

# Project V – Community-Based Transit/Circulators

2024 Call for Projects Workshop and Q & A Session

December 5, 2023



- Purpose: Review the 2024 CTFP Call Process
- Agenda
  - ❖ 2024 Call Schedule
  - ❖ Project V Overview and Objectives
  - ❖ Eligible & Ineligible Categories
  - ❖ Performance Standards
  - ❖ Application Process
  - ❖ Supplemental Application
  - ❖ Q&A

# 2024 Call Schedule

Call Issued

November 13, 2023

Pre-Application Consultations

Now – January 25, 2024

**Applications Due**

**Thursday, January 25, 2024 at 5:00 PM**

Qualitative Reviews

February 2024 – March 2024

Local Agency Coordination

February 2024 – April 2024

Adopted Resolution Due to OCTA

February 15, 2024

Funding Recommendations

Spring 2024

# Project V Overview

- Competitive Measure M (M2) program
- Provides funding for local transit services that:
  - complement existing regional transit services; and
  - meet needs in areas not adequately served by regional transit
- Productivity standards
- Cannot compete or duplicate existing transit services



# General Program Objectives



- To provide community transit service that is safe, clean, and convenient.
- To encourage new, well-coordinated, flexible transportation systems customized to each community's needs.
- To develop financially sustainable local transit services that complement regional bus and rail service.
- To meet transportation needs in areas not served by regional transit with reliable and viable transit services.

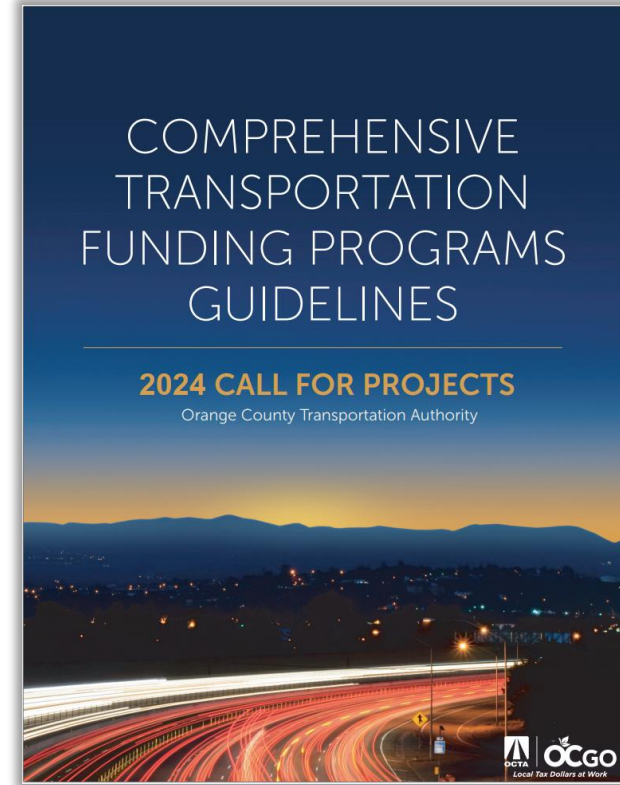
# 2024 Call Objective Priorities

- 1) Continue funding existing projects that are expiring.
- 2) Encourage and support expansion of existing projects.
- 3) Support new Traditional Project V services.
- 4) Allow for on-demand services that provide shared ride options.

## *Other Priorities to Note:*

- Combine continuing existing services into one grant
- Competitively procure or reprocure for service providers

**CTFP Guidelines (Updated 2024 Edition)**  
[www.octa.net/pdf/CTFPGuidelines2024.pdf](http://www.octa.net/pdf/CTFPGuidelines2024.pdf)



# Eligible Service Categories

## ❑ Traditional Project V Services:

- Fixed route
- Deviated fixed route
- Circulators and rubber-tire trolleys
- Point-to-point shuttle services (event parking shuttles)



## ❑ On-Demand (mobility) Services:

- Shared Ride-hailing or transportation network companies
- Microtransit



- **Maximum grant (escalated annually<sup>1</sup>)** – FY 2025 through FY 2031
  - up to **\$592K per year for Traditional** services
  - up to **\$296K per year for On-Demand** services
  - Available starting July 1, 2024 (FY2025) or with pre-award authority, upon programming by the OCTA Board
- Required **minimum match (cash only, no in-kind)**
  - Capital and initial/start-up marketing - 10%
  - Traditional Transit Operations and Maintenance<sup>2</sup> (O&M) - 10%
  - On-Demand O&M\* – 50%

<sup>1</sup> Maximum fiscal year funding allocation escalates on an annual basis. Refer to CTFP Guidelines Table 6-1

<sup>2</sup> Maximum reimbursement by OCTA is **\$10.81 per passenger**



**Operations and Maintenance (O&M) for On-Demand and Traditional Services:** contracted services or in-house services, drivers, mechanics, dispatch, ongoing marketing, fuel, parts, recurring fees, maintenance, parking fees or vehicle storage

**Capital:** vehicle purchase/lease, communications equipment, supporting equipment and facilities, reasonable bus stop improvements and related amenities.

- Subject to useful life provisions.
- Bus stop improvements and amenities generally consistent with Project W guidelines.

**Initial/Start-up Marketing to Establish Service:** up to \$80,000 for first year only

- Funds will support initial/start-up marketing costs to establish **NEW** and/or **EXPANDED** Project V service.



## Operations and Maintenance (O&M)

- Minimum of 10% for Traditional Project V service or 50% for On-Demand service, net fares.
- Additional points for higher match.

| <b>Financial Commitment</b> |                           | <b>15 Points Max</b>        |
|-----------------------------|---------------------------|-----------------------------|
| <b>Overall Match Rates</b>  |                           |                             |
| <b>Traditional Services</b> | <b>On-Demand Services</b> |                             |
| ≥ 30%                       | ≥ 70%                     | <input type="checkbox"/> 15 |
| 20-29%                      | 60%-69%                   | <input type="checkbox"/> 10 |
| 10-19%                      | 50-59%                    | <input type="checkbox"/> 5  |

- **Note:** O&M costs are subject to a limitation of \$10.81 per boarding/user reimbursement limitation. Actual required match provided may be greater than 10% or 50% minimums.
- Project V Grant will support up to \$25,000 for regular/ongoing marketing costs per year.
- Agencies receiving Project V funds must meet ADA requirements and may be asked to adopt a paratransit plan prior to starting operations.

Match can **NOT** be made up of in-kind services or fares.

# O&M Reimbursement – Example Payt

OCTA maximum \$10.81 per boarding, or 90% for Traditional Transit and 50% for On-Demand Service, “whichever is lower”.

| SAMPLE PAYMENT CALCULATION                              |                 |
|---|-----------------|
| ASSUMPTIONS: 10% MATCH and 1,500 BOARDINGS              |                 |
| Operating Cost  | \$23,000        |
| Fare Revenue (deduct)                                   | -\$3,000        |
| Net Operating Cost                                      | \$20,000        |
| Agency Match (10%)                                      | \$2,000         |
| <b>Agency Reimbursement (90%)</b>                       | <b>\$18,000</b> |
| or  |                 |
| Operating Cost  | \$23,000        |
| Fare Revenue (deduct)                                   | -\$3,000        |
| Net Operating Cost                                      | \$20,000        |
| \$10.81 x Boardings (\$10.81 x 1,500)                   | \$16,215        |
| Agency Match  | \$3,785         |
| <b>Agency Reimbursement (\$10.81 per boarding/user)</b> | <b>\$16,215</b> |

| SAMPLE PAYMENT CALCULATION                              |                 |
|---|-----------------|
| ASSUMPTIONS: 10% MATCH and 400 BOARDINGS                |                 |
| Operating Cost  | \$23,000        |
| Fare Revenue (deduct)                                   | -\$3,000        |
| Net Operating Cost                                      | \$20,000        |
| Agency Match (10%)                                      | \$2,000         |
| <b>Agency Reimbursement (90%)</b>                       | <b>\$18,000</b> |
| or  |                 |
| Operating Cost  | \$23,000        |
| Fare Revenue (deduct)                                   | -\$3,000        |
| Net Operating Cost                                      | \$20,000        |
| \$10.81 x Boardings (\$10.81 x 400)                     | \$4,234         |
| Agency Match  | \$15,766        |
| <b>Agency Reimbursement (\$10.81 per boarding/user)</b> | <b>\$4,234</b>  |



Project V funds may **NOT** be used for the following:

- Planning Studies (2024 call)
- Micromobility services (e.g., shared bicycle, scooters)
- ROW acquisition
- Existing transit services (decided on case-by-case review)
- Supplanting developer fee or other grant funding
- Fare subsidies
- Indirect costs
- OCTA-led services



- Local agency must be eligible to receive M2 funds
- Support OC Transit Vision, local planning efforts, other regional goals, and 2024 call objectives
- Demonstrate cost reasonableness
- Demonstrate availability of local match funds
- Cooperative funding agreement with OCTA
- Meet ADA requirements
- If applicable, include ADA costs
- Final City Council Resolution by Feb. 15, 2024
- General Transit Feed Specification (GTFS) formatted scheduling information

- Minimum Performance Standards:
  - Project V service shall meet the minimum performance standard, which is a maximum cost per boarding of twice the per boarding subsidy, currently approximately \$21 - \$23 per passenger.
  - On-demand services, must meet the requirement above but may be subject to a performance standard that is unique to each service.
- Consequence: City Council or BOS action must confirm continuation of service despite the high cost, at least once a year.



# Questions & Answers

Please use the Q&A or raise hand to ask questions  
\*6 to unmute / \*9 to raise hand

# Project V Application Process



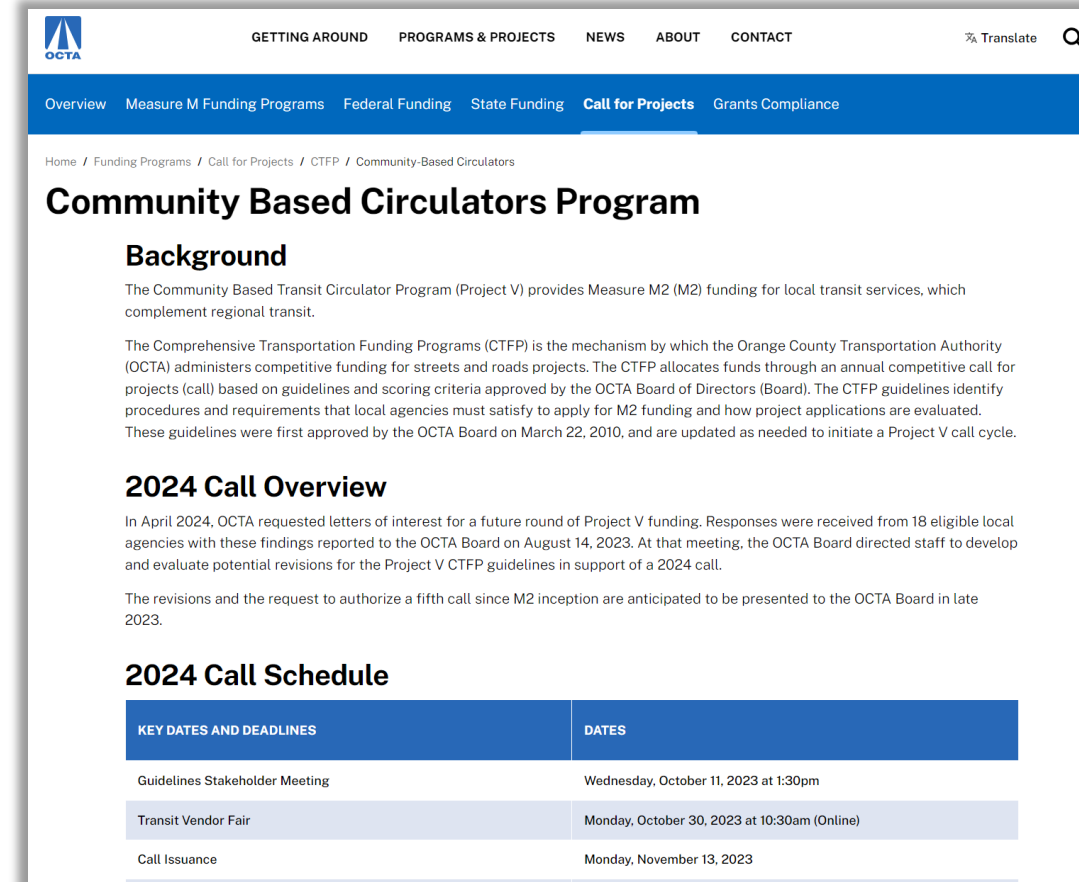
# Application Process

Application materials posted online at:  
[www.octa.net/programs-projects/programs/funding-programs/Call-for-Projects/ctfp/Community-Based-Circulators/](http://www.octa.net/programs-projects/programs/funding-programs/Call-for-Projects/ctfp/Community-Based-Circulators/)

## Complete Application Package:

- OCTA Application Form
- Supplemental Application (excel file, no PDF)
- Supporting Documents
- Board/Council Resolution

**Required Submission:** one (1) unbound hardcopy and any supporting documentation including KMZ files **and** one electronic copy via upload to OCFundtracker.



The screenshot shows the OCTA website page for the Community Based Circulators Program. The page includes a navigation menu with links for GETTING AROUND, PROGRAMS & PROJECTS, NEWS, ABOUT, and CONTACT. Below the navigation menu, there is a sub-menu with links for Overview, Measure M Funding Programs, Federal Funding, State Funding, Call for Projects, and Grants Compliance. The main content area features a breadcrumb trail: Home / Funding Programs / Call for Projects / CTFP / Community-Based Circulators. The page title is "Community Based Circulators Program".

### Background

The Community Based Transit Circulator Program (Project V) provides Measure M2 (M2) funding for local transit services, which complement regional transit.

The Comprehensive Transportation Funding Programs (CTFP) is the mechanism by which the Orange County Transportation Authority (OCTA) administers competitive funding for streets and roads projects. The CTFP allocates funds through an annual competitive call for projects (call) based on guidelines and scoring criteria approved by the OCTA Board of Directors (Board). The CTFP guidelines identify procedures and requirements that local agencies must satisfy to apply for M2 funding and how project applications are evaluated. These guidelines were first approved by the OCTA Board on March 22, 2010, and are updated as needed to initiate a Project V call cycle.

### 2024 Call Overview

In April 2024, OCTA requested letters of interest for a future round of Project V funding. Responses were received from 18 eligible local agencies with these findings reported to the OCTA Board on August 14, 2023. At that meeting, the OCTA Board directed staff to develop and evaluate potential revisions for the Project V CTFP guidelines in support of a 2024 call.

The revisions and the request to authorize a fifth call since M2 inception are anticipated to be presented to the OCTA Board in late 2023.


### 2024 Call Schedule

| KEY DATES AND DEADLINES        | DATES  |
|--------------------------------|--|
| Guidelines Stakeholder Meeting | Wednesday, October 11, 2023 at 1:30pm        |
| Transit Vendor Fair            | Monday, October 30, 2023 at 10:30am (Online) |
| Call Issuance                  | Monday, November 13, 2023                    |

# Application Contents

At **minimum**, must include the following:

- Project need, goals and objectives
- Project development and implementation schedule
- Detailed funding plan
- Proposed and/or ongoing service and operations plan
- O&M facility management
- KMZ file(s) of proposed service, sufficient to support OCTA geocoding efforts
- Additional info deemed relevant by applicant and/or OCTA
- Ridership Projections
- Demonstration of coordination with existing service operators/providers



**PROJECT V**  
2024 Call for Projects Application & Scoring Criteria

| APPLICATION CHECKLIST  |                          |
|--|--------------------------|
| Application materials should be submitted in the order they are listed below. Refer to the CTFP Guidelines for more detailed application requirements. Points shown are the maximum points given per category. |                          |
| Completed Application  | <input type="checkbox"/> |
| Supporting Project Documentation   | <input type="checkbox"/> |
| Board/Council Resolution (Draft Permitted Initially)   | <input type="checkbox"/> |
| Agreement to Collect Data in Support of Performance Requirements   | <input type="checkbox"/> |
| Lease/Cost Sharing Agreements  | <input type="checkbox"/> |
| <b>Scoring Criteria – 100 Points Total</b>   |                          |
| <b>Financial Commitment (15 Points)</b>  | <input type="checkbox"/> |
| Total Initial Marketing, Capital, and Recurring O&M Costs  | <input type="checkbox"/> |
| Local Match Identification and Overall Contribution  | <input type="checkbox"/> |
| <b>Cost Effectiveness (10 Points)</b>  | <input type="checkbox"/> |
| Estimated Cost per Boarding and per Revenue Hour   | <input type="checkbox"/> |
| Documentation Supporting Projected Costs (Vendor Operations, Capital Lease and Amenity, User Fee Schedule, etc.)   | <input type="checkbox"/> |
| Documentation Supporting Projected Ridership   | <input type="checkbox"/> |
| <b>Project Readiness (10 Points)</b>   | <input type="checkbox"/> |
| Project Implementation Schedule  | <input type="checkbox"/> |
| Procurement, Startup, Mobilization / Demobilization Approach   | <input type="checkbox"/> |
| Planning and Environmental Documentation   | <input type="checkbox"/> |
| Tracking Customer Satisfaction and On Time Performance   | <input type="checkbox"/> |
| <b>Operations Plan and Service Type (25 Points)</b>  | <input type="checkbox"/> |
| Traditional and/or On Demand Service Type and Description(s)   | <input type="checkbox"/> |
| Number Routes or Services Proposed by Project  | <input type="checkbox"/> |
| Service Status – New; OR Continuation, Expansion, or Modification of Existing  | <input type="checkbox"/> |
| Operating Calendar and Span (hours)  | <input type="checkbox"/> |
| Estimated 1-Way or Roundtrip Cycle Times, and Proposed Headways by Time Period   | <input type="checkbox"/> |
| Route Map w/ Existing Transit Service  | <input type="checkbox"/> |
| Stop Locations and Identified Regional Transit Routes (Map & KMZ)  | <input type="checkbox"/> |
| Fleet Size & Summary of Vehicle Types  | <input type="checkbox"/> |
| Maintenance Facilities Identified & Approach to Vehicle Maintenance  | <input type="checkbox"/> |
| Estimation of Revenue Service Hours  | <input type="checkbox"/> |
| ADA / Paratransit Service Plan   | <input type="checkbox"/> |

Updated: 10/12/2023 Page 1 of 4

Specific scoring criteria will be used to evaluate the applications.

A total of **100 points** will be available for the following application categories:

- |                                    |           |
|------------------------------------|-----------|
| • Financial Commitment             | 15 Points |
| • Cost Effectiveness               | 10 Points |
| • Project Readiness                | 10 Points |
| • Operations Plan and Service Type | 25 Points |
| • Ridership Protection             | 5 Points  |
| • Funding Plan                     | 10 Points |
| • Community Benefit                | 25 Points |



# Supplemental Application

Jimi Mitchell, OCTA CTFP Consultant

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# Supplemental Application Overview

- Readme and Sample
- 1 application per project - Traditional or On Demand
- A Project may consist of multiple fixed routes or service areas

Agencies may submit one (1) set of Project V supplemental application forms to consolidate all existing and proposed Traditional Project V Transit Services; and one (1) set of Project V supplemental application forms to consolidate all existing and proposed On Demand Project V Transit Services.

**NOTE:** This Supplemental Application is password protected!

| Supplemental Application Sections | Description of Contents   |
|-----------------------------------|---|
| A. PROJECT INFORMATION            | Overview of Project, service type, description of service, and routes/services proposed for operation   |
| B. OPERATING SUMMARY              | Projection of annual revenue hours per Service Type and route   |
| C. COST SUMMARY                   | Estimated annual cost of initial marketing, capital purchase, ongoing O&M; and associated local match contributions   |
| D. COST BREAKDOWN                 | Itemized Marketing, Capital, O&M cost items and assumptions   |
| E. FUNDING SUMMARY                | Proposed local and 3rd Party revenue sources supporting initial marketing, capital purchase, ongoing O&M  |
| F. OPERATING PROFILE              | Proposed Project operating spans, frequencies, cycle times, fleet requirements (by route)   |
| G. TRANSIT NETWORK CONNECTIVITY   | Description of Local and Regional fixed route transit connections   |
| H. COST EFFECTIVENESS             | Projected Ridership and cost per boarding calculations.   |
| I. PROJECT READINESS              | Service Implementation (procurement, initial startup, mobilization and demobilization) and performance monitoring approach.<br>Discussion of relevant Agency experience providing transit services, including years in service. |

Tabs are formatted to print. Do not add any columns to these forms. If you need additional space for responses, please include within supplemental materials and documentation.

Application Instructions  
Local Agencies applying for Project V funds are required to complete and submit this application. Application materials must be included the Application Checklist. Any projects not in compliance with the CTFP guidelines will not be eligible for funding.

Project #1: \_\_\_\_\_ Applicant: click to enter.

A. PROJECT INFORMATION  
Project Name: click to enter.

Project Area Population Density (persons/sq. mi):  
On Demand: \_\_\_\_\_  
click to select If yes, how many? click

Sections\_Readme

Sample\_Sect A-E

Sample\_Sect F-I

Proj 1\_Sect A-E

Proj 1\_Sect F-I

Proj 2\_Sect A-E

Proj 2\_Sect F-I

Proj 3\_Sect A-E

Proj 3\_Sect F-I

Sections\_Readme

Sample\_Sect A-E

Sample\_Sect F-I

Proj 1\_Sect A-E

Proj 1\_Sect F-I

Proj 2\_Sect A-E

Proj 2\_Sect F-I

Proj 3\_Sect A-E

Proj 3\_Sect F-I

# Sect. A – Project Information

## A. PROJECT INFORMATION

**Project Name:** click to enter.

**Service Type:** click to select

**Project Area Population Density (persons/sq. mi):** click to enter.

**Does your Project include more than one of the above Traditional or On Demand service type?**  
(e.g. fixed route/trolley/shuttle etc., or ride-hail/microtransit etc.)  
(describe below)

click to select If yes, how many? click to enter.

## Drop-down Lists

### Service Type:

- Traditional
- On Demand

### Proposed Service Name(s)

- 1 [ex -- service area/route 1]
- 2 [ex -- service area/route 2]
- 3 [ex -- service area/route 3]
- 4 [ex -- service area/route 4]
- 5 [ex -- service area/route 5]

### Current Service Status:

- click to select
- click to select
- click to select
- click to select
- click to select

### Current Service Status:

- Existing Service - Continuation/Funding Extension
- Existing Service - Expansion of Service Area or Time Period
- Existing Service - Other Operating Modification
- New Service

**Is this Project exclusively operating Special Event service?** No

**Project Description:** Brief discussion of each **Service Areas/Route** named above with relevant information for each including, but not limited to:

- Route descriptions (where does it go "from XX to XX", and roadways used)
- Ridership market (Whom) is this intended to serve? (e.g., commuters, local activities, seasonal visitors, etc..)
- Service Period (summer, seasonal, daily, weekend, special events, etc..)
- Service Frequency/Days/Hours of Operations]

**Clearly differentiate between new, expanded, and extended services.**

# Sect. B – Operating Summary

## B. OPERATING SUMMARY

### Revenue Vehicle Hours (RVH)

RVH do not include 'deadhead' hours to maintenance and storage facility at beginning and end of shift. If Applicants pay separate costs for deadhead hours, these costs may be included with projected annual O&M costs (Section C).

Only include (SE) Special Event RVH if providing special event service outside of normal operating hours (see Section F.)

| Route Name(s)                  | (Existing Services Only)<br>FY 23/24 | Year 1<br>FY 24/25 | Year 2<br>FY 25/26 | Year 3<br>FY 26/27 | Year 4<br>FY 27/28 | Year 5<br>FY 28/29 | Year 6<br>FY 29/30 | Year 7<br>FY 30/31 | TOTALS   |
|--------------------------------|--------------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|----------|
| 1 [ex -- service area/route 1] | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| 2 [ex -- service area/route 2] | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| 3 *Autopopulated from Sect. A* | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| 4 [ex -- service area/route 4] | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| 5 [ex -- service area/route 5] | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| SE Special Event Total         | Click to enter.                      | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | Click to enter.    | 0        |
| <b>Project Total</b>           | <b>0</b>                             | <b>0</b>           | <b>0</b>           | <b>0</b>           | <b>0</b>           | <b>0</b>           | <b>0</b>           | <b>0</b>           | <b>0</b> |

# Sect. C – Cost Summary

## C. COST SUMMARY

### Recent Costs of Existing Services

enter amount (\$) or percent (%)

Enter projected costs for FY 23/24

| Route Name(s)                  | FY 23/24 O&M | FY 23/24 Marketing | Total Annual Cost |
|--------------------------------|--------------|--------------------|-------------------|
| 1 n/a                          |              |                    | \$ -              |
| 2 n/a                          |              |                    | \$ -              |
| 3 *Autopopulated from Sect. A* |              |                    | \$ -              |
| 4 n/a                          |              |                    | \$ -              |
| 5 n/a                          |              |                    | \$ -              |
|                                | \$ -         | \$ -               | \$ -              |

### Total Fares Collected

|      |
|------|
| \$ - |
|      |
|      |
|      |
|      |
| \$ - |

### NOTE: For any proposed New Project V Service(s)

If the total annual funding allocation of existing Project V services (\$XX) = total cost minus local match -- Then the total combined Annual Funding request per PROJECT application may be no greater than:

\$XX + \$592K in FY 25 for Traditional Services; OR

\$XX + 296K in FY 25 for On Demand Services

(see CTFP Guidelines Ch. 6)



# Sect. D – Cost Breakdown

## D. COST BREAKDOWN

Include description of anticipated expenditures (i.e. vehicles, bus stops, staff time, marketing, etc.) below

### Marketing

| <u>Expenditure</u> | <u>Anticipated Cost</u> | <u>Initial, Recurring, and/or Annual, etc.</u> |
|--------------------|-------------------------|--|
| 1 click to enter.  | click to enter.         | click to enter.                                |
| 2 click to enter.  | click to enter.         | click to enter.                                |
| 3 click to enter.  | click to enter.         | click to enter.                                |
| 4 click to enter.  | click to enter.         | click to enter.                                |
| 5 click to enter.  | click to enter.         | click to enter.                                |

### Capital

| <u>Expenditure</u> | <u>Anticipated Cost</u> | <u>Initial, Recurring, and/or Annual, etc.</u> |
|--------------------|-------------------------|--|
| 1 click to enter.  | click to enter.         | click to enter.                                |
| 2 click to enter.  | click to enter.         | click to enter.                                |
| 3 click to enter.  | click to enter.         | click to enter.                                |
| 4 click to enter.  | click to enter.         | click to enter.                                |
| 5 click to enter.  | click to enter.         | click to enter.                                |

### Operations & Maintenance (O&M)

| <u>Expenditure</u> | <u>Anticipated Cost</u> | <u>Initial, Recurring, and/or Annual, etc.</u> |
|--------------------|-------------------------|--|
| 1 click to enter.  | click to enter.         | click to enter.                                |
| 2 click to enter.  | click to enter.         | click to enter.                                |
| 3 click to enter.  | click to enter.         | click to enter.                                |
| 4 click to enter.  | click to enter.         | click to enter.                                |
| 5 click to enter.  | click to enter.         | click to enter.                                |

# Sect. E – Funding Summary

## E. FUNDING SUMMARY

Proposed Local Match (reference only)

|                            | Year 1<br>FY 24/25 | Year 2<br>FY 25/26 | Year 3<br>FY 26/27 | Year 4<br>FY 27/28 | Year 5<br>FY 28/29 | Year 6<br>FY 29/30 | Year 7<br>FY 30/31 | TOTALS |
|----------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------|
| Marketing                  | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -   |
| Capital                    | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -   |
| O&M                        | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -               | \$ -   |
| Proposed Local Match Total |                    |                    |                    |                    |                    |                    |                    | \$ -   |

### Funding Sources, Phases, and Amounts

Identify party providing funds (applicant, 3rd party, etc), phase of funding contribution (marketing, capital, O&M), total funding toward the Project, and current level of funding commitment (planned, binding agreement, programmed). Enter funding totals projected for the life of the grant period (FY 24/25 to FY 30/31).

Average User Fare (\$) Anticipated per Boarding:

\$ -

| Source                          | (FY 24/25 to FY 30/31) | Marketing       | Capital         | O&M             | Funding Total | Level of Commitment |
|---------------------------------|------------------------|-----------------|-----------------|-----------------|---------------|---------------------|
| 1 Fares Collected               |                        | n/a             | n/a             | 0               | \$ -          | Programmed          |
| 2 click to enter.               |                        | click to enter. | click to enter. | click to enter. | \$ -          | click to select     |
| 3 click to enter.               |                        | click to enter. | click to enter. | click to enter. | \$ -          | click to select     |
| 4 click to enter.               |                        | click to enter. | click to enter. | click to enter. | \$ -          | click to select     |
| 5 click to enter.               |                        | click to enter. | click to enter. | click to enter. | \$ -          | click to select     |
| Local Funding Total             |                        |                 |                 |                 | \$ -          |                     |
| <b>Local Match (Less Fares)</b> |                        |                 |                 |                 | <b>\$ -</b>   |                     |

If selecting "Other" regarding Level of Commitment for funding sources, provide additional information below.

click to enter.

Describe the Agency's contingency plan to manage budget to align with service demands, and address potential local or 3rd Party partner funding shortfalls

click to enter.

# Sect. F – Operating Profile

## F. OPERATING PROFILE

|   | Service                      | Service Start/End Time          |                                 | Frequency (min) |                  |                 |
|---|------------------------------|---------------------------------|---------------------------------|-----------------|------------------|-----------------|
|   |                              | Weekdays<br>(ex 9:00a to 9:00p) | Weekends<br>(ex 9:00a to 9:00p) | Weekday Peak    | Weekday Off-peak | Weekend         |
| 1 | [ex -- service area/route 1] | Click to enter.                 | Click to enter.                 | Click to enter. | Click to enter.  | Click to enter. |
| 2 | [ex -- service area/route 2] | Click to enter.                 | Click to enter.                 | Click to enter. | Click to enter.  | Click to enter. |
| 3 | Autopopulated from Sect. A   | Click to enter.                 | Click to enter.                 | Click to enter. | Click to enter.  | Click to enter. |
| 4 | [ex -- service area/route 4] | Click to enter.                 | Click to enter.                 | Click to enter. | Click to enter.  | Click to enter. |
| 5 | [ex -- service area/route 5] | Click to enter.                 | Click to enter.                 | Click to enter. | Click to enter.  | Click to enter. |

|   | Service                      | Route Length (mi.) or<br>Service Area (sq. mi.) | Approx. 1-way Run Time or<br>On-Demand Response<br>Target (min) | Number of Vehicles |                  |                 |
|---|------------------------------|---|---|--------------------|------------------|-----------------|
|   |                              |   |   | Weekday Peak       | Weekday Off-peak | Weekend         |
| 1 | [ex -- service area/route 1] | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter.  | Click to enter. |
| 2 | [ex -- service area/route 2] | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter.  | Click to enter. |
| 3 | Autopopulated from Sect. A   | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter.  | Click to enter. |
| 4 | [ex -- service area/route 4] | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter.  | Click to enter. |
| 5 | [ex -- service area/route 5] | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter.  | Click to enter. |

Does this project include Special Event operations outside of the regular operating hours of the routes identified above?

[click to select](#)

|   | Special Event Route(s) | Route Length (mi.) or<br>Service Area (sq. mi.) | Approx. 1-way Run Time or<br>On-Demand Response<br>Target (min) | Number of Vehicles |                 | Total Annual Operating<br>Days |
|---|------------------------|---|---|--------------------|-----------------|--------------------------------|
|   |                        |   |   | Peak               | Off-peak        |                                |
| 1 | Special Event 1        | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter. | Click to enter.                |
| 2 | Special Event 2        | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter. | Click to enter.                |
| 3 | Special Event 3        | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter. | Click to enter.                |
| 4 | Special Event 4        | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter. | Click to enter.                |
| 5 | Special Event 5        | Click to enter.                                 | Click to enter.   | Click to enter.    | Click to enter. | Click to enter.                |

|   | Service                      | Annual Service Calendar |                 | Additional / Special<br>Event Service Days | Total Annual Operating<br>Days |
|---|------------------------------|-------------------------|-----------------|--|--------------------------------|
|   |                              | Begin Date              | End Date        |  |                                |
| 1 | [ex -- service area/route 1] | Click to enter.         | Click to enter. | Click to enter.                            | Click to enter.                |
| 2 | [ex -- service area/route 2] | Click to enter.         | Click to enter. | Click to enter.                            | Click to enter.                |
| 3 | Autopopulated from Sect. A   | Click to enter.         | Click to enter. | Click to enter.                            | Click to enter.                |
| 4 | [ex -- service area/route 4] | Click to enter.         | Click to enter. | Click to enter.                            | Click to enter.                |
| 5 | [ex -- service area/route 5] | Click to enter.         | Click to enter. | Click to enter.                            | Click to enter.                |

# Sect. G – Transit Network/Connections

## G. TRANSIT NETWORK and ACTIVITY CENTER CONNECTIVITY

**Regional Transit Service Connections** - OC Bus routes, regional transit centers and rail stations  
(within 1/4 mile of Project)

| Operating Agency | Connecting Transit Center and/or Fixed Route |
|------------------|--|
| Click to enter.  | Click to enter.                              |
| Click to enter.  | Click to enter.                              |
| Click to enter.  | Click to enter.                              |
| Click to enter.  | Click to enter.                              |
| Click to enter.  | Click to enter.                              |

**Local Transit Connections** - locally operated fixed routes, shuttles, Project V services, etc...  
(within 1/4 mile of Project)

| Operating Agency | Connecting Transit Center and/or Fixed Route | Project V Funded (y/n) |
|------------------|--|------------------------|
| Click to enter.  | Click to enter.                              | <i>click to select</i> |
| Click to enter.  | Click to enter.                              | <i>click to select</i> |
| Click to enter.  | Click to enter.                              | <i>click to select</i> |
| Click to enter.  | Click to enter.                              | <i>click to select</i> |

Enter total number of transit connections for each Project route / service area below.

|                                  | Service                      | Total Connections |
|----------------------------------|------------------------------|-------------------|
| 1                                | [ex -- service area/route 1] | Click to enter.   |
| 2                                | [ex -- service area/route 2] | Click to enter.   |
| 3                                | Autopopulated from Sect. A   | Click to enter.   |
| 4                                | [ex -- service area/route 4] | Click to enter.   |
| 5                                | [ex -- service area/route 5] | Click to enter.   |
| <b>Project Total Connections</b> |                              | 0                 |

**Activity Center Connections** - list all relevant activity centers (within a reasonable distance) served by the Project routes/service areas

|   | Service                      | Key Destinations | Community and Cultural Centers |
|---|------------------------------|------------------|--------------------------------|
| 1 | [ex -- service area/route 1] | Click to enter.  | Click to enter.                |
| 2 | [ex -- service area/route 2] | Click to enter.  | Click to enter.                |
| 3 | Autopopulated from Sect. A   | Click to enter.  | Click to enter.                |
| 4 | [ex -- service area/route 4] | Click to enter.  | Click to enter.                |
| 5 | [ex -- service area/route 5] | Click to enter.  | Click to enter.                |

|   | Service                      | Affordable Housing and High-Density Communities | Tourist Attractions and Event Venues |
|---|------------------------------|---|--------------------------------------|
| 1 | [ex -- service area/route 1] | Click to enter.                                 | Click to enter.                      |
| 2 | [ex -- service area/route 2] | Click to enter.                                 | Click to enter.                      |
| 3 | Autopopulated from Sect. A   | Click to enter.                                 | Click to enter.                      |
| 4 | [ex -- service area/route 4] | Click to enter.                                 | Click to enter.                      |
| 5 | [ex -- service area/route 5] | Click to enter.                                 | Click to enter.                      |

# Sect. H – Cost Effectiveness

## H. COST EFFECTIVENESS

Provide rationale and supporting materials for opening date of service and ridership projections withing supplemental application documentation.

### Anticipated Transit Usage

| Service                        | Opening Mo. of Service | Opening FY of Service | Projected Average Annual Ridership | Annual Operating Days | Avg Daily Ridership |
|--------------------------------|------------------------|-----------------------|------------------------------------|-----------------------|---------------------|
| 1 [ex -- service area/route 1] | click to select        | click to select       | 0                                  |                       | Click to enter.     |
| 2 [ex -- service area/route 2] | click to select        | click to select       | 0                                  |                       | Click to enter.     |
| 3 *Autopopulated from Sect. A* | click to select        | click to select       | 0                                  |                       | Click to enter.     |
| 4 [ex -- service area/route 4] | click to select        | click to select       | 0                                  |                       | Click to enter.     |
| 5 [ex -- service area/route 5] | click to select        | click to select       | 0                                  |                       | Click to enter.     |
| SE Special Event Total         | click to select        | click to select       | 0                                  | 0                     | Click to enter.     |

Total Annual Project Ridership (anticipated): 0

Average Annual O&M Cost (FY 24 to FY 31): #DIV/0!

| Average Cost per Revenue Hr | Average Cost per Boarding |
|-----------------------------|---------------------------|
| #DIV/0!                     | #DIV/0!                   |

Note: \$10.81 Cost per Boarding threshold

# Sect. I – Project Readiness

## I. PROJECT READINESS

Does Agency have an active contract with an appropriate transportation service Vendor and plan to use Vendor to operate proposed Project V services? [click to select](#)

(if Yes) Dates of existing contract procurement (advertisement) and award (selection) or extension: [click to enter.](#)

(if Yes) Was existing contract competitively procured? [click to select](#)

(if Yes) Duration and expiration date of current transportation service Vendor contract? [click to enter.](#)

When does Agency plan to procure (or re-procure) transportation service Vendor contract for Project V operations? [click to enter.](#)

### Implementation Timeline

For each Existing and New service proposed, provide a proposed timeline with proposed dates for key Project Readiness activities, including vehicle and operator procurement; any required training, startup testing and marketing activities in anticipation of revenue operations in the opening month/year for all Services identified in Section H tables, above.

(Note: If Agencies have an existing Transportation Service Vendor, successful Project V recipients must competitively reprocure Vendor services by **June 30, 2026.**)

[click to enter.](#)

# Application Submittal

- Application needs to be thorough and complete
- Initial screening for missing elements
- Qualitative review identifies questions for clarification, additional documentation or corrections
- Unique issues or problems may require meeting
- Project recommendations released after consensus review (with agencies) is completed for each service



❖ **RECOMMEND:** Meet with OCTA to discuss complex projects prior to submittal.



- Applications are due on **Thursday, January 25, 2024 by 5:00 PM PST**
- Submittal required in **both** electronic and hardcopy formats
  - Electronic: Uploaded in OCFundtracker at [ocfundtracker.octa.net](https://ocfundtracker.octa.net)
  - Hardcopy: One (1) UNBOUND copy of application package and supporting attachments
- Ensure application package includes all items on the application checklist
- Checklists and resolution templates are provided online at OCTA website
- 2024 CTFP Guidelines: [www.octa.net/pdf/CTFPGuidelines2024.pdf](https://www.octa.net/pdf/CTFPGuidelines2024.pdf)
- 2024 Supplemental Application and Instructions
  - [www.octa.net/programs-projects/programs/funding-programs/call-for-projects/ctfp/community-based-circulators/](https://www.octa.net/programs-projects/programs/funding-programs/call-for-projects/ctfp/community-based-circulators/)

# Questions & Answers

Please use the Q&A or raise hand to ask questions  
\*6 to unmute / \*9 to raise hand

For project-related inquiries, application pre-review requests, or to schedule one-on-one meetings, please contact:

## **OCTA Call Lead**

**Adrian Salazar**

714.560.5363

[asalazar@octa.net](mailto:asalazar@octa.net)

## **Application Support**

**Jimi Mitchell, Consultant**

213.694.4457

[jmitchell@nelsonnygaard.com](mailto:jmitchell@nelsonnygaard.com)