



*DRAFT*  
**Human Services  
Transportation  
Coordinated Plan**  
*EXECUTIVE SUMMARY*



October 2024

Prepared by **transpogroup**   
WHAT TRANSPORTATION CAN BE.

<b>Introduction and Policy Overview .....</b>	<b>1</b>
<i>Overview of the Planning Process .....</i>	<i>1</i>
<b>Existing Transportation Services .....</b>	<b>3</b>
<i>Public Fixed-Route Services .....</i>	<i>3</i>
<i>Public Demand-Response Services .....</i>	<i>3</i>
<i>ADA Paratransit Services.....</i>	<i>3</i>
<i>Specialized Transportation Services .....</i>	<i>3</i>
<i>Other Dedicated and Contracted Services .....</i>	<i>5</i>
<i>Transportation Support Programs .....</i>	<i>5</i>
<b>Existing Community Conditions &amp; Travel Patterns .....</b>	<b>6</b>
<i>Travel Patterns .....</i>	<i>7</i>
<b>Transportation Provider &amp; Community Engagement Activities .....</b>	<b>11</b>
<i>Community Members .....</i>	<i>11</i>
<i>Transportation &amp; Social Services Providers.....</i>	<i>11</i>
<i>Accessible Transit Advisory Committee (ATAC).....</i>	<i>12</i>
<i>OCTA Project Development Team.....</i>	<i>12</i>
<b>Needs Identification.....</b>	<b>13</b>
<b>Recommended Strategies .....</b>	<b>15</b>
<b>Prioritized Goals and Strategies .....</b>	<b>17</b>
<b>Implementation Steps.....</b>	<b>20</b>
<b>Conclusion .....</b>	<b>22</b>

## Introduction and Policy Overview

The Orange County Transportation Authority (OCTA) is the regional public transit operator in Orange County. OCTA's stated mission "is to develop and deliver transportation solutions to enhance the quality of life and keep Orange County moving." OCTA is also the designated Consolidated Transportation Services Agency (CTSA). As the CTSA, OCTA is required to prepare a Human Services Transportation Coordinated Plan ("HSTCP," "Coordinated Plan," or "the Plan") every four years. While OCTA is responsible for developing the Plan, the Plan addresses existing conditions, transportation needs, and recommended strategies that reflect all of Orange County and are addressed to all Orange County transportation service providers and related organizations.

The OCTA Coordinated Plan was developed to address the needs of individuals with disabilities, seniors, low-income populations, and other Orange County residents with enhanced mobility needs. OCTA is a recipient of funding under the Enhanced Mobility for Seniors and Individuals with Disabilities (Section 5310) Program. Section 5310 is a federal grant program overseen by the Federal Transit Administration (FTA) to improve mobility for seniors and individuals with disabilities. The 5310 program requires funding recipients to develop a Coordinated Plan with human services transportation operators and clients. To be eligible for funding, projects must be directly included in the Plan or address a Plan need or strategy, and must be updated every four years. It is important to note that not everything identified in the plan is required to be funded and or implemented, as the OCTA grant programs are intended to supplement other sources of funds available to the specialized transportation providers.

The following objectives were established by OCTA to guide completion of the Plan:

- To develop a Human Services Transportation Coordinated Plan and implementation process to guide the prioritization and selection of projects for funding by the Federal Transit Administration (FTA) Section 5310 within Orange County over the next four years;
- To facilitate stakeholder participation among a broad group of agencies and encourage a higher level of public-private participation in the transportation coordination discussion and planning process;
- To update the inventory of public transit – human services transportation in Orange County;
- To provide relevant peer examples of coordination that offer fresh ideas to Orange County;
- To ensure the proposed plan is consistent with the transportation coordination regulatory requirements; and
- To devise a program for the coordination of human services transportation.

## Overview of the Planning Process

Development of this Coordinated Plan began in November 2023 and is expected to be completed in October 2024 with Board adoption. The development of this Coordinated Plan included:

- Identification of human services transportation (HST) providers, their services and programs, and fleet characteristics
  - Efforts included a survey of HST agencies and follow-up interviews
- Analysis of travel needs of older adults, people with disabilities, people with low incomes, and other transportation disadvantaged populations
  - Efforts included a survey of riders, analysis of OCTA ACCESS trip data, analysis of simulated and forecasted trip data, and demographic and socioeconomic analysis
- Comparison of available services with community travel needs

- Recommendation of strategies to address human services transportation needs in Orange County

## Existing Transportation Services

This Plan summarizes the public and human services transportation (and related) services available in Orange County. Transportation services in Orange Counties are provided by public transit systems, human service agencies/non-profit programs, and other private providers such as taxis or transportation network companies (TNCs) like Uber or Lyft. This diversity of services is considered the “supply” side of mobility, which works in conjunction with the “demand” side of transportation services, which will be discussed in the next section.

### Public Fixed-Route Services

Fixed route services are those that operate along an established route with scheduled stops at predetermined locations. Within Orange County, OCTA provides the vast majority of fixed route services throughout 34 cities and unincorporated areas in Orange County. OCTA provides local and community routes, Metrolink Stationlink routes, and Rapid routes.

Other fixed-route services in Orange County include those provided by Laguna Beach, Anaheim Transportation Network, and the Project V-funded community-based circulators in Anaheim, Dana Point, Huntington Beach, Newport Beach, Laguna Beach, San Clemente, Laguna Niguel, Mission Viejo, County of Orange, and San Juan Capistrano.

### Public Demand-Response Services

Public on-demand services are flexible shared-ride transit services available to the public. These services do not travel a fixed route and instead allow passengers to request a trip to and from specific locations, sometimes from within a list of eligible locations. Depending on the rules of the service, riders can request trips in advance or for immediate fulfillment.

Public demand-response services in Orange County are limited to the Laguna Beach Local, San Clemente SC Rides, and OC Flex in parts of Aliso Viejo, Laguna Niguel, and Mission Viejo.

### ADA Paratransit Services

OCTA's OC ACCESS is the Americans with Disabilities Act (ADA) complementary paratransit service for Orange County, providing curb-to-curb demand-response transportation to individuals certified to ride the service. OC ACCESS service is available to qualified applicants whose physical or cognitive limitations prevent them from using the standard OC Bus fixed-route service. OC ACCESS is available within 3/4 of a mile of OCTA fixed-route bus routes during the same span of service. OCTA also offers a same-day taxi service for OC ACCESS-eligible riders. This service is not a shared-ride service nor limited to providing transportation within 3/4 of a mile of fixed-route services.

### Specialized Transportation Services

Many city and non-profit operated programs, intended to provide additional travel options to increase mobility for the vulnerable populations of Orange County, supplement transportation services provided by OCTA. OCTA lends funding support to many of these programs to relieve demand on OC ACCESS and offer low- or no-cost solutions for individuals not able to ride the OC Bus.

***OCTA-Contracted Specialized Services***

OCTA contracts with four non-profit organizations for additional transportation services beyond what OC ACCESS provides. Contracted service providers include Alzheimer’s Family Services, Alzheimer’s Orange County, Community Senior Services/Meals on Wheels, and My Day Counts. These contracted services are only available to OC ACCESS riders, and other trip and rider eligibility requirements depend on individual service providers. These services transport riders to and from eligible adult day health center programs.

***Senior Non-Emergency Transportation (SNEMT)***

The OC Go Senior Non-Emergency Transportation (SNEMT) Program, run by the Orange County Office on Aging, provides transportation to adults ages 60 and over who need low-cost transportation to and from medical appointments and other health-related trips. Service is provided under contract by Age Well Senior Services in the south part of the county and Abrazar, Inc. in the north and central/west part of the county. The Office on Aging receives funding from OCTA and other agencies to operate the SNEMT. There is a voluntary \$2.00 donation fee per one-way trip, but riders are limited to 16 one-way trips per month. Care attendants may ride free.

***Senior Mobility Program (SMP)***

OCTA’s Senior Mobility Program (SMP) provides funding for participating cities and communities in Orange County to provide senior transportation services. Participating cities receive operational funds and/or vehicles from OCTA to support the transportation services that best fit the seniors’ needs in their communities. Funding for the Senior Mobility Program comes from Measure M, Orange County’s half-cent sales tax for transportation improvements. One percent of this tax revenue is allocated to the SMP, and participating cities receive an allocation based on their share of Orange County’s population of seniors aged 60 years and older. In addition to the participating cities, there are three non-profit agencies participating, which include Abrazar, Inc, Korean-American Seniors Association, and Southland Integrated Services, Inc. A list of the participating SMP providers is presented in Table 1. Communities receiving SMP funds may provide services directly or by contracting with an outside provider such as taxicab company or non-profit provider like Abazar. The program is designed to leverage local funds; communities must provide 20 percent or more of the cost of the full program.

*Table 1. Orange County Senior Mobility Program Participating Cities & Organizations*

Aliso Viejo	La Habra	San Juan Capistrano
Anaheim	Laguna Beach	Santa Ana
Brea	Laguna Hills	Seal Beach
Buena Park	Laguna Niguel	Stanton
Costa Mesa	Laguna Woods	Tustin
Cypress	Lake Forest	Villa Park
Dana Point	Mission Viejo	Westminster
Fountain Valley	Newport Beach	Yorba Linda
Fullerton	Orange	Abrazar, Inc.
Garden Grove	Placentia	Korean-American Seniors Association
Huntington Beach	Rancho Santa Margarita	Southland Integrated Services
Irvine	San Clemente	

## **Other Dedicated and Contracted Services**

Depending on their location and their eligibility, residents may have access to other services, such as local taxicab companies, transportation network companies (TNCs such as Uber or Lyft) or private non-emergency medical transportation providers, in addition to the public and specialized services available in Orange County. The availability of these services differs throughout the county, and some providers may also act as contracted providers for programs described earlier in this section.

In Laguna Beach, Sally's Fund provides transportation outside of Orange County for veterans to the Long Beach VA. Sally's Fund also provides services above and beyond the Senior Mobility Program services for seniors and people with disabilities. These services include assisted and escorted door-to-door transportation to medical and other appointments within a 30-mile radius, food and grocery delivery, and more.

Several senior living facilities, nursing facilities, and adult day health centers also manage their own in-house transportation programs or contract out for transportation services for their residents or members. This group includes dozens of different organizations, including private for-profit and non-profit groups. Just a few are highlighted below:

- Reimagine O.C. supports over 400 individuals with neurodevelopmental disabilities and their families. Reimagine O.C. provides in-house transportation services and contracts with Yellow Cab to help clients access their sites and programs.
- Orange County Rescue Mission provides in-house transportation services and arranges and pays for clients to use transportation network companies (i.e., Uber or Lyft) for medical transportation.
- Goodwill Industries of O.C. teaches clients how to use public transportation and provides direct transportation for clients in their Community-Based Services Program.

## **Transportation Support Programs**

The following organizations and programs provide transportation-related support (for example: referrals, travel training, or bus passes) but do not provide transportation services directly.

- 2-1-1 Orange County (211OC)
- Braille Institute Orientation and Mobility Program
- Dayle McIntosh Center
- Tierney Center for Veteran Services
- Disabled American Veterans

## Existing Community Conditions & Travel Patterns

The project team identified needs for specialized transportation services in Orange County by reviewing demographics and travel patterns compared to available services and by implementing an extensive engagement program consisting of an agency survey, agency interviews, and a community survey. Coordinated human services transportation plans focus on individuals that may have limited transportation options, including older adults, people with disabilities, and people with low incomes. While veterans and individuals with low income are not a focus population under the FTA Section 5310, they are commonly included in Coordinated Plans since many HST providers serve these groups as part of their customer base. Veterans and individuals with low income are considered in conjunction with other key characteristics, such as being seniors or individuals with disabilities, ensuring the focus remains on populations facing transportation challenges.

The total population of Orange County is 3,182,954 as of 2022. The Plan includes maps that reflect the proportions of each group throughout the county, though the maps only include one factor at a time so do not represent individuals with multiple characteristics.

Table 2 represents the number of individuals with characteristics related to human service transportation planning. Understanding the overlapping factors that individuals face can help OCTA and partner organizations tailor services and outreach accordingly. Among the nearly 3.2 million people in Orange County, over 900,000 are either in poverty, have a disability, are over age 65, are a veteran, or are some combination of these. Over 23,000 individuals are in poverty and have a disability, and another 15,041 individuals are in poverty, have a disability, and are over 65 years old. The Plan includes maps that reflect the proportions of each group throughout the county, though the maps only include one factor at a time so do not represent individuals with multiple characteristics.

Table 2. Individuals with One or More Demographic Characteristics Related to Human Services Transportation\*

Exclusive Groups	Population
In poverty	251,883
With a disability	112,801
Age 65 or older	264,455
Veteran	41,980
In poverty and with a disability	23,026
In poverty and age 65 or older	25,431
In poverty and a veteran	2,674
With a disability age 65 or older	101,067
With a disability and a veteran	5,131
Age 65 or older and a veteran	40,247
In poverty, with a disability, and age 65 or older	15,041
In poverty, with a disability, and a veteran	913
In poverty, age 65 or older, and a veteran	1,949
With a disability, age 65 or older, and a veteran	22,845
In poverty, with a disability, age 65 or older, and a veteran	1,351
Total unique individuals with one or more focus characteristics	911,154
Total population (all PUMAs in OC)	3,182,954

\*All data variables were from ACS 5-Year Estimates PUMS (2021)



As described later in the Transportation Provider & Community Engagement Activities section, OCTA surveyed OC ACCESS riders and the broader community to understand their transportation needs. Respondents were asked questions about their demographic and socioeconomic characteristics. Key factors are presented here.

Understanding the overlapping factors individuals face can help OCTA and partner organizations tailor services and outreach accordingly. Among the survey respondents, 1,769 answered all the demographic and socioeconomic questions related to age, income, disability, English proficiency, and how many vehicles are in their household.

Among survey respondents who answered all the relevant demographic and socioeconomic questions, 0.5 percent (ten individuals) do not have any of the characteristics typically associated with transportation disadvantage. For all other respondents who answered all the relevant demographic and socioeconomic questions, the breakdown of overlapping factors is:

- 5 percent (83 individuals) have one characteristic
- 28 percent (498 individuals) have two characteristics
- 35 percent (615 individuals) have three characteristics
- 23 percent (411 individuals) have four characteristics
- 9 percent (152 individuals) have all five characteristics

Over two-thirds of respondents who answered the relevant questions have three or more characteristics that are associated with transportation disadvantage. This suggests that most survey respondents are likely to have more unmet transportation needs and greater challenges to meeting those needs than individuals who do not have such overlapping factors.

The responses to the community survey are largely representative of the Coordinated Plan's focus populations. Many respondents have multiple characteristics associated with limited transportation options, and their travel needs, existing transportation challenges, and suggestions for improvement reflect their desire to access key services and take part in their communities in a more convenient, safe, and affordable manner. The key needs and suggestions identified by respondents (described in the Needs Identification section), along with the existing conditions data analysis and agency survey results, guided the development of Coordinated Plan goals and strategies.

## **Travel Patterns**

The project team examined current travel patterns through analysis of OC ACCESS trips, information provided by the community through the community survey, and as modeled using big data from location-based services. The team also created an estimation of future HST travel, based on existing conditions and anticipated population changes in Orange County.

### ***OC ACCESS Trips***

The project team examined OC ACCESS trips from October 2023 to better understand the most common OC ACCESS trips. The team examined trips that shared common origins and destinations to identify the twenty most common trips. Once these were identified, locations were mapped to the center of the Census tract they are located in in order to protect the privacy of OC ACCESS travelers, who are often traveling to or from their home addresses. Figure 1 shows the twenty most common trips as a straight line between origins and destinations.

Figure 1 also represents the number of OC ACCESS trip destinations in each Census tract. While some of the Census tracts with the highest number of trips include an origin or destination in the top

# Executive Summary OCTA Human Services Transportation Plan - October 2024

twenty trips, others have a high number of destinations but without a clear pattern to the trips that begin or end in that tract.

Amongst the top twenty links served by OC ACCESS in October 2023, the top five links primarily occurred within a small area – heavily populated and retail portions of Mission Viejo and Laguna Hills, with one exception being a link a few miles away in Laguna Beach.

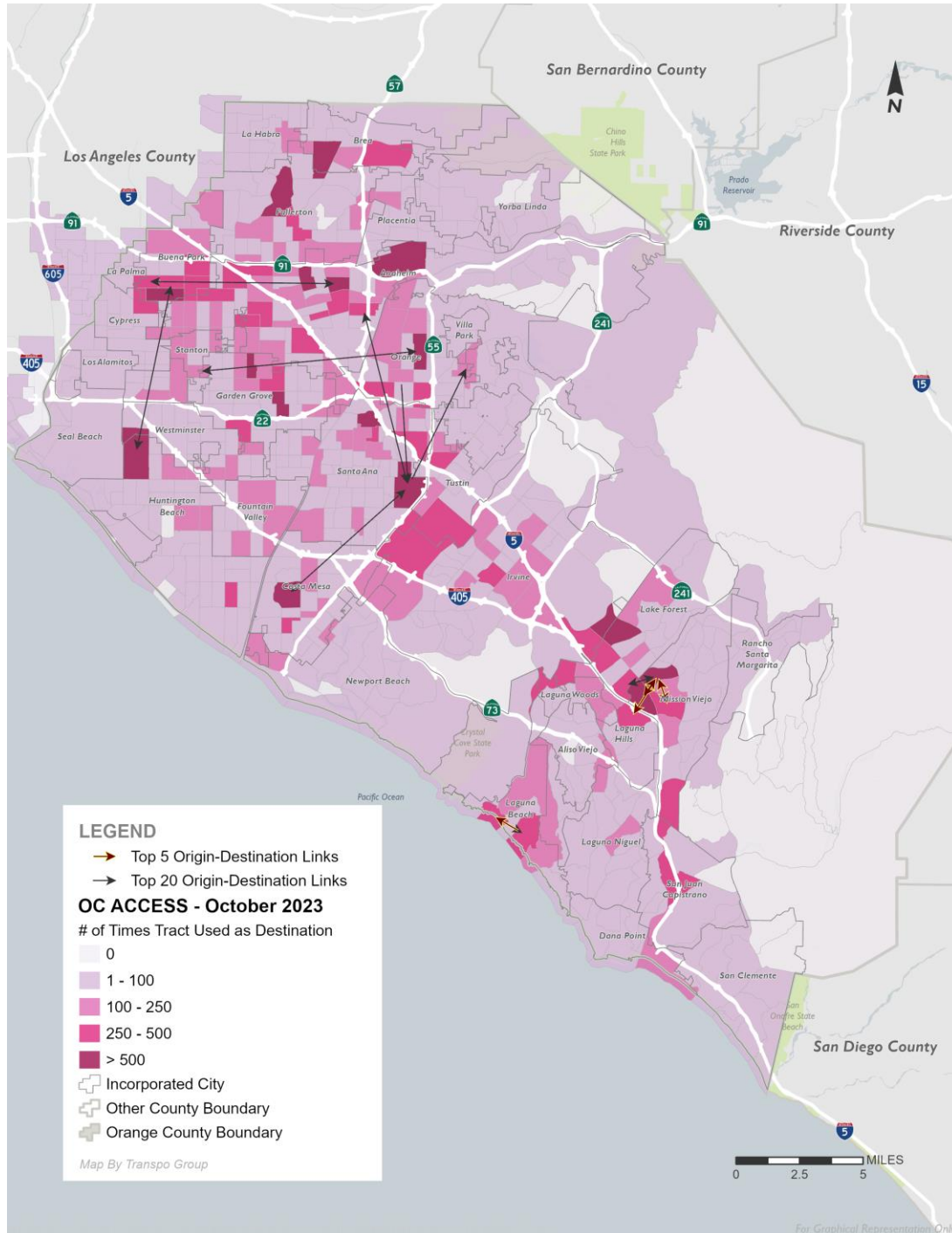


Figure 1. OC ACCESS Pick-Ups and Drop-Offs by 2022 Census Tracts, October 2023

### ***Community Survey Respondents Travel Patterns***

OCTA received 2,320 (non-duplicated) surveys between survey responses online and completed through the paper mailer OCTA sent out to all active OC ACCESS riders. The survey included questions about respondents' individual and household characteristics, travel patterns, and challenges and recommendations related to human services transportation in Orange County.

For questions about respondent travel patterns, the project team analyzed responses across all respondents and for specific groups of the most significant focus for the Coordinated Plan (older adults, people with disabilities, people with low incomes) and for other groups that have limited transportation options or are transportation disadvantaged (households with 0 vehicles and people with limited English proficiency).

Outside of OC ACCESS and OC Bus, major transportation options used regularly for all groups include: 1) being driven by friends or family, 2) walking, and 3) taking a taxi, Uber, or Lyft. Most respondents make trips outside of their home three to four times a week or more. Most respondents miss or are unable to make a trip less than once a month.

Trips that respondents regularly make include, in rank order are below. Educational, work, and volunteering were the least chosen.

1. Medical/dental (#1 across all groups)
2. Shopping and errands (#2 across all groups)
3. Social/recreational; Visiting friends and family; Religious

Three trip types tied for third in terms of which ranks highest, varying by individual groups (older adults, people with disabilities, and people with low incomes).

Overall, respondents appear to rely on OCTA services for most of their travel, followed by friends and family, and make regular healthcare and shopping-related trips. Nearly all respondents (92 percent have one or more disabilities, so there was little difference in results between the full set of respondents and people with disabilities. Among people with LEP and low incomes, there is generally less travel outside of the home and a slightly higher number of respondents who miss or are unable to make trips on a more regular basis. Adults aged 60 and older also have a slightly higher rate of lower travel outside of their home.

### ***Modeled Current Trip Demand***

OC ACCESS trip data represent trips that travelers took, but the data do not provide information about the trips that travelers might want to take but may not be able to. To identify potential demand for trips beyond those taken through OC ACCESS, the project team used data from Replica to examine travel demand. Replica, a commercial data product, is essentially a synthetic travel-survey database with advanced relational characteristics; it is described by its vendor as a "High-fidelity travel model with simulated population and trip-taking activity."

Replica data was filtered to isolate the travel patterns of specific groups most likely to use human services transportation. Disability is not a demographic factor available in Replica; analysis included zero-vehicle households, people aged 65 and older, and households with low and limited annual incomes (\$0-\$15,000; \$15,000-\$25,000; \$25,000-\$50,000). For each group, the top 100 origin-destination pairs were identified. The Plan includes each of these maps, which can be used to identify potential future services for OCTA or other providers.

**Estimated Future Human Services Transportation Demand**

The project team developed estimates of HST demand for 2045 using the framework developed for the SCAG ADA Paratransit Tool. The framework considers total service area population, proportion of the population with at least one type of disability, and agency factors related to ADA service (including percentage of population that applies for ADA paratransit service, percentage of applicants deemed eligible, percentage of registrants who have taken at least one trip in the last year, total trip requests, denial rate, and cancellation and no-show rate).

Illustrated in Figure 2 below are the annual unlinked trips for demand-responsive services spanning from 2017 to the present day. The data indicates a gradual increase in unlinked trips followed by a decline by roughly two-thirds as the pandemic's impact on mobility became apparent. Ridership has shown an upward trend since hitting a low point in 2021, suggesting a gradual return of demand for these services to pre-pandemic levels.

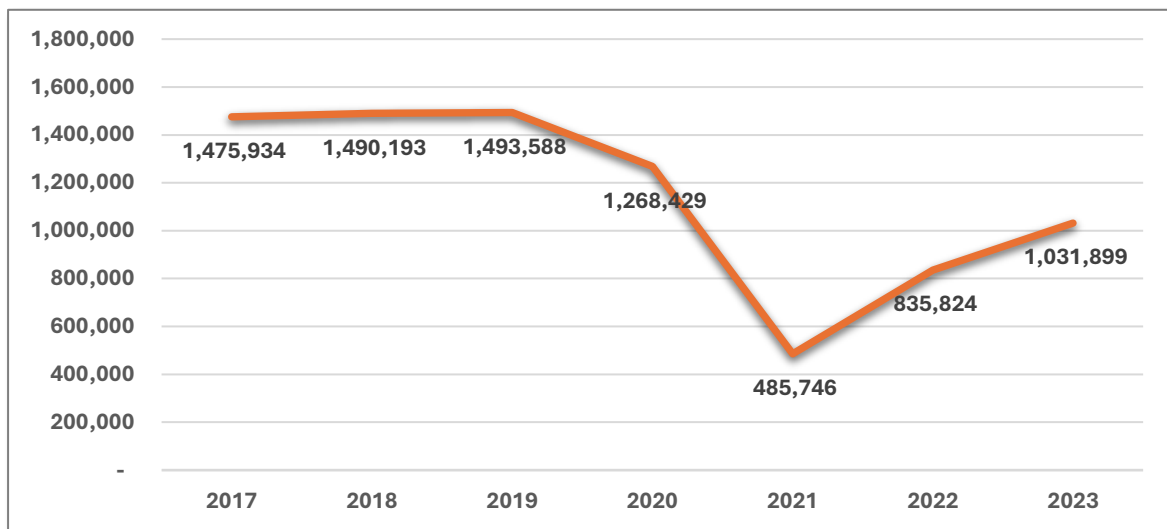


Figure 2. Historical Annual Unlinked Passenger Trips: Demand Response Services

When the tool was developed, parameters were fine-tuned based on conditions prevailing in 2017. Since then, external factors, particularly the COVID-19 pandemic, have significantly influenced the demand for HST services. Table 3 shows the estimated future Year 2045 annual unlinked passenger trips based on a short-term rebound to pre-pandemic levels, followed by adjustments linked to demographic shifts.

Table 3. Current and Future Unlinked Passenger Trips

Category	Year 2017	Year 2023	Year 2045
	Model Base	Current	Future
Total Population of Service Area	3,151,184	3,158,331	3,251,576
Target Population	282,529	288,138	296,645
Annual Unlinked Passenger Trips	1,475,934	1,031,899	1,522,954

## Transportation Provider & Community Engagement Activities

The project team relied on activities with four key groups during the development of the Coordinated Plan:

- Community members
- Transportation providers and other human services providers
- OCTA's Accessible Transit Advisory Committee (ATAC)
- OCTA's internal project development team

The project team developed a website to provide high-level information about the plan update. The project website was also where the community and the agency surveys were available and where participants could learn about and register for the community and agency virtual meetings. Website content was made available in English, Spanish, and Vietnamese.

### Community Members

As part of community outreach and developing a deeper understanding of community human services transportation needs, OCTA made a rider survey available online and in print. In late February 2024, OCTA mailed the printed survey to all 5,049 active OC ACCESS riders (as a postage-paid mailer which respondents could return to OCTA). OCTA printed the survey in English with a note in Spanish and Vietnamese, letting recipients know they could complete the survey online or request a paper survey in those and other languages as well. OCTA did not receive any requests for paper surveys in Spanish, Vietnamese, or any other language. The online survey was available in English, Spanish, and Vietnamese. The surveys were available in early February and closed at the beginning of April.

All survey respondents were asked to submit their responses by March 31<sup>st</sup> and had the option to take part in a drawing for one of five \$25 Visa gift cards. OCTA hosted a virtual community meeting on March 20<sup>th</sup> to provide participants an opportunity to learn more about the plan, share their thoughts, and get assistance filling out the survey, if needed. OCTA received 2,391 survey responses, 2,079 of which were paper surveys. At least 13 surveys were completed in Spanish, and none were completed in Vietnamese.

In addition to the survey, OCTA offered an online open house during the survey period and posted the draft Plan on the project website for public comment in August 2024.

### Transportation & Social Services Providers

Agency outreach happened in two phases in 2024 – a survey emailed to each agency and follow-up interviews with select agencies. In addition, a virtual meeting was held on February 21<sup>st</sup>. The meeting included an overview of the plan and the planning process, including high-level information about transportation providers and population characteristics. OCTA also held virtual open business hours on February 28<sup>th</sup> and 29<sup>th</sup> from 10:00am-12:00pm for agencies to discuss the plan and their projects. These open business hours aligned with agencies and OCTA preparing for the 2024 call for projects for Enhanced Mobility for Seniors and People with Disabilities (EMSD) funding, and information about the current planning process was available but was not the primary focus of the open business hours.

OCTA made the agency survey available on the project's website from February 12<sup>th</sup> through March 22<sup>nd</sup>. The survey collected information from organizations that provide human services transportation or otherwise support clients who use these services. The project team emailed the survey to over 500 contacts that OCTA identified through multiple OCTA program spreadsheets. Organizations contacted included senior centers, adult day health centers, transit providers, churches, culturally specific advocacy groups, disability advocacy groups, social services providers, and more. The project team followed up with a survey reminder and made phone calls to dozens of agencies whose contact information was unavailable or out of date. After accounting for duplicate entries, 49 agencies or individuals submitted responses to the agency survey. Among the 49 respondents, 32 (nearly 65 percent) represent private, non-profit organizations. Nearly one-third of respondents (14) represent a public agency, and three respondents represent a private, for-profit organization.

Following up on the results of the agency survey, the project team conducted five interviews with key human services transportation providers, including transportation operators and other organizations whose clients use human service transportation. The project team conducted these interviews between April 16 and April 30, 2024. Interview questions differed between the agencies, based on their responses to the survey and their role in the community.

Between the survey and the interviews, agencies identified key challenges and opportunities that informed the project team's work to identify needs and strategies, as discussed in the following sections.

## **Accessible Transit Advisory Committee (ATAC)**

During the plan update, the project team presented at quarterly ATAC meetings.

- January 2024 – outreach plan and project workplan
- April 2024 – project updates including agency and community survey results
- July 2024 – draft Coordinated Plan

In addition, the project team shared both the community survey and the agency survey with ATAC members to complete and to disseminate within their networks.

## **OCTA Project Development Team**

Through the Plan update, OCTA staff representing Transportation Planning, Programming, Special Transit Services, and External Affairs met monthly to guide the update process, provide information and insight, and review analysis.

## Needs Identification

There are areas of Orange County with high concentrations of individuals who are part of one or more of the groups that the Coordinated Plan is most concerned with. In some areas, these individuals have access to multiple transportation options, and in others, options are very limited and may be inaccessible due to service timing, fares, or physical accessibility. The project team relied on the existing conditions analysis and input from the community and agencies to identify unmet transit needs for older adults, people with disabilities, people with low incomes, and other groups with limited transportation options.

This section summarizes the five themes (“Needs”) that emerged. These themes are presented in a ranked order, representing the themes that were most strongly expressed or prioritized by the community, providers, and the OCTA project development team.

### **#1 – Sustainability of Existing Services**

*Support funding, staffing, and ability constraints limit the ability of existing service providers to meet demand in an effective and sustainable way.*

- Contracted rates for human services providers have not kept pace with the increasing cost of service provision, jeopardizing the continuation of existing services.
- Training and compliance requirements may be overly burdensome to service providers, especially very small organizations with limited staff capacity and expertise.

### **#2 – Enhanced Existing Service Coverage and Operating Hours.**

*Existing services have limited operating hours, and geographic coverage, in part due to low demand for fixed route service in low density areas.*

- Some areas of the county are unserved or underserved by existing programs, in part due to limited fixed-route services and resulting limited OC ACCESS service. These areas include the western portion of the county, with Yorba Linda, Anaheim Hills, and Rancho Santa Margarita. Laguna Beach, Laguna Niguel, and San Clemente are also among the areas underserved.
- Across all transportation providers that responded to the survey, there is limited availability of service on weekends and weekday evenings. Riders identified weekend service as a higher priority than weekday evenings.
- Across the network of human service transportation providers, there are too few wheelchair-accessible vehicles available to meet demand.
- Community transportation providers are not mandated to transition their fleets to low- or no-emissions vehicles, but planning for these transitions will benefit the agencies and the communities by expanding funding opportunities and reducing greenhouse gas emissions.

### **#3 – Improved Rider-Facing Information and Communication**

*Not all riders are able to access important transportation information, including information about the status of their trip.*

- Riders are not receiving sufficient communication about trip status. Riders do not receive proactive communication about trip delays and must call OCTA for updates. Though OC ACCESS riders who book online can see trip status updates, many riders who responded to the survey do not appear to be aware of this option.

- Rider-facing information is not sufficiently accessible for people with vision, hearing, and developmental disabilities, people with mental illness, and for people who have limited English proficiency.

#### **#4 – Improved Service Quality and Rider Experience**

*Some riders, especially those with disabilities and/or who have limited English proficiency, experience safety, comfort, and customer service challenges.*

- Some riders and social services staff experience poor service from OC ACCESS and same-day taxi drivers and customer service representatives due to language barriers and/or a lack of understanding about how to support and communicate with people with disabilities.
- OC ACCESS riders complain about spending too much time on the vehicle and/or traveling out of direction.
- Riders may need to change vehicles and drivers between same-day taxi and OC ACCESS even when both services are being provided by the same contracted provider, creating lengthier travel times and potentially requiring riders to wait in an area that is not secure.
- Some riders do not feel safe waiting for the bus in a public, open space.
- Having only one option for fare payment is limiting and can be difficult to keep track of. Stored-value card payment was previously available but deprecated due to software challenges.
- Reliance on phone calls for OC ACCESS and other program booking can be onerous and inefficient. OCTA provides OC ACCESS riders the option of booking online; not all riders seem aware of this option.
- Rider eligibility is conducted across multiple organizations through different processes that can be challenging to navigate and coordinate. For example, riders may require registration and case management through a particular agency such as an adult day health center, eligibility determination by the Office on Aging for SNEMT, and ADA eligibility for OC ACCESS.

#### **#5 – Increased Number of Service Options**

*Gaps in existing services limit the ability of older adults, people with disabilities, and people with low incomes to fully meet their travel needs.*

- Current scheduling limitations make it difficult for riders to meet their transportation needs when more flexibility is required.
- Destinations outside of Orange County are difficult to access due to trip restrictions and limited coordination between providers. Respondents noted destinations, especially medical services, in Los Angeles County, San Diego County, Riverside County, and other surrounding counties.
- Areas not served by OC Bus and OC ACCESS have comparably limited options, making it difficult and/or expensive for riders in those areas to access transportation.
- Riders requested more flexible service options, especially same-day and on-demand services.
- It can be challenging for riders who need to connect across the county lines, especially to medical facilities.
- There is a need for more HST coverage options in remote, low-density areas of the county where fixed-route bus service is not feasible.



## Recommended Strategies

This section presents goals that reflect identified needs, along with strategies to accomplish each goal. They are strategies that OCTA and human service transportation providers should consider based on their effectiveness and feasibility of implementation. Recommendations from community members and agency representatives informed strategy development. Most are relevant to human service transportation providers and related organizations throughout the county.

Because these goals tie directly to the identified needs, they are also presented in the order of greatest emphasis from community members, providers, and the project development team. Within each goal, strategies are not presented in a ranked order; the following section, Prioritizing Goals and Strategies, further explains the strategy ranking.

### **Goal 1 – Sustain Existing Services**

- Prioritize FTA Section 5310 funds to support OC ACCESS.
- Increase or prioritize funding available for capital and operations, first to make existing programs whole and then to enhance services.
- Pilot a mobility coordination committee where all agencies with shared human services clients meet regularly to identify challenges and develop solutions.
- Promote/encourage interagency partnerships to improve coordination and address unmet needs.
- Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.

### **Goal 2 – Enhance Existing Service Coverage and Operating Hours.**

- Increase funding in general for capital and operations to enhance services.
- Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.
- Prioritize areas that require new or enhanced service for high demand and underserved populations.
- Develop an understanding of transportation provider capacity for and interest in low-/no-emission fleet transition and community infrastructure and other resources to support transition.

### **Goal 3 – Improve Rider-Facing Information and Communication**

- Improve day-of-trip communication with riders, informed by 2024 OC ACCESS text notification pilot.
- Provide more comprehensive, up-to-date, and easily understandable rider-facing information online and in print.
- Provide more accessible services information – accessible both in terms of spoken language, American Sign Language, and for people with disabilities.

### **Goal 4 – Improve Service Quality and Rider Experience**

- Improve training for drivers and customer service representatives to better communicate with and support riders with disabilities and/or who have limited English proficiency.

- Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys and/or feedback mechanisms into daily service delivery to identify improvement areas.
- Explore re-introducing more payment options, including account-based payments and stored-value cards, for OC ACCESS and same-day taxi riders.
- Provide riders with the option to book and check the status of trips online and/or through a mobile application. For OC ACCESS, increase promotion and marketing of this feature.
- Improve transportation provider access to advanced scheduling and dispatch software.
- Explore opportunities to coordinate program eligibility.
- Improve the safety and security of fixed route bus stops and designated OC ACCESS stops.

**Goal 5 – Increase Number of Service Options**

- Provide flexible service options, especially same-day and on-demand services.
- Improve coordination of services across the county lines, especially to medical facilities.
- Provide more service coverage and options in remote areas of the county, especially those not served or underserved by OC Bus and OC ACCESS.
- Continue to provide flexible service options to ADA-eligible customers traveling in the areas with the highest origin-destination pairs, as identified by analyzing OC ACCESS data.
- Increase service options for individuals who have disabilities but may not qualify for OC ACCESS or other age- and trip-limited transit services (such as SMP or SNEMT).

## Prioritized Goals and Strategies

The previous plan noted that all proposed strategies, to varying degrees, met one or more of the following criteria:

- Address identified gaps and barriers
- Impact the highest number of members of target populations
- Make use of new technology in delivery of service whenever possible
- Strong potential to be funded and implemented over the life of the Plan

Strategies were prioritized according to costs and implementation timeline. For this Plan update the project development team opted to prioritize the strategies in a similar way. In the table following, the implementation timeline and cost for each strategy is estimated, along with a prioritization of the strategy. Strategies were prioritized based on the following factors:

- High Priority – low cost and short or medium implementation timeline
- Medium Priority – medium cost and implementation timeline, medium cost and long implementation timeline, or high cost and medium implementation timeline
- Low Priority – high cost and long implementation timeline

Strategies ranked “Low” in priority are not less valuable than the strategies ranked “High” or “Medium” priority; the priority ranking indicates which strategies should be pursued first. In addition, some specific implementation actions associated with the strategies may be lower cost or have a shorter implementation timeframe than the full strategy, so it may be beneficial to pursue these specific actions in a shorter timeframe, even for strategies that rank “Low.”

The “Cost” factor considers direct costs such as software or capital expenditures and staff salaries, in addition to soft costs such as staff time spent in coordination or management tasks.

STRATEGY	IMPLEMENTATION TIMELINE	COST	PRIORITY
<b>Goal 1 – Sustain Existing Services</b>			
1.1 Prioritize FTA Section 5310 funds to support OC ACCESS.	Short (6-12 months)	Low	High
1.2 Pilot a mobility coordination committee where agencies with shared human services clients meet regularly to identify challenges and develop solutions.	Short (6-12 months)	Low	High
1.3 Promote/encourage interagency partnerships to improve coordination and address unmet needs	Short (6-12 months) and ongoing	Low	High
1.4 Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.	Medium (12-24 months)	Low	High
1.5 Increase or prioritize funding available for capital and operations, first to make existing programs whole and then to enhance services.	Medium (12-24 months)	Medium	Medium
<b>Goal 2 – Enhance Existing Service Coverage and Operating Hours.</b>			
2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.	Medium (12-24 months)	Low	High
2.2 Prioritize areas that require new or enhanced service for high demand and underserved populations.	Medium (12-24 months)	Low	High
2.3 Develop understanding of factors related to community transportation fleet transition to low-/no-emissions vehicles.	Medium (12-24 months)	Medium	Medium
2.4 Increase funding available for capital and operations to enhance services.	Long (24-48 months)	Medium	Medium
<b>Goal 3 – Improve Rider-Facing Information and Communication</b>			
3.1 Improve day-of-trip communication with riders, informed by 2024 OC ACCESS text notification pilot.	Medium (12-24 months)	Medium	Medium
3.2 Provide more accessible services information – accessible both in terms of spoken language, American Sign Language, and for people with disabilities.	Medium (12-24 months)	Medium	Medium

3.3 Provide more comprehensive, up-to-date, and easily understandable rider-facing information online and in print.	Long (24-48 months)	Medium	Medium
<b>Goal 4 – Improve Service Quality and Rider Experience</b>			
4.1 Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys, and/or feedback mechanisms into daily service delivery to identify improvement areas.	Medium (12-24 months)	Low	High
4.2 Improve transportation provider access to advanced scheduling and dispatch software.	Medium (12-24 months)	Medium	Medium
4.3 Improve training for drivers and customer service representatives to better communicate with and support riders with disabilities and/or who have limited English proficiency.	Long (24-48 months)	Medium	Medium
4.4 Improve coordination of services across the county lines, especially to medical facilities.	Long (24-48 months)	Medium	Medium
4.5 Improve the safety and security of fixed route bus stops and designated OC ACCESS stops.	Medium (12-24 months)	High	Medium
4.6 Explore opportunities to coordinate program eligibility.	Long (24-48 months)	Medium	Low
4.7 Explore re-introducing more payment options, including account-based payments and stored-value card, for OC ACCESS and same-day taxi riders.	Long (24-48 months)	High	Low
4.8 Provide riders with the option to book and check the status of trips online and/or through a mobile application. For OC ACCESS, increase promotion and marketing of this feature.	Long (24-48 months)	High	Low
<b>Goal 5 – Increase Number of Service Options</b>			
5.1 Improve coordination of services across the county lines, especially to medical facilities.	Long (24-48 months)	Medium	Medium
5.2 Provide flexible service options, especially same-day and on-demand services.	Long (24-48 months)	High	Low
5.3 Provide more service coverage and options in remote areas of the county, especially those not served or underserved by OC Bus and OC ACCESS.	Long (24-48 months)	High	Low
5.4 Continue to provide flexible service options to ADA-eligible customers traveling in the areas with the highest origin-destination pairs, as identified by analyzing OC ACCESS data.	Long (24-48 months)	High	Low
5.5 Increase service options for individuals who have disabilities but may not qualify for OC ACCESS or other age- and trip-limited transit services (such as SMP or SNEMT).	Long (24-48 months)	High	Low

## Implementation Steps

This section describes specific tasks and objectives to implement strategies that are ranked “High” priority. For strategies ranked “Medium” or “Low” priority, there may be lower cost or shorter implementation steps that can be identified through future efforts.

STRATEGY	IMPLEMENTATION STEPS
<b>High Priority Strategies</b>	
1.1 Prioritize FTA Section 5310 funds to support OC ACCESS.	Continue OCTA's practice of prioritizing 5310 funds for OC ACCESS and supporting other human services transportation through other funding sources.
1.2 Pilot a mobility coordination committee where agencies with shared human services clients meet regularly to identify challenges and develop solutions.	Facilitate a conversation with ATAC about interest in and capacity to participate in the MCC the benefits and challenges of creating a separate structure.  Determine appropriate structure for MCC, including the person or agency with responsibility for the development and facilitation of the MCC.
1.3 Promote/encourage interagency partnerships to improve coordination and address unmet needs	The development of the MCC will allow for regular coordination across all human service transportation providers and related organizations. One of the first steps of the MCC after establishing foundational documents will be to identify opportunities to improve coordination across the county in support of meeting the needs identified in the Plan.  =

STRATEGY	IMPLEMENTATION STEPS
<b>High Priority Strategies</b>	
<p>1.4 Support transportation providers by providing joint training, especially driver training and those related to compliance and administration and establish contracting mechanisms for service providers to procure scheduling and dispatch software.</p>	<p>The first step in this strategy will be to determine, in greater detail than reflected in this plan, the specific challenges that human transportation providers of all sizes are facing in Orange County to understand the full extent of support needed and the full set of community resources available to provide solutions. The MCC could facilitate this research and create a workplan for developing, funding, and implementing the solutions identified.</p>
<p>2.1 Expand the OCTA retired vehicle donation program to increase the number of wheelchair accessible vehicles available to external human service transportation providers.</p>	<p>The first step in this strategy will be to identify OCTA's capacity to increase the number of vehicle donations. After understanding the resources needed to enhance the program, OCTA will need to communicate with potential recipients to promote the program and to better understand if organizations are facing barriers to participation.</p>
<p>2.2 Prioritize areas that require new or enhanced service for high demand and underserved populations.</p>	<p>In evaluating proposals for competitive grant funding, OCTA should prioritize projects that meet the identified needs of the communities and areas of focus in the Plan. For all human services transportation partners, projects and programs should consider elevating the needs of communities and areas of focus in the Plan.</p>
<p>4.1 Provide more timely feedback than is available through the bi-annual OC ACCESS service evaluation, by incorporating rider satisfaction surveys, and/or feedback mechanisms into daily service delivery to identify improvement areas.</p>	<p>With the transition to new scheduling software and a rider-facing application, OCTA should explore providing more real-time opportunities for rider feedback. For all human transportation services providers, providing regular rider feedback opportunities through in-vehicle surveys, phone surveys, mailed surveys, and online surveys will ensure timely recognition of issues and successes and a strong foundation for subsequent Plan updates.</p>

## Conclusion

Several programs in Orange County provide transportation for older adults, people with disabilities, and people with low income. While these programs collectively serve thousands of riders each day, there are still opportunities to improve service sustainability, introduce new services, and improve rider experiences. While OCTA is responsible for producing this Coordinated Plan, the needs, gaps, goals, and strategies presented in this plan reflect the human service transportation network in Orange County.

The Coordinated Plan provides an opportunity to comprehensively examine existing traveler needs and organizational capacities and to develop strategies specifically designed to improve mobility for older adults, people with disabilities, and people with low income. These strategies will guide human services transportation investment in the coming years, but partner organizations do not need to wait for funding opportunities to pursue these strategies. OCTA is actively working on some of the listed strategies, including an OC ACCESS rider notification pilot, procuring a more feature-rich scheduling and dispatch software option for OCTA and partners, and evaluating OCTA's eligibility process.