



March 24, 2025

To: Members of the Board of Directors

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Approval to Release Request for Proposals for OC ACCESS Eligibility Assessments and Transit Support Services

Overview

The Orange County Transportation Authority requires the services of a firm to provide OC ACCESS eligibility assessments and transit support services. Staff has developed a draft request for proposals to initiate the competitive procurement process to select a firm to provide OC ACCESS eligibility assessments and transit support services.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 5-3959 to select a firm to provide OC ACCESS eligibility assessments and transit support services.
- B. Approve the release of Request for Proposals 5-3959 for a consultant to provide OC ACCESS eligibility assessments and transit support services, for a three-year initial term with one, two-year option term.

Discussion

OC ACCESS is the Orange County Transportation Authority's (OCTA) paratransit service for individuals who are unable to use the regular fixed-route transit service because of functional limitations. To become eligible for the OC ACCESS service, applicants must be certified by OCTA after completing an assessment consistent with Americans with Disabilities Act (ADA) eligibility criteria.

Title 49 of the Code of Federal Regulations Part 37 of the ADA requires public entities who provide complementary paratransit service to establish a process for determining ADA paratransit eligibility through verification that individuals requesting the service meet the regulatory criteria for eligibility. Since 2005, all individuals who apply for OC ACCESS eligibility, including those seeking

recertification, are required to participate in an in-person functional assessment. Conducting an in-person functional assessment offers the most effective way to evaluate an individual's ability to use fixed-route transit services and to determine their eligibility for these services under ADA guidelines. This assessment involves examining the applicant's physical and cognitive disabilities that may hinder their use of regular fixed-route transit services.

As of December 2024, there are 27,215 individuals eligible to use OC ACCESS, of which 3,873 are considered active riders. An "active rider" is defined as an individual who completes at least four trips per month. In accordance with ADA guidelines, all OC ACCESS eligible riders must be re-evaluated every five years. To improve the rider experience and reduce operating costs, OCTA implemented an automatic renewal process for individuals whose physical and/or cognitive disabilities are not expected to improve over time, with training, new medical treatments, or a change in mobility devices. In these cases, the rider's eligibility determination is also not expected to change, which eliminates the need for an in-person functional assessment. Prior to the expiration of their eligibility, these individuals are contacted to review and update their information for renewal.

The scope of work also requires the selected firm to provide transit support services that include travel training and a marking and tethering program for mobility devices and mobility aids.

Travel Training Program

In July 2017, OCTA developed and implemented a two-year grant-funded pilot program to provide travel training services to OC ACCESS riders, seniors, and persons with disabilities to increase ridership on the OC Bus service. Following the conclusion of the pilot program in spring 2019, the Board of Directors (Board) authorized staff to implement a formal Travel Training Program. In June 2020, staff updated the program scope to include language interpretation services to expand the program and offer travel training services to limited-English proficiency individuals. To date, travel training services can be provided in English, Chinese, Korean, Mandarin, Spanish, and Vietnamese.

Since August 2022, the travel training program conducted 81 workshops, providing group training to more than 1,275 participants on how to navigate and use the OC Bus service. The workshops were conducted at senior centers, senior living facilities, adult day centers, social service centers, and high schools.

Additionally, some individuals participated in a customized one-on-one or small group training. During this same period, outreach was conducted at local community centers and referrals were received from the OC ACCESS eligibility contractor. As a result of the workshops, outreach, and eligibility referrals, the program has conducted 274 one-on-one transit training sessions since August 2022.

Marking and Tethering Program

To enhance mobility and accessibility for all riders, OCTA is seeking to introduce a Marking and Tethering (MAT) Program as part of this scope of work. This initiative aims to improve the safety and comfort of riders who utilize mobility devices and mobility aids when using OCTA's transit services.

Currently, riders with mobility devices and mobility aids face delays associated with securing their device before departure. By implementing the MAT program, OCTA will address these issues and ensure a more efficient, reliable, and safe transit experience for riders.

The MAT program will extend to both paratransit and fixed-route service and deliver the following benefits:

- **Improved Accessibility:** Mobility devices and mobility aids vary widely in feature and function. Review of each specific device will ensure the optimal location for securement placement is identified, and users can be assisted by drivers more quickly.
- **Enhanced Safety:** By securing mobility devices and mobility aids using the most optimal locations on the device, the risk of incidents during transit will be significantly reduced.
- **Operational Efficiency:** Reducing boarding times for devices that are difficult to secure can improve overall route timeliness.

In May 2024, OCTA staff, with consultant support, evaluated the current paratransit eligibility assessment delivery model and contract structure against other peer agencies for the development of this scope of work and to maximize the opportunity of referring riders who do not qualify or only qualify for some OC ACCESS service, to learn how to use the OC Bus service. As a result, the new agreement brings together the OC ACCESS Eligibility Assessments and Travel Training services. In addition, the new agreement will now include a fixed rate and variable rate structure, providing OCTA with greater cost control and predictability to respond to service demand, while incentivizing the selected firm to improve service quality and performance. Fixed costs will include

administrative and overhead costs, the lease of the certification center, and equipment required to perform the services. Variable rate costs will include a unit-based reimbursement for each service type; this approach ensures better resource allocation and planning, which in turn will help to control cost.

Procurement Approach

OCTA's Board-approved procurement policies and procedures require that the Board approve all request for proposals (RFP) over \$1,000,000, as well as approve the evaluation criteria and weightings. Staff is submitting for Board approval the draft RFP and evaluation criteria and weightings, which will be used to evaluate proposals received in response to the RFP.

The proposed evaluation criteria and weightings are as follows:

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| • Qualifications of the Firm | 20 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan | 25 percent |
| • Cost | 25 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm is weighted at 20 percent as the firm must demonstrate experience in receiving and processing applications to ensure completeness of applicants. Staffing and project organization is weighted at 30 percent as the firm must provide the necessary personnel, or subcontractor(s), whose expertise will ensure successful administration, management, and delivery of the services as required. Work plan is weighted at 25 percent as the firm's proposed implementation plan and solution must be able to meet the program goals, service, and technology requirements as specified in the scope of work. Cost and price is weighted at 25 percent to ensure OCTA receives the best value for the services provided.

The contract term for this procurement will be a three-year initial term with one, two-year option term. The total cost for the three-year initial term is anticipated to be approximately \$5,347,779.

This RFP will be released upon Board approval of these recommendations.

Fiscal Impact

Funding is included in OCTA's proposed Fiscal Year 2025-26 Budget, Operations Division, Specialized Transit Services Department, account nos. 2147-7519-D1208-8T7, 2147-7519-D1503-THP, and 2147-7519-D1208-4AM.

Summary

Board of Directors' approval is requested to release RFP 5-3959 to select a firm to provide OC ACCESS eligibility assessments and transit support services, and to approve the proposed evaluation criteria and weightings.

Attachment

- A. Draft Request for Proposals (RFP) 5-3959 OC ACCESS Eligibility Assessments and Transit Support Services

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