



## **Citizens Advisory Committee**

600 S. Main Street, Orange CA, Room 103/104 (UPDATED)  
January 17, 2017 | 12:00 p.m. – 2:00 p.m.

### **AGENDA**

#### **1. Welcome**

#### **2. Presentation Items**

- A. OC Transit Vision: State of Transit Report (25 min.)  
Presentation – Gary Hewitt, Section Manager, Strategic Planning, and Jennifer Wieland, Nelson\Nygaard
- B. I-405 Improvement Project Status (15 min.)  
Presentation – Jim Beil, Executive Director, Capital Projects
- C. OC Bus 360 Results (10 min.)  
Presentation – Gary Hewitt, Section Manager, Strategic Planning
- D. OC Streetcar Bus Rail Interface (10 min.)  
Presentation – Chad Kim, Transportation Analyst, Transit & Non Motorized Planning
- E. Technology and Innovation Ad Hoc (5 min.)  
Presentation – Roy Shahbazian, CAC Chair
- F. 2016 Year in Review (10 min.)  
Presentation – Ellen Burton, Executive Director, External Affairs

#### **3. OCTA Staff Updates (5 minutes each)**

- A. Bicycle/Pedestrian Subcommittee – Brian Cox, BPS Chair
- B. February Service Change – Scott Holmes, Manager, Transit
- C. Government Affairs – Lance Larson, Executive Director, Government Relations
- D. Measure M Next 10 Delivery Plan – Tamara Warren Measure M Program Manager, Planning
- E. Fare Study – Sean Murdock, Director, Finance and Administration
- F. Staff Liaison – Alice Rogan, Public Outreach Manager

#### **4. Chair / Vice-Chair Remarks**

#### **5. Committee Member Comments**

#### **6. Public Comments\***

#### **7. Adjournment**

*The next meeting will be held on April 18, 2017*

#### **Agenda Descriptions/Public Comments on Agenda Items**

The Agenda descriptions are intended to give notice to members of the public of a general summary of items of business to be transacted or discussed. Members from the public wishing to address the Committee will be recognized by the Chair at the time the Agenda item is to be considered. A speaker's comments shall be limited to three (3) minutes.

Any person with a disability who requires a modification or accommodation in order to participate in this meeting should contact the OCTA at (714) 560-5611, no less than two (2) business days prior to this meeting to enable OCTA to make reasonable arrangements to assure accessibility to this meeting.



**Citizens Advisory Committee  
Meeting Notes  
October 18, 2016  
1:00 p.m. to 3:00 p.m.  
550 S. Main Street, Orange, Calif.  
Conference Room 07**

**Members Present**

**Paul Adams**, *Fountain Valley Planning Commissioner*  
**Michael Brandman**, *Building Industry Association*  
**Brian Cox**, *Orange County Bicycle Coalition*  
**Kara Darnell**, *Cal State Fullerton*  
**Barbara Delgleize**, *Huntington Beach Chamber*  
**Sue Gordon**, *Huntington Beach Resident*  
**Janine Heft**, *Laguna Hills Resident*  
**Dan Kalmick**, *Huntington Beach Resident*

**Steve Kozak**, *City of Tustin Planning Commissioner*  
**Theodore Luckham**, *Anaheim Resident*  
**Derek McGregor**, *Trabuco Canyon Advisory Comm.*  
**Michael McNally**, *UC Irvine*  
**Mark Paredes**, *Garden Grove Planning Commission*  
**Laurel Reimer**, *Urban Planner*  
**Roy Shahbazian**, *Bus Rider, Transit Advocate of OC*  
**Jeff Thompson**, *Tustin Planning Commission and BIA*  
**Cynthia Ward**, *Anaheim Resident*

Greg Winterbottom, *OCTA Board Member*

**Members Absent**

**Dan Avery**, *Mission Viejo Resident*  
**Hamid Bahadori**, *AAA of Southern California*  
**Vince Buck**, *Cal State Fullerton*  
**Tim Byers**, *Laguna Niguel Police Auxiliary Citizens' Team*  
**Michael Carroll**, *Irvine Community Services Commission*  
**Min Chai**, *Irvine Resident*  
**Barry Duffin**, *Orange County Wheelmen*

**Merlin "Bud" Henry**, *North Tustin Advisory Committee*  
**Frank Murphy**, *Orange Rotary*  
**Dan Oregel**, *Santa Ana Resident*  
**Lyle Overby**, *Building Industry Association*  
**Donna Marsh Peery**, *Tustin Community Services Comsn.*  
**Schelly Sustarsic**, *Seal Beach Parks & Rec. Comsn.*  
**John Taylor**, *Rotary Club of San Juan Capistrano*

**1. Vice-Chair's Remarks**

Chairman Roy Shahbazian welcomed everyone to the Orange County Transportation Authority (OCTA) Citizens Advisory Committee (CAC) meeting at 12:05 p.m.

**2. Presentation Items**

**A. Transit Master Plan**

Gary Hewitt gave a brief overview of the Transit Master Plan. He then introduced Ron Kilcoyne from Nelson\Nygaard. Ron provided a presentation on the Transit Master Plan.

Ron asked the committee for their input. He asked what the committee envisions for the future of transportation.

- Brian Cox said he envisions a more inclusive, less car-centric future. He would like to see more attention paid to pedestrians, bicyclists and transit.
- Michael McNally said he would like to see transit working again in terms of getting more riders.
- Barbara Delgleize said she does not know how we can change people back to transit – maybe more education about transit.
- Paul Adams said we need to educate the younger demographics on transit and biking, and perhaps consider autonomous vehicles in their own lane for short trips.
- Laurel Reimer said there needs to be a focus on rideshare programs and suggested OCTA use something like Uber to get people to the bus stops so they don't have to walk the mile or two to the stop. She said there needs to be a look at partnerships with alternate transportation modes.
- Jeff Thompson said when he travels he tries to go without a car and tests the transportation system of whatever city/county he is in. He said he is successful, for the most part, everywhere he travels except Orange County. He suggested transit connection be made between major hubs, perhaps with some form of rail.
- Kara Darnell said she would like to see more transit focus more on the experience/destination traveler rather than the commuter travel.
- Dan Kalmick said he would like to see the development of a light rail system. He said there should also be disincentives for car travel – make it “not cool” to drive. He also agrees with partnering with companies like Uber and utilizing the private industry. He would like to see autonomous vehicles work similar to Uber, where a car can be called to your house and take you where you need to go.
- Derek McGregor said there needs to be a cultural change, starting with the young people. Children need to be educated on transit and its benefits.
- Michael McNally said Orange County grew as an auto-dominated community, but with this growth in density transit is now a viable option.

Ron asked the committee who they believe can help set the county's transit vision.

- Barbara said employers.
- Michael said cities and developers.

Ron asked the committee what is working well in the county and where has OCTA been successful.

- Michael said OCTA has been most successful with delivering the projects in both Measure M1 and Measure M2. He said OCTA develops a plan and sticks to it.

- Paul said the OC Loop is a good thing and it will start connecting the county for bike riders.

Ron asked who or what is not being served well by OCTA in regards to transit.

- Barbara said the first/last mile gap needs to be addressed.
- Dan said connecting the beach communities with entertainment venues.
- Jeff said it would be good to expand pedestrian walkways like the OC Loop for bicyclists. He said rail corridors need to be expanded to meet needs, but he realizes this is not something OCTA can do alone. Cities need to be involved and develop master plans that include the growth of bus rapid transit and rail service.
- Michael said colleges and schools need better transit services available to campuses.
- Dan said the airport could be better served by transit.

Ron asked the committee what is holding Orange County back when it comes to transit.

- Laurel said she is concerned that Orange County is too spread out.
- Dan said funding is the issue.
- Paul said that funding local circulators is a good first step, but we need to get them connected.

Ron asked what OCTA's top priority should be for transit.

- Michael said maintain transit services for those who most need it.
- Laurel said transit that is easier and more convenient to use.

Ron asked the committee what success looks like.

- Barbara said more realistic and convenient options.
- Laurel said experience-based options.
- Dan agreed experience-based options need to be expanded.

Jeff asked the presenters to help the committee define what success looks like in other communities. Ron said transit works well in Europe, Portland and Santa Clara County. He said Santa Clara County is very similar to Orange County. He said they are facing a decline in ridership as well, but their service is more productive and they have more rail options. Ron said Denver and Salt Lake City are successful as well.

Ron said Phoenix has some of the same issues as Orange County with regards to being spread out, but they have had success with light rail and it has stimulated development.

Gary thanked the committee for their comments. He said they will come back to the committee with the State of Transit Report early 2017.

Michael said he would like to see some graphics from OCTA showing Orange County's success stories. Gary Hewitt said it will be included in the State of Transit report.

B. Measure M2 Next 10

Tamara Warren provided a presentation on the Measure M2 Next 10 Delivery Plan.

Michael McNally said if the trends continue we are looking at around 40 percent less funds than expected. Michael asked if there has been any thought about going back to the public to change Measure M. Tamara said if the two projects within the 91 corridor are funded with the money from the 91 Express Lanes, then the Measure M money that would have gone to those projects is freed-up for the other projects.

Tamara also said last year during the ten year review of Measure M, OCTA received feedback that the community's priorities still align with the projects listed in Measure M.

Jeff Thompson said he appreciates the resourcefulness of OCTA in coming up with these options. He asked where the discrepancy in the actual versus projected revenue collected came from, and if it is due to e-commerce or mortgages. Tamara said with the initial drop in the economy revenues started out way lower than expected, so the overall starting point was much lower. She said on the bus funding side revenues are lower than expected as well and some of that is due to e-commerce. She said on the Measure M side of things it is due to lower revenue collected and may be due to smarter consumers. Gary Hewitt said taxable items are down due to technology.

C. 2016 Focus Group Research Results

Alice Rogan introduced Shakari Byerly from Evitarus. Shakari gave a brief overview of the focus groups that took place in August.

Michael McNally asked if there was discussion regarding tolls and the toll lanes. Shakari said yes there was discussion and there was some concern about the increasing cost to drive the toll roads and signage regarding the cost to drive the toll roads. She said there were a few comments that general purpose lanes are fairer than the toll lanes, but people also liked the option to take a toll road when they needed to get some place quickly.

Cynthia Ward asked for clarity about the focus group participants wanting a connection between Los Angeles and San Diego considering that service is already provided. Alice said people would like to see an increase in hours and frequency.

Cynthia asked if the focus groups wanted routes expanded along the LOSSAN Corridor. Alice said the focus groups did not specify what types of rail they wanted, but that there was a desire for more rail lines in general. Shakari said they also wanted Orange County to link up with Los Angeles' Metro Rail System and San Diego's express Lanes.

Cynthia asked if the CAC could see what happens with the information collected in the focus groups. Alice said there is currently a draft report with the information collected during the focus groups and a link will be sent to the CAC with the final document when it goes to the OCTA Board.

Paul Adams asked if the groups were asked any questions regarding the number of people using the bicycle carriers on the bus/Metrolink. Shakari said the question was not asked directly, but the general perception regarding having bicycle carriers on the busses and increasing safety on bike lanes was favorable.

#### D. OC Streetcar Vehicle Branding

Stella Lin presented and led a discussion on the branding of the new OC Streetcar vehicles.

Stella asked the CAC to look at the different options regarding the colors and the graphics proposed for the new OC Streetcar vehicles. She said OCTA is looking at two brands of streetcars that have slightly different shapes. She asked the committee to vote on the different concepts for each variation on the cars. Alice Rogan said the CAC could rank each concept on the survey handout that was provided.

Barbara Delgleize said she likes A1 because it looks like a road – like the way she looks at the OCTA logo. Another committee member said it looks like an Orange County road going up to the mountains.

Ellen Burton asked the CAC to look at the front of the vehicles as well and asked if anyone had feedback on the graphics for the fronts. Laurel Reimer said that is why she liked the look of B2 and B3. The fronts look like they are coming towards you.

Michael McNally said B1 and B3 might look nice as the car is coming towards you, but might be annoying if you missed a ride. He then asked if there is a difference in costs. Stella said all costs are within the same parameters. She said we are only in a concept stage.

Michael asked if and why these vehicles are double articulated. Alice said this is due to the turning radius required to operate on the streets. Michael asked if anyone is currently using these cars. Alice said they are in use in Tucson,

Cincinnati, Portland, and other systems. Michael asked if it is light rail vehicles in Portland. Stella said Portland uses concept A's vehicles.

Stella asked what the committee likes about B4. The response was it looks clean.

### **3. OCTA Staff Updates**

#### **A. Bicycle/Pedestrian Subcommittee**

Roy Shahbazian announced Brian Cox as the new Chair and Paul Adams as the new Vice-Chair of the committee. He said the subcommittee looked at how the OC Streetcar works with bike lanes on the streets. He said the Interchange Treatment Letter went to the OCTA Regional Highways and Planning Committee and then to the OCTA Board. Roy said John Taylor is a new member of the subcommittee.

#### **B. October Service Change Status**

Hong Vo, Manager of Service Planning & Customer Advocacy, provided a brief update on the October Service Change.

Michael McNally asked how Lyft rides are being subsidized in San Clemente. Alice Rogan said Project V is subsidizing the amount above the normal \$2 bus fare.

Barbara Delgleize commended OCTA for having staff out ahead of time letting people know about the service change and the cuts to different lines.

#### **C. Government Affairs**

Brandon Bullock, State and Federal Relations, gave a brief update on the current legislative session.

#### **D. Marketing**

Ellen Burton, External Affairs Executive Director, said there is no report at this time.

#### **E. Staff Liaison**

Alice Rogan said a Technology Ad Hoc Committee or Roundtable will be established early next year. She said on October 29 there will be a hike in Trabuco Canyon and another one in November that will be more family-oriented. She said there will be a tour of OC Bridges on November 15 and more information will be sent out as the date gets closer.

Alice said committee members recently participated in a tour of the RCTC SR-91 Improvement Project. Steve Kozak said he went on the tour and gave a brief overview. Barbara Delgleize commended the partnership of OCTA and RCTC and looks forward to the changes.

**4. Committee Member Comments**

Brian Cox commented on the breakdown of funds going to transit versus the freeways, streets and roads. He said there is never going to be change until there's a change in funding. Alice Rogan said when Measure M was approved by the voters, people wanted freeways, streets and roads. Brian said it should be up to OCTA to set the transit vision for the county because consumer citizens tend to not have the ability to set that type of vision. Alice said people have to see it to support it and OCTA is getting closer to citizens being able to realize a transit vision thanks to projects like the OC Streetcar and Transit Master Plan.

Sue Gordon said she downloaded the new transit app and she is happy to see it become available. Alice said there is a new promotional fare along with the app as part of the latest fare study.

Cynthia Ward introduced herself. This was her first CAC meeting.

**5. Public Comments**

No one from the public spoke.

**6. Adjournment/Next Meeting**

The meeting adjourned at 1:57 p.m. The next meeting will be at the OCTA offices on January 17, 2017 at 12:00 p.m.

**Citizens Advisory Committee  
Fiscal Year 2016-2017 Attendance Record**

● = Present

⊙ = Absent

R = Resigned

Member				
	8/2/16*	10/18/16	1/17/17	4/18/17
Adams, Paul	●	●		
Avery, Dan	⊙	⊙		
Bahadori, Hamid	⊙	⊙		
Brandman, Michael	⊙	●		
Buck, Vince	⊙	⊙		
Byers, Tim	●	⊙		
Carroll, Michael	⊙	⊙		
Chai, Min	●	⊙		
Cox, Brian	⊙	●		
Darnell, Kara	⊙	●		
Delgleize, Barbara	●	●		
Duffin, Barry	⊙	⊙		
Gordon, Susan	●	●		
Heft, Janine	●	●		
Henry, Merlin "Bud"	●	⊙		
Kalmick, Dan	●	●		
Kozak, Steve	●	●		
Luckham, Theodore	●	●		
McGregor, Derek	●	●		
McNally, Michael	●	●		
Murphy, Frank	●	⊙		
Oregel, Dan	⊙	⊙		
Overby, Lyle	⊙	⊙		
Paredes, Mark	●	●		
Peery, Donna	⊙	⊙		
Reimer, Laurel	●	●		
Shahbazian, Roy	●	●		
Schelly Sustarsic	●	⊙		
Taylor, John	●	⊙		
Thompson, Jeff	●	●		
Ward, Cynthia	⊙	●		

\*original date July 19, 2016

# *Presentation Items*



**January 12, 2017**

**To:** Transit Committee

**From:** Darrell Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "Darrell Johnson", is written over the "From:" line of the email header.

**Subject:** OC Bus 360 Update and Next Steps

### **Overview**

The Orange County Transportation Authority is implementing a comprehensive effort to reposition the bus system in response to changing market conditions. The overall strategy to improve transit service by examining it from many angles is an initiative named OC Bus 360. The goals are to reverse ridership declines, and increase ridership by reducing passenger travel times, improving travel speeds, and designing services to benefit existing customers and attract new customers. A status report on major OC Bus 360 elements is presented along with next steps.

### **Recommendation**

Receive and file as an information item.

### **Background**

To address continuing bus ridership declines, in 2015, the Board of Directors (Board) endorsed a comprehensive action plan, known as OC Bus 360. Specific actions to reverse ridership declines, and grow bus ridership were implemented over a year-long period. This effort included a comprehensive review of current and former rider perceptions, a peer review panel that reviewed the Orange County Transportation Authority's (OCTA) performance and plans, new branding and marketing tactics tied to rider needs, upgraded bus routes and services to better match demand and capacity, technology changes to improve the passenger experience, and pricing and other revenue changes to stimulate ridership and provide new funding. Extensive work was invested by OCTA divisions to implement the plan.

This work included:

- implementation of new bus routes that offered customers up to a 30 percent travel time improvement;
- redeployment of approximately 160,000 revenue vehicle hours to high-demand transit corridors in June and October 2016, one of the largest changes to bus service in OCTA's history;
- a 20 percent promotional discount on the one-day pass, which is used for approximately 36 percent of fixed-route boardings, and OCTA's first fare decrease of this magnitude;
- an award of 17 Measure M2 transit grants to local agencies, the largest number and amount of transit grant awards to local agencies;
- rollout of a systemwide mobile ticketing system, allowing passengers to directly purchase full fare media via smartphone in addition to in-store purchases;
- rollout of a new, real-time bus arrival smartphone app that has over 1.3 million uses by passengers, allowing customers to better plan trips and reduce wait times at bus stops;
- securing over \$7 million in grant funds for Bravo! buses, mobile ticketing equipment, and the day pass discount to reduce the need for local funds and partially offsetting revenue declines from ridership changes;
- distribution of 165,000 direct mailings and the implementation of 59 street team events, online marketing (display ads, social media, email), 100 outdoor and bus advertisements, and seven public meetings (service and fare-related), one of OCTA's most extensive outreach efforts related to bus service changes;
- Continue transition to contracted fixed-route operations per previous plans.

While marketing and promotional efforts will continue, the OC Bus 360 action plan is nearly complete, and several follow-up efforts will flow into 2017 (Attachment A).

### ***Discussion***

Most of the OC Bus 360 actions focused on improving travel time for passengers, implementing new rider-focused technologies, and promoting all these efforts. For example, new services, such as Bravo! and "Xpress" routes, offered better travel times on the bus, and more frequent service on other corridors decreased time waiting for a bus. The new real-time bus arrival information available to customers through mobile apps and texting also reduced wait time uncertainty for customers. The mobile ticketing application also decreased customer time used for buying passes at retail outlets, and the day pass discount helped incentivize more rides.

While it will take at least six months to evaluate longer-term benefits, early results indicate that these strategies have had a positive influence on ridership. Average weekday ridership for those routes that were improved is better than those routes that were not changed in June and October 2016, as summarized in the table below (Attachment B).

<b>Route Type</b>	<b>November 2015 Average Weekday Boardings</b>	<b>November 2016 Average Weekday Boardings</b>	<b>Daily Change</b>
Improved Service in June	22,257	22,343	86
Improved Service in October	10,836	10,666	(171)
Reduced Service in June	2,531	1,147	(1,384)
Reduced Service in October	10,839	8,118	(2,721)
No Change	95,376	88,456	(6,920)
<b>Total</b>	<b>141,839</b>	<b>130,729</b>	<b>(11,110)</b>

Unfortunately, ridership continued to decrease in fiscal year (FY) 2015-16, before the June and October service changes, and FY 2015-16 ended with ridership approximately eight percent below that of FY 2014-15, further reducing fare revenues and compounding OCTA's financial issues, as detailed in other reports. The recent, continued ridership drop appears to largely be the result of external factors that are also impacting other transit agencies in Southern California. External factors impacting bus ridership will vary by county and area, but may include employment changes from the great recession, high housing costs relative to household incomes, and the growth of competing travel modes. For example, between 2009 and 2015, Orange County's population increased by 4.7 percent, but driver licenses and car registrations were up by 9.9 percent and 16.9 percent, respectively, for the same period. Further, the cost of living in Orange County continues to be a challenge, given housing affordability. In 2015, an hourly wage of \$25.50/hour (\$53,040 annually) was needed to afford an average one-bedroom apartment in Orange County, which is well beyond the average hourly pay for most bus customers (Attachment C).

Keeping pace with these external factors presents new challenges to the bus system, and OCTA should be at the forefront in meeting these challenges. As a result, new options should be pursued for consideration for OC Bus 360. These new options will be further developed in the coming months, and may include more changes to the bus system, a few of which are outlined below.

- continue implementation of 15-minute peak period frequencies on high-demand corridors to retain and grow ridership;

- for routes that operate more frequently than 15 minutes, evaluate minor frequency changes (e.g., move from 12 to 15 minutes) to decrease capital requirements and shift resources to corridors that could benefit from additional frequency;
- implement more weekend service in high-demand areas to grow ridership and in response to changing employment patterns;
- replace lower-productivity StationLink service with private, shared-mobility services (e.g., transportation network companies and taxis) to reduce capital requirements;
- work with private, shared-mobility companies to replace traditional bus service in lower-demand areas of Orange County;
- evaluate opportunities to increase revenues (e.g., lease properties, etc.).

The service concepts listed above (and others) will be included in the countywide “OC Transit Vision” Transit Master Plan that is currently under development. The plan vision is to implement policies, programs, and investments resulting in a high-quality transit system that makes it easier and more desirable for people to use transit. A key, first deliverable is a “State of Transit” report for Orange County. This deliverable will complete the phrase “transit works best where...”, and provide a list of key factors that lead to a successful transit system now and in the future. The report will also describe the current and future conditions of transit in Orange County, identifying both positive elements, as well as areas of concern, and highlighting opportunities to improve transit quality and accessibility. The report is scheduled for Board review in early 2017 and will provide a foundation for the strategies that will be recommended in the OC Transit Vision. Finally, OCTA is retaining consultant assistance to evaluate other revenue-generating and cost reduction concepts that can help address revenue shortfalls in the future. This effort is planned for Board review by summer 2017.

### ***Summary***

OCTA implemented a comprehensive program through OC Bus 360 to retain and grow ridership. Early results are positive, and new strategies should be developed to address continuing ridership declines. The State of Transit Report will be provided in early 2017 and will serve as a starting point for a new Orange County transit vision.

**Attachments**

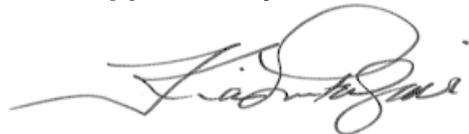
- A. 2017 OC Bus 360 Ridership Marketing Initiatives
- B. Before and After Weekday Ridership Comparison by Route
- C. External Factors Influencing Bus Ridership

**Prepared by:**



Kurt Brotcke  
Director, Strategic Planning  
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**Approved by:**



Kia Mortazavi  
Executive Director, Planning  
(714) 560-5741

## 2017 OC Bus 360 Ridership Marketing Initiatives

- Focus on attracting commuters to the system by marketing more heavily to business located on high-frequency and newly improved bus routes.
- Clearly identify destinations served by our high-frequency and newly improved bus routes in digital, informational, and promotional materials.
- Greatly enhance our digital engagement with key target markets through ongoing (organic and paid) social media that continually promotes OC Bus services and programs.
- Implement an ongoing e-marketing program to target new and existing riders to communicate new and existing products and services and keep our growing OC Bus database informed about the latest news and events.
- Strengthen online transactional capabilities by providing visitors to OCTA.net and OC Bus.com with critical and seamless rider information (such as trip-planning) at key engagement points (home and landing pages).
- Outreach directly to colleges and universities in Orange County to promote all service that is available to students and faculty.
- Target diverse audiences through direct marketing and direct (street team) outreach and event participation.
- Outreach directly to diverse (Asian and Hispanic) communities to educate customers about improved OC Bus service.
- Continue to promote the discounted day pass to build ridership and cross-sell services to customers.
- Continue to promote the mobile ticketing system that allows passengers to directly purchase all fare media via smartphone, in addition to in-store purchases.
- Continue to push the real-time bus arrival smartphone app to help customers to better plan trips and reduce wait times at bus stops.

Before and After Weekday Ridership Comparison by Route

Route	Type	November 2015	November 2016	
1-Long Beach - San Clemente	No Change	1,989	1,927	
20-La Habra - Brea	Reduced Service in October	160	0	
21-Buena Park - Huntington Beach	No Change	332	290	
24-Buena Park - Mall of Orange	No Change	723	614	
25-Fullerton - Huntington Beach	No Change	1,649	1,549	
26-Buena Park - Yorba Linda	Improved Service in October	1,758	1,458	↓
29-La Habra - Huntington Beach	No Change	6,411	6,099	
30-Cerritos - Anaheim	Improved Service in June	2,022	2,146	↑
33-Fullerton - Huntington Beach	No Change	1,680	1,469	
35-Fullerton - Huntington Beach	Improved Service in June	2,509	2,821	↑
37-La Habra - Fountain Valley	Improved Service in October	3,349	3,336	↓
38-Lakewood - Anaheim Hills	No Change	4,643	4,211	
42-Orange - Seal Beach	No Change	6,057	5,553	
43-Fullerton - Costa Mesa	No Change	7,455	6,743	
46-Long Beach - Orange	No Change	2,562	2,297	
47-Fullerton - Newport Beach	Reduced Service in October	7,827	7,267	
50-Long Beach - Orange	Improved Service in June	3,788	3,898	↑
51-Santa Ana - Costa Mesa	Reduced Service in June*	762	0	
53-Orange - Irvine	No Change	7,126	6,952	
54-Garden Grove - Orange	Improved Service in June	4,138	4,233	↑
55-Santa Ana - Newport Beach	No Change	4,470	4,234	
56-Garden Grove - Orange	No Change	1,543	1,465	
57-Brea - Newport Beach	No Change	11,594	10,807	
59-Anaheim - Irvine	No Change	2,155	2,039	
60-Long Beach - Tustin	Improved Service in June*	9,800	5,963	↓
64-Huntington Beach - Tustin	No Change	7,706	6,963	
66-Huntington Beach - Irvine	No Change	7,098	6,715	
70-Sunset Beach - Tustin	No Change	3,585	3,298	
71-Yorba Linda - Newport Beach	Improved Service in October	2,140	2,160	↑
72-Sunset Beach - Tustin	Improved Service in October	1,189	1,346	↑
76-Huntington Beach - Newport Beach	Reduced Service in June	752	398	
79-Tustin - Newport Beach	Improved Service in October	1,460	1,410	↓
82-Mission Viejo - Rancho Santa Margarita	Reduced Service in October	675	416	
83-Anaheim - Laguna Hills	No Change	2,393	2,230	
85-Mission Viejo - Dana Point	Reduced Service in October	697	435	
86-Costa Mesa - Mission Viejo	No Change	671	637	
87-Rancho Santa Margarita - Laguna Niguel	No Change	390	379	
89-Lake Forest - Laguna Beach	No Change	1,214	1,190	
90-Tustin - Dana Point	No Change	1,089	1,114	
91-Mission Viejo - Laguna Hills	No Change	1,483	1,440	
129-La Habra - Anaheim	No Change	793	738	
143-La Habra - Brea	No Change	770	662	
145-Santa Ana	Reduced Service in June*	480	0	
150-Santa Ana to Costa Mesa	Reduced Service in June*	0	749	
153-Brea - Orange	No Change	634	452	

Before and After Weekday Ridership Comparison by Route

Route	Type	November 2015	November 2016	
167-Anaheim - Irvine	Improved Service in October	724	747	↑
172-Huntington Beach - Santa Ana	Reduced Service in June	218	0	
173-Costa Mesa	Reduced Service in June	319	0	
175-Irvine	Reduced Service in October	395	0	
177-Foothill Ranch - Laguna Hills	No Change	349	325	
178-Huntington Beach - Irvine	No Change	603	538	
187-Laguna Hills - Dana Point	Reduced Service in October	200	0	
188-Laguna Hills - Irvine	Reduced Service in October	185	0	
191-Mission Viejo - San Clemente	Reduced Service in October	537	0	
193-Contracted Community	Reduced Service in October	97	0	
206-Santa Ana - Lake Forest	Improved Service in October	87	89	↑
211-Irvine - Seal Beach	Improved Service in October	129	119	↓
212-Irvine - San Juan Capistrano	No Change	54	44	
213-Brea - Fullerton - Placentia - Irvine	No Change	169	144	
216-Costa Mesa - San Juan Capistrano	No Change	19	12	
410-Anaheim Canyon Metrolink Station	No Change	26	0	
411-Anaheim Canyon Metrolink Station	No Change	22	21	
430-Anaheim Amtrak Station - Anaheim	No Change	37	19	
453-Orange Metrolink Station - Orange	No Change	156	153	
454-Orange Metrolink Station - The Block	No Change	206	180	
462-Santa Ana Depot - Civic Center	No Change	145	192	
463-Santa Ana Depot to Imperial Promenade	No Change	97	87	
464-Santa Ana Depot - Costa Mesa	No Change	92	0	
472-Tustin Metrolink Station to Irvine	No Change	134	121	
473-Tustin Metrolink Station to UCI	No Change	215	206	
480-Irvine Metrolink Station - Irvine Spectrum	No Change	75	84	
490-Laguna Niguel Train Station	No Change	29	32	
543-Fullerton - Costa Mesa - Bravo	No Change	4,336	3,886	
560-Santa Ana to Long Beach	Improved Service in June*	0	3,281	↑
701-Los Angeles - Huntington Beach Express	No Change	84	93	
721-Los Angeles - Fullerton Express	No Change	144	118	
757-Pomona - Santa Ana Express	Reduced Service in October	35	0	
758-Chino - Irvine Spectrum Express	Reduced Service in October	33	0	
794-Riverside / Corona to South Coast Metro Express	No Change	168	135	
<b>Total</b>		<b>141,839</b>	<b>130,729</b>	

\* The combined changes for Routes 60 and 560 were a net service improvement

\*\* The combined changes for Routes 51, 145, and 150 were a net service reduction

Route Type	November 2015 Average Weekday Boardings	November 2016 Average Weekday Boardings	Daily Change
Improved Service in June	22,257	22,343	86
Improved Service in October	10,836	10,666	(171)
Reduced Service in June	2,531	1,147	(1,384)
Reduced Service in October	10,839	8,118	(2,721)
No Change	95,376	88,456	(6,920)
<b>Total</b>	<b>141,839</b>	<b>130,729</b>	<b>(11,110)</b>

External Factors Influencing Bus Ridership

NATIONAL, STATE, AND REGIONAL TRANSIT OPERATOR RIDERSHIP TRENDS

<b>All Modes: United States and Canada</b>	<b>Change January - June 2015 versus 2016</b>
Heavy Rail	↑ 0.31 percent
Light Rail	↑ 3.66 percent
Commuter Rail	↑ 2.29 percent
Trolleybus	↓ -2.82 percent
Bus: Population Total	↓ -3.10 percent
Bus: Population 2,000,000+	↓ -2.79 percent
Bus: Population 500,000 to 1,999,999	↓ -3.74 percent
Bus: Population 100,000 to 499,999	↓ -5.07 percent
Bus: Population Below 100,000	↓ -0.83 percent
Demand Response	↑ 1.99 percent
Other	↑ 1.89 percent
<b>United States Total</b>	<b>↓ -1.06 percent</b>
<b>Canada Total</b>	<b>↓ -0.19 percent</b>

<b>Bus: California Large Agencies</b>	<b>Change January - June 2015 versus 2016</b>
Long Beach Transit	↓ -6.05 percent
Los Angeles County Metropolitan Transportation Authority (LA Metro)	↓ -7.82 percent
Alameda-Contra Costa Transit District	↓ -4.02 percent
Orange County Transportation Authority	↓ -9.71 percent
San Diego Metropolitan Transit System (MTS)	↓ -5.86 percent
San Francisco Muni	↑ 6.88 percent
Santa Clara Valley Transportation Authority	↓ -6.35 percent
Santa Monica Big Blue Bus	↓ -13.73 percent

<b>Bus: Other Local Connecting Agencies</b>	<b>Change January - June 2015 versus 2016</b>
Anaheim Resort Transit	↑ 3.17 percent
City of Irvine (iShuttle)	↑ 4.75 percent
Norwalk Transit	↓ -11.45 percent
North County Transit District (NCTD)	↓ -6.63 percent
Riverside Transit	↓ -7.32 percent
Omnitrans (San Bernardino)	↓ -11.13 percent
Foothill Transit (San Gabriel Valley)	↓ -8.17 percent

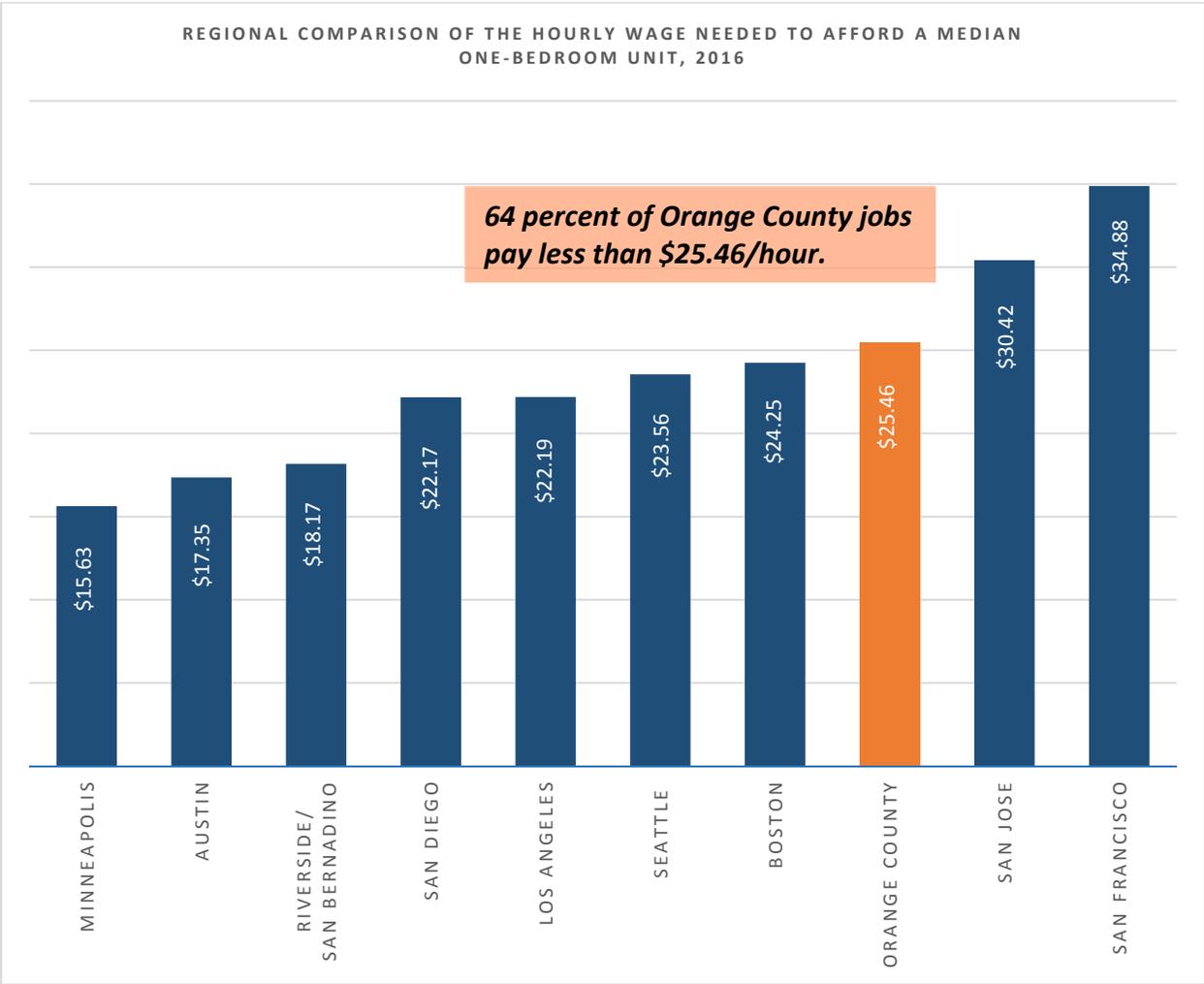
<b>Commuter Rail: Southern California</b>	<b>Change January - June 2015 versus 2016</b>
Metrolink	↓ -3.38 percent
North County Transit District Coaster	↓ -5.68 percent

<b>Light/Heavy Rail: Southern California</b>	<b>Change January - June 2015 versus 2016</b>
LA Metro Heavy Rail	↓ -2.11 percent
LA Metro Light Rail	↑ 5.19 percent
NCTD Light Rail	↓ -4.54 percent
San Diego MTS Light Rail	↓ -5.76 percent

Source: American Public Transportation Association Ridership Report: Second Quarter 2016  
(<http://www.apta.com/resources/statistics/Pages/ridershipreport.aspx>)

# External Factors Influencing Bus Ridership

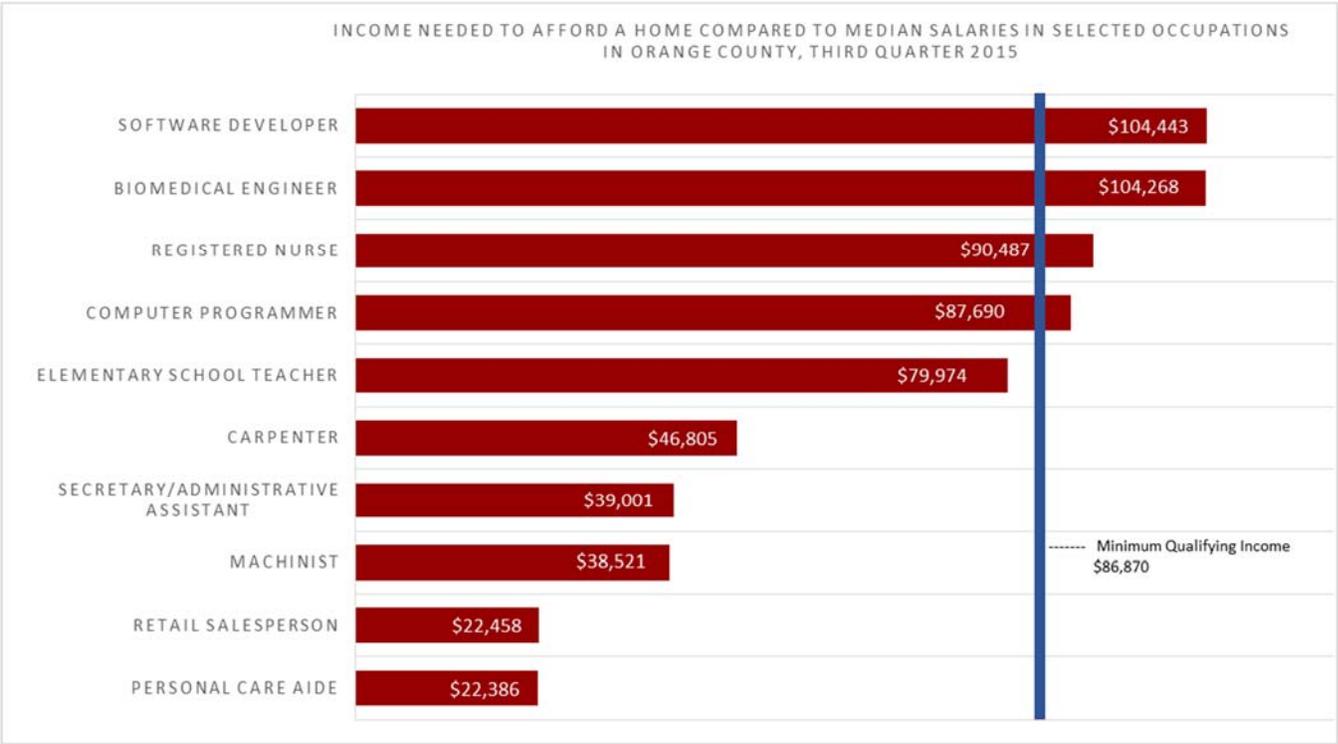
## RENTAL AFFORDABILITY



Source: 2016 Orange County Community Indicators Report (<http://ocgov.com/about/infooc/facts/indicators>)

# External Factors Influencing Bus Ridership

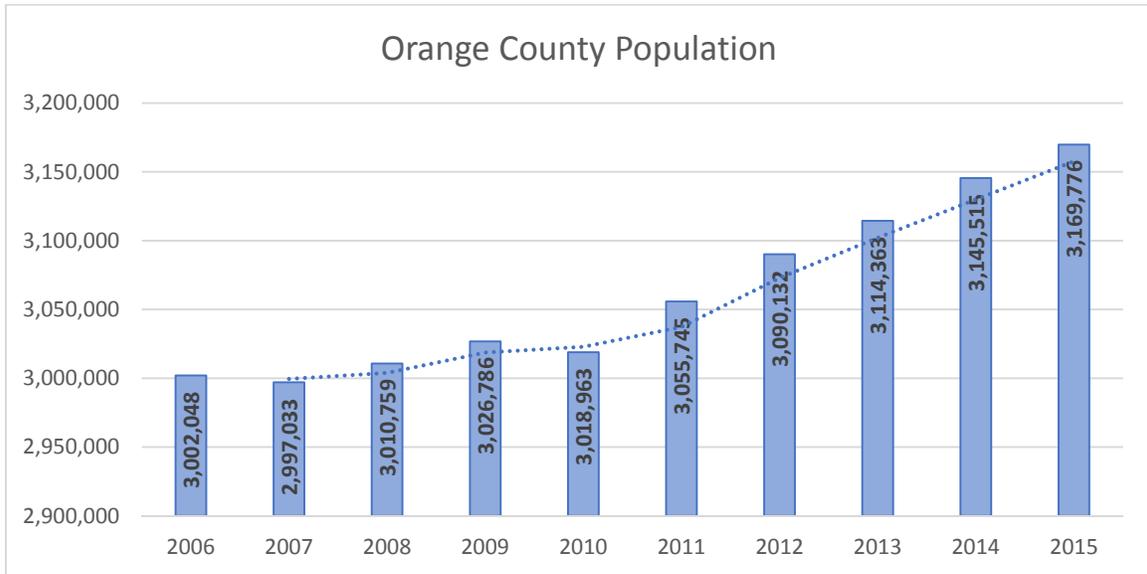
## HOME OWNERSHIP AFFORDABILITY



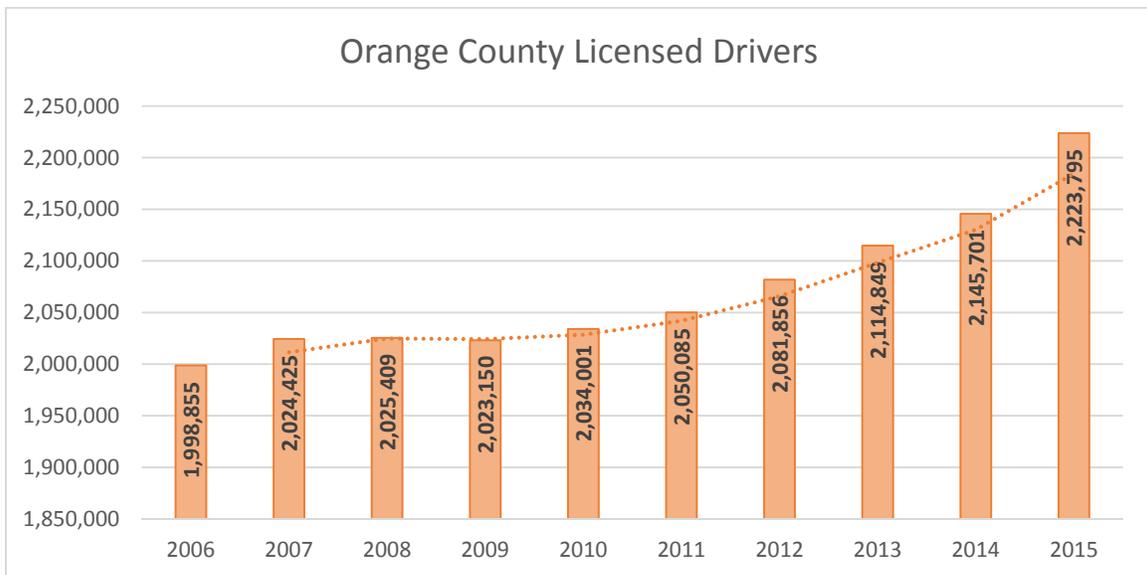
Source: 2016 Orange County Community Indicators Report (<http://ocgov.com/about/infooc/facts/indicators>)

## External Factors Influencing Bus Ridership

### TRENDS IN ORANGE COUNTY POPULATION AND AUTO OWNERSHIP

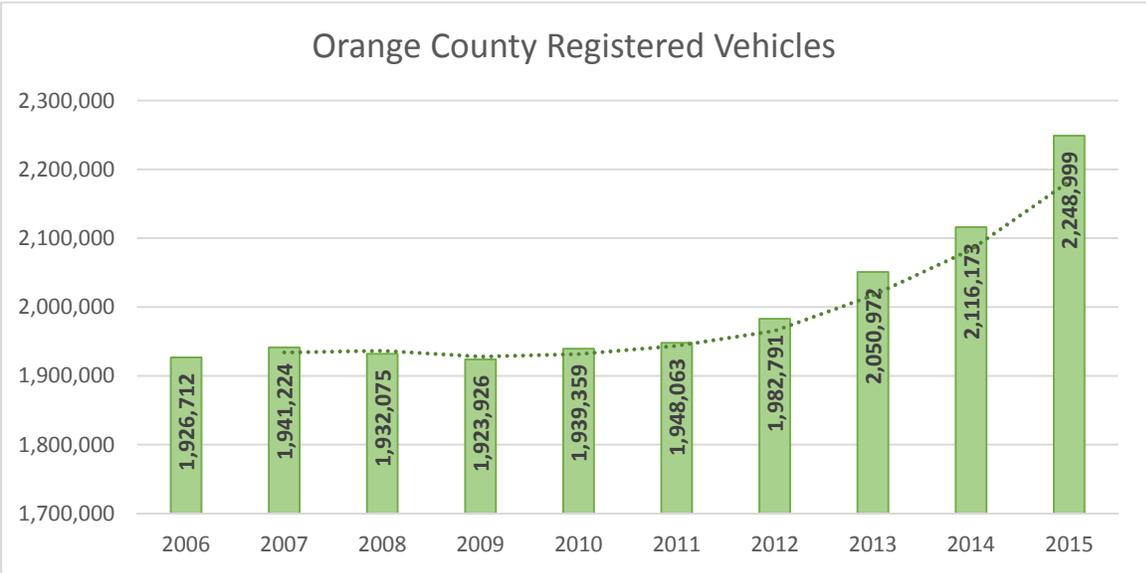


Source: Census American Community Survey 1-Year Estimates  
(<http://www.census.gov/programs-surveys/acs/>)



Source: California Department of Motor Vehicles (DMV) Driver Licenses Outstanding By County ([https://www.dmv.ca.gov/portal/dmv/detail/pubs/media\\_center/statistics](https://www.dmv.ca.gov/portal/dmv/detail/pubs/media_center/statistics))

### External Factors Influencing Bus Ridership



Source: California DMV Estimated Fee Paid Vehicle Registrations by County ([https://www.dmv.ca.gov/portal/dmv/detail/pubs/media\\_center/statistics](https://www.dmv.ca.gov/portal/dmv/detail/pubs/media_center/statistics))

*Staff Update*  
*Items*



COMMITTEE TRANSMITTAL

**November 28, 2016**

**To:** Members of the Board of Directors  
**From:** Laurena Weinert, Clerk of the Board  
**Subject:** Fare Policy Recommendations

Finance and Administration Committee Meeting of November 9, 2016

**Present:** Directors Hennessey, Jones, Katapodis, Miller, Pulido, Spitzer,  
and Steel  
**Absent:** Director Do

**Committee Vote**

This item was passed by the Members present.

Director Spitzer voted in opposition of Recommendation D and voted for Recommendations A, B, C, and E.

Director Pulido was not present to vote on this item.

**Committee Recommendations**

- A. Direct staff to return to the Board of Directors in 2017 with a recommendation for the price of the Day Pass following the promotional period, which ends on April 9, 2017.
- B. Eliminate the 5-Ride and 7-Day Passes.
- C. Categorize routes 206, 211, 212, 213, 216 as intracounty Express routes.
- D. Set fares for intracounty Express routes to \$4.00 and intercounty Express routes to \$7.00.
- E. Require proof of eligibility at the point of sale for the purchase of reduced fare media.



***Committee Discussion***

At the November 9, 2016 Finance and Administration Committee meeting, Committee Chairman Spitzer requested the Express routes ridership data and a list of the Orange County Transportation Authority's (OCTA) overall cost-saving measures be developed to help provide a bigger picture of the financial issues OCTA is facing and how OCTA has responded.



**ORANGE COUNTY TRANSPORTATION AUTHORITY**

## **Fare Policy Recommendations**

### **Staff Report**



**November 9, 2016**

**To:** Finance and Administration Committee  
**From:** Darrell Johnson, Chief Executive Officer  
**Subject:** Fare Policy Recommendations

**Overview**

The Orange County Transportation Authority's OC Bus 360° Plan contains several initiatives to increase bus system ridership. One of the initiatives within the plan is an evaluation of Orange County Transportation Authority's fare policy. A fare policy study has been conducted, and a set of changes to improve Orange County Transportation Authority's fare policy is being recommended.

**Recommendations**

- A. Direct staff to return to the Board of Directors in 2017 with a recommendation for the price of the Day Pass following the promotional period, which ends on April 9, 2017.
- B. Eliminate the 5-Ride and 7-Day Passes.
- C. Categorize routes 206, 211, 212, 213, 216 as intracounty Express routes.
- D. Set fares for intracounty Express routes to \$4.00 and intercounty Express routes to \$7.00.
- E. Require proof of eligibility at the point of sale for the purchase of reduced fare media.

**Background**

In July 2015, the Orange County Transportation Authority (OCTA) contracted with a consultant team to conduct an evaluation of OCTA's fare policy as part of the OC Bus 360° effort. The selected consultant team, CH2M, developed a series of recommendations that were presented to the Finance and Administration (F&A) Committee on April 13, 2016, and the Transit Committee

on April 14, 2016. CH2M's final report was provided to the Board of Directors (Board) on May 9, 2016.

Based on CH2M's final report, staff developed a series of recommendations to improve OCTA's fare policy. These recommendations were presented to the F&A Committee on August 10, 2016, Transit Committee on August 11, 2016, and to the Board on August 22, 2016. At the August 22, 2016 meeting, the Board approved a reduction in the price of the Day Pass from \$5.00 to \$4.00 for a six-month promotional period. This reduction in price began with the October 9, 2016, service change and will end on April 9, 2017, unless extended.

A public hearing was held at the Board meeting on September 26, 2016 to receive public input on the proposed changes to OCTA's fare policy. At that meeting, the Board directed staff to remove the recommendation to modify the ACCESS fare structure and to return to the Transit Committee with alternative recommendations.

### ***Discussion***

Staff is proposing a number of changes to OCTA's fare policy based on CH2M's report and the goals of OCTA's fare policy which are: increase ridership, improve the customer experience, minimize the impact to fare revenue, encourage fare simplicity, and to enhance equity. Based on the evaluation of CH2M's final report, Board input, and public input, staff is putting forth the following recommendations.

#### **Return to the Board in 2017 with a Recommendation for the Price for the Day Pass Following the Promotional Period**

At the August 22, 2016 meeting, the Board approved a reduction in the price of the day pass from \$5.00 to \$4.00 for a six-month promotional period, which ends on April 9, 2017. Staff recommends returning to the Board in 2017 with a recommendation on whether to continue with the price reduction on the Day Pass. The recommendation would be based on the impact to ridership from the reduction of the price of the Day Pass, as well as the availability of external revenue to subsidize the price reduction going forward.

#### **Eliminate the 5-Ride and 7-Day Passes**

To encourage simplicity in OCTA's fare policy, staff is recommending eliminating the 5-Ride Pass and 7-Day Pass. Both of the passes account for less than one percent of pass usage. Eliminating these passes would simplify OCTA's fare structure and would eliminate the cost of production.

**Recategorize Express Services**

Staff is also recommending changes to the fare structure for Express routes. OCTA currently operates five fixed-routes within the county that are proposed to be converted to intracounty Express routes. These routes have limited stops and cover longer distances using the freeway than typical fixed-routes. These routes would be converted to intracounty Express routes and branded as “OC Express.” The proposed Express routes are listed below.

<b>Route #</b>	<b>Route Description</b>	<b>Current Category</b>	<b>Proposed Category</b>
206	Santa Ana to Lake Forest	Fixed-route	OC Express
211	Irvine to Seal Beach	Fixed-route	OC Express
212	Irvine to San Juan Capistrano	Fixed-route	OC Express
213	Brea to Fullerton / Placentia / Irvine	Fixed-route	OC Express
216	Costa Mesa to San Juan Capistrano	Fixed-route	OC Express
701	Huntington Beach to Los Angeles	Express	Express
721	Fullerton to Los Angeles	Express	Express
794	Riverside / Corona to South Coast Metro area	Express	Express

The second part of this recommendation is to price the Express fares more equitably for the service being provided. Currently, the fare for the five fixed-routes that are proposed to change to OC Express routes is \$2.00. The recommendation is to increase the fare from \$2.00 to \$4.00 to align the fare more equitably with the average trip distance of 14 miles for these routes, as opposed to 4 miles for a typical fixed-route ride. Similarly, with the intercounty Express routes, staff proposes to increase the fare from \$6.00 to \$7.00 given the average trip length of 36 miles. The table below shows the current and recommended fare structure.

<b>Express Service</b>	<b>Current Fare</b>	<b>Recommended Fare</b>	<b>Average Trip Length</b>
Intracounty (200 routes)	\$2.00	\$4.00	14 miles
Intercounty (700 routes)	\$6.00	\$7.00	36 miles

It is estimated that the increase in Express fares will decrease Express ridership by 24,700 boardings or 11.4 percent. The decrease in Express ridership as a percentage of total fixed-route boardings, which were 43.3 million in fiscal year 2016, would be 0.06 percent of total fixed-route boardings. Fare revenue is anticipated to increase by \$107,000 based on the proposed fare change.

### Enforce Reduced Fare Eligibility Requirements

OCTA currently sells reduced fare passes at retail outlets, online, or at the OCTA store with no verification of eligibility required. Staff is recommending changing this practice and requiring verification of eligibility at the point of sale. Verifying eligibility at the point of sale is common practice at most United States transit agencies, and OCTA is one of the few that relies solely on verification of eligibility at the time of boarding. While it is difficult to know how much fraud is currently occurring in the Reduced Fare Program, OCTA has continued to see growth in senior/disabled ridership despite significant declines in non-senior/disabled ridership. In addition, this was an important topic in meetings with coach operators during the development of the fare policy recommendations. Coach operators were supportive of this recommendation because in addition to their efforts, it would be another tool helping to reduce fraud in the bus system.

Enforcement may have a negative impact on ridership while having the potential to have a positive impact on fare revenue. CH2M estimates that if increasing enforcement moved ten percent of senior/disabled riders from reduced fare passes to full fare media, ridership would decrease by approximately 567,000 boardings annually, but fare revenue would increase by \$632,000. Protecting fare revenue is important for a number of reasons, including protecting eligible reduced fare customers from potential fare increases as a result of fraudulent use. Enforcing reduced fare eligibility at the point of sale also has the added benefit of reducing the risk of confrontation for coach operators as they verify eligibility at the time of boarding.

### Review Interagency Agreements

OCTA has transfer agreements with regional transit agencies to facilitate easier connectivity for riders traveling to and from Orange County. Given the evolution of electronic fare media, as well as changes to routes operated by OCTA and other regional transit agencies, OCTA is moving forward with efforts to review interagency agreements. From a fare policy perspective, areas of importance would include ensuring that fare media utilized by riders transferring from other regional transit agencies can be validated in order to minimize transfer abuse, that transfer points are updated to reflect changes in routes, and to evaluate whether reimbursement rates between agencies remain equitable.

### Outreach

A public involvement plan was developed and implemented to create awareness of the proposed changes to OCTA's fare policy and to solicit feedback. Public notices appeared in several local newspapers including: the OC Register, Excelsio, Miniodas, Nguoi Viet, Korea Times, and Chinese World Journal. Staff also provided information cards on buses, 45,000 collateral pieces that included

comment cards, as well as 12,500 pieces of mail, and 5,964 emails that were sent directly to customers.

Staff also created a webpage to inform the public of the proposed changes and upcoming community meetings, as well as to solicit feedback. OCTA’s transit ambassadors shared information about the proposed fare changes during their support of the October service change, and the OC Street Team also held 23 events in Hispanic and Vietnamese communities to share information about the proposed fare changes and to encourage ridership.

Staff also conducted community open house meetings on the proposed changes in Laguna Hills on September 20, Anaheim on September 21, Santa Ana on October 18, and held a public hearing at the September 26, 2017 Board meeting. Additionally, several meetings were held with OCTA public committees and interest groups.

As of October 17<sup>th</sup>, a total of 278 comments have been received as a result of the various outreach efforts. Of the 278 comments received, 166 of the comments were either complimentary of OCTA services, provided comments not related to the proposed fare changes, or provided no comment. The remaining 112 comments opposed some element of the proposed changes to the fare policy. The breakdown of the comments is provided in the table below. A comprehensive outreach findings report is included in Attachment A.

<b>Comment</b>	<b>Total</b>
Complimented OCTA services	75
Comment not related to proposed fare changes	60
Response did not provide comments	31
<b>Subtotal</b>	<b>166</b>
Opposed changes to ACCESS fares	61
Opposed higher Express fares	34
Opposed elimination of underutilized passes	14
Opposed requiring eligibility status at the point of sale	3
<b>Subtotal</b>	<b>112</b>
<b>Total Comments</b>	<b>278</b>

**Implementation**

An implementation schedule has been developed for the proposed recommendations. Changes to fare policy are generally coordinated and implemented with service changes, which enables OCTA to efficiently train staff on both route and fare changes, and to coordinate outreach efforts to riders. OCTA has three schedule changes per year which occur in the months of February, June, and October. The proposed implementation schedule would be as follows:

Service Change	Proposed Change
February 2017	Eliminate 5-Ride and 7-Day Passes Categorize five fixed-routes as OC Express Align OC Express and Express fares with trip distance
October 2017	Require proof of eligibility to purchase reduced fare media at retail outlets

Staff would propose eliminating the sales of the 5-Ride and 7-Day passes effective with the February 2017 service change. OCTA would allow riders that had previously bought the 5-Ride and 7-Day passes to use them until the February 2018 service change, after which time the passes will no longer be accepted. Changes to the Express fares would also be proposed to take place with the February 2017 service change. The five 200-routes, currently categorized as local fixed-routes, would be categorized as OC Express routes, and both the OC Express and Express fares would change to align with the trip distance of the routes.

OCTA will immediately begin working with retail outlets if the proposed requirement for proof of eligibility to purchase fare media at the retail outlets is approved. OCTA currently sells fare media through approximately 280 retail outlets and will work with the various retail outlets to update the existing agreements with the new requirement. At the same time, OCTA will begin the work necessary to ensure that the customer store and online sales platforms will be able to enforce the new requirement. OCTA is working with its mobile application developer to include reduced fare media sales on the mobile application. It is anticipated that the mobile application will include the sales of reduced fare media in March 2017, and the purchase of reduced fare media through the mobile application will require a reduced fare identification number. Staff intends to implement this change in policy as soon as possible, but given the need to amend agreements with retail outlets and required modifications for the customer store and online sales platforms, the implementation date has been conservatively scheduled for the October 2017 service change.

**Summary**

Staff is recommending implementation of a set of changes to improve OCTA’s fare policy. If approved, staff would continue outreach efforts to the public for the fare policy changes and would implement the changes over the next three service changes. In addition, staff would return to the Board in March 2017 with a recommendation for the price of the Day Pass following the promotional period, which ends on April 9, 2017.

***Attachment***

- A. Proposed 2016 Fare Policy Adjustments, Public Involvement Program Final Report, October 21, 2016
- B. OCTA Public Hearing on Proposed Changes to Fare Policy, Board Member Questions and Answers, Express Service and Additional Public Meeting

**Prepared by:**



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Sean Murdock  
Director  
Finance and Administration  
714-560-5685

**Approved by:**



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Andrew Oftelie  
Executive Director  
Finance and Administration  
714-560-5649



**ORANGE COUNTY TRANSPORTATION AUTHORITY**

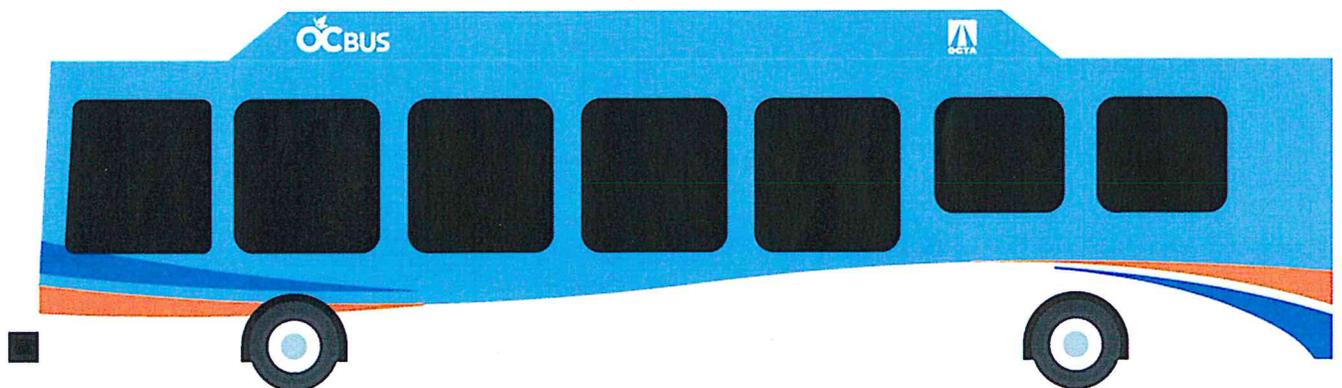
## **Fare Policy Recommendations**

### **Attachment A**



*Innovating from every angle*

**Proposed 2016 Fare Policy Adjustments  
Public Involvement Program  
Final Report  
October 21, 2016**



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**Comments by Mail Summary** .....page 7

**Comments from Online Survey Summary** ..... page 7

**Comments from OCTA Comments System Summary** .....page 7

**Community Meetings** ..... page 7

        a. Laguna Hills Community Center

        b. Brookhurst Community Center

        c. Rancho Santiago Community College District Office

**OCTA Public Committees and Nonprofit Serving the Disabled**...page 8

        a. Citizens Advisory Committee

        b. Special Needs Advisory Committee

        c. Diversity Community Leaders Committee

        d. Regional Center of Orange County

**Public Hearing** ..... page 9

## INTRODUCTION AND OVERVIEW

As part of OC Bus 360°, a plan to improve bus service from all angles, the Orange County Transportation Authority (OCTA), wanted to evaluate its fare policy and sought public input on proposed adjustments, which included:

- Reduce Day Pass fare from \$5 to \$4 (six-month promotional period approved)
- Eliminate underutilized passes (5-Rides and 7-Day)
- Recategorize and increase fares on express services (200 and 700 routes)
- Implement zone-based ACCESS fares
- Enforce reduced fare eligibility requirements at point of sale

Changes to OCTA's fare policy were proposed based on an independent evaluation by consultant CH2M and evaluated by OCTA staff.

In August 2016, the Proposed Fare Policy Adjustments Plan was released for public review. An outreach program was conducted which included public meetings in Laguna Hills, Anaheim, and Santa Ana, a public hearing held during an OCTA Board of Directors meeting in Orange, and many other outreach efforts designed to share the fare proposals and gather feedback.

Comments have been compiled and are being submitted to the OCTA Board of Directors for review as part of this report.



# PUBLIC INFORMATION & OUTREACH PROGRAM

## 1. Public Notification

### a. Print Advertisements

- 7 newspaper ads for Community Meeting Notices: OC Register, Excelsior, Miniondas, Nguoi Viet Daily News (2), Korea Times, and Chinese World Journal
- 2 newspaper ads for Public Hearing Notice: OC Register and Unidos



### 2 Bus Advertisements and Collateral

- 1,800 Interior Bus Cards - English, Spanish & Vietnamese (600 each language)
- 35,000 Public Notice Multilingual Brochures with comment card in English, Spanish & Vietnamese
- 10,000 of Second Public Notice Multilingual Brochures with comment card in English, Spanish & Vietnamese



### 3 Mailings

- 12,500 ACCESS customers

### 4 Electronic Media

- OCTA website in English, Spanish & Vietnamese, including an online survey
- 5,964 emails/one email
- 6,600 "On The Move" e-News distribution/two e-News articles
- Facebook posts and ads



### 5 Press Releases

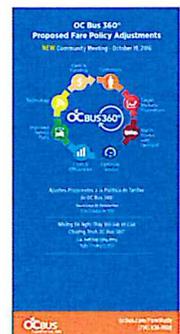
Four press releases were distributed:

- Aug. 23: OCTA Drops Day Pass Fare
- Sept. 14: Public Asked to Weigh In on Proposed Fare Policy Adjustments
- Sept. 26: Public Input Leads Board to Change Fare Policy Proposal
- Oct. 12: Santa Ana Community Meeting to Give Public Another Chance to Weigh In on Fare Policy



### 6 Transit Ambassadors

To share information about the October 2016 Service Change and the Proposed Fare Policy Adjustments Plan, staff was stationed at stops and rode on buses affected by route changes and eliminations.



## **7 Street Team Outreach**

To share information about the Proposed Fare Policy Adjustments Plan and encourage ridership, the OC Street Teams held 23 events in Hispanic and Vietnamese communities.

## **8 (714) 636-RIDE Hotline**

Information about the Proposed Fare Policy Adjustments Plan was shared with Customer Information Center staff.

## **9 Local Jurisdiction Communication**

- Email about the plan and community meeting dates to all local jurisdiction public information officers (PIOs) for distribution via city communication tools
- Email and social information to City of Laguna Hills for distribution
- Email and social information to the City of Anaheim for distribution
- Email in Spanish to the City of Santa Ana for distribution

## **2. Public Outreach Meetings**

### **a. Community Meetings**

- Laguna Hills Community Center in Laguna Hills – 9/20/16
- Brookhurst Community Center in Anaheim – 9/21/16
- Rancho Santiago Community College District Office in Santa Ana – 10/18/16

### **b. OCTA Public Committees and Nonprofit Serving the Disabled**

- Citizens Advisory Committee – 6/21/16
- Special Needs Advisory Committee – 7/26/16
- Diverse Community Leaders Meeting – 9/14/16
- Regional Center of Orange County – 9/13/16

### **c. Public Hearing at OCTA Headquarters – 9/26/16**

## WHAT WE LEARNED

### Executive Summary

Following extensive public outreach, a total of 278 comments were received at community meetings, the public hearing, OCTA public committee meetings, online, by mail and phone. Detailed information about those comments is included in this report.

Of the more than a quarter of the responses received, 27 percent, were compliments and expressions of satisfaction with OC Bus service.

Customers were most vocal concerning the proposal to implement a zone-based fare plan for ACCESS customers that would have increased the cost for the longest paratransit trips. Nearly 22 percent of respondents spoke out against this proposal. After listening to the concerns of ACCESS customers at the public hearing, the OCTA Board of Directors removed this proposal from consideration. The OCTA Board of Directors also requested that a third community meeting be added to give the public greater opportunity to provide feedback, and an additional meeting was added in Santa Ana.

Approximately 21 percent of responses were unrelated to the Proposed Fare Policy Recommendations Plan. Slightly more than 12 percent objected to changing the price of express service routes, and about 5 percent were opposed to eliminating underutilized passes. About 1 percent commented negatively about enforcing fare eligibility at point of sale.

### Proposed Fare Policy Adjustments as of 10/17/16 Total of Online, Mail, Comment System & Community Meetings Combined

Comments	Compliments	Oppose ACCESS Zone Fare	Oppose Elimination of Underutilized Passes	Oppose Higher Express Fares	Oppose Requiring Eligibility Status at Point-of-sale	No Comment Response	Other Non-related	Totals
Mail	60	29	0	3	1	23	39	155
Online Surveys	14	11	10	22	2	8	19	86
OCTA Comments System	0	5	4	7	0	0	0	16
Community Meetings (9/20 & 21,10/18)	0	3		2			2	7
Public Hearing (9/26)	1	13						14
<b>Totals</b>	<b>75</b>	<b>61</b>	<b>14</b>	<b>34</b>	<b>3</b>	<b>31</b>	<b>60</b>	<b>278</b>

## WHAT WE LEARNED

### Comments by Mail Summary

12,500 brochures were mailed to ACCESS customers. A total of 155 comments cards were received back. Comments are summarized below.

- 39% complimented services
- 25% were non-fare related issues
- 19% opposed implementing zone-based ACCESS fares
- 15% had no comment

### Comments from Online Surveys

A special OCTA webpage was launched in English, Spanish & Vietnamese, including an online survey. A total of 86 customers completed the survey. Comments are summarized below.

- 27% opposed increasing fare on Express Services
- 22% were non-fare related issues
- 16% complimented services
- 13% opposed implementing zone-based ACCESS fares
- 12% opposed the elimination of underutilized passes (5-Rides and 7-Day passes)

### Comments from OCTA Comments System

A total of 16 customers inquired via the OCTA Comments System (C3). Comments are summarized below.

- 44% opposed increasing fare on Express Services
- 31% opposed implementing zone-based ACCESS fares
- 25% opposed the elimination of underutilized passes (5-Rides and 7-Day passes)

### Community Meetings

A total of 14 customers participated in three community meetings. Seven public comments were recorded. Comments at each meeting are summarized below.

- **September 20, 2016 – Laguna Hills Community Center**  
Participants: 4      Speakers: 3

Comments:

1. Is OCTA reducing the senior bus fares?
2. Asked about ACCESS fare structure; concerned about the 100% increase in new fares
3. ACCESS customers are low income; concerned about doubling fares, fewer fixed bus routes available for ACCESS, and additional costs for same-day taxi. ACCESS is treated like a 'step-child'

- **September 21, 2016 – Brookhurst Community Center, Anaheim**  
Participants: 8      Speakers: 2

Comments:

1. Worried about entire route price even when going a short distance
2. Pay by distance would benefit students and businesses for shorter trips and would increase ridership

- **October 18, 2016 – Rancho Santiago Community College District Office, Santa Ana**  
Participants: 2      Speakers: 2

Comments:

1. Reduce the express route fares
2. Opposed increases to express route fares

### **OCTA Public Committees and Local Nonprofit Serving the Disabled**

A total of five community members participated in three OCTA Public Committee meetings. A presentation was also provided at the Regional Center of Orange County, a local nonprofit serving the disabled. Comments at each meeting are summarized below

- **Citizens Advisory Committee**

A presentation regarding the Proposed Fare Policy Adjustments was made to the Citizens Advisory Committee at its meeting on June 21, 2016.

No comments were received however members indicated they would share information with their various constituencies.

- **Special Needs Advisory Committee**

A presentation regarding the Proposed Fare Policy Adjustments was made to the Special Needs Advisory Committee at its meeting on July 26, 2016.

Comments:

1. Suggested using miles instead of zones to calculate ACCESS fares
2. Stated that the ACCESS zone fare would be very detrimental to many low-income seniors
3. ACCESS zone fare would isolate people in San Clemente even more than they already are
4. ACCESS individuals are low income and will not be able to go anywhere at all
5. Seniors make trips to doctors, grocery store and other places and already pay \$3.60 for each trip
6. Suggestion to charge 1½ times for three zones.

- **OCTA Diverse Community Leaders Meeting**

A presentation regarding the Proposed Fare Policy Adjustments was made to the Diverse Community Leaders Meeting at its meeting on September 14, 2016.

No comments were received however members indicated they would share information with their various constituencies.

- **Regional Center of Orange County**

A presentation regarding the Proposed Fare Policy Adjustment was made to the Regional Center of Orange County on September 13, 2016. The Regional Center is a local non-profit serving the disabled community.

No comments were received however staff indicated they would share information with clients.

## **Public Hearing**

### **September 26, 2016 – OCTA Headquarters**

Participants: 14      Speakers: 14

A presentation regarding the Proposed Fare Policy Adjustment was made during a public hearing at a meeting of OCTA Board of Directors on September 26, 2016.

#### Comments:

1. Same day taxi will add double the trips and cost to use. It takes a lot of coordination and stamina. Also, do not do zone based fares, it will increase prices for people who are low income
2. I'm on a fixed income and cannot afford the zone based fares. Do not implement it.
3. The 3 zones will have a significant impact on many seniors and disabled.
4. There is a discrepancy on the proposed fare policy. You are lowering regular ridership but increasing ACCESS. Also, instead of zone based fares it should be mileage based.
5. The ACCESS increase is nothing but greed. We are on fixed income and already struggling. You don't care about people and are being greedy.
6. The ACCESS fare increase is going to affect my budget and I don't appreciate it. Our disability pay didn't increase and it's hard for us to find a job. I'm really concerned about my choices.
7. I'm in a wheelchair and my only option is ACCESS. I can't take Uber or Lyft or any other ridesharing service. Forty percent (40%) of riders are disabled. There are two facilities, one in the north and one in the south zone and we travel between these two offices. We will end up paying double the fare. You are public transportation and need to help people in need. Do mileage based like LA.

8. I'm on a fixed income and the proposed ACCESS fare is way too much for me to try to foot and I speak on behalf of many.
9. I'm from Dayle McIntosh Center, an independent living center for the disabled. The proposed ACCESS fare increase will be a hardship for those on limited incomes. Currently the average cost for ACCESS is about \$144 a month. Increasing to double that will be a hardship for those on limited average incomes of \$850. Besides the financial impact there will be a social aspect as well.
10. Saying that ACCESS trips are discretionary is wrong. Was this question asked of fixed bus route users? It doesn't seem fair that you would do that to people with disabilities. Many facilities are in North County, we are being penalized for where we live. Maybe it should be mileage based or a flat \$5 fee.
11. I'm on a fixed income and because of my disability I can't find a job. Raising ACCESS prices is going to really cut me off. I don't misuse the service, I've been grateful. But we are little people, you are big people. Don't do this to us.
12. We disabled people need your sympathy, not indifference. Doubling the ACCESS fare is too much and will scare people off. Do a flat \$5 rate like the other person stated.
13. Have more bus service.
14. I've been riding ACCESS for 4 years. The rate increase is not for everyone, only 3 percent. We should thank you for the great service. Yes, doubling the price is a lot but it's still a pretty good deal.



**ORANGE COUNTY TRANSPORTATION AUTHORITY**

## **Fare Policy Recommendations**

### **Attachment B**



OCTA Public Hearing on Proposed Changes to Fare Policy  
Board Member Questions and Answers  
Express Service and Additional Public Meeting

1. Please provide the number of riders as well as cost per trip for the Express routes?

**Answer:** The boardings and subsidy per trip for fiscal year 2016 are listed below:

Routes		FY 2016 Boardings	Subsidy Per Boarding
<i>Proposed Intra-county Routes</i>			
206	Santa Ana - Lake Forest	22,444	\$ 14.95
211	Irvine - Seal Beach	33,155	14.66
212	Irvine - San Juan Capistrano	12,510	16.69
213	Brea - Fullerton - Placentia - Irvine	43,570	11.95
216	Costa Mesa - San Juan Capistrano	4,001	25.93
		115,680	
<i>Inter-county Routes</i>			
701	Los Angeles - Huntington Beach Express	22,026	\$ 33.50
721	Los Angeles - Fullerton Express	35,328	28.75
794	Riverside / Corona to South Coast Metro Express	42,935	18.31
		100,289	

2. Can a community meeting for the proposed fare changes be held in the first district?

**Answer:** A community meeting for the first district was held on October 18<sup>th</sup> at Rancho Santiago Community College.

3. What is the anticipated decrease in Express ridership based on the fare increase?

**Answer:** The estimated decrease in Express ridership is 24,700 boardings or 11.4 percent of Express boardings. The decrease in Express ridership as a percentage of total fixed route boardings, which were 43.3 million in fiscal year 2016, would be 0.06 percent of total fixed route boardings.