

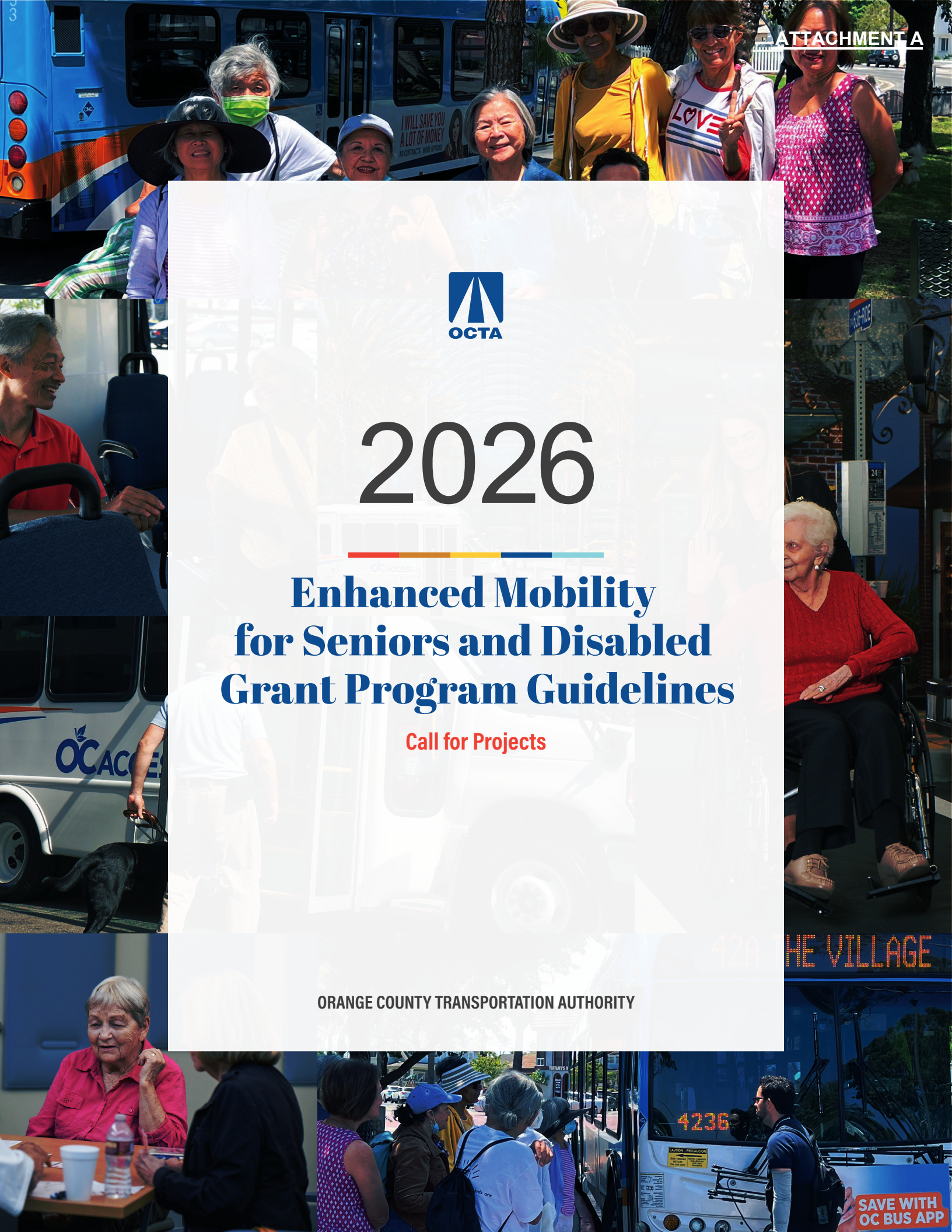


2026

Enhanced Mobility for Seniors and Disabled Grant Program Guidelines

Call for Projects

ORANGE COUNTY TRANSPORTATION AUTHORITY



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Purpose and Authority

The Orange County Enhanced Mobility for Seniors and Individuals with Disabilities (EMSD) Grant Program call for projects (call) is intended to enhance the mobility of seniors and individuals with disabilities by providing local transportation funding to meet the transportation needs of seniors and individuals with disabilities where public transportation services may not appropriately meet their needs. The EMSD Grant Program offers grant opportunities to nonprofit organizations (nonprofits) and local public agencies to help meet these needs. The EMSD Program directly supports the Orange County Transportation Authority (OCTA) 2024 Human Services Transportation Coordinated Plan (Coordinated Plan) by funding local transportation projects that address identified service gaps, meet priority mobility needs, and advance the Coordinated Plan's goals to sustain and enhance transportation options for older adults, people with disabilities, and individuals with low income.

Roles and Responsibilities

OCTA administers the EMSD Grant Program in alignment with the Coordinated Plan. OCTA's role is to ensure that EMSD funds are awarded and managed in a manner that supports identified mobility needs for older adults and people with disabilities. OCTA responsibilities include:

- Issuing the call for projects and providing program guidance.
- Evaluating eligible applications and recommending projects for OCTA Board of Directors (Board) consideration.
- Executing and administering cooperative agreements with awarded grantees.
- Providing general program oversight and monitoring throughout the period of performance.
- Ensuring funds are administered consistent with these guidelines and the Coordinated Plan.

Eligible applicants and awarded grantees are responsible for proposing projects that address unmet transportation needs identified in the Coordinated Plan. If awarded, grantees are responsible for implementing projects in accordance with the approved scope and cooperative agreement. Responsibilities include:

- Demonstrating how the proposed eligible project addresses at least one mobility need or strategy identified in the Coordinated Plan. Conducting required public hearings, if applicable.
- Entering into and complying with the terms of the cooperative agreement for the awarded project.
- Providing the required local match and ensuring financial readiness to deliver the project.
- Implementing the project consistent with the approved scope, schedule, and budget.
- Delivering services or acquiring capital assets consistent with the approved application.
- Maintaining appropriate documentation and submitting required reports and invoices.
- Complying with all applicable program requirements throughout the project term.

Program Goals

The EMSD Program is intended to meet the transportation needs of older adults and people with disabilities when transportation services provided are unavailable, insufficient, or inappropriate to meet these needs. The Program advances strategies identified in the Coordinated Plan and supports the following goals:

- Supporting transportation sustainability and capacity and addressing funding and staffing challenges identified by human service providers.
- Improving mobility for underserved areas and populations with limited or insufficient transportation services.
- Enhance weekend and evening mobility options where gaps were widely identified.
- Support safe, reliable door-to-door transportation for medical, shopping, and social needs, the top trip categories identified by riders.
- Encourage coordination and joint efforts between agencies to share resources, consistent with identified strategies of the Coordinated Plan.

Projects funded through EMSD must support at least one unmet need or strategy identified in the 2024 Coordinated Plan. Strong proposals will demonstrate how the project:

- Supports medical, shopping, social, or other high-demand trip categories;
- Expands weekend/evening or door-to-door capacity;
- Improves service reliability and rider experience;
- Serves areas with limited transit availability;
- Builds agency capacity and sustainability;.
- Enhances coordination with other transportation programs.

Background

Since 2018, the Orange County EMSD Grant Program replaces the Federal Transit Administration Section 5310 (FTA 5310) Program by providing local funding support in lieu of federal funding, which allows grantees to streamline project implementation and reduce the risk of non-compliance with federal requirements. Due to the long-standing success of the FTA 5310 grant program, all beneficial elements of that program have been retained.

2026 Call

The 2026 EMSD call will make up to \$5.85 million in local funds available for eligible and high scoring projects. Funding availability is based on the FTA 5310 apportionment to OCTA and is subject to change. All projects proposed and considered for funding are required to be included in the Coordinated Plan. Under FTA guidelines, the Coordinated Plan is required to be updated every four years. This call will award projects consistent with that plan.

Additional funding has been augmented to this call to support a three-year program cycle, allowing projects to be funded over an extended period of performance (up to 36 months). EMSD will program funding across a three-year cycle, utilizing a portion of a future year FTA 5310 apportionment. Funding for the 2026 EMSD call will be contingent upon the outcome of the federal reauthorization bill and the availability of future apportionments. All future year funding assumptions are subject to the passage or continuation of a federal surface transportation authorization act. OCTA will monitor federal actions and adjust, if necessary, to ensure consistency with available funding and program requirements.

EMSD Program Schedule

EMSD Schedule (Subject to Change)	
May 6, 2026	EMSD Program Workshop (Virtual)
June 22, 2026	Call for Applications Opens
July 13-24, 2026	Application Office Hours
August 28, 2026	Application Due Date by 4 p.m.
August – November 2026	Application Reviews and Scoring
December 2026	OCTA Board Consideration of EMSD Funding Recommendations
December 2026 / January 2027	Awarded Applicant Office Hours

Eligible Applicants

Eligible applicants include:

- Private nonprofit organizations providing transit services for older adults and people with disabilities, and
- Public agencies where private nonprofits are not readily available to provide the proposed service for these individuals (see **Public Hearing for Public Agency** section).

Public Hearing for Public Agencies

Nominating public agencies, including all 34 Orange County (County) cities and the County, are required to schedule and hold a public hearing, and notify relevant nonprofits as soon as possible to proceed with the application process to establish coordination and ensure services are not duplicated or overlapping in scope. Documentation of a public hearing being held will be required as part of the application package. Public hearings should be scheduled in

advance of the application due date with all applicable documentation included as part of the submittal package. Applications without required public hearing documentation will not be considered.

Coordination

Inter-agency coordination is highly recommended. OCTA encourages agencies to work in partnership with other agencies to better offer well-rounded and coordinated services or use of vehicles and/or equipment. The EMSD Program emphasizes the importance of coordinated planning. Priority will be given to nominations that successfully show inter-agency coordination and demonstrate partnership(s).

Funding Priorities

1. Capital
2. Operating
 - a. Existing Operating Assistance Services Only
 - b. Mobility Management (New, Expansion, or Continuation)

Eligible Project Categories and Availability of Funds

Funds will be available for two categories and distributed to organizations and agencies serving Orange County based on the funding priorities above. To support the transportation needs and service gaps identified in the Coordinated Plan, priority consideration will be given to capital projects that directly address documented mobility challenges in Orange County. This includes acquisition of:

- Wheelchair-accessible vehicles to address the countywide shortage of accessible vehicles;
- Vehicles that will operate in areas with limited or no specialized transportation services;
- Vehicles that will support medical transportation, including trips to clinics, hospitals, specialists, and therapy appointments (identified as the most frequently requested trip purpose in the Coordinated Plan).

These priorities help ensure EMSD capital investments directly respond to documented regional mobility needs for seniors and individuals with disabilities.

Project Category	Funding availability
Capital	\$3.22 million (minimum) or 55 percent minimum of awarded funds
Operating	\$2.63 million (maximum) or 45 percent maximum of awarded funds
Total	\$5.85 million

Consistent with FTA 5310 requirements, at least **55 percent** of funds (\$3.22 million) must be used for “traditional” capital projects. That is, those public transportation **Capital** projects planned, designed, and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate. As a result, the **Operating** projects category is limited to a total target of \$2.63 million award maximum, and the funding that goes to operations cannot be greater than **45 percent** of the total available funding.

Capital Projects

Project Types	Eligible Activities
Vehicle and Equipment Acquisition:	Vehicle leases or purchases; service-related equipment purchases including wheelchair lifts, ramps, securement devices, dispatching devices, computer hardware, software, and related transportation equipment as part of a larger capital project.
Small Capital Purchases:	Standalone computer hardware, software, dispatching devices, communication tools, and other equipment directly tied to transportation operations.

Capital projects will consist of vehicle leases or purchases. This includes buses and vans with the purpose of transporting seniors and individuals with disabilities. Vehicles may be either new or used (consistent with used vehicle requirements – see **Vehicle Acquisition Cost-Effectiveness Requirements** section). Vehicles may be

replacements for those currently in operation that have met or exceeded their useful life or to allow expansion of service. For a project to be categorized as replacement vehicles, the vehicles to be replaced must be in active service during the applicant's normal days and hours of operation. Unless an acceptable justification is provided, the vehicle should have met a minimum useful life or will meet its useful life when the replacement vehicle will start service.

Each vehicle acquired (both purchased and leased) must be Americans with Disabilities Act (ADA) accessible and provide a minimum of 10 hours of service per week, where service is provided by the awarded applicant or in coordination with other agencies. Zero-emission vehicles (ZEV) and zero-emission buses (ZEB) are eligible; however, the purchase or installation of ZEV charging equipment is not an eligible expense of the EMSD program.

Useful Life Requirements for Capital Projects

If capital equipment (vehicles, equipment, software, etc.) is purchased using EMSD funds, it is expected that the capital equipment will be used for their entire useful life and/or through termination of the service (see Timely Use of Funds). If termination occurs prior to completion of the capital item's useful life and/or grant term, the grantee shall repay OCTA the same percentage of the sale price [or estimated value of the asset(s)] based on straight line depreciation consistent with the EMSD percentage of initial purchase. Useful life shall be documented in project agreements.

California Association for Coordinated Transportation (CalACT) Purchasing Cooperative

Agencies may acquire vehicles through the CalACT Purchasing Cooperative; however, this is not a requirement of the EMSD program. Agencies that plan to acquire vehicles through CalACT must notify OCTA of their intent as part of the application. For more information, please visit <https://calact.org/>.

Vehicle Acquisition Cost-Effectiveness Requirements

The purchase of **used** vehicles will be allowed when the proposed used vehicle is determined to be more cost-effective than the purchase of new vehicles and meets the additional used vehicle provisions noted below. Applicants who opt to request funding for the purchase of used vehicles must provide a cost-benefit analysis as part of the project application clearly indicating that the purchase of used vehicles is more cost-effective.

Additional **Used** Vehicle Provisions

Used vehicle purchases will be allowed that meet the following criteria:

- Vehicles are less than three years old (based on model year),
- Vehicles have less than 65,000 miles,
- Vehicles are under warranty,
- Applicants provide proof that multiple vendors were contacted for comparable prices,
- A mechanical inspection was conducted prior to purchase, and
- Vehicles are fully ADA compliant or will be modified to be compliant – including ramps, tie downs, and other safety features.

The **leasing** of new vehicles will be allowed when it is determined to be more cost-effective than purchasing new or used vehicles. Applicants who opt to request funding for leasing must provide a cost-benefit analysis as part of the project application clearly indicating that leasing is more cost-effective. A draft lease agreement must be included as part of the application, and a final lease agreement shall be provided to OCTA upon agreement execution. Cost-effectiveness methodology will be at the discretion of each applicant agency and must be prepared in good faith.

Additional **Leased** Vehicle Provisions (under warranty and inspected prior to purchase)

- Applicants provide proof that multiple vendors were contacted for comparable prices,
- Vehicles are fully ADA compliant or will be modified to be compliant (e.g., ramps, tie downs, and other safety features).

Equipment Purchases

The Capital category may also include the purchase of service-related equipment such as wheelchair lifts, ramps, and securement devices as well as computer hardware (i.e., computers, keyboards, mice, dispatching devices and software). ZEV charging equipment is not an eligible equipment purchase. Applicants must submit at least one equipment quote consistent with the application, detailing key characteristics. Multiple quotes are preferred. These will serve as an Independent Cost Estimate (ICE), and the lowest quote provided will determine the grant amount.

Small Capital Purchases

Small capital purchases may include computer hardware, tablets, dispatching devices, software, communication tools, and other equipment directly tied to transportation operations that do not meet the minimum requirements of a traditional capital project. These purchases are intended to support service coordination, scheduling and dispatching, rider communication, operational efficiency, and other needs identified in the Coordinated Plan. Applicants must provide justification in the application narrative describing how the purchase supports transportation service delivery and operational needs.

Operating Projects

Operating projects will consist of Operating Assistance and Mobility Management.

Project Types	Eligible Activities
Operating Assistance:	Labor (Staffing) Expenses, Materials (Fuel, Office Supplies), Ongoing Maintenance (including routine vehicle maintenance), Continuation of Services, Contracted Services, and/or First and Last-Mile Trips
Mobility Management:	Coordinating Transportation Services, Traveler/Client Call Centers, Driver/Travel Training, Client Travel Training and Mobility Education, and/or Coordinating/Dispatching Communications System

In alignment with unmet needs identified in the Coordinated Plan, operating assistance that expands weekend, evening, and door-to-door service is strongly encouraged, particularly for medical, grocery, and essential-needs trips where mobility gaps persist.

Award Limitations and Matching Fund Requirements

Applicants may submit applications for either one or both categories. However, the total funding request per applicant may not exceed **\$750,000** (not including local match), as noted in the application and project type table below. For the purposes of the EMSD Program, match refers to any non-EMSD funding contribution committed and provided by the lead agency to support a share of the total project expenses. Projects will be required to provide a cash match consistent with the table below.

Application and Project Type	Minimum Grant Request	Maximum Grant Request	Minimum Match Requirement
Capital: Vehicle purchases, leases, and limited supporting equipment	\$100,000	\$750,000	10 percent
Capital: Standalone Capital Equipment Purchases	\$10,000	\$100,000	10 percent
Operating: Operating Assistance	\$100,000	\$600,000	20 percent
Operating: Mobility Management	\$50,000	\$300,000	10 percent

All sources of the required local cash match must be clearly identified and described in the grant application. In-kind contributions are not eligible to satisfy the local match requirement.

- **The local cash share** of eligible capital expenses (vehicles, supporting and standalone equipment) and Mobility Management costs must be at least 10 percent of the net project cost.
- **The local cash share** for eligible operating assistance costs must be at least 20 percent of the net project cost.

Indirect Costs

The program will allow for no greater than 10 percent of requested funds to contribute to indirect costs. This will be applicable to the operating category only. Applicants should factor in this limit when structuring their proposed project budgets, demonstrating a clear understanding of how the grant funds will be effectively utilized for both direct and indirect costs. Examples of indirect costs that could be considered include:

- General administrative and overhead costs.
- Office supplies.
- Development of specifications for vehicles and equipment.
- Staff salaries (for capital applications).
- Technical assistance and planning activities.
- Any other costs deemed necessary for the administration, planning, or technical assistance purposes of the project.

Contingency Costs

Contingency is allowed for unforeseen circumstances, such as cost increases or delays, amounting up to 10 percent of the total funds requested in proposed project budgets. This allocation ensures adaptability to changing conditions while minimizing disruptions to project implementation.

Evaluation Criteria

Applications will be considered for funding based on this evaluation criteria and point distribution. Capital and Operating projects will be scored similarly with the criteria detailed below. The criteria align with federal and state goals for FTA 5310 and are the basis for reviewing and selecting applications. All projects are required to be included in the 2024 Coordinated Plan. Applicants must describe:

1. Which Coordinated Plan goals or strategies the project(s) address.
2. Which unmet needs the project fills (e.g., medical access, underserved cities, weekend service, etc.).
3. How the project contributes to sustaining or expanding existing services.

Capital and Operating Evaluation Criteria

EMSD Evaluation Criteria	Max Points
<p>A. Scope of Work, Goals, Needs, and Objectives – Project is consistent with EMSD Program goals and clearly addresses at least one mobility need or strategy identified in the Coordinated Plan, such as: wheelchair-accessible vehicle shortages; limited weekend/evening/door-to-door service; medical trip demand; limited access to grocery, senior, or social destinations; or geographic service gaps in underserved areas. Project must provide transportation-related activities beyond ADA minimum requirements.</p>	15
<p>B. Project Implementation, Delivery Plan, and Applicant Ability – Evaluation of the applicant’s capability to successfully deliver the proposed project. Includes delivery plan, staffing, training, maintenance capacity, operational readiness, financial management, dispatching capabilities, and prior experience providing transportation or human services.</p> <ul style="list-style-type: none"> • Capital: Ability to procure, operate, and maintain vehicles/equipment. • Operating: Completeness of service plan (routes, schedules, staffing, and marketing). 	15

<p>C. Coordination Planning, Outreach, and Gap Identification – Extent to which the project is coordinated with other agencies, avoids duplication of existing services, and responds to specific gaps identified in the Coordinated Plan. Includes outreach with seniors and individuals with disabilities, consultation with public and nonprofit partners, and demonstrated understanding of local mobility needs.</p> <ul style="list-style-type: none"> • Public Agencies: Held a publicly noticed hearing, notified relevant nonprofits to ensure coordination and avoid duplication, and included required hearing documentation. 	10
<p>D. Service Impact and Performance Measures – Clarity and strength of measurable outcomes, performance indicators, and expected benefits. Evaluation includes ridership projections, mobility outcomes, service hours added, persons served, access to high-demand destinations (e.g., medical), and overall service improvement.</p> <ul style="list-style-type: none"> • Capital: Impact of replacement or expansion vehicles on service efficiency, reliability, wheelchair-accessible vehicles availability, or geographic coverage. • Operating: Demonstrated improvements in frequency, reliability, service span (weekends/evenings), or trip availability. 	5
<p>E. Emergency Planning and Preparedness and Project Readiness – Strength of applicant’s emergency preparedness plans, drill participation, continuity of operations, and protocols for serving vulnerable populations during emergencies. Including overall project readiness.</p>	5
Total Points	50

Accountability Evaluation

The 2026 EMSD call will evaluate applicants on past project delivery performance. Up to five points may be deducted from the overall project score for applicants with a history of poor past project delivery performance including in contract execution, timing of expenditures and invoicing, and overall program understanding. This evaluation will ensure continuation of responsible delivery of EMSD-funded projects.

Provisions of Use Criteria

- Upon approval by OCTA’s Board, awarded applicants will be notified and will be required to enter into an agreement with OCTA to start the project and receive funding. The agreement will remain in effect throughout the project’s period of performance or the equipment’s useful life.
- For vehicle purchases, grantees are responsible for the proper use, operating costs, and maintenance of all vehicles and project equipment, and must be prepared to comply with all applicable regulations and requirements.
- For vehicle purchases funded through EMSD, OCTA shall be listed as lienholder on the vehicle title for the duration of the vehicle’s useful life and/or grant term, as specified in the cooperative agreement. Grantees shall not transfer, dispose of, or otherwise modify ownership of grant-funded vehicles without prior written approval from OCTA. In the event of vehicle disposition, grantees shall comply with all applicable disposition requirements identified in the cooperative agreement.
- Applicants are responsible for management, oversight, and control over the operations of contracted service and purchased equipment. Appropriate documentation must also be maintained and provided upon request during the project term and through the useful life of the asset or through the period of performance.
- For nonprofit applicants, nonprofit status must be documented as “active.”
- Public agencies are required to complete a public hearing prior to the application deadline to verify that they would not be nominating overlapping services or providing services where a nonprofit could. More information on this can be viewed in the Public Hearing for Public Agency section.

Pre-Award Authority

To support timely project delivery and minimize delays, OCTA will provide pre-award authority to awarded applicants upon written notification of award, unless otherwise specified. Pre-award authority allows awarded applicants to begin incurring eligible project costs after the OCTA Board approval date. Awarded applicants may alternatively choose to begin incurring costs at the time the cooperative agreement is fully executed. Conditions:

- Pre-award authority is effective upon written notification from OCTA.
- Reimbursement of costs incurred under pre-award authority will occur only after the cooperative agreement is fully executed by both OCTA and the awarded applicant.
- All pre-award costs are incurred at the applicant's own risk. If the cooperative agreement is not executed, OCTA has no obligation to reimburse any costs.
- All costs must be eligible under these Guidelines and consistent with the approved project scope.
- The project period of performance will be established in the executed cooperative agreement and may include a backfilled start date corresponding to the pre-award period.

Timely-Use of Funds

Funding for the 2026 EMSD call will be made available during Fiscal Years (FY) 2026-27, 2027-28, and 2028-29. All reimbursable work should be completed within the timeframe outlined in the executed agreement. Timely delivery ensures that EMSD investments address immediate needs identified in the Coordinated Plan, including limited availability of weekend/evening services and shortages of wheelchair-accessible vehicles.

For **Capital** projects, applicants will be required to award a contract or execute a purchase after the agreed upon cooperative agreement has been fully executed. Applicants would then have up to 36 months from the agreement's execution to receive and/or install the equipment. The contract execution will serve as the start of the up to 36 month period of performance. The expenditure deadline will also start at the agreement execution, and all eligible awarded funds must be expended by the end of the 36 month period. Extensions of up to one additional expenditure year (12 months) will be considered on a case-by-case basis with a formal letter indicating reasons for the extension.

For **Operating** projects, awarded applicants will be required to show evidence that they have entered into a cooperative or service agreement, as applicable to the funded project, and must start service based on the schedule provided and once the cooperative agreement is fully executed. For existing operating agreements, applicants may request funds to continue service. The date of the OCTA/Agency cooperative or service agreement or start of the continuation of service using the grant funds will begin the up to 36 month period of performance.

Funding for projects that have not (1) started within the requested FY and (2) have not invoiced within 60 days of the end of the FY, may be forfeited and projects will be subject to OCTA approval for any delays. Extensions of up to one additional year (12 months) will be approved on a case-by-case basis. Requests should be made through a letter indicating reasons for the delay and how funds will begin invoicing by June of the extended FY.

Extension Requests, Scope Changes and Cost Savings

Scope changes and extension requests are considered on a case-by-case basis and requests must be submitted via email to OCTA EMSD email at OCTAEMSD@octa.net. Typically, to consider a scope change for approval by staff, OCTA expects the project benefits to match the original application. If the project does not deliver the same benefits, the project request may not be approved and will be presented to the OCTA Board for consideration. Applicants must provide an explanation and justification for the change and include documentation for how project benefits will be impacted and how they compare to the original application. Please note that project extensions are not guaranteed, and OCTA encourages awarded applicants to initiate and complete projects within the original period of performance of the grant.

OCTA will complete a thorough evaluation of the scope change and/or extension request and the potential impact to the project(s) benefits prior to making a recommendation. Major scope changes which significantly impact benefits may require approval by the OCTA Board of Directors. If the applicant reduces the scope of an approved project a reduction in EMSD funds must be applied proportionally to maintain the approved local match percentage.

Cost Savings. Reduced costs associated with a scope reduction will not be considered cost savings. Savings at project completion will either remain with OCTA or be returned to OCTA, if already paid out to the agency.

Cost Increases

The EMSD Grant Program will not cover project cost increases for awarded projects. Applicants commit to cover any cost increases beyond awarded funds and match requirements. Any such cost increases will be the sole responsibility of the awarded grantee.

Invoices and Reimbursements

Costs incurred prior to OCTA Board approval, or that are not consistent with the approved guidelines, will not be reimbursable unless requested by exception.

The EMSD Grant Program provides funding on a reimbursement basis, in accordance with the reimbursement schedule outlined in the table below. Payment procedures, including exceptions for vehicle purchases, are summarized by project type. The lead agency will be required to provide proper documentation with their invoices to validate that the expenditure was properly incurred.

Applicants may begin invoicing from the date their contract agreements with OCTA are executed. Reimbursements will be dispersed upon review and approval of a complete expense report, performance report, and consistency with the cooperative agreement requirements and specifications. Invoices for capital must be submitted no later than 30 days after the end of the month in which the expenditure occurred, with the exception for vehicle purchases. For operating projects, invoicing will be required at minimum on a quarterly basis consistent with the reporting schedule below. Applicants are expected to submit a final report form and closeout form within 90 days of project completion.

Project Type	Reimbursement Schedule Process
Capital: Vehicles and Equipment	Vehicles: OCTA will pay up to 65 percent of the award amount (OCTA’s share) of the cost up front, based on a verified purchase order, with the applicant’s required local match excluded. The remaining 35 percent will be paid upon applicant’s delivery and acceptance of the vehicle.
	Any funding not initially paid out from the grant will be disbursed consistent with the total project cost and required match, following confirmation of receipt of the vehicle and/ or equipment. Applicants must submit an invoice no later than 30 days after the end of the month following vehicle acceptance.
Operating: Operating Assistance and Mobility Management	Equipment: Applicants incur expenses and request reimbursement from OCTA once the equipment has been delivered and accepted by the organization. Applicants submit invoices to OCTA on a quarterly basis , with the applicant’s required local match excluded (See quarterly reporting due dates below).

If awarded, successful applicants will enter into a cooperative agreement with OCTA specifying grant requirements.

Reporting

Awarded applicants will be required to submit quarterly reports to allow OCTA to monitor progress on the project and ensure it will be completed within the period of performance of the grant. Quarterly reporting forms will be available on the EMSD website here: <https://www.octa.net/programs-projects/programs/funding-programs/call-for-projects/emsd-grant-program>. Awarded applicants should start submitting quarterly reports to OCTA once cooperative agreements are executed. Monthly data (see quarterly report templates) are to be submitted on a quarterly basis, in accordance with the reporting schedule below:

Period of Performance	Quarterly Report Due Date
Quarter 1: January-March	April 30 th
Quarter 2: April-June	July 30 th
Quarter 3: July-September	October 30 th
Quarter 4: October-December	January 30 th

The final invoice for vehicles must be submitted 30 days following the end of the month in which the expenditure occurred. The final invoice for operating must be submitted 30 days following the end of the quarter in which the expenditure occurred. Once the project is complete, the applicant is expected to submit a final report form and closeout from 90 days following issuance of final payment. Final report and closeout templates will be available on the [EMSD website](#) following the project award.

Insurance Requirements

The following insurance is required, subject to change at the time of award:

- Commercial general liability (includes products/completed operations, independent contractors, contractual liability, personal injury liability, and property damage) minimum limit \$1,000,000 per occurrence, \$2,000,000 general aggregate.
- Automobile liability insurance to include owned, hired, and non-owned autos with a combined single limit of \$1,000,000.
- Workers' compensation with limits as required by the State of California including a waiver of subrogation in favor of OCTA, its officers, directors, employees, or agents.
- Employers' liability with minimum limits of \$1,000,000.

Proof of coverage, including certificates and endorsements, will be required as part of the Cooperative Agreements if selected for funding. Policies shall be primary and non-contributory, and OCTA shall be named as Additional Insured in the certificates of insurance and endorsements, as applicable. OCTA will reserve the right to request policy reviews in response to any loss.

Additional Program Requirements

The following State and Federal requirements are required as part of the cooperative agreement and are subject to change at the time of the award. It is important to note that documentation of meeting these requirements could be reviewed, inspected, and/or audited in addition to the reports required by OCTA. Further action is at the discretion of said contact during their visits to your organization's operating site(s). The following requirements do not need to be reported in their entirety if they can be verified in person and the required reporting forms are completed accurately.

Required Drug and Alcohol Programs and Related Reporting

If awarded, applicants will be required to comply with the requirements of the Drug-Free Workplace Act of 1988, the California Drug-Free Workplace Act of 1990, and the U.S. Department of Transportation (USDOT) drug testing regulations. Applicants and their subcontractors performing safety-sensitive tasks are subject to the same

regulations. Before finalizing any agreements, selected applicants must establish and enforce a substance abuse program in accordance with state and federal rules, with ongoing revisions to ensure compliance.

OCTA recognizes that some agencies may have existing Drug and Alcohol Programs in place. For example, tests used to comply with Federal Motor Carrier Safety Administration (FMCSA) requirements may also be used to comply with EMSD program requirements provided that they cover the same time period required.

Awarded applicants also agree to periodic reviews of the drug and alcohol testing program by OCTA and/or a designated representative. These reviews will encompass a thorough examination of program-related forms, documents, and procedures employed by the awarded applicant and its service agents, including the Collection Site, Drug Testing Laboratory, Medical Review Officer, Substance Abuse Professional, and Consortium/Third Party Administrator (if applicable). Any identified program deficiencies or findings must be promptly rectified. Corrective actions should be documented for review by authority staff or designated representatives.

Documentation supporting compliance with the aforementioned regulations must be provided to authorized representatives of USDOT or its operating administrations, the State of California oversight agency, or to OCTA and/or their designated representative to inspect the facilities and records associated with the implementation of the drug and alcohol testing program.

The awarded applicant is responsible for submitting an annual Drug and Alcohol Testing Report to OCTA using the current Drug and Alcohol Testing Management Information System (MIS) Data Collection Form published by the FTA. The annual reports are due no later than the 30th of the month following the close of each year. Forms can be [found here: https://www.transportation.gov/odapc/Part40/Appendix-J](https://www.transportation.gov/odapc/Part40/Appendix-J).

- Close of each year (January – December) – on or by January 30th of the following year

Additionally on an annual basis, no later than January 30th of each year following the close of the previous calendar year for review, applicants are required to:

- Submit to OCTA all required drug and alcohol testing data using the appropriate FTA prescribed forms; and
- Provide certifications for all Service Agents (Includes, but not limited to: The Collection Site for Urine Specimen Collectors, Breath Alcohol Technicians, Screening Test Technicians, Oral Fluid Collectors, Medical Review Officers, and Substance Abuse Professionals)

An awarded applicant's failure to comply with these requirements may result in nonpayment or termination of any entered agreements.

Required Driver Training for Vehicles

Applicants will ensure that their operators or contracted vendor's operators are properly licensed and trained to proficiency to perform duties safely, and in a manner which treats riders with respect and dignity. Disability awareness and passenger assistance will be included in this training.

It is required that the individual(s) responsible for operating vehicles for the applicant agency complete the Passenger Assistance, Safety and Sensitivity (PASS) Basic Online course offered by the Community Transportation Association of America (CTAA). More information on the course and instructions to complete the industry standard training is available here: <https://ctaa.org/pass/>.

This course is to be completed within one year or as soon as practical after initiating your program and included as part of the annual report (due January 30th). If your operators have already completed the training, please include applicable documentation as part of your annual report. If your agency participates in another applicable and industry acceptable driver-related training, include this to satisfy this requirement.

Required Maintenance for Vehicles and Equipment

Organization will perform, or ensure that a contracted vendor performs maintenance of all awarded vehicles including:

- Maintaining maintenance records for each vehicle for five (5) years; and
- If required, cooperation in annual motor coach carrier terminal inspections conducted by the California Highway Patrol.

Submittal Requirements

A completed application will contain the following documents:

- Completed capital and/or operating application with corresponding attachments;
 - Application templates are available on the program webpage, applications must be submitted following these templates or will not be considered;
- Nonprofits must provide verification of nonprofit status as “active”;
- Local cities or county agencies must submit documentation of public hearing(s);
- Resolution from governing body or similar confirming match commitment and legal authority to submit;
- Benefit-cost analyses for vehicle acquisitions if applicable;
- Any other required documents, such as documentation of reduced service (if applicable), copy of your agencies most recent financial statement or single audit if applicable and have previously received federal funding, vehicle photos, etc. (refer to application for required documents).

Incomplete applications will not be considered for funding, so please ensure that all submittals contain all the required documentation. Important documents regarding the 2026 EMSD are available on the [EMSD website](#).

Applicants to the 2026 EMSD Program will not be required to submit hard copy applications to OCTA. Electronic project applications for the 2026 EMSD call must be received by OCTA no later than 4 p.m. **August 28, 2026**, via a SharePoint location, please email Vic Mireles at vmireles@octa.net or Brandon Lesser at blesser@octa.net for specific SharePoint file access.

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

Information on how to submit electronic project applications will be posted prior to the call on the OCTA [EMSD website](#). Applicants to the 2026 Enhanced Mobility for Seniors and Individuals with Disabilities Grant Program will not be required to submit hard copy applications to OCTA. Hard copies of applications will not be accepted. Applications that do not follow these requirements will not be considered.

OCTA Contacts

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