

ORANGE COUNTY
Y24-902(C) – TWO# 20
SCOPE OF PROFESSIONAL SERVICES
Phase 1: Microtransit White Paper

Purpose

the Transportation Mobility Advisory Commission (TransMAC) needs additional information to determine if microtransit service could enhance mobility funding, efficiency, or safety; better support connections to SunRail and LYNX, or utilize new technology.

The Microtransit white paper is intended to inform areas for further study. It is not a feasibility study, operating plan, procurement document, vendor evaluation, or transit development plan. This first phase will explore the following questions:

1. When is microtransit more efficient than conventional transit?
2. Has microtransit enhanced the customer experience or safety?
3. Can microtransit support first-mile-last-mile connection to commuter rail?
4. What technology interface has been used on successful microtransit systems?

Scope of Services

The consultant shall prepare a policy white paper to assist Orange County and TransMAC in understanding advantages and disadvantages of microtransit in the areas of funding, efficiency, and safety. The white paper shall summarize best practices, and identify service thresholds, cost comparisons, commuter rail connection examples, technology application examples, effects on safety, and recommend appropriate next steps for further evaluation in a separate task work order.

Task 1: Literature Review and Lynx Coordination

The consultant shall review and summarize up to six previously completed studies of microtransit including from:

- USF Center for Urban Transportation Research (CUTR)
- The Transit Cooperative Research Program (TCRP)
- American Public Transportation Association (APTA)

The focus will be on microtransit to be considered as a public transportation service that could increase fare box recovery, rider experience, and safety. Transportation Network Companies (TNCs) will not be a focus, nor will TNC regulations be reviewed.

The consultant will hold up to two meetings with LYNX: one to coordinate efforts at the beginning of the study and one to discuss the draft white paper.

Task 2: Best Practices

Core technical content of the white paper will be focused around the phase 1 questions listed above.

The white paper shall address the following:

Best Practices for Microtransit

Summarize in what conditions microtransit tends to perform well or poorly and establish threshold conditions needed for successful implementation, including service design, customer access and communications, equity and ADA considerations, performance monitoring, data governance, and vendor oversight. The up to six transit agencies will be reviewed including:

- LA Metro
- The Regional Transportation Commission of Southern Nevada in Las Vegas
- Bay Area Rapid Transit in San Francisco
- Scout in Seminole County

Passenger Thresholds Conducive to Microtransit

Identify practical thresholds for when microtransit should be considered as a supplement to or potential replacement for existing service, including key indicators such as route productivity, ridership, subsidy, service frequency, equity and ADA impacts, trip characteristics, and land use/demand patterns.

Present a framework to distinguish where fixed-route service should be retained or improved versus where microtransit may be appropriate to supplement, connect, or replace service, as well as where microtransit should not be pursued.

Frequency, Vehicle Size, and Service Productivity

Describe how microtransit can affect effective frequency and productivity when compared with low-frequency fixed-route service, including key tradeoffs related to vehicle size, operating cost, staffing, and service area design.

This section should distinguish scheduled frequency from the rider's effective frequency.

Microtransit as a Commuter Rail Feeder System

Summarize best practices for using microtransit to support commuter rail, including station-area service design, schedule and transfer coordination, ADA access, and policies to prioritize feeder trips over longer competing trips.

Technology Interface and Rider Experience

Present and discuss the importance of an integrated rider experience for trip planning, booking, payment, transfers, and customer communication across transit and mobility services.

Outline principles for a more seamless rider experience across LYNX, SunRail, microtransit, and related micromobility programs.

Task 3: Summary of Findings

Best-practice findings and decision frameworks shall be summarized and compared to Orange County at a high level. The findings will be documented in a draft white paper for County review. Comments received will be addressed in a Final white paper. An executive summary will be prepared as a one-page infographic handout or brief powerpoint presentation.

Task 4: Supplemental Meetings

Kimley-Horn will participate in supplemental meetings (in addition to the meetings with Lynx in task 1). This task could include meetings with Orange County staff, TransMAC, Orange County Board of County Commissioners, MetroPlan, or other interested stakeholders. Task includes preparation of a meeting agenda (if needed) and meeting summary.

Phase 1 Phase 1 Deliverables

The consultant shall provide the following deliverables:

- Draft White Paper
 - Abstract
 - Definitions
 - Literature Review
 - Best Practices for Public Microtransit
 - Summary of Findings
 - Next Steps
- Final White Paper
- Executive Summary / Board Briefing Materials
 - Summary suitable for internal distribution or Board/committee discussion. This may be a one-page infographic handout, or brief presentation, depending on committee/staff preference.

Fee

Kimley-Horn will perform the Services in Tasks 1 through 3 for a lump sum fee of **\$35,076.92**, and Task 4 for a limiting amount fee not to exceed **\$4,163.10**. Lump sum fees will be invoiced monthly based upon a percentage of services performed for each task. Limiting Amount fees will be invoiced monthly based on number of hours worked. Payment will be due within 25 days of your receipt of the invoice. A break down of fees is included in the table below.

Performed By	Description of Tasks	Lump Sum Fee	Limiting Amount Fee
Kimley-Horn	Task 1 - Literature Review and Lynx Coordination	\$9,796.59	
	Task 2 - Best Practices	\$15,483.74	
	Task 3 - Summary of Findings	\$9,796.59	
	Task 4 – Supplemental Meetings	-	\$4,163.10
TOTAL LABOR FEES:		\$35,076.92	\$4,163.10

Project Schedule

The CONSULTANT shall provide the services within a **four-month** timeframe. The COUNTY will be responsible for providing review comments on a timely basis. Responses to COUNTY comments will be provided within three weeks of receipt.

Optional Services

Phase 2 will be scoped and negotiated separately based on the results of Phase 1. Tasks anticipated for Phase 2 – Orange County Microtransit Development Plan include:

- Concept of Operations
- Ridership and Fare Model Alternatives
- Results and Recommendations
- Implementation Plan