23,000)
	Preventable Accidents	\$ (2,000)	\$ -	\$ -	\$ -	\$ (2,000)
	Preventable Incidents	\$ -	\$ -	\$ -	\$ -	\$ -
	Trip Denial	\$ (1,000)	\$ -	\$ -	\$ -	\$ (1,000)
	Terminal Inspections	\$ -	\$ -	\$ -	\$ -	\$ -
	Preventive Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -
	Road calls	\$ (700)	\$ -	\$ -	\$ -	\$ (700)
	Reports	\$ (39,100)	\$ -	\$ -	\$ -	\$ (39,100)
	Vehicle Damage	\$ -	\$ -	\$ -	\$ -	\$ -
	Excessive Travel Time	\$ -	\$ -	\$ -	\$ -	\$ -
	Routing Efficiency	\$ (24,000)	\$ -	\$ -	\$ -	\$ (24,000)
	Key Positions	\$ (208,599)	\$ -	\$ -	\$ -	\$ (208,599)
	Drug and Alcohol Audit	\$ -	\$ -	\$ -	\$ -	\$ -
	Fare Variance	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total</b>	<b>\$ (550,299)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (550,299)</b>
<b>Incentives</b>	Arrival On-time Performance	\$ -	\$ -	\$ -	\$ -	\$ -
	Pick-Up On-time Performance	\$ -	\$ -	\$ -	\$ -	\$ -
	Excessively Early Trips	\$ -	\$ -	\$ -	\$ -	\$ -
	Excessively Late Trips	\$ -	\$ -	\$ -	\$ -	\$ -
	Missed Trips	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Adjustment</b>	Unreported Accident (Prior Period)	\$ -	\$ -	\$ -	\$ -	\$ -
	Waived Penalties	\$ 12,706	\$ -	\$ -	\$ -	\$ 12,706
	Waived Incentives	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total</b>	<b>\$ 12,706</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 12,706</b>
<b>All</b>	<b>Total</b>	<b>\$ (537,593)</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ (537,593)</b>

## Farebox Recovery Ratio

FRR is a measure of the proportion of operating costs recovered by passenger fares, calculated by dividing the farebox revenue by total operating expenses. A minimum FRR of 20 percent for all services is required by the Transportation Development Act for transit agencies to receive the state sales tax available for public transit purposes. To normalize seasonal fluctuations, data shown below reflects actuals over the last 12 months from Oct 2021 through September 2022.



Note:

(\*) National Transit Database (NTD) FRR consists of only passenger fares

(\*\*) Transportation Development Act (TDA) FRR includes passenger fares, property tax revenue, advertising revenue and Measure M2 fare stabilization

(\*\*\*) New Transportation Development Act (TDA) FRR allows federal funds to be counted and exclusions on ADA paratransit service, demand-response, microtransit operating cost, cost of improving payment and ticketing systems and services, and costs of planning for zero-emission transition

Based on the NTD definition in which only passenger fares are included under revenue, FRR (\*NTD FRR) did not meet the 20 percent goal coming in at 9.8 percent. It is important to note this fact, as it is considered the true farebox recovery ratio without any exceptions.

However, as a result of the passage of SB 508 (Chapter 716, Statutes of 2015), OCTA was able to adjust the FRR to include local funds. SB 508 states, “If fare revenues are insufficient to meet the applicable ratio of fare revenues to operating cost required by this article, an operator may satisfy that requirement by supplementing its fare revenues with local funds. As used in this section, “local funds” are any non-federal or non-state grant funds or other revenue generated by, earned by, or distributed to an operator.” This would include property tax revenue, advertising revenue, and Measure M2 fare stabilization. Once these additional revenues are included the adjusted FRR (\*\*TDA FRR) was 18.4 percent, an increase of 1.6 percentage points from the same quarter as last year.

Furthermore, as a result of the COVID-19 pandemic and the statewide impacts it created on farebox revenues as a result of little to no passengers, the Governor signed AB 90 (Chapter 17, Statutes of 2020) last year, which removed all financial penalties for failing to meet the 20 percent FRR requirement until January 1, 2022. This year, the Governor signed AB 149 (Chapter 81, Statutes of 2021), which includes an extension of this exemption through the 2022-23 FY. In addition, AB 149 (Chapter 81, statutes of 2021) provided additional exemptions from the definition of “operating cost” for purposes of calculating TDA FRR (\*\*\*New TDA FRR). These exemptions include the:

- Costs of operating ADA paratransit service
- Costs to operate demand-response and microtransit services that expand access to transit service beyond fixed route corridors
- Costs of security services and public safety contracts
- Any expense greater than the actuarially determined contribution associated with pensions and other post-employment benefits as required by Governmental Accounting Board Statement Numbers 68 and 75
- Costs of funding or improving payment and ticketing systems and services
- Costs of planning for improvements in transit operations, integration with other operators and agencies, zero emission transition, and compliance with state and federal mandates. For the purposes of calculating the TDA FRR, discount and fare free transit passes are allowed to be counted at their full retail value, and federal funds are allowed to be counted as “local funds”.

It is important to note that this is not a true reflection of our true farebox recovery ratio but instead a method approved by the state under which with all exceptions allows us to meet, in our case exceed, the 20 percent TDA goal requirement.

## Operating Cost per Revenue Vehicle Hour

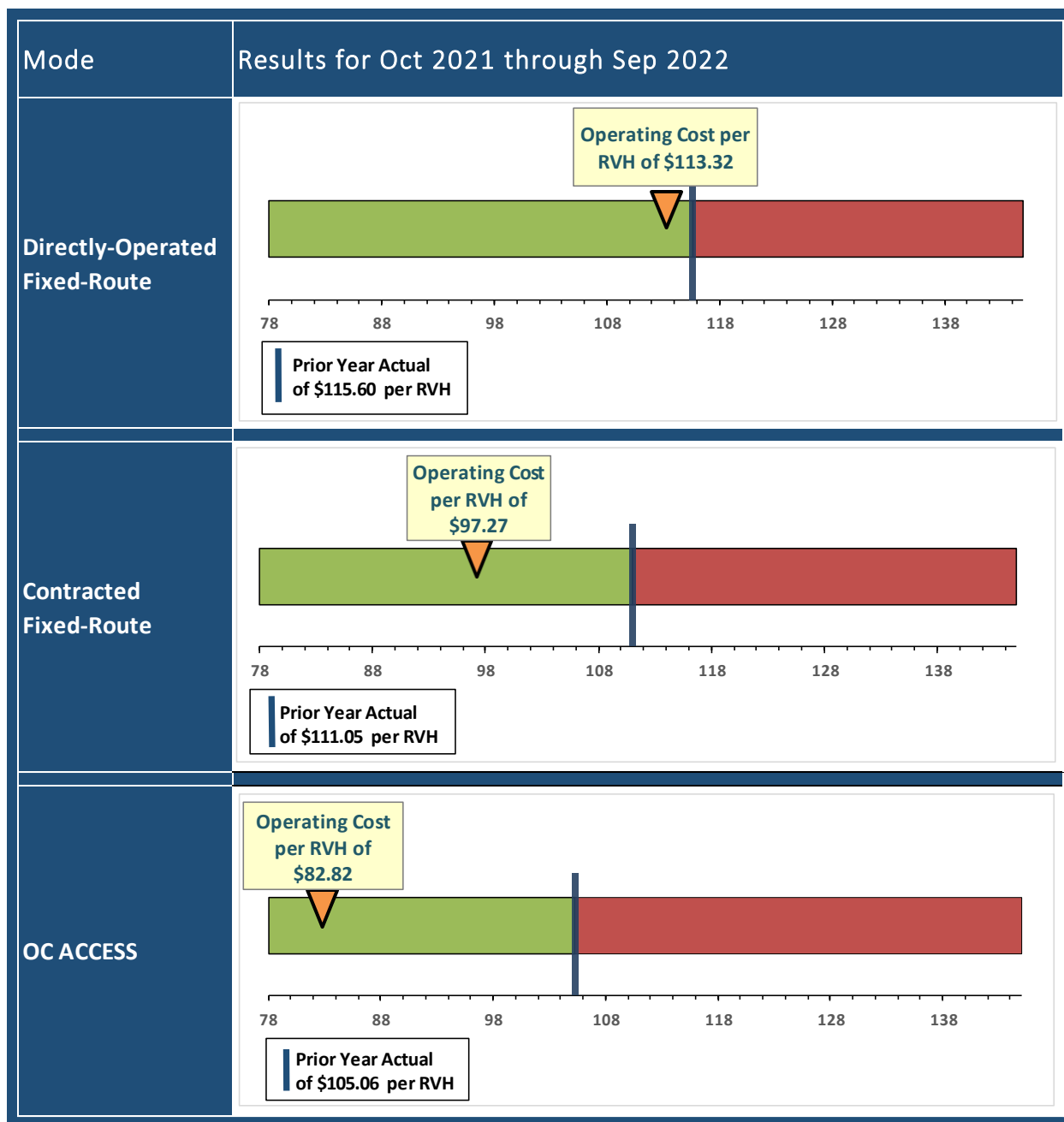
Cost per RVH is one of the industry standards used to measure the cost efficiency of transit service. It is derived by dividing actual operating expenses by RVH that is scheduled for the reporting period. To provide a more comparable illustration, all metrics below are calculated based on direct operating cost, which excludes capital, general administrative, and other overhead costs. DOFR cost includes labor costs for coach operator and maintenance employees. It also includes consumables such as replacement parts, fuel, and tires. CFR and OC ACCESS cost includes contracted costs (net of assessed penalties and incentives) and costs incurred by OCTA for maintenance, parts, and fuel for the contracted fleet.

Similar to the FRR, the statistics above depict actuals over the last 12 months. The difference in cost per RVH from the prior period was a 1.97 percent decrease in DOFR, a 12.42 percent decrease in CFR, and a 21.17 percent decrease in OC ACCESS.

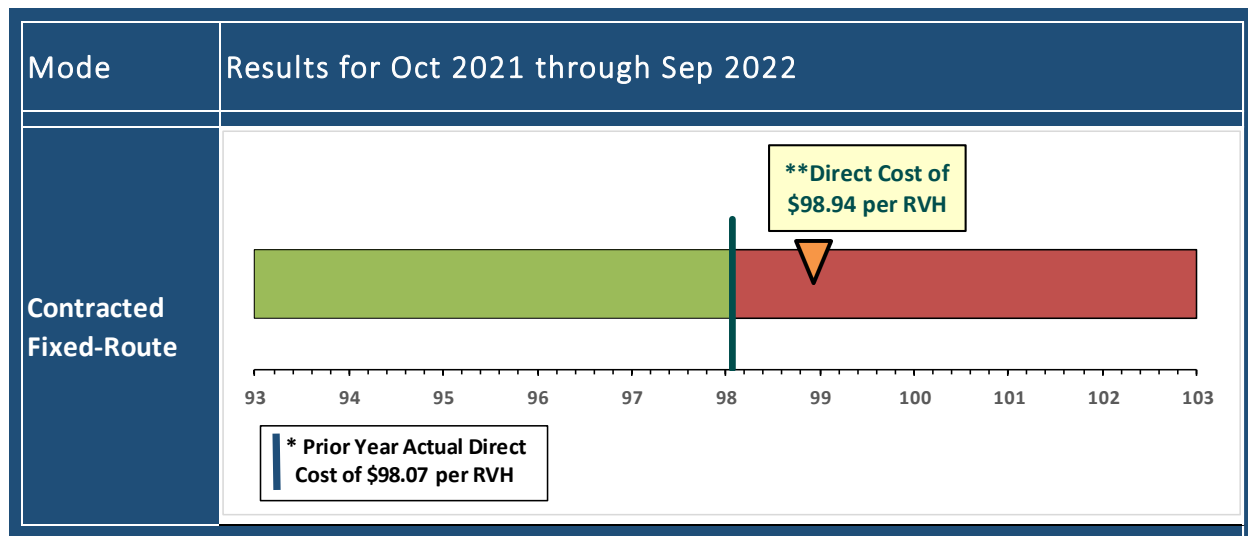
CFR operated at a lower cost per RVH compared to the prior 12-month period. The cost decrease is primarily due to the \$3.9 million of penalties incurred in the current period as a result of missed trips. However, it is important to note that the cost for CFR without the incurred penalties reflects a higher cost per RVH by 0.89 percent compared to the previous 12-month prior period due to the increase in year-over-year contract rate which resulted from COVID-19 pandemic with a decrease in maintenance, parts, and tires cost.

The decrease in cost per RVH for DOFR is also associated with the restoration of ridership from the pandemic and increased productivity. The prior 12-month period was a recovery period from the impact of COVID-19, where cost was higher per RVH due to the reduced service level.

Similarly, the decrease in OC ACCESS cost per RVH resulted from service demand restoration from the COVID-19 pandemic. The OC ACCESS contract has been operating on a tier-structure rate based on service demand. An increase in service from tier to tier would trigger a lower rate. Since the COVID-19 pandemic, the contracted rates for OC ACCESS have moved from tier 1 to tier 4, with tier 4 being one tier before the pre-pandemic equivalent tier. With the service demand moving toward higher tiers with lower trip rates, OC ACCESS cost per RVH decreased compared to the prior year.



## CFR Direct cost per RVH



### Note:

- The graph represents only the CFR direct operating cost per actual RVH on a rolling 12-month period without including the incurred penalties and COVID-19 reimbursement expense

(\*) Direct cost per actual RVH of the prior period

(\*\*) Direct cost per actual RVH of the current period

## Performance Evaluation by Route

Continuing efforts are underway to better understand, evaluate, and improve route performance. Performance evaluation is important because it provides:

- A better understanding of where resources are being applied.
- A measure of how well services is being delivered.
- A measure of how well these services is used; and
- An objective basis for decisions regarding future service changes and service deployment.

The tables on the following pages summarize route-level performance through Q1. The first two tables present the route-level performance sorted by routes with the highest net subsidy per boarding to routes with a lower net subsidy per boarding. The remaining two tables present the same information sorted by routes with the highest boardings to routes with a lower level of boardings.

A route guide listing all the routes and their points of origin and destinations is provided after the route-level performance tables. Route types are grouped by route numbers as follows:

- **Routes 1 to 99:** Local routes include two sub-categories:
  - Major: These routes operate as frequently as every 15 minutes during peak times. Major routes operate seven days a week throughout the day. Together, the Major routes form a grid on arterial streets throughout the highest transit propensity portions of the OC Bus service area, primarily in northern parts of the County.
  - Local: These routes operate on arterials within the grid created by the Major routes but at lower frequencies. Local routes also operate in parts of Orange County with lower transit demand. Most Local routes operate seven days per week; however, some operate on weekdays only.
- **Routes 100 to 199:** Community routes to connect pockets of transit demand with major destinations and offer local circulation. Routes tend to be less direct than Local routes, serving neighborhoods and destinations off the arterial grid. Approximately half of the Community routes operate seven days per week.
- **Routes 400 to 499:** Stationlink routes are rail feeder services designed to connect Metrolink stations to nearby employment destinations. These routes have relatively short alignments, with schedules tied to Metrolink arrivals and departures. They operate during weekday peak hours only, in the peak direction, from the station to destinations in the morning and the reverse in the evening.
- **Routes 500 to 599:** Bravo! routes are limited-stop services operated with branded vehicles.
- **Routes 600 to 699:** Seasonal or Temporary routes (these are not included on the following charts) such as the OC Fair Express. **(Did not operate during Q1 FY 2022-23).**



**OCTA Operating Statistics By Route for Local and Community Services (Sorted by Subsidy per Boarding)**  
Fiscal Year 2022-23

Route	Zone	Farebox	Subsidy per Boarding	Direct Subsidy	Indirect Subsidy	"Capital Subsidy" Per Boarding	Revenue per Boarding	Boardings	CostVSH	Direct CostVSH	CostVSM	BoardVSH	VSH	Bus Count		
														40 FT	32 FT	60 FT
862	C	2.6%	\$ 22.82	\$ 14.11	\$ 8.23	\$ 0.48	\$ 0.60	19,246	\$ 179.96	\$ 113.29	\$ 20.93	7.84	2,454	1	-	-
178	C	3.0%	21.99	12.96	7.56	1.47	0.62	18,933	175.81	111.22	14.06	8.32	2,276	3	-	-
085	S	3.1%	20.30	13.08	6.12	1.10	0.60	16,873	167.36	115.73	13.31	8.45	1,997	2	-	-
167	C	3.4%	17.86	10.68	6.23	0.95	0.60	39,095	174.67	110.40	14.60	9.98	3,917	4	-	-
087	S	4.2%	17.44	11.15	5.22	1.07	0.72	17,420	168.49	116.15	11.44	9.86	1,766	2	-	-
123	N	3.9%	15.96	9.48	5.53	0.95	0.61	49,106	181.36	115.02	13.22	11.61	4,230	5	-	-
086	C	4.4%	15.92	10.21	4.78	0.93	0.68	30,043	166.48	115.52	13.26	10.62	2,829	3	-	-
177	S	5.2%	15.25	9.81	4.53	0.91	0.78	20,512	164.48	113.83	13.22	10.87	1,886	2	-	-
001	S	4.4%	15.05	9.16	5.31	0.58	0.67	112,997	190.04	121.81	12.11	12.55	9,006	7	-	-
153	N	4.9%	15.04	9.85	4.55	0.64	0.75	28,931	158.36	108.83	12.40	10.45	2,768	2	-	-
082	S	4.7%	13.82	8.45	3.96	1.41	0.62	13,201	175.81	117.78	12.31	13.50	978	2	-	-
079	C	4.5%	13.76	8.86	4.15	0.75	0.62	74,219	164.81	111.53	14.47	12.10	6,135	6	-	-
091	S	6.4%	13.46	8.58	4.02	0.86	0.86	86,879	162.57	110.79	11.91	12.09	7,188	8	-	-
076	C	4.7%	13.24	7.85	4.55	0.84	0.61	22,160	175.32	110.66	14.84	13.48	1,644	2	-	-
143	N	4.7%	13.23	8.66	4.00	0.57	0.63	48,921	163.10	111.16	14.47	12.28	3,985	3	-	-
129	N	6.0%	12.91	8.37	3.87	0.67	0.79	41,899	161.46	109.70	13.70	12.39	3,382	3	-	-
083	C	4.6%	12.83	7.59	4.40	0.84	0.58	122,526	183.42	117.32	10.66	14.59	8,398	11	-	-
090	S	5.8%	12.11	7.86	3.68	0.57	0.71	65,193	163.08	111.85	11.01	13.32	4,894	4	-	-
529	C	5.2%	10.87	6.41	3.72	0.74	0.55	63,168	187.14	118.18	16.29	17.51	3,608	5	-	-
059	C	6.1%	10.78	6.92	3.24	0.62	0.66	104,720	162.96	111.28	15.60	15.05	6,957	7	-	-
150	C	4.5%	10.77	6.35	3.71	0.71	0.47	52,643	171.53	107.73	18.44	16.29	3,232	4	-	-
025	N	6.2%	10.75	7.00	3.28	0.47	0.67	79,597	163.32	111.26	13.99	14.90	5,340	4	-	-
026	N	6.1%	10.55	6.85	3.21	0.49	0.65	95,083	162.73	111.80	15.07	15.19	6,259	5	-	-
033	N	5.4%	10.20	6.76	3.16	0.28	0.57	67,197	161.64	111.79	13.40	15.41	4,361	2	-	-
089	S	7.9%	10.12	6.43	3.01	0.68	0.81	68,390	164.59	111.20	13.20	16.07	4,257	5	-	-
056	N	5.8%	9.54	5.75	3.33	0.46	0.56	100,646	178.85	113.20	15.76	18.56	5,424	5	-	-
560	C	6.1%	9.36	5.54	3.21	0.61	0.57	122,797	180.42	114.06	15.40	19.35	6,346	8	-	-
072	C	6.7%	9.34	5.65	3.28	0.41	0.64	113,283	175.74	111.35	14.33	18.38	6,164	5	-	-
071	N	7.6%	8.86	5.77	2.70	0.39	0.70	120,220	160.51	109.37	13.28	17.50	6,871	5	-	-
070	C	6.7%	8.74	5.71	2.67	0.36	0.60	179,148	162.51	110.70	15.12	18.09	9,904	7	-	-
050	N	6.6%	8.67	5.23	3.03	0.41	0.58	274,834	178.14	112.87	15.18	20.14	13,647	12	-	-
054	N	7.2%	8.23	4.94	2.87	0.42	0.61	221,011	180.08	113.88	16.75	21.41	10,323	10	-	-
046	N	7.2%	8.22	5.31	2.49	0.42	0.61	111,985	162.23	110.27	14.67	19.31	5,798	5	-	-
030	N	7.6%	8.10	5.27	2.47	0.36	0.64	103,622	162.64	110.71	12.93	19.43	5,334	4	-	-
035	N	7.2%	8.01	5.28	2.47	0.26	0.60	142,482	163.25	110.57	14.99	19.55	7,289	4	-	-
055	C	8.6%	7.94	4.77	2.77	0.40	0.71	279,805	178.91	113.13	16.59	21.68	12,906	12	-	-
038	N	7.9%	7.82	4.99	2.34	0.49	0.63	209,279	164.82	112.19	13.25	20.72	10,102	11	-	-
037	N	7.6%	7.57	4.59	2.66	0.32	0.60	202,131	179.32	113.30	15.82	22.87	8,839	7	-	-
543	N	7.7%	7.21	4.32	2.51	0.38	0.57	171,673	175.12	110.57	17.32	23.68	7,250	7	-	-
053	C	8.2%	6.90	4.16	2.41	0.33	0.59	390,395	175.33	110.39	19.51	24.48	15,947	14	-	-
029	N	9.5%	6.73	4.01	2.33	0.39	0.66	411,949	186.44	118.22	16.05	26.61	15,481	2	-	11
042	N	8.2%	6.63	4.27	2.00	0.36	0.56	287,910	164.04	110.35	14.80	24.02	11,985	11	-	-
047	C	9.6%	6.45	3.86	2.24	0.35	0.65	474,805	182.63	115.49	16.29	27.06	17,544	15	-	2
060	C	8.9%	5.95	3.62	2.10	0.23	0.56	403,263	180.40	114.46	15.53	28.75	14,025	10	-	-
043	N	10.0%	5.83	3.55	2.06	0.22	0.62	462,775	176.05	110.98	18.62	28.27	16,371	11	-	-
057	C	9.9%	5.68	3.39	1.97	0.32	0.59	642,967	182.79	115.63	17.45	30.71	20,939	1	-	15
064	C	10.3%	5.16	3.12	1.81	0.23	0.56	450,822	175.21	110.48	18.30	31.92	14,125	11	-	-
066	C	11.4%	5.13	3.06	1.77	0.30	0.62	462,376	181.63	114.69	17.94	33.29	13,891	15	-	-

- (1) Total bus count (337) is based on PM weekday equipment requirements  
(2) C under Zone is Central County, N is North County and S is South County.





**OCTA Operating Statistics By Route for Stationlink Service (Sorted by Subsidy per Boarding)**  
**Fiscal Year 2022-23**

Route	Zone	Farebox	Subsidy per Boarding	Direct Subsidy	Indirect Subsidy	"Capital Subsidy" Per Boarding	Revenue per Boarding	Boardings	CostVSH	Direct CostVSH	CostVSM	BoardVSH	VSH	Bus Count		
														40 FT	32 FT	60 FT
463	C	1.7%	\$ 57.70	\$ 21.12	\$ 21.62	\$ 14.96	\$ 0.75	3,110	\$ 170.74	\$ 85.08	\$ 17.00	3.93	792	5	-	-
453	N	1.7%	31.61	11.61	11.89	8.11	0.41	3,441	177.28	86.39	29.79	7.42	464	3	-	-
480	C	4.4%	23.31	8.96	9.17	5.18	0.84	3,595	173.23	85.86	13.60	9.13	394	2	-	-
472	C	6.2%	16.59	5.82	5.96	4.81	0.77	5,799	165.23	83.77	13.82	13.17	440	3	-	-
473	C	6.1%	14.84	5.48	5.61	3.75	0.72	7,452	179.13	86.36	17.21	15.18	491	3	-	-

(1) Total bus count (337) is based on PM weekday equipment requirements

(2) C under Zone is Central County, N is North County and S is South County.



**OCTA Operating Statistics By Route for Local and Community Services (Sorted by Boardings)**  
Fiscal Year 2022-23

Route	Zone	Farebox	Subsidy per Boarding	Direct Subsidy	Indirect Subsidy	"Capital Subsidy" Per Boarding	Revenue per Boarding	Boardings	CostVSH	Direct CostVSH	CostVSM	BoardVSH	VSH	Bus Count		
														40 FT	32 FT	60 FT
057	C	9.9%	\$ 5.68	\$ 3.39	\$ 1.97	\$ 0.32	\$ 0.59	642,967	\$ 182.79	\$ 115.63	\$ 17.45	30.71	20,939	1	-	15
047	C	9.6%	6.45	3.86	2.24	0.35	0.65	474,805	182.63	115.49	16.29	27.06	17,544	15	-	2
043	N	10.0%	5.83	3.55	2.06	0.22	0.62	462,775	176.05	110.98	18.62	28.27	16,371	11	-	-
066	C	11.4%	5.13	3.06	1.77	0.30	0.62	462,376	181.63	114.69	17.94	33.29	13,891	15	-	-
064	C	10.3%	5.16	3.12	1.81	0.23	0.56	450,822	175.21	110.48	18.30	31.92	14,125	11	-	-
029	N	9.5%	6.73	4.01	2.33	0.39	0.66	411,949	186.44	118.22	16.05	26.61	15,481	2	-	11
060	C	8.9%	5.95	3.62	2.10	0.23	0.56	403,263	180.40	114.46	15.53	28.75	14,025	10	-	-
053	C	8.2%	6.90	4.16	2.41	0.33	0.59	390,395	175.33	110.39	19.51	24.48	15,947	14	-	-
042	N	8.2%	6.63	4.27	2.00	0.36	0.56	287,910	164.04	110.35	14.80	24.02	11,985	11	-	-
055	C	8.6%	7.94	4.77	2.77	0.40	0.71	279,805	178.91	113.13	16.59	21.68	12,906	12	-	-
050	N	6.6%	8.67	5.23	3.03	0.41	0.58	274,834	178.14	112.87	15.18	20.14	13,647	12	-	-
054	N	7.2%	8.23	4.94	2.87	0.42	0.61	221,011	180.08	113.88	16.75	21.41	10,323	10	-	-
038	N	7.9%	7.82	4.99	2.34	0.49	0.63	209,279	164.82	112.19	13.25	20.72	10,102	11	-	-
037	N	7.6%	7.57	4.59	2.66	0.32	0.60	202,131	179.32	113.30	15.82	22.87	8,839	7	-	-
070	C	6.7%	8.74	5.71	2.67	0.36	0.60	179,148	162.51	110.70	15.12	18.09	9,904	7	-	-
543	N	7.7%	7.21	4.32	2.51	0.38	0.57	171,673	175.12	110.57	17.32	23.68	7,250	7	-	-
035	N	7.2%	8.01	5.28	2.47	0.26	0.60	142,482	163.25	110.57	14.99	19.55	7,289	4	-	-
560	C	6.1%	9.36	5.54	3.21	0.61	0.57	122,797	180.42	114.06	15.40	19.35	6,346	8	-	-
083	C	4.6%	12.83	7.59	4.40	0.84	0.58	122,526	183.42	117.32	10.66	14.59	8,398	11	-	-
071	N	7.6%	8.86	5.77	2.70	0.39	0.70	120,220	160.51	109.37	13.28	17.50	6,871	5	-	-
072	C	6.7%	9.34	5.65	3.28	0.41	0.64	113,283	175.74	111.35	14.33	18.38	6,164	5	-	-
001	S	4.4%	15.05	9.16	5.31	0.58	0.67	112,997	190.04	121.81	12.11	12.55	9,006	7	-	-
046	N	7.2%	8.22	5.31	2.49	0.42	0.61	111,985	162.23	110.27	14.67	19.31	5,798	5	-	-
059	C	6.1%	10.78	6.92	3.24	0.62	0.66	104,720	162.96	111.28	15.60	15.05	6,957	7	-	-
030	N	7.6%	8.10	5.27	2.47	0.36	0.64	103,622	162.64	110.71	12.93	19.43	5,334	4	-	-
056	N	5.8%	9.54	5.75	3.33	0.46	0.56	100,646	178.85	113.20	15.76	18.56	5,424	5	-	-
026	N	6.1%	10.55	6.85	3.21	0.49	0.65	95,083	162.73	111.80	15.07	15.19	6,259	5	-	-
091	S	6.4%	13.46	8.58	4.02	0.86	0.86	86,879	162.57	110.79	11.91	12.09	7,188	8	-	-
025	N	6.2%	10.75	7.00	3.28	0.47	0.67	79,597	163.32	111.26	13.99	14.90	5,340	4	-	-
079	C	4.5%	13.76	8.86	4.15	0.75	0.62	74,219	164.81	111.53	14.47	12.10	6,135	6	-	-
089	S	7.9%	10.12	6.43	3.01	0.68	0.81	68,390	164.59	111.20	13.20	16.07	4,257	5	-	-
033	N	5.4%	10.20	6.76	3.16	0.28	0.57	67,197	161.64	111.79	13.40	15.41	4,361	2	-	-
090	S	5.8%	12.11	7.86	3.68	0.57	0.71	65,193	163.08	111.85	11.01	13.32	4,894	4	-	-
529	C	5.2%	10.87	6.41	3.72	0.74	0.55	63,168	187.14	118.18	16.29	17.51	3,608	5	-	-
150	C	4.5%	10.77	6.35	3.71	0.71	0.47	52,643	171.53	107.73	18.44	16.29	3,232	4	-	-
123	N	3.9%	15.96	9.48	5.53	0.95	0.61	49,106	181.36	115.02	13.22	11.61	4,230	5	-	-
143	N	4.7%	13.23	8.66	4.00	0.57	0.63	48,921	163.10	111.16	14.47	12.28	3,985	3	-	-
129	N	6.0%	12.91	8.37	3.87	0.67	0.79	41,899	161.46	109.70	13.70	12.39	3,382	3	-	-
167	C	3.4%	17.86	10.68	6.23	0.95	0.60	39,095	174.67	110.40	14.60	9.98	3,917	4	-	-
086	C	4.4%	15.92	10.21	4.78	0.93	0.68	30,043	166.48	115.52	13.26	10.62	2,829	3	-	-
153	N	4.9%	15.04	9.85	4.55	0.64	0.75	28,931	158.36	108.83	12.40	10.45	2,768	2	-	-
076	C	4.7%	13.24	7.85	4.55	0.84	0.61	22,160	175.32	110.66	14.84	13.48	1,644	2	-	-
177	S	5.2%	15.25	9.81	4.53	0.91	0.78	20,512	164.48	113.83	13.22	10.87	1,886	2	-	-
862	C	2.6%	22.82	14.11	8.23	0.48	0.60	19,246	179.96	113.29	20.93	7.84	2,454	1	-	-
178	C	3.0%	21.99	12.96	7.56	1.47	0.62	18,933	175.81	111.22	14.06	8.32	2,276	3	-	-
087	S	4.2%	17.44	11.15	5.22	1.07	0.72	17,420	168.49	116.15	11.44	9.86	1,766	2	-	-
085	S	3.1%	20.30	13.08	6.12	1.10	0.60	16,873	167.36	115.73	13.31	8.45	1,997	2	-	-
082	S	4.7%	13.82	8.45	3.96	1.41	0.62	13,201	175.81	117.78	12.31	13.50	978	2	-	-

- (1) Total bus count (337) is based on PM weekday equipment requirements  
(2) C under Zone is Central County, N is North County and S is South County.



**OCTA Operating Statistics By Route for Stationlink Service (Sorted by Boardings)**  
**Fiscal Year 2022-23**

Route	Zone	Farebox	Subsidy per Boarding	Direct Subsidy	Indirect Subsidy	"Capital Subsidy" Per Boarding	Revenue per Boarding	Boardings	CostVSH	Direct CostVSH	CostVSM	BoardVSH	VSH	Bus Count		
														40 FT	32 FT	60 FT
473	C	6.1%	\$ 14.84	\$ 5.48	\$ 5.61	\$ 3.75	\$ 0.72	7,452	\$ 179.13	\$ 86.36	\$ 17.21	15.18	491	3	-	-
472	C	6.2%	16.59	5.82	5.96	4.81	0.77	5,799	165.23	83.77	13.82	13.17	440	3	-	-
480	C	4.4%	23.31	8.96	9.17	5.18	0.84	3,595	173.23	85.86	13.60	9.13	394	2	-	-
453	N	1.7%	31.61	11.61	11.89	8.11	0.41	3,441	177.28	86.39	29.79	7.42	464	3	-	-
463	C	1.7%	57.70	21.12	21.62	14.96	0.75	3,110	170.74	85.08	17.00	3.93	792	5	-	-

- (1) Total bus count (337) is based on PM weekday equipment requirements  
 (2) C under Zone is Central County, N is North County and S is South County.

## Route Reference Table

Route	Route Description	Main Street	Route Category
1	Long Beach - San Clemente	via Pacific Coast Hwy	LOCAL
25	Fullerton - Huntington Beach	via Knott Ave/ Goldenwest St	LOCAL
26	Fullerton - Yorba Linda	via Commonwealth Ave/ Yorba Linda Blvd	LOCAL
29	La Habra - Huntington Beach	via Beach Blvd	LOCAL
30	Cerritos - Anaheim	via Orangethorpe Ave	LOCAL
33	Fullerton - Huntington Beach	via Magnolia St	LOCAL
35	Fullerton - Costa Mesa	via Brookhurst St	LOCAL
37	La Habra - Fountain Valley	via Euclid St	LOCAL
38	Lakewood - Anaheim Hills	via Del Amo Blvd/ La Palma Ave	LOCAL
42	Seal Beach - Orange	via Seal Beach Blvd/ Los Alamitos Blvd/ Lincoln Ave	LOCAL
43	Fullerton - Costa Mesa	via Harbor Blvd	LOCAL
46	Long Beach - Orange	via Ball Road/ Taft Ave	LOCAL
47	Fullerton - Balboa	via Anaheim Blvd/ Fairview St	LOCAL
50	Long Beach - Orange	via Katella Ave	LOCAL
53	Anaheim - Irvine	via Main St	LOCAL
54	Garden Grove - Orange	via Chapman Ave	LOCAL
55	Santa Ana - Newport Beach	via Standard Ave/ Bristol St/ Fairview St/ 17th St	LOCAL
56	Garden Grove - Orange	via Garden Grove Blvd	LOCAL
57	Brea - Newport Beach	via State College Blvd/ Bristol St	LOCAL
59	Anaheim - Irvine	via Kraemer Blvd/ Glassell St/ Grand Ave/ Von Karman Ave	LOCAL
60	Long Beach - Tustin	via Westminster Ave/ 17th St	LOCAL
64	Huntington Beach - Tustin	via Bolsa Ave/ 1st St	LOCAL
66	Huntington Beach - Irvine	via McFadden Ave/ Walnut Ave	LOCAL
70	Sunset Beach - Tustin	via Edinger Ave	LOCAL
71	Yorba Linda - Newport Beach	via Tustin Ave/ Red Hill Ave/ Newport Blvd	LOCAL
72	Sunset Beach - Tustin	via Warner Ave	LOCAL
76	Huntington Beach - John Wayne Airport	via Talbert Ave/ MacArthur Blvd	LOCAL
79	Tustin - Newport Beach	via Bryan Ave/ Culver Dr/ University Ave	LOCAL
82	Foothill Ranch - Rancho Santa Margarita	via Portola Pkwy/ Santa Margarita Pkwy	LOCAL
83	Anaheim - Laguna Hills	via 5 Fwy/ Main St	LOCAL
85	Mission Viejo - Laguna Niguel	via Marguerite Pkwy/ Crown Valley Pkwy	LOCAL
86	Costa Mesa - Mission Viejo	via Alton Pkwy/ Jeronimo Rd	LOCAL
87	Rancho Santa Margarita - Laguna Niguel	via Alicia Pkwy	LOCAL
89	Mission Viejo - Laguna Beach	via El Toro Rd/ Laguna Canyon Rd	LOCAL
90	Tustin - Dana Point	via Irvine Center Dr/ Moulton Pkwy/ Golden Lantern St	LOCAL
91	Laguna Hills - San Clemente	via Paseo de Valencia/ Camino Capistrano/ Del Obispo St	LOCAL
123	Anaheim - Huntington Beach	via Malvern Ave/ Valley View/ Bolsa Chica	COMMUNITY
129	La Habra - Anaheim	via La Habra Blvd/ Brea Blvd/ Birch St/ Kraemer Blvd	COMMUNITY
143	La Habra - Brea	via Whittier Blvd/ Harbor Blvd/ Brea Blvd/ Birch St	COMMUNITY
150	Santa Ana - Costa Mesa	via Fairview St/ Flower St	COMMUNITY
153	Brea - Anaheim	via Placentia Ave	COMMUNITY
167	Orange - Irvine	via Irvine Ave/ Hewes St/ Jeffrey Rd	COMMUNITY
177	Foothill Ranch - Laguna Hills	via Lake Forest Dr/ Muirlands Blvd/ Los Alisos Blvd	COMMUNITY
178	Huntington Beach - Irvine	via Adams Ave/ Birch St/ Campus Dr	COMMUNITY
453	Orange Transportation Center - St. Joseph's Hospital	via Chapman Ave/ Main St/ La Veta Ave	STATIONLINK
463	Santa Ana Regional transportation Center - Hutton Centre	via Grand Ave	STATIONLINK
472	Tustin Metrolink Station - Irvine Business Complex	via Edinger Ave/ Red Hill Ave/ Campus Dr/ Jamboree Rd	STATIONLINK
473	Tustin Metrolink Station - U.C.I.	via Edinger Ave/ Harvard Ave	STATIONLINK
480	Irvine Metrolink Station - Lake Forest	via Alton Pkwy/ Bake Pkwy/ Lake Forest Dr	STATIONLINK
529	Fullerton to Huntington Beach	via Beach Blvd	BRAVO
543	Fullerton Transportation Center - Santa Ana	via Harbor Blvd	BRAVO
560	Santa Ana - Long Beach	via 17th St / Westminster Ave	BRAVO
862	Downtown Santa Ana Shuttle	via Civic Center Dr	COMMUNITY

## OC Bus 360 Initiatives

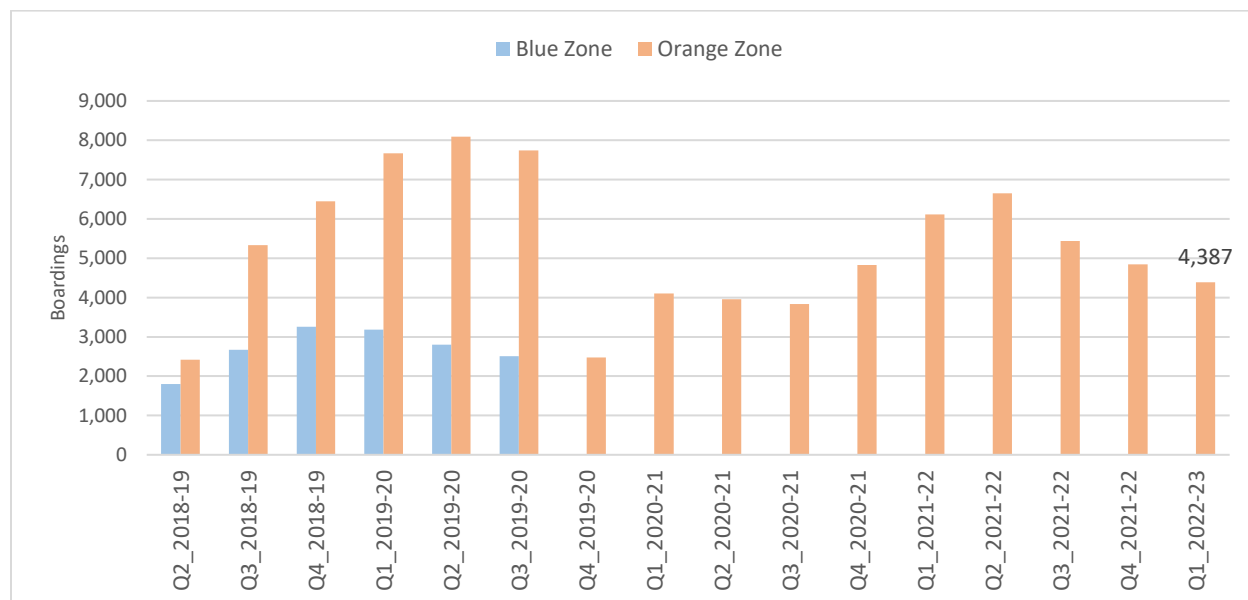
### OC Flex

#### OC Flex Program

OC Flex service launched in October 2018 in two zones under a pilot program. The Board approved five primary goals and performance metrics to evaluate the pilot program. Upon approval of the pilot program, the Board directed staff to provide updates on the performance metrics as part of a quarterly Bus Operations Performance Measurements Report.

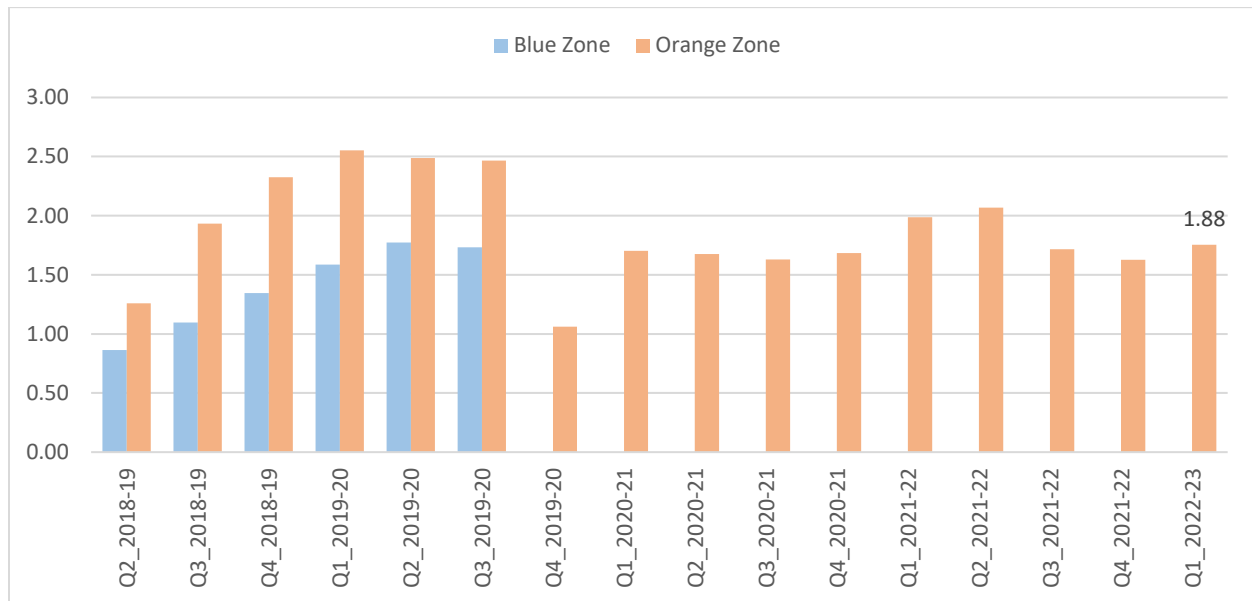
For Q1 of FY 2022-23, ridership in the Orange Zone decreased slightly from the previous quarter, due to summer break for schools within the zone, which are high trip generators for the program. Other metrics remained relatively stable, such as the rate of shared rides and connecting trips, which continues to trend above target.

#### Quarterly OC Flex Ridership – Through Q1-FY 2022-23



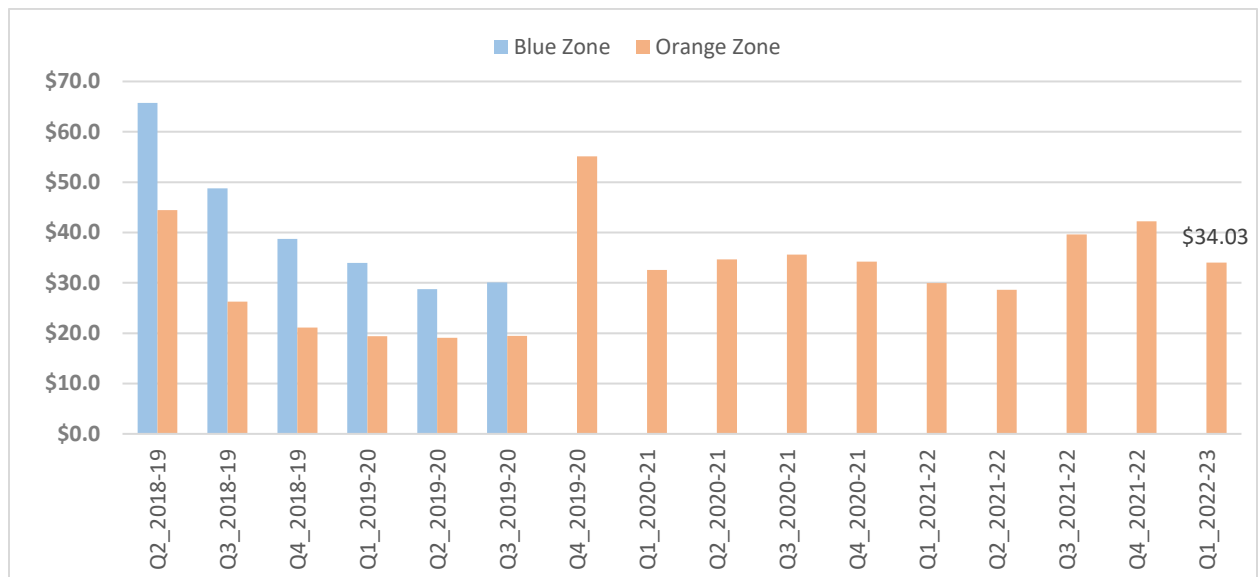
### OC Flex Productivity (Boarding/Revenue Vehicle Hour) – Through Q1-FY 2023-23

Target: Productivity – Six Boardings Per Revenue Vehicle Hour



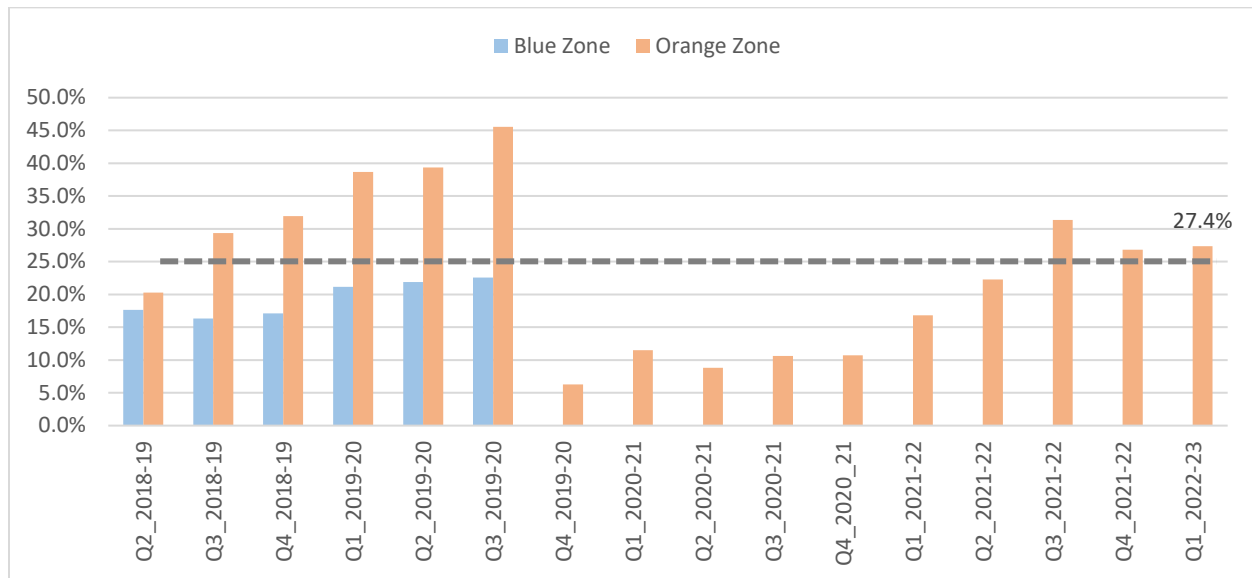
### Quarterly OC Flex Direct Subsidy per Boarding – Through Q1-FY 2023-23

Target: Direct Subsidy per Boarding – \$9 per Boarding



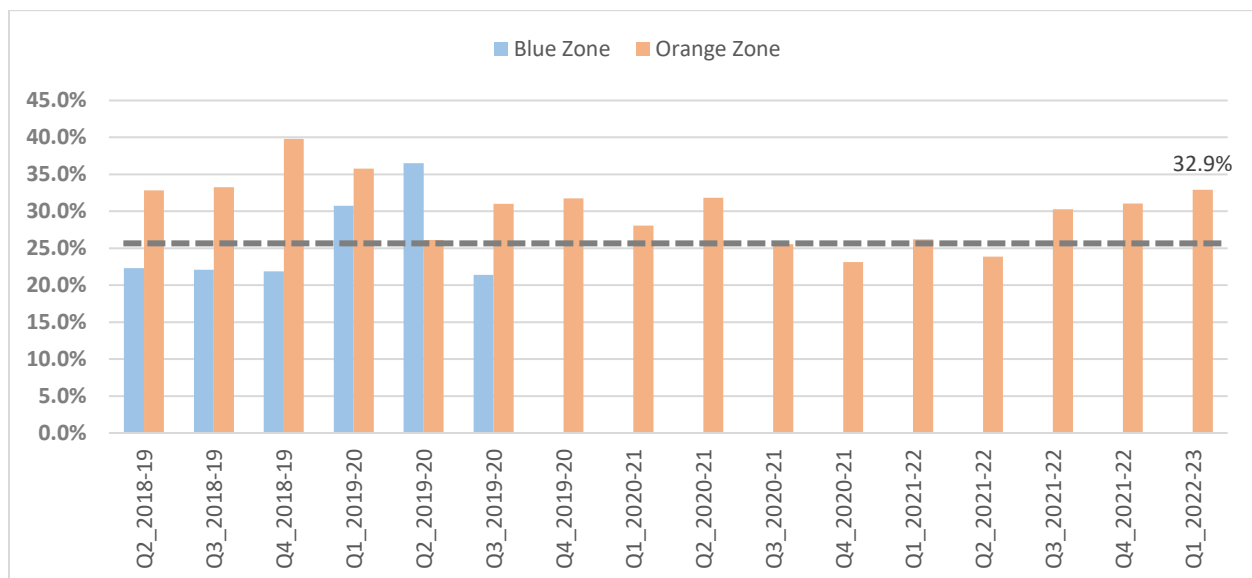
### OC Flex Shared Trips – Through Q1-FY 2023-23

Target: 25 Percent of Booked Trips Sharing a Vehicle



### OC Flex Connecting Trips (Transfers) – Through Q1-FY 2023-23

Target: 25 Percent of Trips Transfer to OC Bus or Metrolink Service



## College Pass Program

OCTA has been working to expand the College Pass Program (CPP), which began in 2017 at Santa Ana College. Through the shared-cost program, community college students get a bus pass as part of their registration that allows them unlimited free rides on OC Bus throughout the semester. In August, Orange Coast College (OCC) joined the program through a five-year agreement offering free bus rides to its 15,000 full-time and part-time students. With OCC's participation, OCTA marked another important milestone, expanding the CPP to all nine community colleges in Orange County. A special commemorating event was held at the Board of Directors meeting August 9, 2022 with presentation of resolutions of appreciation to all nine colleges' presidents in attendance.

To create awareness and encourage ridership among OCC students, a marketing campaign was conducted including an OCC-designed full bus wrap and in-person outreach that interacted and engaged with hundreds of students on campus. Within the first month of CPP at OCC, more than 800 individual students have taken the bus, generating 13,535 boardings. Total ridership in September 2022 for all nine colleges exceeded 90,000 a 125 percent increase over September 2021.





**January 12, 2023**

**To:** Transit Committee

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

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

### **Overview**

Measure M2 includes a program to fund community-based transit circulators known as Project V. The goal of the program is to provide local transit services in areas not well-served by regional transit services. Funding is awarded to local jurisdictions through a competitive call for projects. Local jurisdictions then implement the awarded services and commit to meeting minimum performance standards including ridership metrics. The ridership information for these awarded services is presented to the Board of Directors twice annually. The ridership report from April 2022 through September 2022 is presented herein.

### **Recommendation**

Receive and file as an information item.

### **Background**

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

Project V services are required to adhere to established minimum performance standards. These standards were modified by the Orange County Transportation Authority (OCTA) Board of Directors (Board) in January 2021 to allow for additional flexibility to continue low-performing services, should a jurisdiction desire to do so contingent on supplemental local subsidies.

Project V-funded services are to remain within a maximum cost per boarding standard, which is equal to twice the M2 Project V per boarding subsidy. Services not meeting this standard are required to disclose the cost per boarding information to their governing boards and seek direction to continue, restructure, or cancel the service. This approach provides local jurisdictions with the flexibility to deliver Project V services in a post-coronavirus (COVID-19) environment, while shifting evaluation metrics to be more financially focused, context sensitive, and locally driven. For fiscal year (FY) 2021-22, the maximum cost per boarding was established at \$20.47 (two times the FY 2021-22 M2 subsidy per boarding of \$10.24), and for FY 2022-23, the maximum cost per boarding was established at \$20.85 (two times the FY 2022-23 M2 subsidy per boarding of \$10.43).

This ridership report covers the period from April 2022 to September 2022 and provides information on boardings per revenue vehicle hour, cost per boarding, customer satisfaction, and on-time performance.

### ***Discussion***

During this reporting period, Project V services in operation included a combination of seasonal, special event, commuter, fixed route, and demand-response projects, which meet a variety of community needs. In comparison to last year, April 2022 through September 2022, the active services demonstrated an overall increase in ridership, with several services closely approaching pre-pandemic levels. During this period, one new Project V grant-funded service, the Laguna Niguel Summer Trolley, was started by the City of Laguna Niguel.

Current active Project V services (15 in total) are identified below. Detailed grant and service operating information is provided in Attachment A. During this reporting period, all services successfully met the required program performance standards including the Board-approved maximum cost per boarding requirement.

The La Habra Special Event Shuttle Service did not operate during this reporting period. Therefore, no information is provided in this update or attachment for that service.

Community shuttles that were in service and met the average cost per boarding requirement, include the following:

- Anaheim Canyon Metrolink Connector Service,
- County of Orange Ranch Ride Service,
- Dana Point Trolley (2014 grant),
- Dana Point Summer Trolley Expansion (2016 grant),

- Dana Point Trolley Continuity and Expansion and Weekend Service (2018 grant),
- Laguna Beach Summer Breeze (2018 grant),
- Laguna Beach Off-Season Weekend Trolley Service (2020 grant),
- Laguna Niguel Summer Trolley (2019 grant),
- Mission Viejo Community Circulator,
- Newport Beach Balboa Peninsula Trolley (2016 grant),
- Newport Beach Balboa Peninsula Trolley Expansion (2018 grant),
- San Clemente Summer Weekend Trolley and Seasonal Service (2016 grant),
- San Clemente Summer Weekday Trolley and Seasonal Service Expansion (2018 grant),
- San Clemente's SC Rides Service (2016 grant), and
- San Juan Capistrano Special Event and Weekend Summer Trolley Service.

Concluded or cancelled projects during this reporting period (three in total) include the following:

- Huntington Beach Special Events (2014 grant),
- Irvine iShuttle Route E – Irvine Metrolink Station Service – East, and
- Irvine iShuttle Route F – Tustin Metrolink Station/Irvine Business Complex West.

The City of Huntington Beach Special Events (2014 grant) project grant expired and is now considered concluded. OCTA confirmed with City of Huntington Beach staff that an extension was not desired and the project had been concluded.

On June 14, 2022, the City of Irvine (City) requested that OCTA cancel the iShuttle Route E and Route F services. Late last year, OCTA notified the City that iShuttle Route F was not meeting the maximum cost per boarding standard. The City agreed to support iShuttle Route F through the end of the FY with hopes that ridership would increase. Unfortunately, ridership levels did not improve during the remainder of the FY. The Route E service was suspended during the COVID-19 pandemic and was never reinstated. Route E ridership was below the performance standard pre-pandemic and also lower than ridership on Route F. Given the performance of Route F and the prior low ridership on Route E, the City took action to cancel both routes.

To ensure compliance and meet the intent of the Project V guidelines, in January 2021, local jurisdictions were asked to report on-time performance and customer satisfaction on an annual basis, as indicated in their cooperative agreements. While some local jurisdictions are still developing the tools to meet

this requirement<sup>1</sup>, based upon the reporting provided in Attachment A, it appears that steady progress is being made toward complete implementation. For those local jurisdictions that were able to report during this period, all successfully met their on-time performance and customer satisfaction thresholds.

***Summary***

A ridership and status report on Project V services is provided for information purposes. Staff will continue working with local jurisdictions as they resume services and implement recently approved Project V programmatic changes including on-time performance and customer satisfaction reporting. A status update on these efforts will continue to be provided to the Board semi-annually, with the next scheduled update occurring in July 2023.

***Attachment***

A. Project V Services – Ridership Report

**Prepared by:**



Adrian Salazar  
Transportation Funding Analyst, Senior  
(714) 560-5363

**Approved by:**



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

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<sup>1</sup> Only San Clemente trolley services remain to establish a target threshold for customer satisfaction.

## Project V Services - Ridership Report

Reporting Period: Q4 of FY 2021-22 and Q1 of FY 2022-23

Agency	Service Description	M2 Project V Total Award	Service Type	Service Start Month/Year	Average Boardings Per Revenue Vehicle Hour (B/RVH) <sup>1</sup> SAR	Average Cost per Boarding (O&M/B) <sup>2</sup> SAR	Met Customer Satisfaction Threshold (Y/N/NA)	Met OTP Threshold (Y/N/NA)
Anaheim	Anaheim Canyon Circulator	\$ 1,141,864	Commuter Service	July 2020	5.8	\$15.79	Y	Y
County of Orange	Local Circulator and Special Event Service (OC Ranch Ride)	\$ 2,041,547	Local Circulator and Special Event	June 2017	39.5	\$8.37	Y	Y
Dana Point	Dana Point Trolley	\$ 2,456,511	Seasonal Service	June 2015	13.0	\$10.16	Y	Y
Dana Point	Dana Point Trolley Expansion	\$ 905,968	Seasonal Service	June 2017	12.9	\$10.17	Y	Y
Dana Point	Dana Point Trolley Continuity	\$ 1,745,065	Seasonal Service	September 2019	12.0	\$10.45	Y	Y
Laguna Beach	Off-Season Weekend Trolley Service	\$ 3,850,000	Special Event	September 2021	18.5	\$4.44	NA	Y
Laguna Beach	Summer Breeze Bus Service	\$ 634,357	Seasonal Service	June 2018	21.4	\$3.59	Y	Y
Laguna Niguel	Laguna Niguel Summer Trolley - Southern Section	\$ 886,082	Seasonal and Special Event	May 2022	9.3	\$12.50	Y	Y
Mission Viejo	Local Community Circulator	\$ 3,332,879	Local Circulator	October 2016	11.7	\$6.99	Y	Y
Newport Beach	Balboa Peninsula Seasonal Trolley	\$ 685,454	Seasonal Service	June 2017	11.5	\$12.61	Y	Y
Newport Beach	Balboa Peninsula Seasonal Trolley Expansion	\$ 278,400	Seasonal Service	August 2018	11.5	\$12.61	Y	Y
San Clemente	Summer Weekend Trolley and Seasonal Service	\$ 1,181,393	Seasonal and Special Event	May 2017	44.7	\$1.46	TBD	Y
San Clemente	Summer Weekday Trolley and Seasonal Service Expansion	\$ 1,537,200	Seasonal and Special Event	July 2018	23.1	\$3.04	TBD	Y
San Juan Capistrano	Special Event and Weekend Summer Trolley Service	\$ 958,642	Seasonal and Special Event	July 2018	21.0	\$8.51	Y	Y
San Clemente	SC Rides	\$ 914,400	Ride Hailing	October 2016	7.8	\$7.84	Y	NA

1. Rounded to the next whole number

2. FY 2021-22 maximum cost per boarding - \$20.47; FY 2022-23 maximum cost per boarding - \$20.85

NA - data point not applicable for current performance period (ex - CS surveys required annually)

Minimum performance standards for cost per boarding (O&amp;M/B)

• \$20.47 maximum cost per boarding set at twice maximum allowable per boarding subsidy of \$10.24 in FY 2021-22 (escalated at 1.85% annually thereafter)

• \$20.85 maximum cost per boarding set at twice maximum allowable per boarding subsidy of \$10.43 in FY 2022-23 (escalated at 1.85% annually thereafter)

Acronyms

B/RVH - Boardings/revenue vehicle hour

CS - Customer satisfaction

FY - Fiscal year

M2 - Measure M2

NA - Not applicable

O&amp;M/B - Operations and maintenance/boardings

OTP - On-time performance

Q1 - Quarter 1 (April - June 2022)

Q4 - Quarter 4 (July - September 2022)

SAR - Semi-annual review

Y/N - Yes/No

TBD - To Be Determined



**January 12, 2023**

**To:** Transit Committee

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

**Subject:** OC Streetcar Project Quarterly Update

### **Overview**

The Orange County Transportation Authority is implementing the OC Streetcar project, and updates are provided to the Board of Directors on a quarterly basis. This report covers OC Streetcar project activities from October 2022 through December 2022.

### **Recommendation**

Receive and file as an information item.

### **Background**

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

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

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

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

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

On March 26, 2018, the OCTA Board of Directors (Board) awarded a contract to Siemens Mobility, Inc., (Siemens) for the manufacture and delivery of eight modern streetcar vehicles, spare parts, and special tools. On September 24, 2018, the Board awarded the Project construction contract to Walsh Construction Company II, LLC (Walsh). On November 30, 2018, the Federal Transit Administration (FTA) executed the Full Funding Grant Agreement (FFGA), securing \$149,000,000 in federal New Starts discretionary funding for the Project. In February 2019, the FFGA was funded through the FTA Transit Award Management System, which was the last step necessary to begin the drawdown of federal funding. Through November 2022, \$108,192,289 has been drawn down on the FFGA. On May 22, 2020, the Board awarded a contract to Herzog Transit Services, Inc., to provide operations and maintenance services for an initial start-up and pre-revenue period, and a five-year revenue term.

### ***Discussion***

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

#### **Construction**

Construction is 78 percent complete with several construction activities continuing to advance in all segments of the Project. In the Downtown Santa Ana area (Downtown), the Project achieved a significant milestone with the completion of the embedded track on Fourth Street. On November 18, 2022, ahead of the Thanksgiving milestone date, both directions of vehicular traffic reopened from French Street to Ross Street. Another significant milestone was completed with the installation of the first platform canopy near French Street. Track installation also occurred in Segment 5 on eastbound Santa Ana Boulevard between Santiago Street and Lacy Street. Overall, approximately 70 percent of the embedded track has been installed throughout the alignment. Attachment A reflects the status of track installation. In the Pacific Electric Right-of-Way portion of the alignment, final compaction of the ballast beneath

the tracks was completed along with grading of the maintenance access road. At the MSF, key activities completed during the quarter included installation of exterior walls, conduit and piping, roof curbs and skylights, girder painting, and shop tracks. Given the significance of the MSF to vehicle testing, staff will be focusing their efforts and close coordination with Walsh to ensure significant completion of the MSF for vehicle storage mid to late next year.

Other ongoing construction activities include preparation of various street intersections for placement of new traffic signal poles, and installation of high voltage switchgear, traction power substations, remaining overhead catenary system poles, and station platform canopies at Harbor Boulevard, Raitt Street, and French Street. Roadway pavement was placed on eastbound Santa Ana Boulevard from Bristol Street to Flower Street. Embedded track work was completed in Sasser Park, and embedded track installation is currently underway on westbound Santa Ana Boulevard between Pointsettia Street and Santiago Street just west of the SARTC.

#### Vehicle and Operations

Siemens continues production of eight S700 streetcar vehicles. Currently, Cars 1-7 are in the final stages of manufacturing with installation of the last remaining vehicle components. Car 8 is in final assembly and preparations are underway to commence static and dynamic testing in first quarter of 2023.

The First Article Inspection (FAI) for Car 1, conducted in May 2022, had open items for reinspection that were conducted in mid-September 2022. Most of the open items were signed off at this reinspection, with the remaining items to be closed in early 2023. Siemens is preparing a final walkthrough for Car 3, and the anticipated inspection is January 2023.

OCTA staff returned to Siemens in December 2022 to inventory and approve an additional 25 percent of the spare parts and special tools stored at Siemens, representing approximately 40 percent of the total line items. OCTA staff is in negotiations with Siemens to extend the warranty for spare parts and special tools over the next year, and to discuss the remaining vehicle delivery schedule. Staff anticipates returning to the Board in early 2023 with any contract amendments required for Siemens as a result of these discussions.

#### Operations and Maintenance (O&M) Contract

A second amendment to the Limited Notice to Proceed (LNTP) for the O&M contractor, Herzog, was executed on November 23, 2022. It represents a continuation of tasks identified as part of the initial LNTP and LNTP Amendment No. 1, as well as the initiation of new tasks identified to facilitate the start-up phase of the Project.



The Herzog O&M general manager is working with OCTA operations staff to prepare procedures and documentation in compliance with all applicable FTA and California Public Utilities Commission (CPUC) requirements. On October 26, 2022, the Rail Activation Committee kick-off was held with various Project stakeholders, including FTA and their project management oversight consultant, and CPUC. Rail activation is the start-up and testing transition between construction and the start of revenue service. The Rail Activation Committee will remain actively engaged in preparation for the start-up and testing phase of the Project.

#### Public Outreach

Outreach efforts between October 2022 through December 2022 continued to provide bilingual notices regarding construction activities, as well as presenting targeted Project information at several in-person community meetings with Downtown merchants and residents near the Santa Ana Regional Transportation Center. Meeting topics included keeping dedicated delivery zones available to merchants in Downtown, general site conditions, parking restoration, and intersection sequencing.

In preparation for next year's electrification of service lines providing power to the streetcar vehicles, the outreach team is introducing safety messaging in our outreach materials. For example, OCTA provided information tables at school events at Carver Elementary and Garfield Elementary which included bilingual activity books targeted at young children to provide education and safety awareness on this topic.

The Eat Shop Play program began running a 15-second advertisement for the Downtown businesses in 11 local movie theaters in addition to social media, newspaper, radio spots, electronic billboards, and bus advertisements to support the Downtown businesses. The outreach team continues to meet individually with business owners to share the metrics produced by the Eat Shop Play marketing efforts. OCTA staff is compiling a year-end program-wide list of metrics that will capture the wide range of efforts made on behalf of Downtown merchants.

During the quarter, OCTA participated in several Downtown community events including an early black Friday shopping event, Tamale Fest, OC Vegan Fest, and the Posada festival. OCTA staff continues to receive positive feedback from visitors to Project information tables and excitement is building to see the vehicle testing next year.

In addition to our general notices for construction activities, the marketing team added drone footage to the OCTA website and provided links to recent tour audiences. OCTA staff accompanied American Society of Civil Engineers group

members from around the country for a tour of the alignment and MSF location. OCTA staff also hosted a group of graduate students from the University of California, Irvine to tour Downtown.

#### **Cost and Schedule**

In December 2021, the Board approved a revised Project budget of \$509,540,000. Staff continues to coordinate with the construction contractor and vehicle manufacturer to achieve the March 2024 revenue service date as presented to the Board in December 2021.

In September 2022, staff conducted a Project risk assessment consistent with achieving 70 percent construction completion. The FTA and CPUC were both in attendance for the assessment. Staff will return to the Board in spring 2023 to present the results of the risk analysis, including any adjustments to the Project cost and schedule.

#### **Next Steps**

Activities in the next quarter will focus on construction of the remaining track westbound between Mortimer Street and Santiago Street along with installation of street pavement, curbs, gutters, and OCS and traffic signal poles, and Santa Ana Regional Transportation Center tracks and platform station. Work will also continue on the station platforms and station canopies installation. Next steps for vehicles include finalizing vehicle equipping, ongoing static and dynamic testing, and completing vehicle inspections. New traffic signal equipment will be delivered and installed next quarter. Upcoming outreach activities include ongoing coordination with the construction team and the City regarding traffic control measures that are needed for the in-street embedded track installation and continued coordination with the City.

#### **Summary**


An OC Streetcar project update covering October 2022 through December 2022 is provided for the Orange County Transportation Authority Board of Directors' review.

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***Attachment***

A. Project Alignment - Status of Track Installation

**Prepared by:**



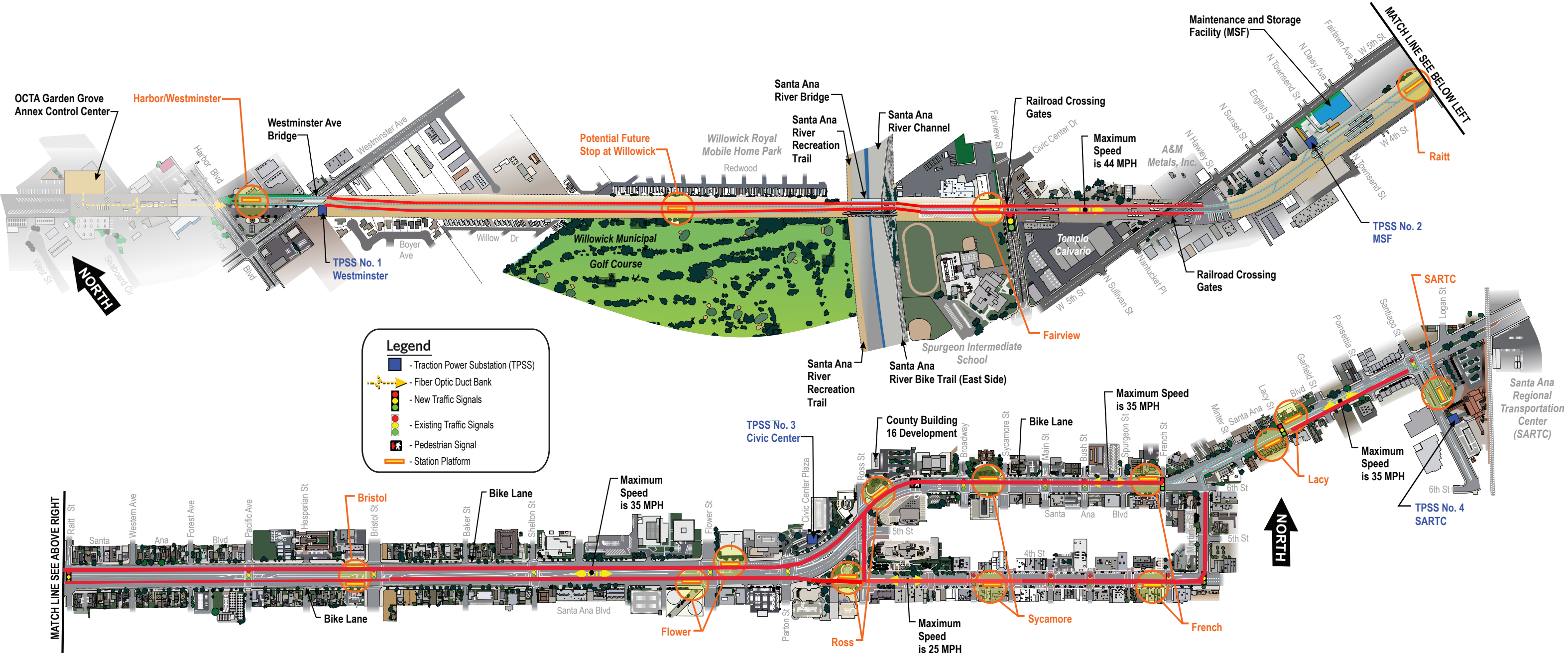
Ross Lew, P.E.  
Sr. Program Manager  
(714) 560-5775

**Approved by:**



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

Project Alignment - Status of Track Installation



MATCH LINE SEE ABOVE RIGHT

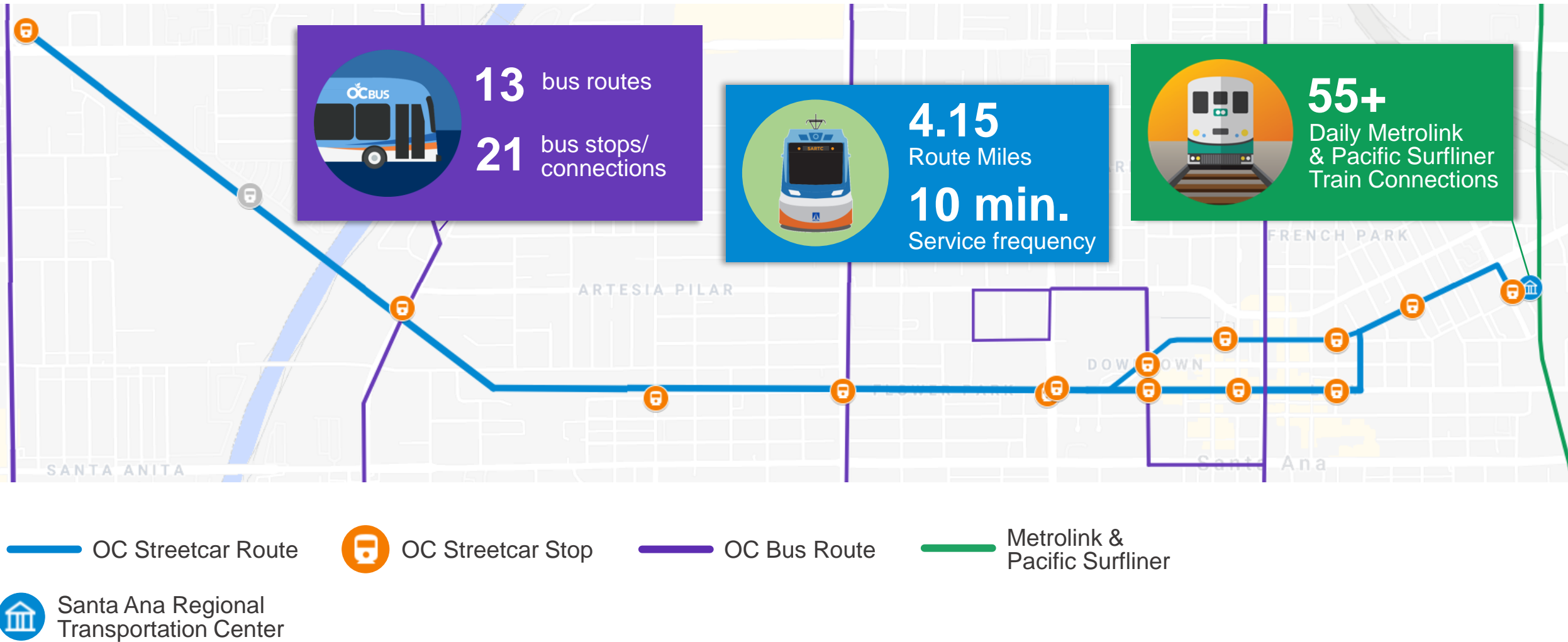
MATCH LINE SEE BELOW LEFT

Track Installed as of September 30, 2022



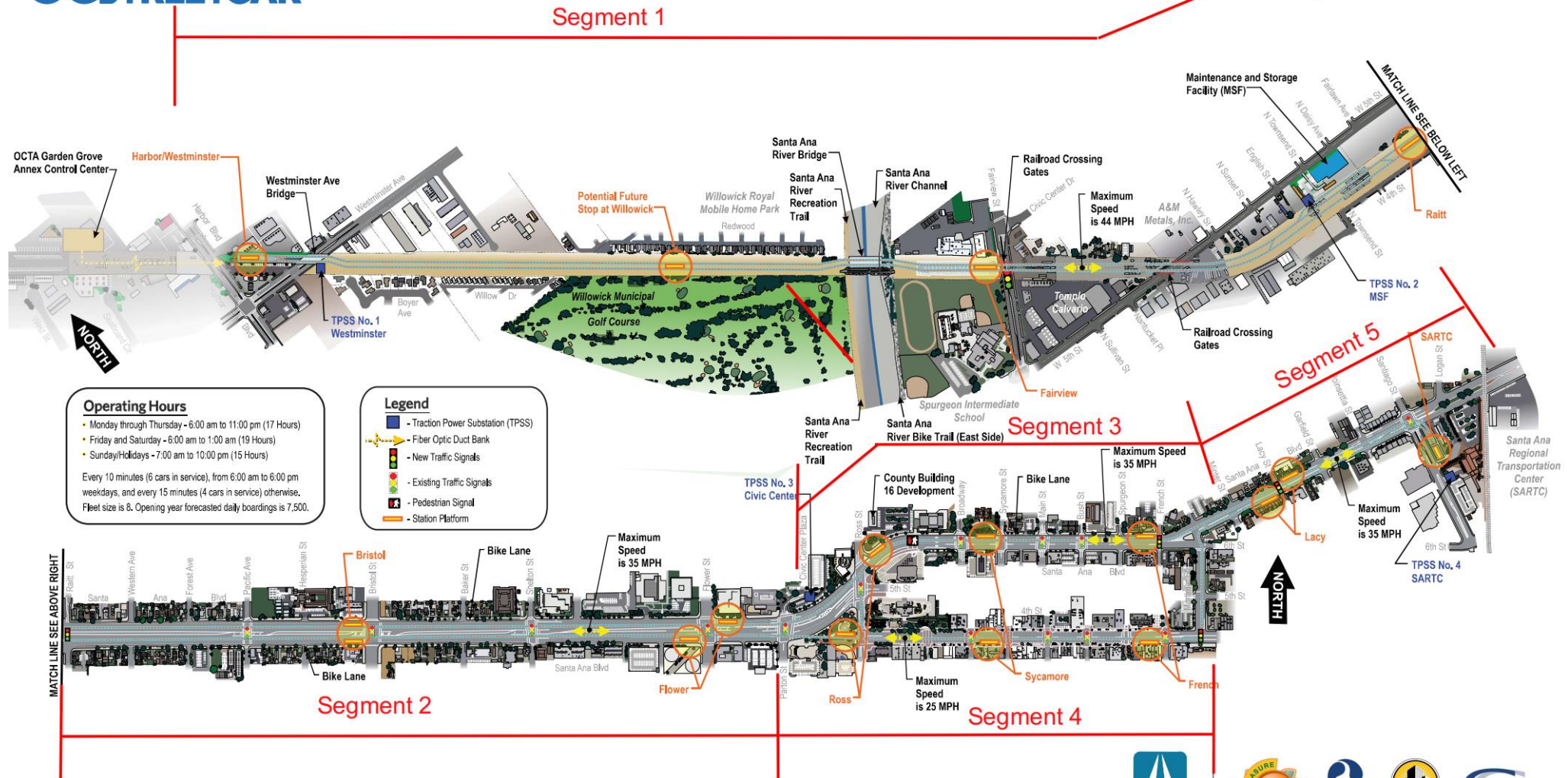
# OC Streetcar Project Quarterly Update

# Transit Connectivity

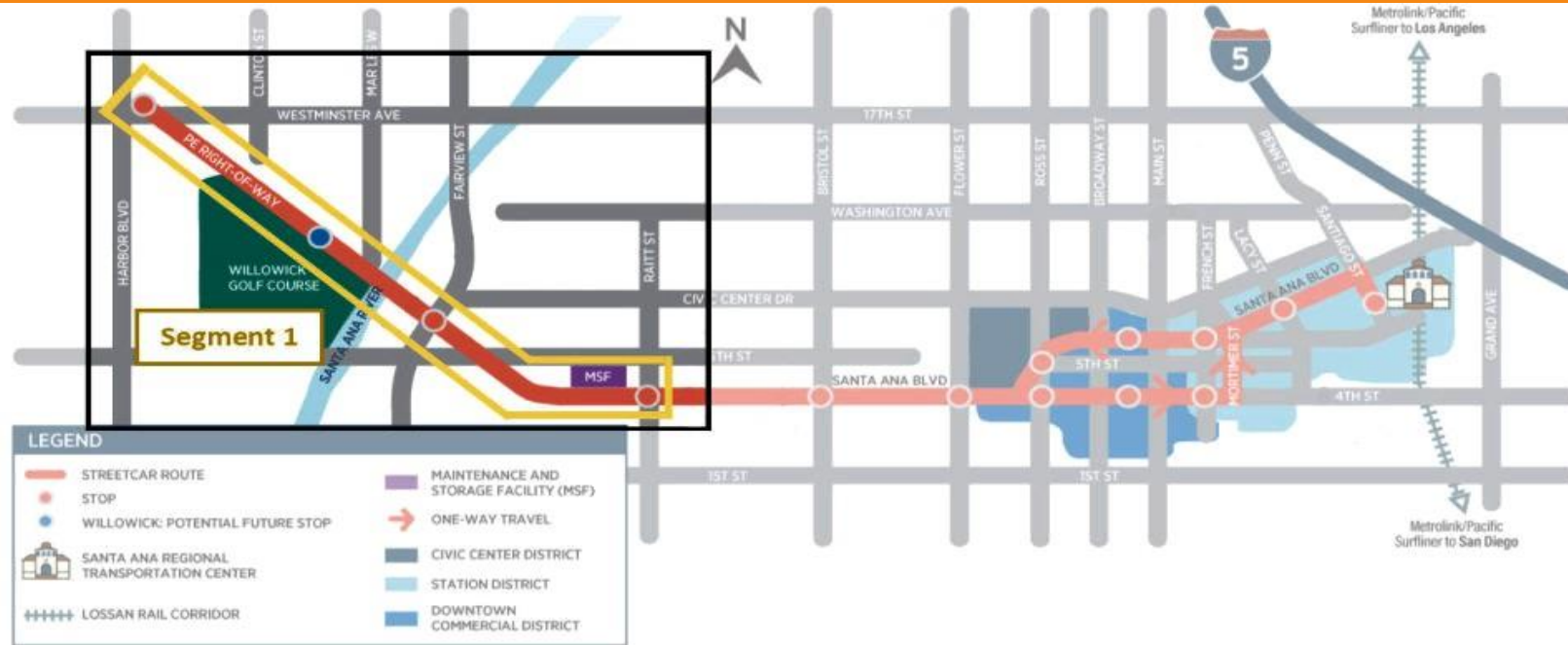




# OC Streetcar Segments 1 to 5



# Construction – Segment 1



- Pacific Electric Right-of-Way (PEROW)
  - Substantial completion of the Santa Ana River and Westminster bridges, and Harbor Station Platform with ongoing placement of concrete plinths and rails.
- Maintenance and Storage Facility
  - Construction continues and includes remaining installation of exterior walls and roof insulation, conduit and piping, girder painting, other interior improvements, and tracks.



# Harbor Station Platform





# Westminster and Santa Ana River Bridges



Westminster Bridge Plinths



Santa Ana River Bridge Plinths



# Santa Ana River Bridge





# Ballast Tracks within the PEROW





# Maintenance and Storage Facility



- 5,800 sf office
- 28,670 sf shop/storage
- 3,400 sf carwash building
- Wye track
- Can accommodate up to 15-16 vehicles



# Maintenance and Storage Facility (Cont.)



Exterior Walls



Tracks within the Service and Inspection Pit



# Maintenance and Storage Facility (Cont.)

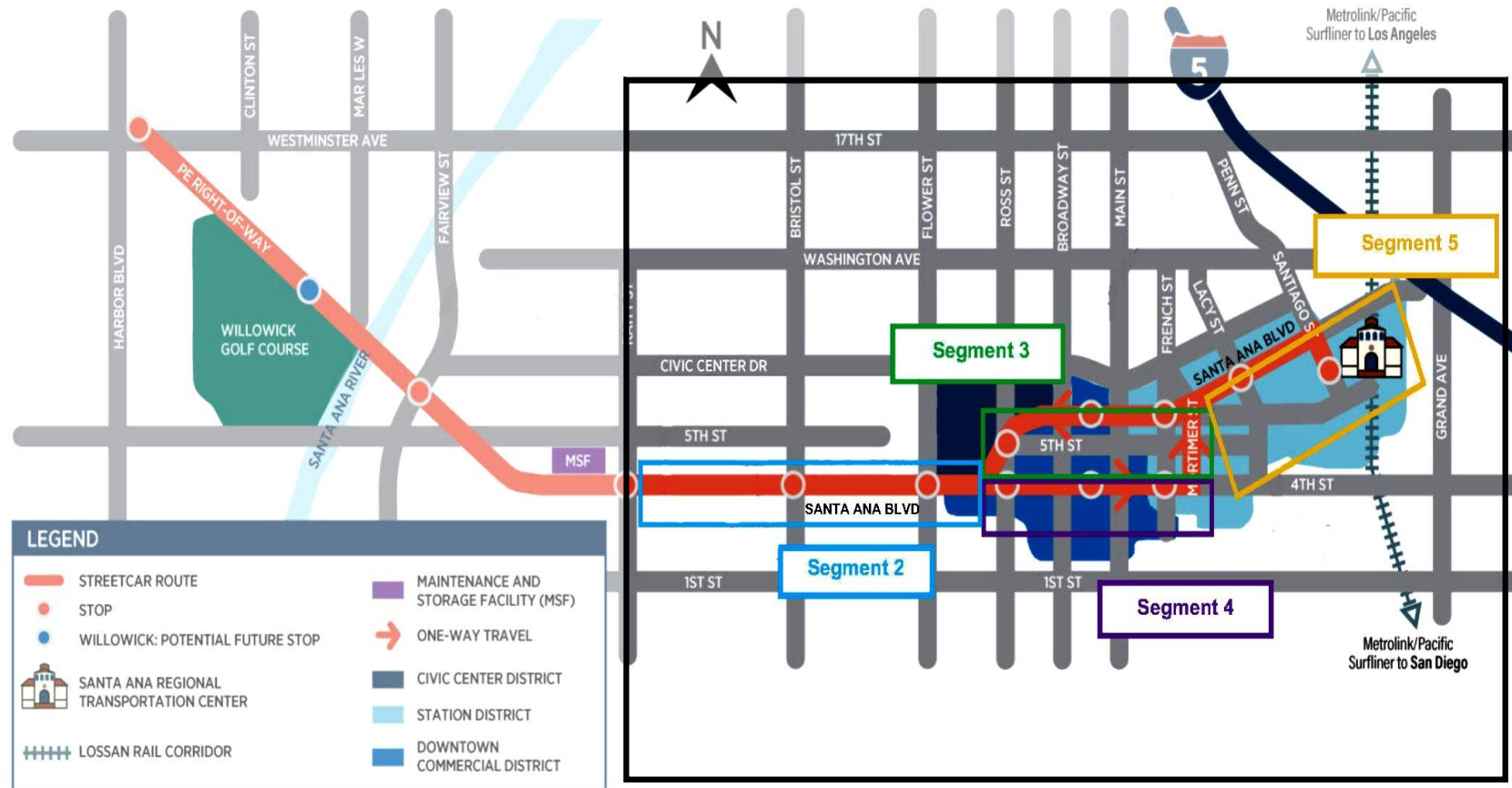


Interior Walls, Piping and Heating, Ventilation, and Air Conditioning



Embedded Track

# Construction – Segments 2 through 5



- Key completions in Segments 2, 3, 4, and 5



# Progress on Segment 2B



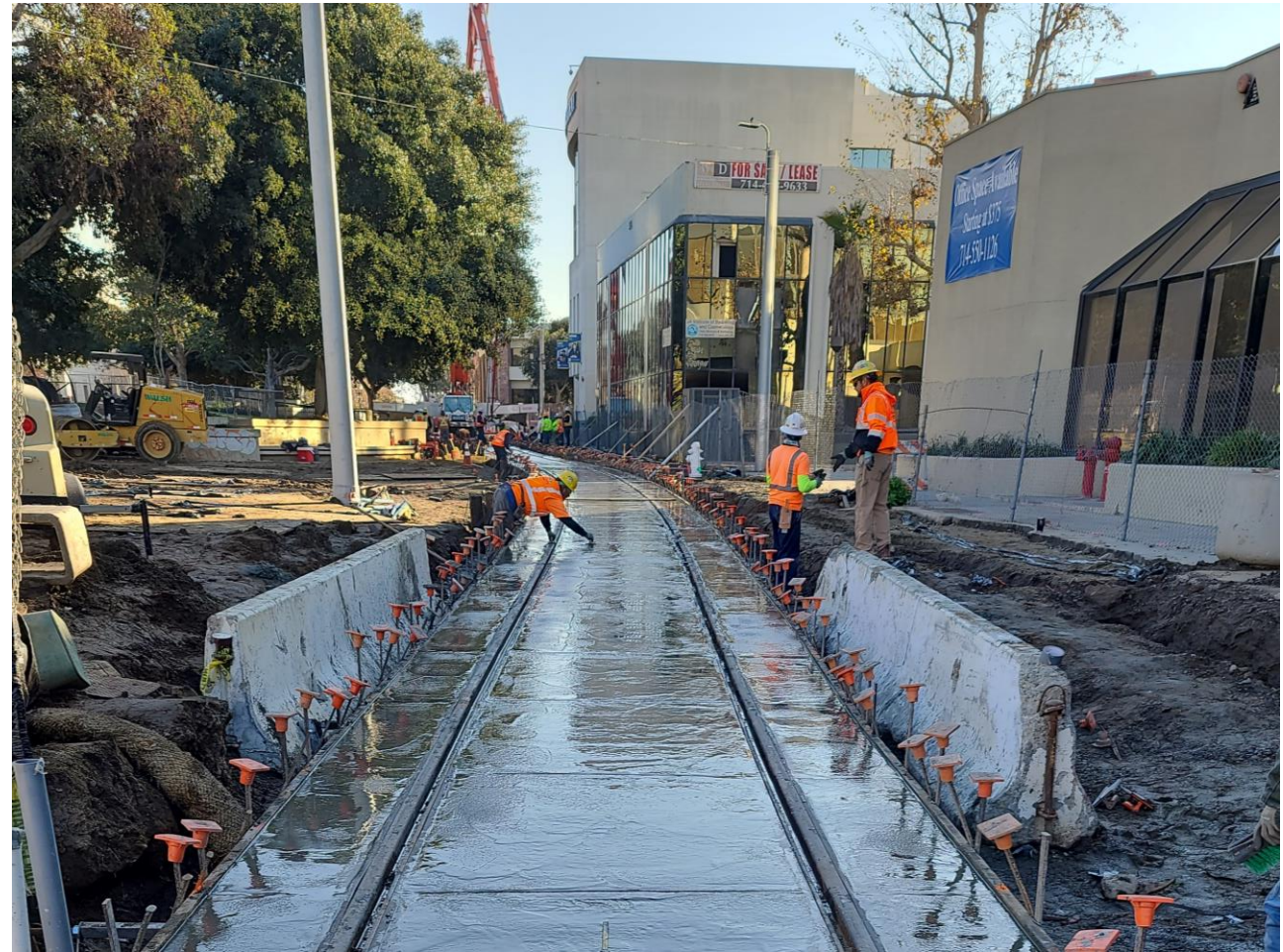
Bristol Street to Flower Street



Bristol Side Station Platforms



# Progress on Segment 3



Embedded Track through Sasscer Park



# Progress on Segment 4 (Fourth Street)



Between Broadway and Ross Street







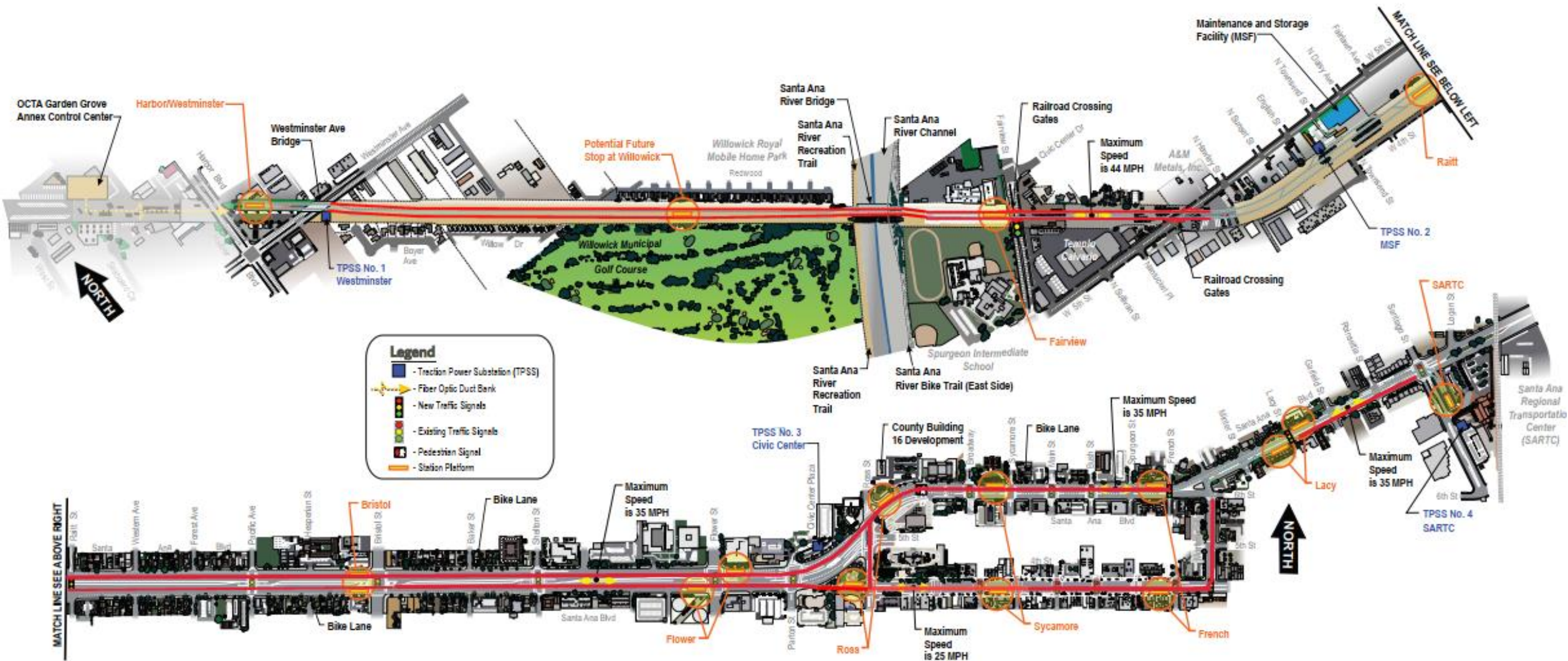
# Progress on Segment 5



Embedded Track – Near Garfield Street



# Track Installation Progress



# Upcoming Construction Activities

- Segment 1 – Complete track work on bridges and within PEROW.
- Maintenance and Storage Facility – Continue site and building work to ensure significant completion for vehicle storage. Start track work to building.
- Segment 2 – Significantly complete the remaining work, including asphalt concrete paving and start conditional acceptance with City of Santa Ana (City) staff.
- Segment 4 – Complete installation of pavers, electrical, and overhead contact system items. Continue conditional acceptance with City staff.
- Segment 5 – Start trackwork in westbound direction. Continue excavation for Santa Ana Regional Transportation Center station. Start work at Santiago Street intersection.
- Continue station platforms at various locations.
- Installation of new traffic signal poles at many intersections.
- Installation of remaining overhead catenary system poles.
- Installation of Traction Power Substations.

# Vehicles

- Cars 1-7 are in the final stages of manufacturing with installation of the last remaining vehicle components.
  - Most of the action items from the First Article Inspection of Car 1 were signed off at reinspection with remaining items to be closed in early 2023.
  - Car 8 is in final assembly and preparations are underway to commence static and dynamic testing in first quarter 2023.
- Staff returned to Siemens in December 2022 to inventory and approve additional items and discuss the vehicle delivery schedule and warranty extension for spare parts and special tools.





# Project Budget and Cost Status

As of November 30, 2022

SCC CODE	DESCRIPTION	APPROVED FFGA BUDGET	APPROVED OCTA BUDGET*	COMMITMENTS	OCTOBER 2022 EXPENDITURES	CURRENT EXPENDITURES	CURRENT FORECAST	PROPOSED FFGA BUDGET / FORECAST VARIANCE
10	GUIDEWAY & TRACK ELEMENTS	\$48,334,164	\$48,803,358	\$48,275,212	\$41,124,753	\$41,804,234	\$48,275,212	\$528,146
20	STATIONS, STOPS, TERMINALS, INTERMODAL	\$9,353,108	\$9,785,451	\$9,207,441	\$3,945,576	\$4,037,002	\$9,507,441	\$278,010
30	SUPPORT FACILITIES: YARDS, SHOPS, ADMIN. BLDGS	\$43,125,724	\$47,073,200	\$46,812,640	\$23,886,018	\$25,796,179	\$47,337,640	(\$264,440)
40	SITework & SPECIAL CONDITIONS	\$84,725,622	\$103,699,790	\$93,933,461	\$78,058,602	\$79,829,500	\$106,402,485	(\$2,702,695)
50	SYSTEMS	\$63,722,009	\$72,278,941	\$74,052,057	\$43,078,552	\$45,822,973	\$74,497,789	(\$2,218,848)
<b>CONSTRUCTION SUBTOTAL (10-50)</b>		<b>\$249,260,628</b>	<b>\$281,640,740</b>	<b>\$272,280,811</b>	<b>\$190,093,501</b>	<b>\$197,289,888</b>	<b>\$286,020,567</b>	<b>(\$4,379,827)</b>
60	ROW, LAND, EXISTING IMPROVEMENTS	\$8,604,055	\$7,174,328	\$6,822,061	\$6,762,598	\$6,762,597	\$7,174,328	\$0
70	VEHICLES	\$57,709,177	\$63,137,294	\$59,460,278	\$34,332,880	\$34,801,816	\$63,137,294	\$0
80	PROFESSIONAL SERVICES	\$74,414,933	\$139,815,499	\$121,352,527	\$88,817,235	\$90,856,691	\$135,435,672	\$4,379,827
<b>SUBTOTAL (10-80)</b>		<b>\$389,988,793</b>	<b>\$491,767,860</b>	<b>\$459,915,678</b>	<b>\$320,006,215</b>	<b>\$329,710,992</b>	<b>\$491,767,860</b>	<b>\$0</b>
90	UNALLOCATED CONTINGENCY	\$17,771,172	\$17,771,172	\$0	\$0	\$0	\$17,771,172	\$0
100	FINANCE CHARGES	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL PROJECT (10-100)</b>		<b>\$407,759,966</b>	<b>\$509,539,032</b>	<b>\$459,915,678</b>	<b>\$320,006,215</b>	<b>\$329,710,992</b>	<b>\$509,539,032</b>	<b>\$0</b>

\*Approved by the OCTA Board December 13, 2021

SCC = Federal Transit Administration Standard Cost Category

FFGA - Full Funding Grant Agreement

# Public Outreach Program

- ☐ Fourth Street Business Outreach
- ☐ City Council
- ☐ Field Meetings
- ☐ Door-to-Door Outreach
- ☐ Downtown Business Associations
- ☐ Eat Shop Play Program
- ☐ Construction Alerts
- ☐ Crowd Fence Covers
- ☐ Parking Structure Banners
- ☐ Eat Shop Play Banners
- ☐ Wayfinding Banners
- ☐ Newspaper, Radio, and Spotify Ads
- ☐ Radio Remotes
- ☐ E-toolkits
- ☐ Movie Theater ads
- ☐ Electronic Billboards
- ☐ Bus Ads
- ☐ Geo-fencing
- ☐ Go-Pro Videos
- ☐ Tours
- ☐ Eat Shop Play Walking Map
- ☐ Lunch Meet-Ups



\* DTSA – Downtown Santa Ana



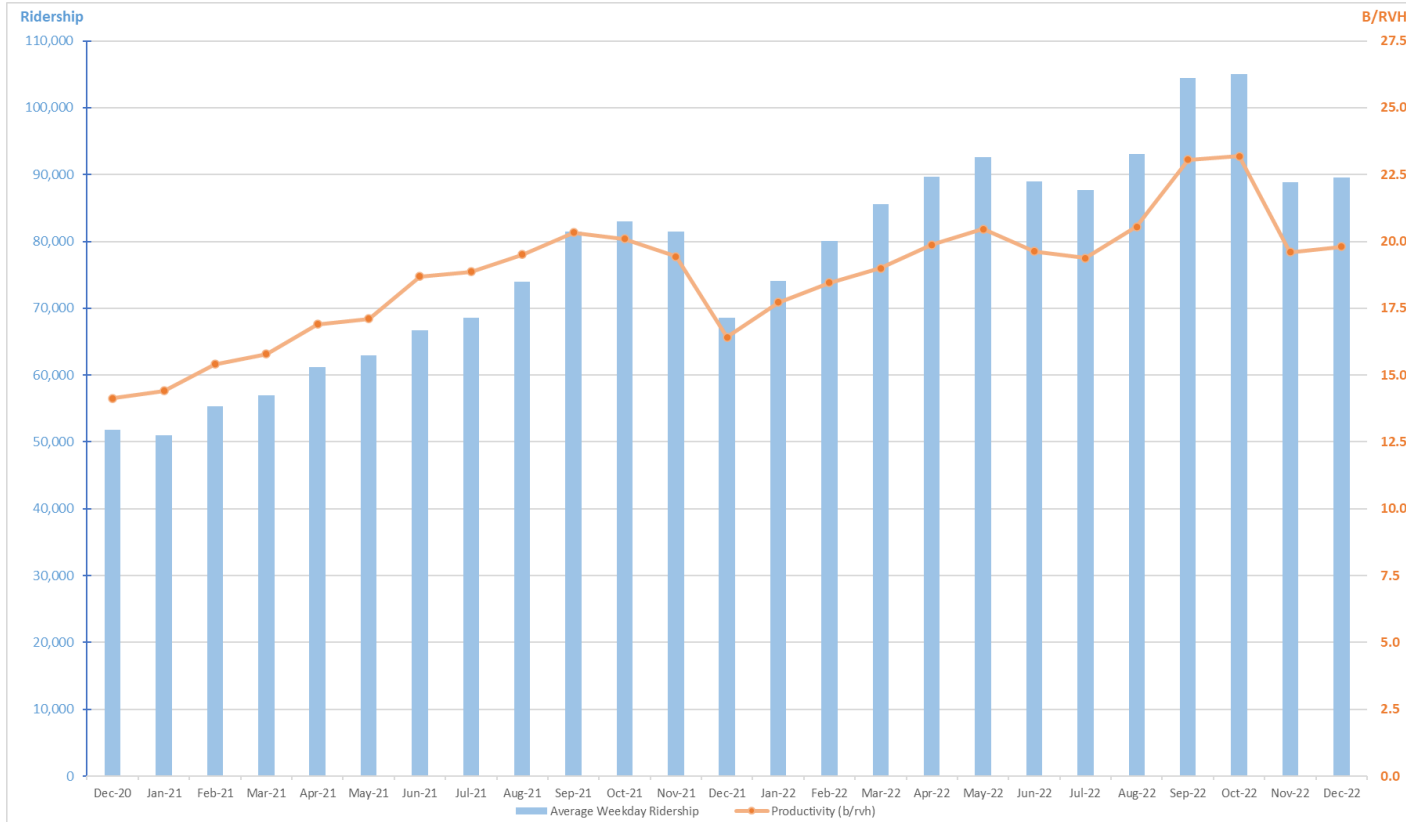
[Eat, Shop, Play Advertisement Video](#)

# OC Bus and OC ACCESS Services Update

- **Ridership**
  - Average weekday boardings and productivity as measured by boardings per revenue vehicle hour (B/RVH)
- **On-Time Performance**
  - Measuring service quality
- **Customer Comments**
  - Trends, feedback, and issues reported

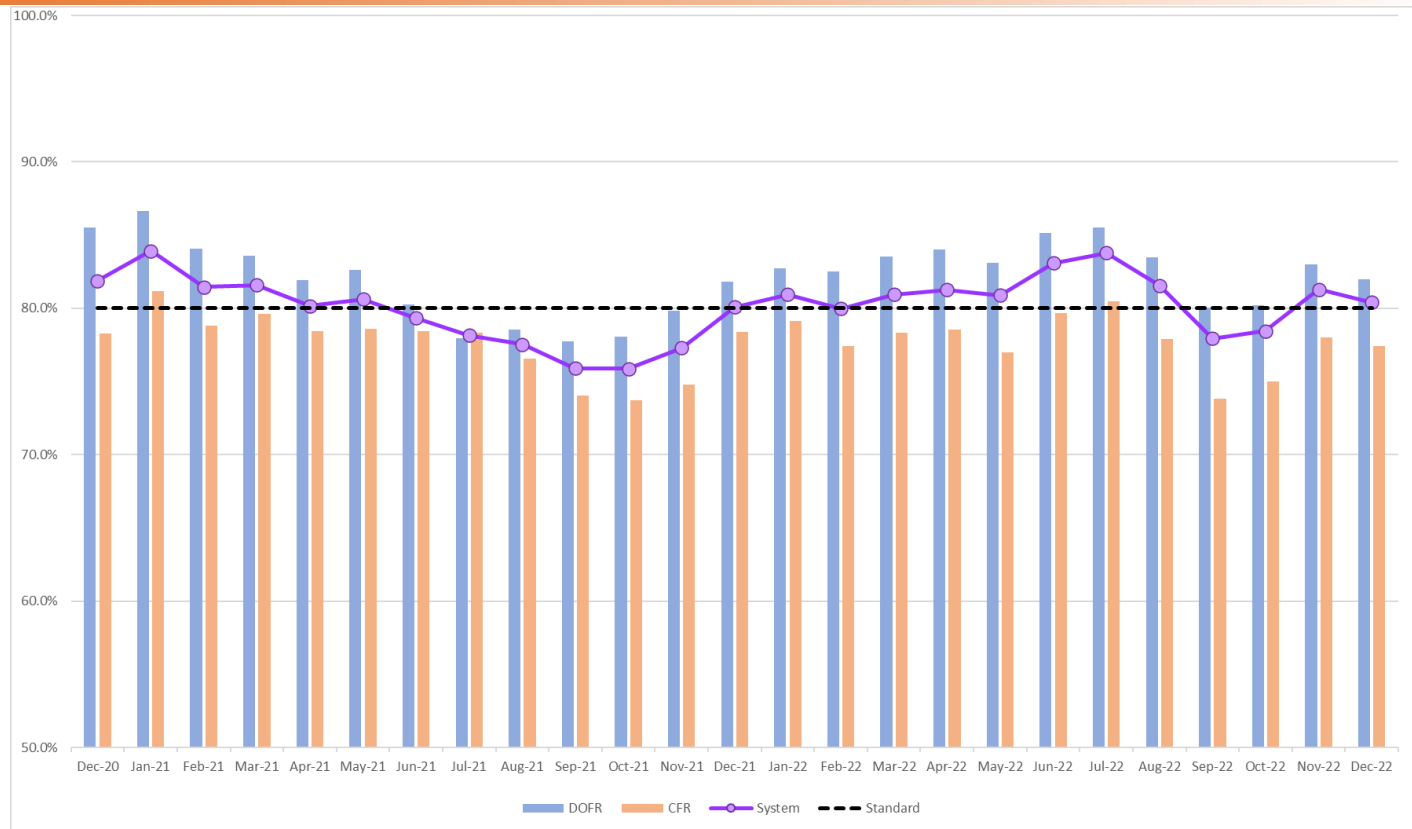
# OC BUS RIDERSHIP AND PRODUCTIVITY

(AVERAGE WEEKDAY – LAST 2 YEARS)



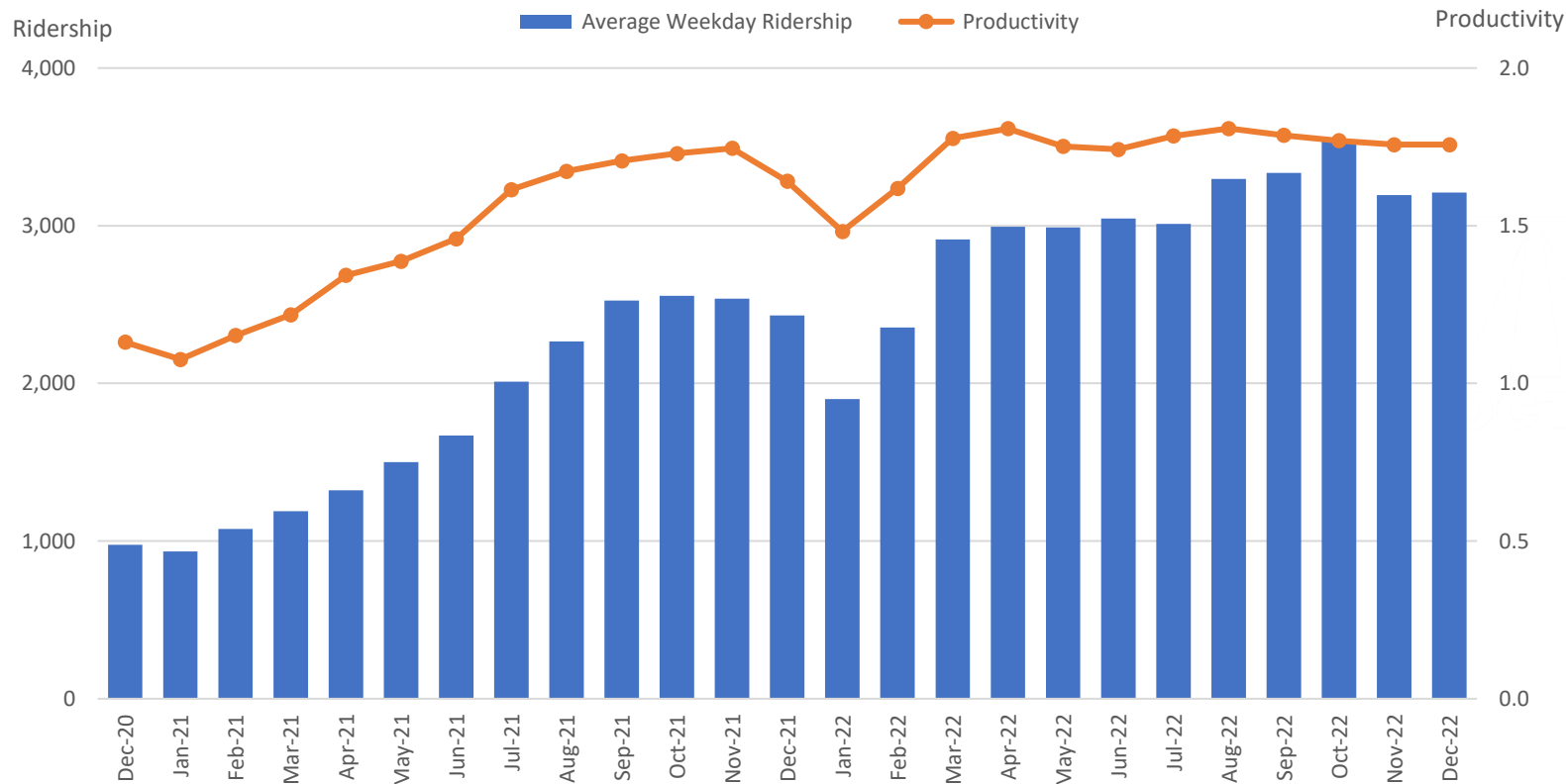
# OC BUS ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)



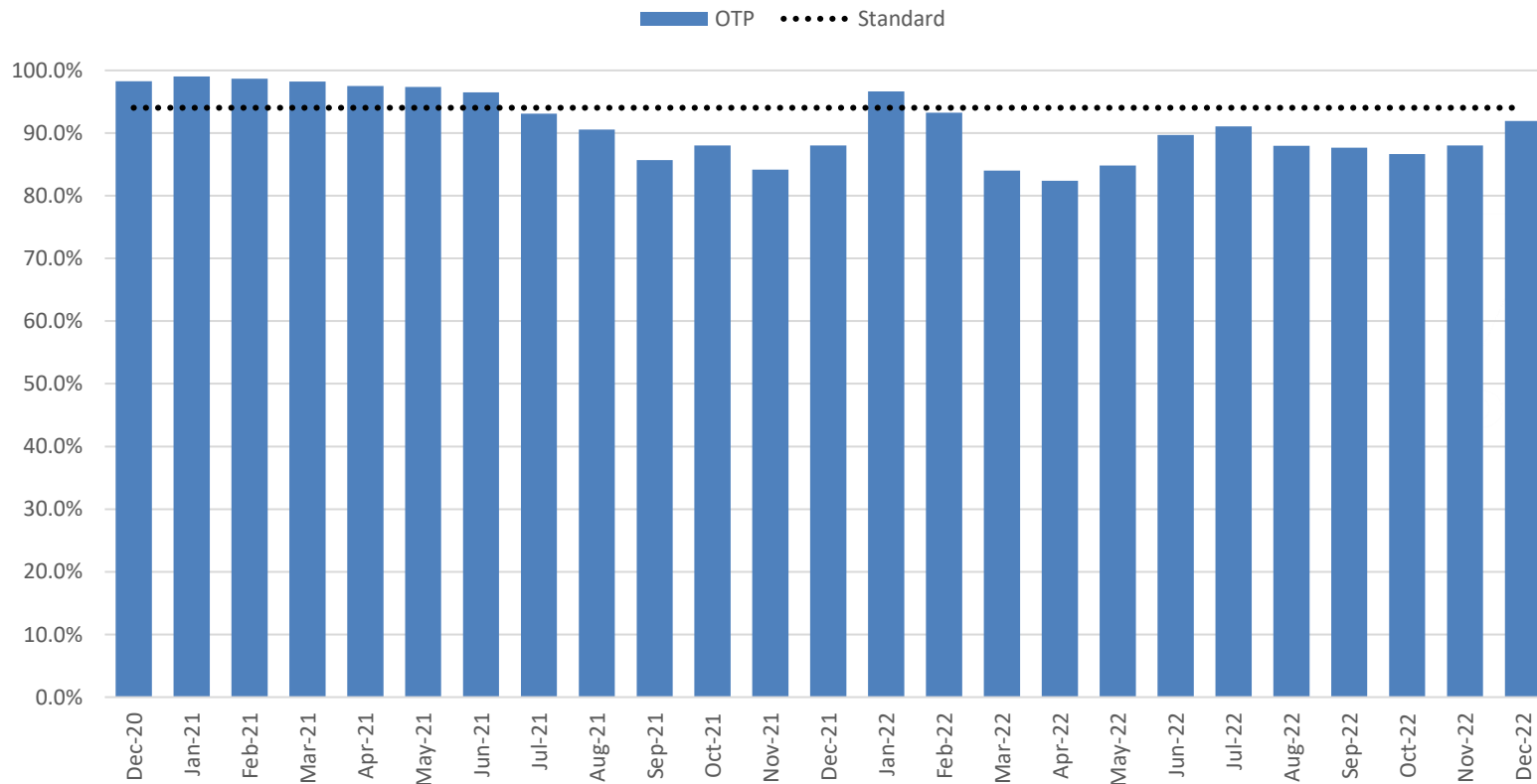
# OC ACCESS RIDERSHIP AND PRODUCTIVITY

(AVERAGE WEEKDAY)



# OC ACCESS ON-TIME PERFORMANCE

(AVERAGE WEEKDAY)



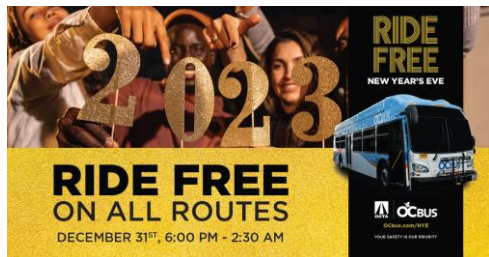


# CUSTOMER COMMUNICATION AND FEEDBACK

## Marketing and Customer Communications

### Customer Communications

- Shared marketing and public information updates with customers using variety of tactics, including the launch of the discounted Smart Pass and the New Year's Eve free ride promotion.



## Customer Comments

### Bus Pass-bys

- Complaints on pass-bys increased to a weekly average of 9.75 complaints in the first four weeks of December compared to 7.5 complaints per week in November.

### No Shows

- Customer complaints for “no show” routes remained low at an average of 1.25 complaints in the first four weeks of December, which was identical to the average number of complaints in November.



## NEXT STEPS

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- Continue to Track Service Performance
  - Ridership trends
  - On-time performance
- Upcoming Service Changes
  - February 12, 2023