

The Orange County Transportation Authority (OCTA) hosted the Project V Stakeholder Workshop (10/11/23), Transit Operator Vendor Fair (10/30/23), and Application Workshop (12/05/23) events to provide information regarding updates to the Comprehensive Transportation Funding Program (CTFP) Guidelines for Project V services, discuss the 2024 call for projects (call) with potential applicants and service providers, and provide direction on the application process.

Based on questions received at these events and subsequent discussions, OCTA has prepared the following responses to commonly asked questions and topics.

1. Clarify the maximum award values for Project V.

The maximum annual Project V award values for new Traditional Transit and new On-Demand Services are \$592K and \$296K, respectively for fiscal year (FY) 2024-25, or Year 1 of the 7-year term of Project V grant award, with escalation (Does not include continuation of previously allocated Project V grant funding for existing services). Traditional Transit includes fixed and deviated fixed routes, circulators and rubber-tire trolleys, point-to-point shuttle services, etc. On-Demand includes shared ride-hailing and microtransit services.

2. Is the annual funding cap per agency? Or per project?

The annual funding cap is per agency and per Project V service type (Traditional or On-Demand). Agencies can apply for the annual maximum of \$592K for new Traditional Transit service and \$296K (annual max) for new On-Demand service. Agencies may also apply for multiple new services so long as they do not exceed the total max amount. Traditional Transit includes fixed and deviated fixed routes, circulators and rubber-tire trolleys, point-to-point shuttle services, etc. On-Demand includes shared ride-hailing and microtransit services.

3. How would a grantee apply if they want multiple (i.e. new and continuation of existing) services funded through this call?

Applicants should submit one application for Traditional Transit services and one application for On-Demand services. Existing services, as well as the proposed new service should be included together in one application if they are the same, with both being either Traditional Transit or On-Demand. If they are different service types (one Traditional Transit and One On-Demand), submit one application for the existing service and one for the new service.

The 2024 Project V Application form and Supplemental Application form (excel workbook) allow for identification and data entry for multiple route/service areas proposed as one project. Traditional Transit includes fixed and deviated fixed routes, circulators and rubber-tire trolleys, point-to-point shuttle services, etc. On-Demand includes shared ride-hailing and microtransit services.

(Continued from Question 3)

For example, all eligible Project V Traditional Transit services (may include multiple routes, lines, etc.) should be submitted as a single application; and all eligible On-Demand services (may include multiple microtransit, ride-hailing service areas) should be submitted as a single application.

Existing Project V Services (Traditional or On-Demand) may apply for one of 3 conditions:

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

See screenshot below from Section C – Cost Summary of the supplemental application with annotations for information on entering the total project cost.

Proposed Services		enter amount (\$) or percent (%)							
(Existing Services Only)	Year 1 FY 24/25	Year 2 FY 25/26	Year 3 FY 26/27	Year 4 FY 27/28	Year 5 FY 28/29	Year 6 FY 29/30	Year 7 FY 30/31	TOTALS	
Marketing									
OCTA Contribution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Local Match (less fares collected)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Enter Total Marketing Cost								\$ -	
Enter Local Match (%)									
Capital									
OCTA Contribution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Local Match (less fares collected)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Enter Total Capital Cost								\$ -	
Enter Local Match (%)									
FY 23/24									
O&M (including any costs for non-revenue vehicle hours)									
OCTA Contribution	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Local Match (less fares collected)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total O&M Cost	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Less fares collected	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Net O&M Cost	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Enter Local Match (%)									
Total Funding Request	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

Enter **Project* Total** (combined) cost per FY for all (Traditional) routes or (On Demand) service areas

Enter total local match percentage per FY

* a Project may include multiple Traditional Transit routes or On Demand service areas. A separate application should be submitted for each service type.

4. Would the maximum grant award be split amongst multiple projects or applications? How does this work with existing projects?

Yes. The maximum grant award may be split among multiple projects. However, for existing projects, the maximum grant award for FY 2024-25 may be added to the current amount that is being provided for existing Project V successful services. If the total annual funding allocation of existing Project V services (\$XX) is equal to the total cost minus fares and local match, then the total combined annual funding request per PROJECT application may be no greater than:

- \$XX + \$592K in FY 2024-25 for Traditional Services; OR
- \$XX + \$296K in FY 2024-25 for On-Demand services

(see [2024 CTFP Guidelines](#) Ch. 6)

5. If applicants want to submit jointly with another local jurisdiction, does the maximum grant amount increase with the number of agencies?

Project V was not set up to consider joint applications. Applications submitted from two or more jurisdictions for a joint service will be subject to the Project V funding maximum per project of \$592K for Traditional Transit and \$296K for On-Demand, in FY 2024-25 (escalated annually).

Joint applicants should submit separate applications, individually, for the same project. Applications must identify lead and supporting agencies, the roles of each participant, a clear funding commitment from each, and a clear delineation of project cost-sharing responsibilities. Costs must be explainable and justifiable. If service is awarded, OCTA may request one applicant to serve as the lead for the project to simplify the cooperative agreement and reimbursement process.

Because Project V was not set up for this type of arrangement, depending on the circumstances for each project application, OCTA may review the applications as a combined submittal and/or may opt to treat the combined applications as separate applications.

6. What if I have an existing Project V grant that expires beyond 2024?

Existing Project V grant recipients are encouraged to apply for funding that will extend service to end in FY 2030-31. OCTA is not planning on holding an interim Project V call during the 7-year programming period identified for the 2024 call.

7. Would you clarify what is meant by Cost Effectiveness?

Typically, OCTA uses the cost per boarding to define cost effectiveness. Consistent with Project V Guidelines, OCTA will pay \$10.81 maximum toward the O&M cost per passenger/boarding. If the proposed Project V service is successful and has more passenger boardings, this OCTA maximum per boarding subsidy will be more than enough for the local agency to be reimbursed by the Project V grant as expected. As an example, if a service costs \$100 per hour, then the service would need to average about 9 boardings per hour to be able to receive 90% of the net operating cost from the Project V grant. However, if boardings are lower, then it is possible that the local agency will not receive the anticipated full OCTA share of the cost, and the local agency will be responsible for covering the difference.

The performance measure for cost effectiveness is based on the average cost per boarding (CPB) during a given period. The CPB threshold for Traditional Transit and most On-Demand services is twice the \$10.81 (rounded) maximum per boarding subsidy, which equals \$21.63. If that cost is exceeded, the local agency must notify their city council or governing body to consider the future operations of the service.

8. When referring to the Operations and Maintenance (O&M) facility management, how should that be represented in the application? Visual? Visual and written?

Please provide a written response in the application and submit additional information (e.g., photos, maps), if available, as supporting documentation.

9. Are Project V routes permitted to use existing OCTA bus stops? Is any additional documentation required for the application for this arrangement? Can you provide contact information for OCTA shuttle stop use?

It depends on the proposed routes and proposed sign. Additional specific details and information are required to make a determination. Contact Adrian Salazar, OCTA Project V Lead, at asalazar@octa.net or (714) 560-5363, to discuss further. Keep in mind that Project V services cannot directly compete with OC Bus or other existing services.

10. If an applicant has an existing pilot service, is it be eligible for Project V? What are the parameters of eligibility for agencies currently testing pilot services and seeking Project V funding?

If an agency is operating an existing limited-term pilot circulator or On-Demand service, the pilot service may be eligible for Project V funding and will be considered on a case-by-case basis. Applications should provide additional documentation and descriptions of planning documents, performance records, contracts, funding sources, etc. to demonstrate potential eligibility.

If an agency is seeking to initiate a new pilot service through this call, agencies should include language in their application to ensure that they have flexibility to test various service options during the pilot period. Also, the cost/financial projections should be scaled to reflect the anticipated/likely scaling of service operations. Please note that it is recommended that agencies apply for funding for the entire duration of this call cycle as an interim call is not planned.

11. Will OCTA consolidate Project V general transit feed specification (GTFS) data into a unified trip planning platform?

Cal ITP and OCTA are interested in consolidating Project V Traditional Transit fixed route GTFS data for online and interactive trip planning opportunities. Agencies receiving Project V funds for fixed route services are required to provide scheduling information in the required GTFS format. In addition, OCTA recommends that agencies coordinate with Project V service providers and vendors to deploy automatic vehicle location (AVL) systems that can provide GTFS.

Note: Existing vendors may have GTFS data available, but the data is not always refined and ready for use (i.e. in Google trip planning).

12. Will additional application points be awarded for ZEVs?

Not at this time, there are not sufficient smaller ZEV options available to make this competitive.

13. Is trip origin-destination information required for Project V On-Demand service performance reporting and invoice backup? What format should the data be provided?

Successful applicants will be responsible for coordinating with their respective Project V transit operator or service vendor to provide trip origin – destination information for each On-Demand trip transaction. Physical addresses would be preferred, but due to privacy considerations the latitude/longitude tract census coordinates are sufficient.

14. Can I apply for Project V funding even if we are still in the planning phase for local circulator or On-Demand service?

Agencies currently in the planning phase for potential future local circulator service operations are encouraged to apply for future year Project V funding. Awards would be contingent on funding availability, the description of the future project and future clarifications of that project and coordination with OCTA.

15. What if my agency recently procured a vendor for existing Project V service operations? Will we need to reprocure as part of 2024 funding award?

Successful applicants must conduct a competitive-bid procurement process for qualified transportation service providers for all Project V service types, and re-procure providers for all continuing services upon expiration of the current contract term or by June 30, 2026, whichever is earlier (refer to Chapter 6 of the [2024 CTFP guidelines](#) for additional information).

The guidelines state: *In order to allow for market competition, new, ongoing, or continuing services must re-bid for a service contractor or service provider as soon as the current term expires or by June 30, 2026, whichever is earlier, unless the agency can provide documentation that they have gone through a competitive procurement process in FY 2022-23 or later. Project V services should be rebid through competitive procurement every three to seven years to ensure the agency is receiving the best rates. This requirement would not apply to services that are being provided by local agency staff.*

16. Provide examples of public outreach. Given the tight deadline and holidays, surveys and workshops seem difficult. What is expected for the application? We wanted to use existing service feedback.

If you have an existing service, the customer satisfaction trends and feedback from existing riders may serve as engagement. If you are applying for a new service area or route, applicants should include previous outreach and community feedback supporting the application for the new service area or route. While the formal guidelines were approved in December 2023, OCTA has been in continuous contact with

local agencies about a potential Project V call, including the anticipated call timeline, since early 2023 when OCTA requested letters of interest for a Project V call from the local agencies.

17. An agency is determining whether it is best to lease/buy own trolley vehicles versus contracting with operator. May we incorporate this uncertainty into the application(s) or does it need to be decided beforehand?

Yes, the uncertainty can be incorporated into the application. Include as much information regarding the pros and cons and costs of each option with the application package. Local Programs and OCTA's Transit Planning will be available to help the City to make a final determination.

18. Does OCTA define how contracts should be awarded? Is low-bid required?

OCTA does not define how contracts should be awarded outside of requiring that they be consistent with State law and any requirements your local agency has. Low bid is not required. All projects must be competitively bid.

19. Will rideshare capabilities be a requirement for Project V On-Demand services?

Yes. To be considered for Project V funding, all On-Demand services must offer a shared ride platform.

20. May we submit a copy of the application prior to the deadline for initial screening, or will the initial screening be done after the deadline?

Yes, OCTA is available to do a pre-submission review. Please contact Adrian Salazar, OCTA Project V Lead, at asalazar@octa.net or (714) 560-5363.

21. How can we set up an appointment to discuss our specific project plan? Do we send an email, or will there be an online scheduling tool?

Contact Adrian Salazar, OCTA Project V Lead, at asalazar@octa.net or (714) 560-5363 to schedule a meeting to discuss your project or address specific call questions.

With the request, please include as much information as possible regarding the service concept or proposed project so that we can coordinate with applicable OCTA staff that may need to be in the meeting (i.e., bus stops, marketing, etc.). Also, if you know your specific questions, please provide those as well.