



Beverly Hills City Council Liaison / Traffic & Parking Commission Committee will conduct a Special Meeting, at the following time and place, and will address the agenda listed below:

**CITY OF BEVERLY HILLS
455 N. Rexford Drive
2nd Floor Conference Room 280A
Beverly Hills, CA 90210**

IN-PERSON / TELEPHONIC / VIDEO CONFERENCE MEETING

**Beverly Hills Liaison Meeting
www.beverlyhills.org/MyCommittee
Meeting ID: 516 191 2424
Passcode: 90210**

**You can also dial in by phone:
+1 669 900 9128 US
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+16699009128,,5161912424# US
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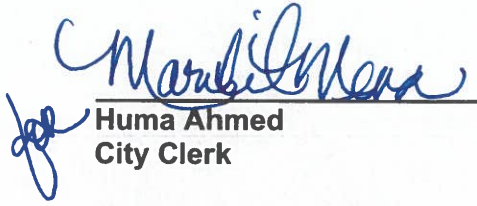
**Monday, June 8, 2026
2:30 PM**

Please be advised that pre-entry metal detector screening requirements are now in place in City Hall. Members of the public are requested to plan visits accordingly.

In the interest of maintaining appropriate social distancing, members of the public can view this meeting through live webcast at www.beverlyhills.org/live and on BH Channel 10 or Channel 35 on Spectrum Cable, and can participate in the teleconference/video conference by using the link above. Written comments may be emailed to mayorandcitycouncil@beverlyhills.org and will also be taken during the meeting when the topic is being reviewed by the Beverly Hills City Council Liaison / Traffic and Parking Commission Committee. Beverly Hills Liaison meetings will be in-person at City Hall.

AGENDA

- 1) Public Comment
 - a. Members of the public will be given the opportunity to directly address the Committee on any item listed on the agenda.
- 2) Microtransit Pilot Project
 - a. Staff Recommends that the City Council and Traffic and Parking Commission Liaison Committee receive a follow-up report on the proposed microtransit pilot project and provide direction to staff on next steps.
- 3) Adjournment


Huma Ahmed
City Clerk

Posted: June 5, 2026

**A DETAILED LIAISON AGENDA PACKET IS AVAILABLE FOR REVIEW AT
WWW.BEVERLYHILLS.ORG**



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CITY OF BEVERLY HILLS
PUBLIC WORKS DEPARTMENT

MEMORANDUM

TO: City Council and Traffic and Parking Commission Liaison Committee

FROM: Daren Grilley, Assistant Director of Public Works/City Engineer
Jessie Holzer Carpenter, Transportation Manager

DATE: June 8, 2026

SUBJECT: Microtransit Pilot Project

ATTACHMENTS:

1. City Council Staff Report, May 5, 2026
2. County Transportation Tax Local Return Estimate FY26/27
3. Proposition A and Proposition C Local Return Guidelines

RECOMMENDATION

Staff recommends that the City Council and Traffic and Parking Commission Liaison Committee receive a follow-up report on the proposed microtransit pilot project and provide direction to staff on next steps.

INTRODUCTION

On May 5, 2026, staff presented a proposed two-year microtransit pilot project to the City Council at a Study Session. The proposed pilot would implement the City's adopted Complete Streets Plan and Climate Action & Adaptation Plan goals for a locally operated transit system providing first/last mile connections to the Metro D (Purple) Line subway stations opening along Wilshire Boulevard in 2026 and 2027.

Following Council discussion, staff was directed to return to the Liaison Committee to address questions raised and provide additional information. This report responds to those questions and seeks Liaison Committee direction on next steps.

BACKGROUND

Following the 2022 Transit Needs Assessment Study, which identified significant unmet transit needs in Beverly Hills, the Liaison Committee directed staff in August 2023 to pursue on-demand, point-to-point transportation options. Staff subsequently conducted a competitive Request for Proposals (RFP) process and selected Via Transportation as the recommended vendor.

On January 7, 2026, the Liaison Committee received a report on the proposed microtransit pilot and directed staff to further develop three aspects: Dial-A-Ride integration, Waymo partnership capabilities, and launch timing relative to the Metro D Line opening.

DISCUSSION

Staff has compiled the City Council's questions and comments from the May 5, 2026 meeting, organized them by topic, and provided responses to each below.

FUNDING AND COSTS

Proposition A Funding

Proposition A is a permanent half-cent countywide sales tax restricted exclusively to public transit uses.

Twenty-five percent of the Proposition A tax is designated for the Local Return Program funds to be used by the 88 Cities and the County (Jurisdictions) in developing and/or improving public transit, paratransit, and the related transportation infrastructure.

Local Return funds are allocated and distributed monthly to Jurisdictions on a "per capita" basis by the Los Angeles County Metropolitan Transportation Authority (Metro). Attachment 2 outlines the estimated Local Return revenue that agencies are expected to receive in fiscal year 2026/27 from all four transportation tax measures (Propositions A and C and Measures R and M).

Will the two-year pilot be completely funded through Prop A?

The proposed two-year pilot is fully funded through dedicated Proposition A transit funds. In addition, there are sufficient Prop A funds (current balance and projected revenue) to fund several years beyond the pilot project should the Council desire to do so.

How much Prop A do we have and how much do we receive each year?

The City currently has approximately \$4.8 million in Prop A fund balance, plus annual revenue of approximately \$840,000. This dedicated funding is separate from the General Fund and cannot be used for any non-transit purpose.

What can Prop A funds be used for?

Transit Services and Operations:

- Fixed-route public transit service
- Paratransit service (including dial-a-ride and specialized public transit)
- Non-exclusive school service
- Recreational transit service

Transit Capital and Infrastructure:

- Bus stop improvements and maintenance
- Public transit capital expenditures (vehicles, facilities)
- Park-and-ride lots
- Transit facilities and transportation enhancements
- Metro Rail capital projects
- Right-of-way improvements supporting transit
- Commuter rail capital and operations
- Capital reserve for future transit projects

Transit System Support:

- Transit systems management (bus priority)
- Transit security
- Fare subsidies
- Transportation planning

- Transit marketing
- Direct administration of transit programs

What is the process for submitting the Prop A plan to Metro?

Details about the Metro approval and audit process are included in the attached Local Return Guidelines (page 3 of Attachment 3).

When will the funds expire?

Prop A funds are subject to a three-year spending requirement, but funds committed to an approved program in the City's annual Local Return Program submittal to Metro are protected from claw-back. Staff confirmed with Metro representatives that currently no Prop A funds are expiring. In June 2027, approximately \$1,000,000 are set to expire, but the City would commit to spending those funds on an approved program well in advance of expiration.

Have we ever had to give Prop A back?

No.

How much Prop A did we purchase?

Prop A funds totaling \$2,057,000 were purchased from five other cities (at a cost of \$1,456,050) to support the Metro D Line North Portal project. To date, only \$400,425 of those funds remain. As noted previously, Metro representatives confirmed that no Prop A funds are expiring.

What are the City's Prop A funds currently used for?

Prop A Funded Program	Approximate Annual Expense
Dial-A-Ride	480,000
Senior On-Demand subsidy	80,000
Trolley operations	70,000
Senior bus pass subsidy	2,000
<i>Approximate Total</i>	<i>632,000</i>

Can Prop A cover the Waymo overflow?

The Waymo overflow trips are eligible for Prop A funding because they operate within the shared-ride microtransit service framework as overflow capacity, not as standalone single-passenger trips. Riders cannot directly request Waymo service (in other words, request a solo ride); the system algorithmically dispatches Waymo based on operational efficiency within the public transit service. This distinction is what differentiates eligible overflow capacity from ineligible private rideshare subsidies.

What happens if we don't use the funds in three years? Can we allocate Prop A funds to microtransit to extend the lifetime of the funds?

Funds not committed to eligible transit purposes within three years must be returned to Metro. Approving microtransit would commit current and future Prop A funds to an approved program, protecting them from claw-back and extending their useful life beyond the three-year window.

Cost Structure and Per-Ride Economics

Provide clarity on initial vs. incurring costs. What is the up-front cost to start the program? What goes into the \$1.6 million and \$1.5 million per year estimates?

The Year 1 estimate of \$1.6 million includes ~\$1.488 million in operational costs plus ~\$112,000 in one-time upfront costs, corresponding to fees to acquire vehicles, deploy the technology, wrap vehicles with Beverly Hills branding, and retrofit vehicles to be wheelchair accessible. The remaining costs are “per vehicle hour costs,” where Beverly Hills pays for just the driver hours that are actually deployed, meaning costs are variable depending on demand. Year 2 operational costs are estimated at \$1.5 million.

Via has a Not-to-Exceed amount of \$3.1M over the two years¹ that they commit to not passing. If demand is lower than anticipated, Via will schedule fewer driver hours to ensure the service operates efficiently.

The cost is all inclusive of any efforts needed to run the program – insurance, marketing, vehicle storage, vehicle charging, driver pay, consultative support from Via’s team, facility rentals, etc.

Is there a hidden cost (ex: charging) or impact on the City leading to out-of-pocket costs?

There are no hidden costs. There would be no impact on City charging infrastructure or hidden costs to the City for vehicle storage or charging. Vehicle lease, maintenance, driver wages, insurance, fuel/charging, customer service, technology platform, and marketing support are all included in the per-vehicle-hour rate.

How was the \$20 per ride estimate calculated?

Via’s pricing is structured on a per-vehicle-hour basis at \$89 per hour, not on a per-ride basis. The \$20 per ride figure is a calculated estimate derived by dividing the projected two-year program cost (~\$3.1 million) by projected ridership (200 rides/day × 730 days ≈ 146,000 rides). The City pays for vehicle service hours regardless of ridership levels.

What would the cost per ride be with fewer than 200 rides per day?

At lower ridership levels, the calculated cost per ride would be higher because fixed costs are spread across fewer rides. However, the total program cost remains the same unless service hours are reduced. If ridership is lower than projected, Via can scale down vehicle hours, which reduces total cost while keeping cost per ride relatively stable.

How can costs be lowered?”

Service metrics are continuously monitored and identify tactics to address performance, as needed. If service is running less efficiently, Via will recommend strategies to grow demand (therefore increasing efficiency) and/or driver hours will be reduced to only schedule the supply needed. Beverly Hills will only pay for actual driver hours deployed.

¹ Note that Via has provided a Best And Final Offer reducing the upfront costs to \$110,000 and the two-year operating costs to \$2.79M. However, to avoid confusion when discussing the proposal over multiple Liaison and City Council meetings, staff is using the figures from Via’s original proposal.

Would using Waymo only (instead of Via) be a lower cost ride, compared with the \$20 per ride estimate?

Waymo-only service is not a comparable option. Waymo operates as a private autonomous ride service with dynamic pricing, does not provide shared rides, and is not eligible for Proposition A funding as standalone single-passenger rides. The Via-Waymo partnership leverages Waymo for overflow capacity within the public transit service framework, not as a replacement for it.

Fare Structure and Revenue

What is the proposed fare? What could be charged to break even?

Microtransit fares typically range from \$1 to \$5 per trip nationally. Previous reports have discussed a \$2 fare, but City Council has full discretion to set the fare – given the comparably high cost of trips via rideshare, a \$5 fare would still likely be a competitive price.

Like all public transit in the US, microtransit cannot achieve break-even through fares alone. California transit systems average 10% farebox recovery². While transit subsidies help provide affordable mobility options for low-income riders, they also help encourage choice riders to choose public transit – which translates to fewer cars on the road, reduced congestion, and lower greenhouse gas emissions.

Regarding subsidies for transit, the proposal to subsidize public transit using Prop A funds is precisely what was envisioned when Prop A was drafted. It is also worth noting that most other City services are subsidized for community benefit – meaning the City endures most if not all of the cost – including emergency services, parks and recreation programs, library services, and street maintenance.

Some agencies offer a fare-free period to encourage people to try the service – should Beverly Hills consider that?

A fare-free launch period (typically 3-6 months) is a common practice that builds initial ridership and community awareness. After the launch period, Council could implement a fare structure based on data from the initial period.

Where is the economy of scale to make the service less costly and sustainable long-term?

Cost per ride decreases meaningfully only when ridership grows beyond current capacity. Within the proposed service structure, the cost-effective ridership range is 200-300 rides per day. Below 200, the calculated cost per ride increases. Above 300, additional vehicles would be needed, creating step increases in fixed costs.

Can microtransit vehicles be equipped with TAP readers?

This is possible, but would likely require a long discussion period with Metro, which could impact the service launch timeline.

² "California Policy Center, "The Cost of Transit in California" (January 2025), available at <https://californiapolicycenter.org/reports/the-cost-of-transit-in-california>."

Long-term Funding Sustainability

If the City continues microtransit beyond the 2-year pilot period, what funding sources would support the program?

We estimate the current Prop A fund balance and annual revenue can sustain the program for an additional 2-4 years, depending on operating hours, cost escalation, and a decision to use Prop A funds for additional transit uses, as discussed at the end of this report. For sustainability beyond that time, staff would actively pursue grant funding during the pilot period. Via has secured significant grants for peer agencies, including \$8.5 million for Cupertino and \$3.2 million for Richmond. Data gathered during the pilot phase would strengthen Beverly Hills' grant applications.

How can it be ensured the City is only using Prop A money – not having to contribute any out-of-pocket costs?

The General Fund is protected throughout this program. Proposition A funds are legally restricted to transit uses and cannot be redirected to the General Fund or other non-transit City programs. The proposed program structure ensures all costs are covered by dedicated Prop A funds for the pilot period and several years beyond.

SERVICE DESIGN AND OPERATIONS

Service Design and Boundaries

What is the goal of microtransit? Is it first/last mile or to create mobility through the city and the business triangle?

Both. The goals are complementary: providing first/last mile connections to Metro D Line stations and improving local mobility throughout the City. The Transit Needs Assessment Study identified both needs, and microtransit's flexible design serves both simultaneously.

Is this for residents only?

No. Under Proposition A requirements, the service must be open to the general public, including residents, workers, and visitors. The service cannot be restricted to residents only.

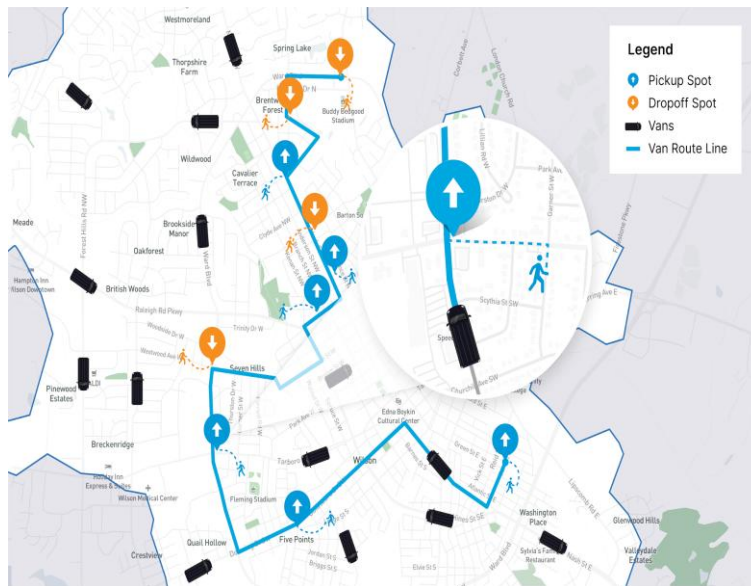
What are the service boundaries – where can people go to / from? Can non-seniors get to medical facilities outside of Beverly Hills?

Staff recommends the service area for all riders include all of Beverly Hills, Metro D Line stations along Wilshire Boulevard, and the Cedars-Sinai Hospital area immediately outside City limits. The Transit Needs Assessment Study identified high-demand destinations – all within or immediately adjacent to City limits. Service boundaries are at Council's discretion and can be adjusted.

How does the system / routing / algorithm work?

As shown in the image below, all components of the Via software suite are powered by ViaAlgo, their proprietary routing, aggregation, dispatch, and demand prediction algorithms. These algorithms are the foundation of Via's platform, achieving the lowest cost per ride in the industry while maintaining a high-quality customer experience. With machine learning and artificial intelligence, the algorithms become smarter over time, continuously optimizing pickups, drop-offs, and routing while dynamically updating riders, drivers, and administrators with real-time

information. These algorithms are configurable and can be adjusted to accommodate a diverse and nuanced set of local needs, ensuring that Via can optimize the use of our technology platform to best meet the City's service goals and objectives.



How would this service cut emissions if no other riders request the same route?

It is possible that some trips would only have one rider – especially when the program is new – but given the city's small size, most trips would be expected to overlap routes enough to justify shared rides.

Dial-A-Ride Integration

Will the combined program delay the Dial-A-Ride users due to increased demand?

Protections are built into Via's algorithm to ensure that Dial-A-Ride riders maintain high on-time-performance even when aggregated microtransit rides. Dial-A-Ride riders will also be able to specify an "appointment time" for prebooked trips, which our system will monitor to ensure they are not late for their appointment.

Will Dial-A-Ride users delay the microtransit because it takes longer for them to load / unload?

No, this should not significantly impact the microtransit users, as the algorithm includes anticipated time to load / unload Dial-A-Ride riders. Therefore, this data is factored into the wait time and trip time assumptions presented to riders.

Could Via replace Dial-A-Ride without microtransit? Would that be a large enough service to pilot?

This is not an option as Via's proposal was scoped to microtransit at a larger scale based on the RFP scope – restructuring the scope to Dial-A-Ride-only would create risk of a procurement protest from other proposers who responded based on the original scope.

Additionally, limiting the service to Dial-A-Ride alone would forfeit the cost efficiencies that make the program financially viable — the economies of scale achieved by combining Dial-A-Ride with

broader microtransit ridership help drive down the per-trip cost and justify the operational investment.

How would Dial-A-Ride booking change with microtransit – can users still pre-book to ensure rides?

Under the proposed integration, Dial-A-Ride users would retain or improve upon all current service features: pre-booking up to one month in advance through phone or app, curb-to-curb service, no fare, trained drivers with wheelchair securement and accessibility training. Additionally, Dial-A-Ride users would gain new flexibility to book on-demand when desired, rather than requiring 24-hour advance booking.

Provide more clarity on wait times, ease of usage, the senior learning curve for utilizing technology, etc.

In general, the app is designed to be as intuitive and easy to use as possible. Via only asks for a few simple prompts (where you are traveling, whether anyone is traveling with you, and how you are paying) to book a ride. The app is also designed to be accessible and compliant with the Web Content Accessibility Guidelines to ensure that riders with accessibility challenges are able to use the technology.

During and after the launch process, the City will host engagement sessions and train the trainer sessions at senior centers to help walk riders (and staff) through the process.

It is understood that not all riders feel comfortable with a smart phone app, so the service is always available by phone for any rider to call and book a ride.

For the other current transit services that the 5 vehicles are being used for (ex: shuttle to Roxbury Park), would there still be costs to maintain those programs?

The current Dial-A-Ride vehicles are leased by the vendor (MV Transportation), not the City. Non-Dial-A-Ride uses (e.g., charters) of these vehicles have been charged to other funds, not Proposition A. Under the microtransit pilot, City departments wishing to charter shuttle service for events or programs would contract directly with vendors.

Phased Implementation Options

As a first step, was only providing first / last mile connections to the D Line considered to see how the program could be managed before expanding it to point-to-point?

A first/last mile-only pilot is an option for consideration, but it would come with significant trade-offs. Restricting trips to those starting or ending at Metro D Line stations (and adjacent bus stops) would reduce ridership, increasing the calculated cost per ride. The fixed costs of operating the service (vehicles, drivers, technology) remain similar regardless of restriction, so reduced ridership simply spreads those costs across fewer rides.

If Council wishes to phase implementation, options could include:

- Phased Geographic Rollout: Launch with service to Metro stations and the Business Triangle, expanding to full citywide service after 3-6 months
- Phased Service Hours: Launch with reduced hours (such as commute periods only) and expand based on demand data

- Phased User Groups: Launch with general public service while continuing Dial-A-Ride separately for the first 6 months

Trade-offs to Consider:

Reduced Ridership and Higher Cost per Ride: Restricting service eliminates a significant portion of potential trips—particularly those connecting residential areas to business districts, medical facilities, schools, and shopping areas identified in the Transit Needs Assessment. Since the fixed costs of operating the service (vehicles, drivers, technology) remain largely the same, fewer rides means a higher cost per ride compared with full service.

Reduced Trip Aggregation Efficiency: Microtransit's cost efficiency comes from algorithmically combining trips heading in similar directions. With unrestricted service, a trip from a residence to a station might pick up another rider going to the station and drop off a third rider at a nearby destination, such as a grocery store. Restricting trips to station origins or destinations reduces these aggregation opportunities.

Limited Implementation of Adopted Plans: The Complete Streets Plan and Climate Action & Adaptation Plan establish goals for a locally operated transit system that addresses broader mobility needs, not just subway connections. The Transit Needs Assessment Study identified significant unmet needs for local circulation, north-south connectivity, and connections to non-station destinations. Restricted service would address the subway connection goal but leave other identified needs unaddressed.

Reduced Visibility and Awareness: Microtransit programs build ridership over time through community awareness and word-of-mouth. A service that only operates near subway stations may have lower visibility throughout the community, potentially limiting long-term adoption.

Staff recommends proceeding with the full citywide service as originally proposed, as this approach best implements the City's adopted plans and provides the most cost-effective service per ride. However, Council may direct staff to pursue any of the alternatives described above.

Vehicle Operations and Charging

What is the charging plan? Where would vehicles be charged and stored over night?

Via will procure a dedicated lot or space in or near Beverly Hills to store vehicles when not in service (this is included in the cost proposal).

For charging, Via will utilize existing publicly available charging stations in the area and the charging costs are included in the cost proposal. The City's existing Level 2 chargers are not anticipated to be used for fleet operations.

Are all vehicles dedicated to Beverly Hills?

Yes. All four vehicles in the fleet (plus one spare) will be dedicated exclusively to Beverly Hills, branded with City-approved wraps, and not used for service in other cities.

Between picking up and dropping off, will drivers stage somewhere or continuously drive around?

During service hours when between trips, drivers will pull over at pre-identified safe waiting locations rather than driving continuously. Via continuously monitors these patterns and adjusts staging locations as needed to avoid neighborhood impacts.

Ridership Projections and Demand Management

How did you arrive at the 200 rides per day? What is that based on?

As noted above, 200 rides per day is an estimate that Via developed. Via has powered hundreds of microtransit services across the county, and dozens of cities in California and have used that large data set to build a robust model in their transit planning software, Remix, which can predict ridership for a given area based on the demographic characteristics of that area and observed ridership in similar, nearby locations. They considered Beverly Hills' specific characteristics: compact 5.7 square mile service area, daytime population exceeding 200,000, mix of residential and commercial land uses, Metro D Line connections, and integrated Dial-A-Ride service.

Ridership typically starts lower and grows over time; the 200 daily rides figure represents an average over the two-year pilot.

Why is the proposed service comparable to Rosemead's?

This comparison was made in regard to incorporating Dial-A-Ride services into the microtransit pilot project, therefore it is based on resident population size and not the daytime population. Rosemead has a population of just over 50,000 relative to around 30,000 in Beverly Hills and previously had a stand-alone Dial-A-Ride service, which moved riders at a cost per ride of \$71. Rosemead deployed a microtransit service that shared rides with the Dial-A-Ride service, and the Dial-A-Ride cost-per ride decreased to \$27.

At what point is the wait so long that people stop riding?

Industry experience indicates riders typically tolerate wait times up to approximately 20 minutes before some begin choosing alternative transportation. The proposed service targets a 15-minute average wait with 90% of pickups within 20 minutes.

Via has a team of transit planners that monitors service performance and will identify solutions to address these trends as needed. If demand is higher than expected, they will identify solutions to address this, such as adjusting the logic for which rides are sent to overflow. Over the long-run, it may be recommended to develop fixed routes if we see consistent travel patterns. The benefit of a pilot like this is that we will gather data on where and when people are trying to travel, which can inform ongoing transit planning.

When the program hits the not-to-exceed amount, what happens? Are you increasing the fixed cost and cost per ride?

The not-to-exceed amount would not be exceeded without Council authorization, nor would service be cut back without notice. If demand exceeds capacity, wait times would increase. Via and City staff would continuously monitor demand and provide Council with regular performance reports well before any capacity issue requires decision. Council could then choose to expand service capacity, adjust service parameters (such as through a truncated operating schedule), or accept longer wait times.

AUTONOMOUS VEHICLE INTEGRATION

When is it more efficient to service rides with Waymo?

Via's system will be able to intelligently deploy the most cost effective way to serve a ride. In some situations, it may be less expensive for the city to have a trip dispatched to Waymo vs. the

dedicated fleet. The system will be able to dynamically weigh this tradeoff. To give an example, a trip near the edge of the city that is unlikely to be matched with another trip may be less expensive to serve with a Waymo than the dedicated fleet. Additionally, Waymo can help provide extra capacity at peak periods where there is heavy demand for the dedicated fleet.

Do Waymo overflow rides in the system stop to pick someone up going the same direction?

Waymo's policy does not offer shared rides. As the autonomous vehicle industry evolves, shared-ride capability may become available, at which point the Via-Waymo partnership could expand to include shared autonomous trips. Having an established partnership positions Beverly Hills to incorporate this capability when available.

Would the City be able to layer other technology, including public safety technology that could be a part of an integrated system?

Yes, the vehicles' video feeds to the BHPD Real Time Watch Center already support public safety. Future phases could incorporate additional technology consistent with applications, such as license plate readers and roadway condition monitoring, could be added in future contract iterations subject to additional cost analysis and Council direction.

IMPLEMENTATION AND RISK

Marketing and Community Outreach

How will the City promote the program, given the low utilization of the Dial-A-Ride service?

A comprehensive marketing strategy and branding would be developed by Via's in-house marketing team working with the City's Public Information Team prior to launch, including resident outreach (direct mail, website, social media, newsletter), targeted community engagement events at Metro stations, senior outreach (in-person sessions at the Active Adult Club, one-on-one training, phone-based support, large-print materials), visitor outreach (hotel partnerships, concierge programs), and employee outreach (e.g., Chamber of Commerce). These efforts are already included in Via's cost proposal.

Is technology the only way for someone to request service? Is there a way for someone to call instead?

Via also provides 24/7 phone-based customer support for booking and assistance for those who prefer to call for service. Smartphone app and phone-based booking are available to all users.

How will abuse be managed? How can the City provide oversight of who is using the service and how it's being utilized?

Riders have to create an account to ride with the service, ensuring Via knows who each passenger is. All vehicles are equipped with cameras, which both deter bad behavior and allow us to investigate any incidents that occur in the vehicle. Drivers are trained with deescalation tactics, with protocols on how to handle difficult riders. Should a rider break the terms of use, we have the ability to ban that rider's account and block any future accounts from being created on their device.

Contract Terms and Risk Management

Would this be a two-year commitment? Is that recommended by staff?

Staff and the Traffic and Parking Commission recommended at least 18-months, but preferably a two-year pilot period, to provide sufficient time to build community awareness of the service, adapt to actual demand patterns, and gather data needed to make an informed decision about whether to continue the service permanently. The contract includes standard termination provisions, so the City is not locked into the full two-year period if circumstances warrant ending the pilot earlier.

If after a year the City chooses not to continue, is the cost amortized or is it exactly half the cost of the \$3.1 million?

All City contracts include termination provisions allowing the City to discontinue service with appropriate notice. If terminated early, the City would pay only for services actually delivered up to the termination date. The upfront setup costs (~\$112,000) are incurred regardless of pilot duration but represent a small portion of total contract value. Unused contracted hours in the second year would not be paid.

Liability and Legal

Since the vehicle would be branded Beverly Hills but is operated by an independent contractor, what would be the City's potential liability if involved in a crash?

The contract will include standard provisions to protect the City: full indemnification by Via for claims arising from service operations, commercial auto liability and general liability insurance with the City as additional insured, and insurance limits consistent with City standards for transportation contractors. While these provisions provide substantial protection, the City may still be named in litigation as with the existing transit services and any other City service.

If vehicles start conducting additional municipal activities (ex: license plate readers and cameras to evaluate roadway conditions), would that potentially increase the City's chances of being held liable?

Adding additional technologies in future phases can be explored through contract amendments with appropriate liability provisions and insurance adjustments in consultation with the City Attorney and City's Risk Manager.

NEXT STEPS

There are several options that City Council can consider regarding next steps for the proposed microtransit pilot:

1. Proceed with the proposed two-year microtransit pilot with a passenger fare between \$1-5, as determined by the Council.
2. Proceed with the proposed two-year microtransit pilot, but with a passenger fare of \$5 to allow committing \$1-2 million of current Prop A funds to other eligible transit uses, such as bus shelters, rider amenities, or the Public Safety Center (currently under construction).
3. Do not proceed with a microtransit pilot.

ATTACHMENT 1



STAFF REPORT

Meeting Date: May 5, 2026

To: Honorable Mayor & City Council

From: Daren Grilley, PE, PTOE, Assistant Director of Public Works/City Engineer
Martha Eros, Transportation Planner

Subject: Microtransit Pilot Project

Attachments:

1. City Council/TPC Liaison Committee Staff Report, August 22, 2023
2. Request for Proposals No. 25-350-7
3. Key RFP Requirements
4. Protest from Circuit, Inc., February 12, 2026
5. Via Transportation Proposal [redacted]

INTRODUCTION

The City's adopted Complete Streets Plan includes goals and policies for exploring a fast, reliable local transit system with connections to the Metro D (Purple) Line subway stations planned to open along Wilshire Boulevard in 2026 and 2027. With the absence of convenient parking at both Metro subway stations, interest in local transit connections is expected to be high when the stations become operational.

The City's adopted Climate Action & Adaptation Plan also recommends developing a locally operated transit system to help shift away from single-occupancy vehicles and reduce carbon emissions. These planning documents establish clear policy direction for the City to explore municipal transit options that complement the regional Metro network.

This report summarizes the City's transit needs assessment, explains the microtransit service model, presents the results of a competitive procurement process, outlines the proposed pilot program, and describes dedicated transit funding currently available to fully fund the program.

BACKGROUND

Transit Needs Assessment Study

Following direction from City Council at their March 15, 2022 Study Session, staff initiated a study of a potential local transit shuttle system. Kittelson & Associates was retained to conduct a comprehensive Transit Needs Assessment Study to determine whether current and future planned transit services are sufficient to support the needs of Beverly Hills residents, workers, and visitors.

To better understand demand, City staff and the Kittelson team held public workshops with interactive mapping exercises and conducted an online survey, receiving over 400 responses from residents, workers, and visitors. Kittelson also analyzed existing regional and local transit use patterns and interviewed peer agencies (LA Metro, West Hollywood, Culver City) regarding their transit operations to inform a potential transit system in Beverly Hills.

Study Findings and Recommendations

The assessment identified significant unmet transit needs and strong community interest with nearly 75% of respondents expressing current or future interest in using transit within Beverly Hills. Primary service gaps include lack of north-south connectivity, infrequent local circulation (e.g., some routes operate only once per hour), and missing connections to key destinations such as schools, parks, medical facilities, and the Golden Triangle business district. Top barriers to transit use include unreliable/slow service, confusing transfers, limited coverage, and system complexity. Community mapping identified high-demand destinations, including the Business Triangle, City facilities, schools, parks, medical facilities, and major shopping areas. Only 35% of current transit riders rated existing service as "good" or "very good" with most rating it as "fair."

The Kittelson study recommended a pilot fixed-route transit service in the southern portion of the city with a complementary demand-based microtransit program in the northern portion that would serve both commercial and residential areas. The study concluded that Beverly Hills is well-suited for microtransit service due to its compact urban form, strong street grid pattern in much of the city, mix of land uses providing consistent all-day travel demand, and need for flexible service to complement fixed-route regional transit. The study also emphasized the critical importance of ensuring connections to the future subway stations to maximize the effectiveness of the regional transit investment and provide first/last mile connectivity for residents and visitors. As part of the study, the City conducted a one-day demonstration of a fixed-route circulator service to evaluate operational feasibility.

Previous Liaison Committee Direction

In August 2023, the City Council and Traffic and Parking Commission Liaison Committee reviewed the study results (Attachment 1) and determined that a point-to-point, on-demand service would better serve the community's diverse travel needs compared to a fixed-route model with scheduled stops and limited flexibility. Staff was directed to research on-demand, point-to-point transportation options such as microtransit or partnering with Transportation Network Companies (TNCs) like Uber or Lyft to provide greater destination coverage and scheduling flexibility while maintaining the connectivity goals identified in the needs assessment.

What Is Microtransit?

Microtransit is a technology-enabled transit service that provides flexible, on-demand shared rides within a defined service area. Unlike traditional fixed-route transit with predetermined schedules and stops, microtransit – a system which adapts to the needs of the commuter – uses dynamic routing algorithms to match multiple passengers traveling in similar directions and optimize vehicle routes in real-time based on trip requests. Riders book trips via smartphone app, website, or phone, are picked up at or near their location, and are dropped off at their destination with the service intelligently grouping trips to maximize efficiency.

The microtransit concept emerged in the mid-2010s as advances in smartphone technology, GPS tracking, and algorithmic optimization made it feasible to provide shared-ride services at scale. Cities began piloting microtransit as a solution to the "first mile/last mile" problem—connecting residents to major transit hubs—and to serve lower-density areas where traditional fixed-route

service is cost-prohibitive. Microtransit differs from TNCs in that it prioritizes shared rides, operates within defined zones, serves the public interest, and is managed and typically subsidized by public agencies to ensure equitable access and affordable fares.

Today, microtransit services operate in hundreds of cities across the United States, from major metropolitan areas to smaller suburban communities. The service has proven particularly effective in compact urban environments with diverse destinations and integration needs with regional transit networks.

Microtransit could provide on-demand service dedicated to taking residents, visitors and workers to and from the subway stations and any location in Beverly Hills. With a daytime population upwards of 200,000, a microtransit service could be an effective tool to reduce traffic congestion associated with non-residents entering the City.

DISCUSSION

Request for Proposals and Evaluation

On November 15, 2024, the City released Request for Proposals (RFP) No. 25-350-7 for Microtransit Turnkey Services (Attachment 2). The RFP sought qualified transportation contractors to develop and implement a flexible transit service for a pilot program in the form of mobility-on-demand or microtransit services for public use within the City of Beverly Hills. The key RFP requirements are summarized in Attachment 3.

Seven qualified proposals were submitted. The evaluation team comprised of staff from Public Works, Community Services, Policy and Management, and Police, who reviewed and scored all proposals.

The City utilized a qualifications-based selection approach, which is standard for professional services contracts and complex operational services like microtransit. Proposals were first evaluated based on qualifications, experience, approach, and technical merit without consideration of cost. Cost information was provided separately by each proposer and was not shared with evaluators during the initial evaluation. After identifying the most qualified proposer(s), cost proposals were reviewed for reasonableness and competitiveness.

Proposals were evaluated using the following weighted criteria:

1. History and capacity to perform the service (15%);
2. Qualifications and experience with similar programs (15%);
3. Familiarity with and proximity to the program area (10%);
4. Proposed program approach and schedule (30%);
5. Proposed technology and fleet (20%); and
6. References from programs of similar size and scope (10%).

The three highest-scoring firms (Circuit, MV Transportation, and Via Transportation) were invited for oral interviews. Based on the proposals and interviews, the evaluation team agreed unanimously that Via emerged as the clear leading candidate based on comprehensive evaluation across all criteria. Via is the largest microtransit provider in the nation, working with more than 30 agencies in California, including many cities in this area such as Los Angeles, Torrance, Calabasas, and West Covina. Via offers a unique combination of unified technology and operations platform, strong local LA County presence, and proven track record of securing grant funding for peer agencies.

On February 12, 2026, staff received a letter from Circuit, Inc., protesting the award of a contract for microtransit services (Attachment 4). While the evaluation process was completed several months ago, Circuit argues that they should be allowed to provide updated information about their services for reconsideration. The City Attorney's office has reviewed this protest and determined that the process being followed is consistent with the provisions in the RFP and that the City is not obligated to allow a protesting vendor to submit additional information or reopen the proposal process.

Proposed Service

For the proposed Microtransit Pilot Project, Via would deploy a turn-key shuttle service with on-demand, shared rides that would be dynamically routed in response to demand. Via would provide all aspects of the service, including vehicles, drivers, operations, technology, data analytics, and customer support. Riders would book rides through a customized smartphone application, through a web booking platform, or by phone with 24/7 live customer support. Via's platform allows riders to plan trips that seamlessly connect with existing Metro fixed-route bus service, as well as the upcoming D Line subway. Support for multiple languages and ADA accessible communication would be provided.

Via proposes a "corner-to-corner" service model for the general public with automatic "curb-to-curb" service for seniors and riders with disabilities. In corner-to-corner service, riders typically walk a short distance to the nearest key intersection for pickup and drop-off. This maximizes efficiency by keeping vehicles on major streets, avoiding time-consuming navigation through residential areas and driveways, enabling more riders to be served per hour and reducing trip times. For seniors and riders with disabilities, the system would automatically provide curb-to-curb service with vehicles brought directly to their specific address.

The proposed vehicle fleet would consist of four zero-emission electric vehicles with seating for 7-10 passengers, including two wheelchair accessible vehicles (WAVs). A fifth vehicle would be available as a spare to ensure service reliability. The vehicles would be marked or wrapped with City-approved branding and equipped with bicycle racks. It is anticipated that the vehicles would be charged using existing infrastructure within or near Beverly Hills.

Service Hours and Performance Expectations

The proposed service would operate seven days per week, year-round, initially from 6 AM to 10 PM daily, providing 16 hours of service each day. This extensive operating schedule is designed to accommodate diverse travel needs, including morning and evening commutes, midday errands, medical appointments, recreational activities, and evening dining and entertainment. The service would cover the entire 5.7 square mile area of the City with priority connection points at the D Line subway stations along Wilshire Boulevard.

Via projects the pilot project will serve approximately 200 rides per day once established. The service is designed to achieve an average wait time of 15 minutes with 90% of pickups occurring within 20 minutes of request. Fleet deployment would consist of up to four vehicles on weekdays and three on weekends, adjusted based on demand.

Safety and Security

Passenger and driver safety is critically important and would be addressed through a multi-layered security approach that exceeds standard transit safety practices. Via's drivers would undergo extensive background checks, DMV record review, and drug testing before hire. Driver training includes de-escalation techniques, conflict resolution, and passenger safety protocols in partnership with nationally recognized organizations including the National Safety Council and

Community Transportation Association of America. All vehicles will be equipped with multiple security cameras that provide continuous recording and GPS tracking. Via uses these systems to support continuous AI-assisted driver coaching and proactive safety programs ensure ongoing adherence to the highest safety standards.

City staff, including the IT Department, have met with Via's technical team to develop solutions to ensure that live video feeds from all vehicles will be streamed directly to the Beverly Hills Police Department (BHPD) Real Time Watch Center. This integration will provide BHPD with real-time visibility into all microtransit vehicles, enabling immediate response to safety incidents and enhancing overall public safety.

Data Collection and Analytics

Via collects operational data, including vehicle locations, trip requests, passenger origins and destinations, wait times, and completion rates. This data is used in real-time to route vehicles efficiently and adjust deployment based on demand patterns.

City staff will have continuous access to a performance dashboard showing daily ridership, average wait times, on-time performance, customer satisfaction, service area usage, vehicle miles traveled, and estimated emissions reductions. All data can be downloaded for City analysis. Via will provide monthly performance reports and quarterly meetings with staff to review service performance and recommend adjustments.

This data will allow staff to monitor contractor performance against service standards, identify areas or times needing service adjustments, and provide information for City Council when considering continuing, modifying, or expanding the service beyond the pilot period.

Via's full proposal is included as Attachment 5.

Recent Liaison Committee Direction

On January 7, 2026, the City Council/TPC Liaison Committee (then Vice Mayor Corman, Councilmember Friedman, Commission Chair Gellar, and Vice Chair Schwartz) received a report on the potential microtransit program and provided feedback on the proposed service. The Committee identified several considerations for full City Council discussion and directed staff to further develop three key aspects of the proposal before Council consideration: integration with the Dial-A-Ride program, potential Waymo partnership capabilities, and optimal launch timing relative to Metro D Line station opening.

First, the Liaisons wanted to consider absorbing the City's Dial-A-Ride program into the pilot microtransit service to reduce costs. The Dial-A-Ride shuttle provides free curb-to-curb, shared-ride transportation for Beverly Hills residents aged 62 and above or residents with disabilities of any age and transports passengers to any location within the city, as well as nearby hospitals and supermarkets outside City limits. The Dial-A-Ride program currently costs approximately \$490,000 per year¹, which breaks down to approximately \$85 per ride (compared with \$21 per ride projected for the microtransit pilot). The cost savings associated with incorporating Dial-A-Ride, as well as elimination of the current senior on-demand ride subsidy (approximately \$80,000 per year), is discussed further in the Fiscal Impact section below.

Because of the similarity in service models and opportunity to reduce the cost per ride through comingling services, cities with microtransit programs have started to operate their Dial-A-Ride

¹ After expiration of the current Dial-A-Ride contract, the annual cost may increase due to increased costs of labor vehicle maintenance.

programs through microtransit. To ensure seniors are prioritized, they are allowed to pre-book rides while the service remains on-demand for microtransit customers. While incorporating the City's Dial-A-Ride into microtransit would also allow for evaluation of the comingled service during the pilot period, if microtransit is not deemed successful or is canceled for some reason, the City would need to begin a new procurement process to replace the Dial-A-Ride service. Staff presented the concept of absorbing the Dial-A-Ride program to the City's Active Adult Club, which offered their support.

Second, the Liaisons asked about potential integration of Waymo into the microtransit program. In late 2025, Via announced a partnership with Waymo as part of the City of Chandler, Arizona's microtransit service² to maintain high quality performance during periods of high demand. During these busier times, the algorithm determines if it would be more cost-effective to match certain riders, such as those with origins/destinations not aligned with other passengers' routes, to solo, point-to-point Waymo trips.

When the City's microtransit RFP was issued in late 2024, the City invited Waymo to respond, but they declined because public transit is not part of their service model. While that remains true today, the City could deploy a Via-Waymo partnership similar to their Chandler, Arizona operations that would allow Via's routing technology to incorporate Waymo's vehicles into its existing fleet, specifically during peak times. All trips remain algorithm-assigned; riders cannot directly request autonomous or private trips. This capability supports consistent service standards during high-demand periods while reinforcing the City's goals to promote shared transit and reduce single-occupancy vehicle trips.

Finally, while Via has indicated that they could begin the implementation phase immediately with launch of service within eight weeks of approval, one Council Liaison suggestion was to consider delaying the launch of the potential pilot program up to six months after the opening of the Wilshire/La Cienega station to provide a clearer picture of first/last mile needs. Another Liaison suggested that delaying the launch might lead to missed opportunities if potential riders perceive taking the subway to be infeasible without a first/last mile connection and rule out transit as an alternative to driving.

Next Steps

If supported by City Council, staff would work with Via to finalize recommendations for the pilot service – such as fare structure, operating parameters, performance measures, marketing, and security logistics with BHPD – and return for City Council feedback, if requested. Marketing, vehicle branding, and public outreach would be closely coordinated with the City Public Information Team.

Additionally, if City Council direction includes incorporating the Dial-A-Ride program into the microtransit pilot, staff would conduct targeted outreach, including one-on-one training, to current Dial-A-Ride customers to help create a seamless transition.

FISCAL IMPACT

Funding

The current Proposition A (Fund 300) balance of approximately \$4.8 million, combined with annual Proposition A revenue and projected farebox revenue, is sufficient to fully fund not only the two-year pilot, but up to four additional years of service beyond the pilot period (2032),

² <https://www.chandleraz.gov/news-center/city-chandler-partners-waymo-and-bring-avs-chandler-flex>

assuming absorption of the Dial-A-Ride program. This provides substantial financial foundation to establish the service, build ridership, and pursue additional funding sources.

The proposed two-year pilot project would be funded using Proposition A revenue—a permanent half-cent countywide sales tax approved by voters in 1980 that is restricted exclusively to fund public transit. The City receives approximately \$840,000 in Proposition A funds annually. The recommended integration of the Dial-A-Ride program into the microtransit service (discussed below) would free up approximately \$480,000 annually. Microtransit would also absorb the current Senior On-Demand (Lyft) subsidy the City provides, saving an additional \$80,000 annually.

Recommended Integration of Dial-A-Ride Program

Due to the low number of average daily rides currently served by the City's Dial-A-Ride program, Via's pricing proposal can absorb Dial-A-Ride without an increase to the proposed cost. In 2024 and 2025, the Dial-A-Ride service averaged 15-16 rides per day with an annual cost of \$478,479 and \$487,867 respectively (approximately \$85 per ride). By absorbing the Dial-A-Ride program into the microtransit service, the cost to serve Dial-A-Ride customers would drop significantly from approximately \$85 to around \$20 per trip.

Farebox Revenue

Microtransit fares in the US typically range from \$1 to \$5 for a one-way trip. Using an assumed \$2 fare and ridership increasing to 200 daily rides, Via estimates potential fare revenue could reach \$195,000 over the two-year period. Per the terms of the RFP, fare revenue will either be credited back to the City to reduce net costs or reinvested in service enhancements at the City's discretion. City Council may choose a higher or lower fare as well as a free promotional period to encourage riders to try the service. If Dial-A-Ride is incorporated into the pilot, rides would be free for residents aged 62 and above as well as residents with disabilities of any age.

Costs

Via's pricing proposal is structured as a pay-as-you-go model based on vehicle service hours. The first-year cost is estimated at \$1.6 million, which includes operational costs plus \$112,000 in one-time upfront costs for technology installation, vehicle retrofits, and branding. Year two operational costs are estimated at \$1.5 million. The total two-year pilot program cost is approximately \$3.1 million with an average hourly rate of \$89 per vehicle hour. (For comparison, the other two firms interviewed provided two-year cost proposals of \$2.9 million and \$5.8 million.)

The upfront costs cover technology platform configuration, wheelchair accessible vehicle retrofits, custom vehicle wraps, and launch preparation. Monthly operational costs average \$125,000 in year one and \$128,000 in year two, covering all aspects of service delivery, including vehicle lease and maintenance, driver wages and benefits, insurance, fuel/charging, customer service, technology platform, and ongoing marketing support.

Based on the projected ridership of 200 rides per day over the two-year period (approximately 146,000 total rides), the estimated cost per ride is approximately \$21. The actual cost per ride will be higher during initial ramp-up months when ridership is lower and is expected to decrease as the service becomes established and ridership grows.

Comparison to Other Transit Service Costs

This cost per ride is comparable to similar services; for example, LA Metro's Metro Micro program operates at approximately \$30 per ride according to the 2022 Transit Needs Assessment Study conducted by Kittelson & Associates.

Like transit systems throughout California and the nation, the proposed microtransit pilot requires significant taxpayer subsidy. California transit systems collectively operate at approximately 10% farebox recovery³, meaning fare revenue covers only one-tenth of operating costs. The Beverly Hills pilot's estimated cost structure is consistent with industry norms for on-demand transit services.

The primary justification for public transit investment is not financial return, but rather the public benefits of reduced traffic congestion, lower greenhouse gas emissions, improved mobility for residents and visitors without vehicles, economic vitality through enhanced access to businesses, and fulfillment of the City's adopted Complete Streets and Climate Action goals. The pilot project data collection will enable the City to quantify these benefits and assess whether the public value justifies the ongoing investment.

Future Funding

As stated above, dedicated transit funds are available to fund microtransit for up to six years. Staff would use the pilot period to actively pursue grant funding and other revenue sources to fund ongoing operation. Via's grants team has successfully secured \$8.5 million for Cupertino and \$3.2 million for Richmond. The comprehensive pilot data would strengthen Beverly Hills' applications for similar competitive grants to support long-term operations.

RECOMMENDATION

Staff recommends that City Council provide direction on next steps for the potential microtransit pilot project.

Shana Epstein,
Director of Public Works

Approved By

³ Marc Joffe and Athan Joshi, "The Cost of Transit in California," California Policy Center, January 2025.

Attachment 1



CITY OF BEVERLY HILLS
PUBLIC WORKS DEPARTMENT
MEMORANDUM

TO: City Council and Traffic and Parking Commission Liaison Committee

FROM: Daren Grilley, Assistant Director/City Engineer
Martha Eros, Transportation Planner

DATE: August 22, 2023

SUBJECT: Beverly Hills Transit Feasibility Study

ATTACHMENT:

1. November 14, 2022 City Council Traffic and Parking Commission Liaison Committee Memorandum (Excerpt)
2. Proposed Transit Fixed-Route Circulator

RECOMMENDATION

Staff recommends that the City Council and Traffic and Parking Commission Liaison Committee (Liaison Committee) receive progress updates on the Transit Feasibility Study and provide feedback and direction to staff on next steps for a potential pilot transit program consisting of a combination of a fixed-route circulator and citywide on-demand microtransit system.

INTRODUCTION

The adopted 2021 Complete Streets Plan includes goals and policies for exploring a fast, reliable local transit shuttle with connections to the upcoming Metro D (Purple) Line subway stations. With the absence of convenient parking at both Metro subway stations, interest in local transit connections is anticipated when the subway stations open in the future. The draft Climate Action & Adaptation Plan also recommends developing a locally operated transit system to help shift away from single-occupancy vehicles and reduce the length of vehicle trips.

A transit needs assessment, including public surveys and outreach, was conducted between July and September 2022. The findings were presented at the October 6, 2022, TPC meeting and the Commission supported the recommendation to develop a pilot project for City Council to consider that would consist of one fixed circulator route operating with high frequency (e.g., 15-minute headways) south of North Santa Monica Boulevard, along with demand-based microtransit that would serve residential areas.

This information was reported to the Liaison Committee on November 14, 2022 (Attachment 1). Vice Mayor Gold, TPC Chair Ignarro and Vice-Chair Shalowitz were in attendance; Councilmember Mirisch recused himself. At that meeting, staff received direction to proceed with additional community outreach to receive feedback on a draft transit route and shuttle stops on commercial and/or residential public right-of-way.

DISCUSSION

Second Public Survey

Staff released a second Transit Circulator Pilot Program Survey the week of December 5, 2022, to gather feedback on the proposed route and stops. Following the same outreach plan for the

feasibility planning phase, the City's Communications team engaged in multiple layers of outreach to solicit participation in the transit survey and attendance at virtual and in-person community meetings. The outreach included newspaper ads, citywide mailings, email blasts, posted signs at transit stops, promotion at City meetings and special events, social media posts, and informational flyers at public counters and on the City's Senior Dial-A-Ride vehicles.

Staff provided a summary of the 113 responses at the January and February 2023 TPC meetings. Highlights include:

- 60% indicated interest in using a local public transit system in the future,
- 41% focus on on-time and reliable service,
- 38% importance of short distances between stops, and
- 48% will use service for recreation, 48% work/commuter, 22% travel.

Write-in comments included the omission of Roxbury Park, the high school, and residential areas in the southwest and north of North Santa Monica Boulevard; attractive bus stop amenities; and duplicating existing Metro bus operations.

Demonstration and Test Runs

Multiple test runs by staff were conducted to test AM and PM peak-hour and non-peak travel times on random days and times, as well as identify stop locations. Based on public input and test run experiences, a fixed-route circulator was developed (Attachment 2).

On March 2, 2023, a transit circulator demonstration was performed from 9 AM to 4 PM to allow community members to get a feel for how a local transit system could operate and to provide additional feedback on the future pilot project.

The demonstration consisted of two City shuttles traveling, each traveling in opposite directions with 21 stops. Each full loop took approximately 35-40 minutes to complete depending on traffic conditions; occasional blockage of a bus stop zone by private passenger vehicles was encountered during operations. Additionally, one run was conducted in the Flats neighborhood, north of North Santa Monica Boulevard via North Rexford and Beverly Drives, to evaluate road grade, potential bus stops on residential street blocks, and distance and timing for a potential northern loop; the loop without stops took approximately 25 minutes.

Phased Implementation Options

The pilot shuttle system could be implemented in phases by adding the southwest area of the city connecting to Beverly Hills High School and Roxbury Park at some point during the pilot period. The proposed demand-based pilot microtransit system is intended to serve all areas of the city based on availability. Although the proposed pilot route runs alongside existing Metro bus lines, frequency and connections between Metro bus stops can take 30-50 minutes in certain areas and may require multiple transfers to reach a local destination, thus the goal of a local shuttle system is to increase frequency for shorter bi-directional trips.

Direction Requested

Staff seeks direction on implementing a pilot transit system, including:

1. Continue planning the implementation of a two-year pilot transit system.
 - Combination of circulator and microtransit (recommended by TPC and staff)
 - Circulator only
 - Microtransit only

2. Postpone implementation to coordinate with opening of the Metro subway system.
3. Cease further evaluation of a local transit system.

FISCAL IMPACT

Preliminary Cost Estimate

The initial estimated costs described in Kittelson’s *Draft Transit Needs Assessment Study Technical Memorandum* was approximately \$3.5 million. That figure was based on transit industry standards and a desired 15-minute headway for fixed-route shuttle and on-demand microtransit services for a one-year pilot program.

Revised Preliminary Cost Estimate

The data gathered from the demonstration was used to determine service frequency, number of vehicles needed to meet demand and refine the preliminary cost estimates. The following revised cost estimate range for the elements of the proposed pilot program was prepared by staff in consultation with other agencies and the executive management team of the City’s current transit contractor:

- Circulator Fixed-Route and On-demand Microtransit: \$ 3.5-4.5 million
- Circulator Fixed-Route Only: \$ 3.0-3.7 million
- Microtransit On-demand Only: \$ 500,000-800,000

DRAFT	Fixed Route	Microtransit	Both
Vehicles	14*	2	16
Operation	3	0	3
Maintenance	3	0	3
Administration	2	1.5	2
Drivers*^	TBD	TBD	TBD
Fuel	TBD	TBD	TBD
Technology	TBD	TBD	TBD

* 15-minute headway each direction

*^ Full- and Part-time shifts

Factors affecting the actual costs include the general operation and administrative costs by a professional transit provider, type and number of vehicles to operate an effective system with the desired 15-minute frequencies, transit stop improvements. The cost estimate does not include potential future infrastructure improvements to support alternative (i.e., electric) fuel vehicles. Purchasing and contracts associated with the pilot program will follow City solicitation and procurement policies.

Funding for a pilot program is available for one-year only using a combination of local return transportation funds, including Proposition A and Measure M funds. All local, state and federal transportation funding requires that services be open to the general public without discrimination and cannot be exclusive to one subset of the population.

Depending on the option selected and the duration of the pilot program, additional funding appropriation will be necessary for fiscal year 2024/25 and beyond. Additional study will be required to understand the capital and operations financial needs and revenue options to sustain a long-term, ongoing transit system.

ATTACHMENT 1



CITY OF BEVERLY HILLS
PUBLIC WORKS DEPARTMENT
MEMORANDUM

TO: City Council and Traffic and Parking Commission Liaison Committee

FROM: Daren Grilley, Assistant Director/City Engineer

DATE: November 14, 2022

SUBJECT: Beverly Hills Transit Feasibility Study and Neighborhood Traffic Calming Program Update

ATTACHMENT:

1. October 6, 2022 Transit Feasibility Study Report
2. November 3, 2022 Neighborhood Traffic Calming Program Report

RECOMMENDATION

Staff recommends that the City Council and Traffic and Parking Commission Liaison Committee receive progress updates on the Transit Feasibility Study and Draft Neighborhood Traffic Calming Program (NTCP), and provide feedback and direction to staff on next steps for each of these initiatives.

INTRODUCTION

On April 20, 2021, the City Council adopted the Complete Streets Plan that includes goals and policies that will guide the City in building a safe, convenient and environmentally responsible transportation system serving multiple modes of travel, including driving, walking, cycling and transit (www.beverlyhills.org/completestreets). Goals of the Complete Streets Plan include:

- Providing First/Last Mile Connections
- Improving Transit Rider Experiences
- Increasing Transit Ridership
- Supporting Safe, Complete, Livable, Sustainable and Quality Neighborhoods

Specific policies in support of these goals include exploring a fast, reliable **transit shuttle** with connections to the upcoming Purple (D) Line subway stations and developing a comprehensive **neighborhood traffic calming** toolbox for residential neighborhoods.

This report summarizes the progress towards implementing these policies.

DISCUSSION

Transit Feasibility Study

At their March 15, 2022 study session, the City Council directed staff to begin developing a transit service plan with the Traffic and Parking Commission (TPC) as the advisory body. With the assistance of the transportation consulting firm, Kittelson & Associates, Inc., a transit needs assessment, including public surveys and outreach, was conducted between July and September 2022.

The findings of the Transit Study were presented at the October 6, 2022 TPC meeting (Attachment 1). The Commission supported the recommendation by staff and Kittelson & Associates to

develop a pilot project for City Council to consider that would consist of one fixed circulator route operating with high frequency (e.g. 15-minute headways) south of North Santa Monica Boulevard, along with demand-based Microtransit that would serve residential areas.

Staff is refining the proposed circulator route, including potential stops, which will be presented to the public for input in November-December. A detailed outline of the proposed transit pilot project will be presented to the TPC in January, followed by the City Council. If supported, an RFP would be issued with the goal of beginning operation of a 12-24 month long pilot project by June 2023.

Neighborhood Traffic Calming Program

At the October 7, 2021 TPC meeting staff presented 16 potential traffic calming measures to consider including in the City's Traffic Calming Toolbox, which serves as a resource to identify traffic calming options that are applicable to address the traffic-related concerns in a specific location. The TPC supported inclusion of all measures as potential options for neighborhoods to request on their streets.

At the May 5, 2022 TPC meeting, staff presented industry best practices in NTCPs, as well as policies, procedures, and considerations from the peer cities of Hayward, Glendale, and Encinitas to inform development of a NTCP for Beverly Hills. The Commissioners provided feedback on project initiation, screening, thresholds of community support, approval, and evaluation, which staff incorporated into the Beverly Hills Draft NTCP.

The Draft NTCP, which combines the traffic calming toolbox with the recommended policies and implementation procedures, was made available for public comment from mid-September through mid-October, and presented to the TPC at their November 3, 2022 meeting (Attachment 2). Commission comments will be incorporated and the Draft NTCP will be brought to the City Council for consideration in early 2023.

Community Outreach

The City's Communications team engaged in multiple layers of outreach to solicit participation in the transit survey and attendance at virtual and in-person community meetings. The outreach—described in detail starting on page 5 of Attachment 1—included newspaper ads, citywide mailings, email blasts, posted signs at transit stops, promotion at City meetings and special events, social media posts, and informational flyers at public counters and on City Dial-A-Ride shuttles.

The City released the Draft NTCP for community review September 16-October 14, 2022 via the project website www.beverlyhills.org/trafficcalming. To get the word out, staff mailed a citywide postcard, distributed a press release, published ads in the newspapers, posted on social media, and emailed community groups. Community members were asked to provide comments via email, phone, or through a form on the website.

FISCAL IMPACT

The fiscal impacts for the Transit Pilot Project and the NTCP are discussed in the attached reports.

Attachment 1



CITY OF BEVERLY HILLS
PUBLIC WORKS DEPARTMENT
TRAFFIC AND PARKING COMMISSION

TO: Traffic and Parking Commission

FROM: Daren Grilley, Assistant Director/City Engineer
Martha Eros, Transportation Planner

DATE: October 6, 2022

SUBJECT: Beverly Hills Transit Feasibility Study

ATTACHMENT:

1. Draft Transit Feasibility Study and Unmet Needs Assessment and Suitability Analysis Technical Memorandum
2. Community Outreach Mailer

RECOMMENDATION

Staff recommends that the Traffic and Parking Commission review the attached draft *Transit Feasibility Study and Unmet Needs Assessment and Suitability Analysis Technical Memorandum* and consider the recommendation to develop a pilot program consisting of a combination of fixed route and microtransit.

INTRODUCTION

At their March 15, 2022 study session, the City Council directed staff to begin developing a transit service plan with the Traffic and Parking Commission (Commission) as the advisory body. At the April 7, 2022 Commission meeting, staff outlined a scope of work for a transit needs assessment analysis to identify opportunities for future transit system connections.

The adopted 2021 Complete Streets Plan identifies first-last mile opportunities for the Metro Purple Line (Line D) subway stations in Beverly Hills, including micro transit systems. Continued support by the Commission and advocacy from the CAC spearheaded the commission of a transit feasibility study to identify appropriate transit systems/services based on current and future transit growth.

DISCUSSION

In June 2022, the transportation planning firm of *Kittelson & Associates Inc.* (Kittelson) was engaged to prepare the transit needs assessment, which will serve as the foundation for the implementation and operation of a citywide transit system.

Fundamental first steps of the transit feasibility study include:

- Gather stakeholder and public input
- Understand transit needs in the community
- Analyze existing transit services to identify gaps/unmet needs
- Identify the goals, objectives and options of new transit service

Community Outreach/Needs Assessment

Two community outreach meetings were conducted in late August/early September with approximately 12 participants attending either the virtual or in-person sessions, and approximately 430 surveys were received in response to a transit survey released on June 20. A summary of the responses include:

- Approximately 28% (118 of 430) of respondents indicated that they are current or past riders of transit within the City; 43% (184) indicated no experience as transit riders and expressed an interest in using public transit in the future; 29% (124) indicated no interest in using public transportation.
- Approximately 35% (41 of 118) of those identifying as transit users rated current transit services within the City as “very good” or “good.”
- Conditions or “barriers” cited against using public transit include the following, from most significant to least significant:
 - Existing transit services take too long or do not run on time
 - Transfers are confusing, time consuming, or costly
 - Public transportation does not operate near (my) home
 - Transit stops are too far from (my) trip origin or destination
- Several travel corridors highlighted by users in the interactive mapping survey:
 - North-South Corridors: Rodeo, Beverly, Canon, Rexford Drives; Robertson Boulevard
 - East-West Corridors: Santa Monica, Olympic, Beverly Boulevards
- Frequent location types cited by users included medical facilities such as urgent cares and Cedars-Sinai Medical Center, parks, public schools, commercial/retail areas (e.g. coffee shops and restaurants), civic centers (e.g. post office, library), and religious institutions.

Westside Transit Operators

In addition to conducting community outreach meetings, the Kittelson team conducted individual interviews with Westside transit stakeholders, including the Cities of West Hollywood and Culver City to gather insight on local transit services serving each community, and with the Metro Westside planning group for NextGen operations and next steps. Each organization indicated transit ridership is trending toward shorter, faster trips with higher frequency.

West Hollywood

The City of West Hollywood operates a combination of fixed route service to supplement the Metro transit network and specialized on-demand service for individuals over 62 years and disabled persons of all ages. In June 2022, the City Council approved a staff proposal to explore a microtransit pilot project to transition away from dial-a-ride system to provide a general-public microtransit service with priority given to seniors and residents with disabilities served by the current dial-a-ride program. While trips will still be offered to qualifying populations for free, West Hollywood plans to charge non-qualifying riders a fare. Since West Hollywood shares a border and a transit contract with Beverly Hills, there is great opportunity to improve connections between the two cities.

Culver City

In 2017, the City of Culver City completed its *Transit Oriented Development (TOD) Visioning Study and Recommendations* report, with a vision of refocusing its mobility planning approach to include all modes of travel, including walking/pedestrians, transit, bicycles, and automobile traffic. As a result of the study, the *MOVE Culver City* project came to fruition with the goal of improving transit connections throughout the City's urban core and Expo Station area, and to improve the bus transit experience to encourage more transit use.

In November 2021, Culver City introduced an electric, low-floor minibus circulator scheduled to run every 10 minutes at peak times and every 15 minutes off-peak. The intent behind the addition of the circulator to the *Move Culver City* pilot project, as well as the use of converted electric passenger vans instead of conventional transit buses, was to help make service more accessible and convenient for residents and reduce the stigma of riding transit. During the school year, additional circulator routes that serve Culver City Middle School and High School are now offered following advocacy and support by the Culver City Unified School District and parents.

Los Angeles County Metro

Following 400+ community outreach events over a two year period, Metro launched its countywide NextGen Plan with the goal of providing 10-minute or less headways and restructuring the bus line network to focus on local service. The four regional Metro lines operating within the Beverly Hills city limits are confined to major arterial streets. To address transit gaps, Metro launched a three-year micro-transit pilot program (similar to a shared on-demand service such as Lyft) to transport riders within 2-3 miles from major transit centers to key destinations. Currently, Metro microtransit service is operating in Westwood to address high student ridership demands.

Service Options for Consideration

Beverly Hills is well-suited for a variety of transit options, with a compact footprint, a grid pattern street network (south of Sunset Boulevard), and a mix of land uses that provides consistent all-day sources of travel demand. In all instances, it is recommended that any service be offered in the form of a limited pilot period under the administration of the City of Beverly Hills. This will offer the City the ability to explore alternatives more quickly and respond more quickly to needs that may not have been able to be considered by this study or in existence at the time of this study. Two complementary options are best suited for consideration of a City-managed transit service pilot project:

- Fixed-route transit
- Microtransit

Fixed Route

Fixed route transit operates like conventional public transportation as seen within Beverly Hills today provided by Metro, operating defined routes on defined schedules, serving defined stops. Public input received over the course of the study indicates that public interest is for fast connection into the upcoming Metro D (Purple) Line stations scheduled to open in calendar year 2024 on Wilshire Boulevard at La Cienega Boulevard and Rodeo Drive. The greatest transit circulation need within the community is for north-south connectivity, as identified through community input and LA Metro peer discussions (Attachment-1, Figure 7).

Fixed-route transit propensity is greatest from Santa Monica Boulevard to the south of the city, as the intensity of commercial activity and greater relative density provides the concentration of residents and commercial points of interest that offers the greatest potential ridership base.

The residential land use patterns north of Santa Monica Boulevard are traditionally associated with lower all-day transit propensity and utilization, and it is not evident through public outreach

that there is an unmet demand in this portion of the city. To ensure citywide transit opportunities, this area may be better served by alternative service, such as microtransit (discussed below).

From the community survey and public workshop feedback in addition to lessons learned from Culver City, there is also evidence to suggest time-limited fixed route service could be effective during morning and afternoon peak-hour activity to connect parts of the city with the greatest concentrations of enrolled students to Beverly Hills High School. Additionally, exploring extended fixed-route, commute-oriented service to connect the Flats region to the upcoming Metro D Line stations as part of a pilot program may be considered for future testing.

Microtransit

Microtransit is an emerging technology option that offers promise for geographies/terrain more challenging for fixed-route transit or defined zones with lower densities adjacent to areas otherwise favorable for a more conventional transit service, utilizing new technologies to offer on-demand routing between more widely spaced origins and destinations using smaller transit vehicles.

Within Beverly Hills, a microtransit pilot is likely to be the most successful service strategy for portions of the city north of Santa Monica Boulevard. Depending on the limitations of any prospective partner (app) platform, it may be possible for the full portion of the city north of Santa Monica Boulevard to be served by a single microtransit zone.

As with fixed-route transit, network connectivity is critical to the success of any transit service, and limited specific connections into the regional network outside of the microtransit zone would be strongly advised, such as incorporating the future Metro D Line stations along Wilshire Boulevard as exclaves of the microtransit zone. If evidence of peak commute-oriented demand exists within the microtransit zone, it may be more efficient to instead operate peak service along a fixed route to more efficiently capture demand and reduce overall trip times.

Next Steps

Based on the study recommendations, staff recommends developing a pilot program consisting of a combination of fixed route and microtransit service. If the Commission supports this recommendation, or similar variation of services, staff will move forward with developing details for the following considerations:

- Route(s) and stop locations
- Operating hours
- Performance standards (service frequency, safety issues, stop amenities, etc.)
- Safety standards (in consultation with the Police Department)
- Vehicle types, passenger capacity, and power options

Staff would conduct additional outreach to get feedback on these details before returning to the Commission, tentatively in December 2022, for review and recommendation to the City Council.

Public Outreach

The City's Communications team engaged in multiple layers of outreach to solicit participation in the transit survey and attendance at the virtual and in-person community meetings, including:

Ads in BH Courier, BH Weekly, and BH Press (transit survey participation and community outreach meetings)	Beverly Hills Unified School District and PTA social media posts and partnership
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City social media posts, including a personal re-post by Councilmember Nazarian	E-blast notices to approximately 1,200 Complete Streets email subscribers
Citywide mailer announcing community meeting dates and survey information to all households and businesses	Promote on landing page of City website, calendar of events and project page (www.beverlyhills.org/transitstudy)
Post information flyers at 20 high-use Metro bus stops along Wilshire Blvd and Beverly Drive	Promoting project at City events, including the Climate Action Committee Movie Night, Concerts on Canon series, Sunday Farmers' Market
TPC monthly updates and public comment forum	Public Works Commission presentation
CAAC Advisory Committee updates	Beverly Hills Active Adult Club (BHAAC) board presentation
Metro Purple Line monthly community outreach meeting	Posted flyers on senior Dial-A-Ride shuttles
Information flyers distributed at all city public counters	Internal City employee newsletter and emails

A total of 430 surveys were submitted as a result of the extensive public outreach. The cost of outreach efforts totaled approximately \$20,000 for newspaper advertisements, citywide mailers, newspaper advertisements and social media posts.

FISCAL IMPACT

The preliminary estimated cost is approximately \$3.5 million for a one-year pilot program with one microtransit vehicle and one circulator route as described in the study. Factors affecting the actual costs include the general operation and administrative costs by a professional transit provider, type and number of vehicles to operate an effective system with the desired number of routes and frequencies, transit stop improvements, infrastructure to support alternative fuel vehicles. Purchasing and contracts associated with the pilot program will follow City solicitation and procurement policies.

Funding is currently available to start a pilot program using local return transportation funds. Depending on the option selected and the duration of the pilot program, additional funding appropriation will be necessary for fiscal year 2023/24. Additional study will be required to understand the capital and operations funding needs and revenue options to sustain a long-term, ongoing transit system.

Technical Memorandum

September 30, 2022

Project# 27708

To: Martha Eros, Transportation Planner
City of Beverly Hills
455 N Rexford Dr
Beverly Hills, CA 90210

From: Peter Casellini, AICP; Fernando Sotelo, TE; Allison Woodworth; Sam Liu, EIT

RE: Beverly Hills Transit Needs Assessment Study
Unmet Needs Assessment and Suitability Analysis

INTRODUCTION

Kittelson & Associates, Inc. (Kittelson) is working with the City of Beverly Hills (City) to determine whether the current and future planned transit services are sufficient to support the needs of Beverly Hills residents, workers, and visitors. This memorandum summarizes the community needs expressed by the public and peer agencies during community outreach efforts including the online survey, interactive mapping exercise, and public meetings, and provides initial recommendations to direct future transit planning efforts by the City based on the results of the community needs analysis and current industry best practices.

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ONLINE SURVEY FINDINGS

The City developed a Mobility Needs Survey to understand how people who work, live, and recreate in Beverly Hills travel around the community and how they imagine doing so in the future. The survey recorded the demographics of respondents; explored their past and current experiences using public transit to travel to, from, and within Beverly hills; and solicited opinions on how to improve transit within the community – from serving new destinations to addressing commonly identified barriers to using the existing system.

The survey (**Appendix A**) was published online via Survey Monkey and publicized through the City's website, two project public meetings, traditional and social media, City hosted events (such as the Farmers' Market), flyers at high activity Metro bus stops within the city, and e-blasts. A full list of outreach distribution strategies will be summarized in the **Outreach Memo**.

In order to capture broader perspectives on mobility and retain the ability to solicit feedback on existing services from current riders, some survey questions were asked only of existing or interested transit riders and others only of people who responded that they did not expect to ever use public transit in the city.

The following sections explore the **who, where, how, why, and why not** of the public transit landscape in Beverly Hills, the answers to which provide a framework for analyzing the City's unmet transit needs.

Existing Regional and Local Transit Use

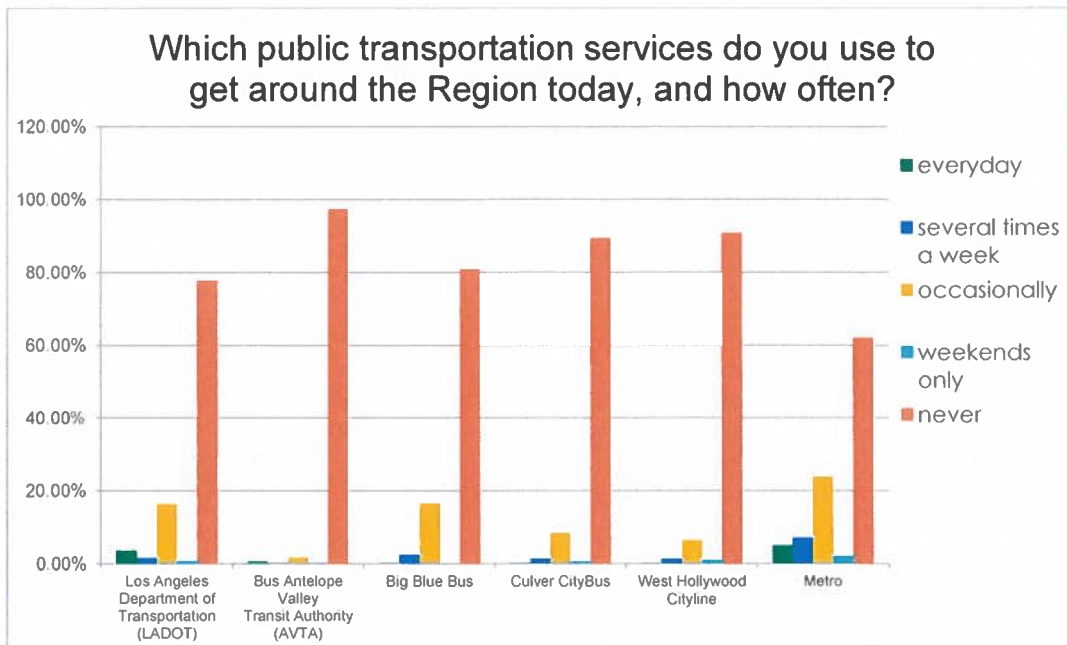
REGIONAL TRIPS

Several transit services operate near or within Beverly Hills and provide **inter-community** and larger regional connectivity. These travel patterns may indicate connection opportunities for potential future local services.

Metro, LADOT, and Big Blue Bus accounted for the highest percentage of daily, several times a week, or occasional trips on the regional options listed (**Figure 1**). The most common frequency cited for riding any of the regional transit services was "occasionally".¹ "Never" accounted for over 80 percent of the frequency responses across all regional services.

¹ This question received a nearly 100 percent response rate from the over 400 survey users. "Other" write in answers included Metrolink, WeHo PickUp, and Metro bikeshare. This question was open to all respondents.

Figure 1 Regional Transit Use

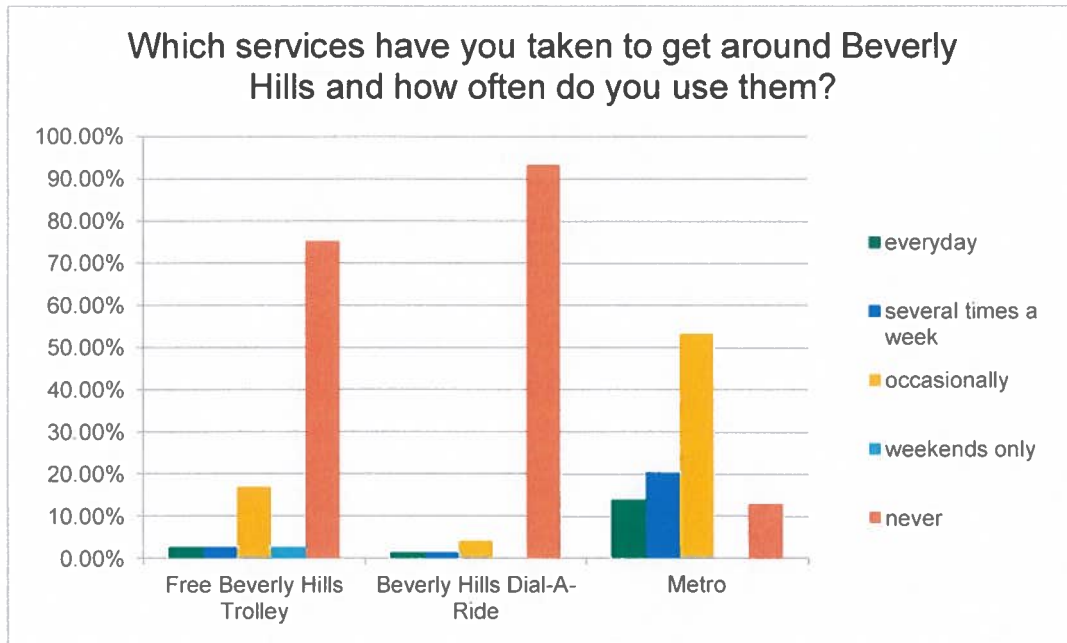


LOCAL TRIPS

Three core public transit services exist within the City and serve local trips currently. Survey users that indicated they had previously taken transit within Beverly Hills were asked which of these services they ride and how often.² Respondents indicated that they use Metro overwhelmingly for most local trips (Figure 2).

² Roughly 1/4 of respondents (99) answered or were eligible to answer this question.

Figure 2 Local Transit Use and Frequency

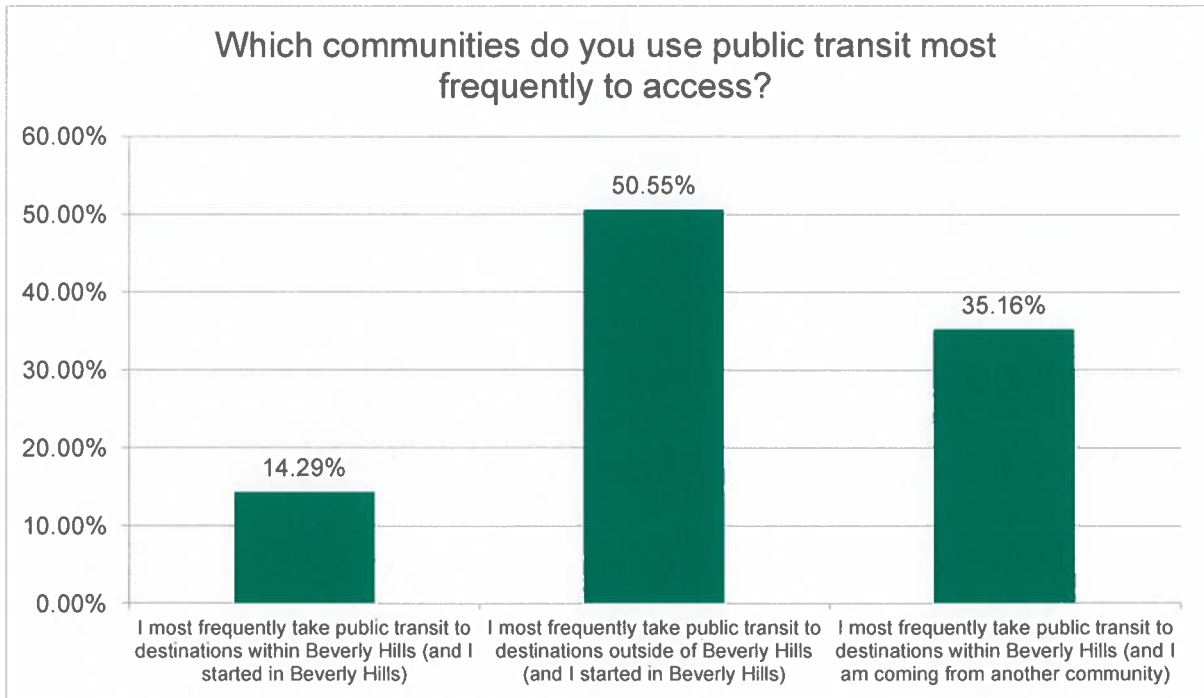


INTRA- AND INTER-COMMUNITY TRANSIT TRAVEL

Beverly Hills is part of a larger region that offers significant entertainment, recreation, and employment opportunities. Half of current transit riders indicated that they use transit for inter-community travel (outside of Beverly Hills).³ While the remaining half of users indicated they take transit to access local destinations, only 14 percent of those riders started their trip within Beverly Hills (**Figure 3**). This does not necessarily indicate that there is an insufficient market for new Beverly Hills transit services. It is possible that the riders coming from outside the community may benefit from additional local connection options to expand their greater access to Beverly Hills businesses and entertainment districts.

³ This question was asked of only current transit riders

Figure 3 Intra- and Inter-Community Trip Demand



Interest

Just over a quarter of respondents indicated that they are current or past riders of transit within the City. A combined 43 percent of respondents indicated no experience as local riders, but expressed an interest in starting in the future. The nearly three quarters of responses from existing or interested riders is a positive indication toward a market for existing or new and improved services. The strong interest in taking transit when the Purple Line opens emphasizes the importance of ensuring that safe, convenient, and comfortable connections to and from the stations (often referred to as the “first mile / last mile”) are available to translate that demand into ridership.

Table 1 Have you used public transportation services in Beverly Hills?

Answer Choices	Responses
Yes, I have used public transportation in Beverly Hills	27.7%
I rarely use public transportation	0.0%
I have never taken public transportation in Beverly Hills and I have no interest in starting ¹	29.1%
I have never taken public transportation in Beverly Hills, but I am interested in starting ¹	22.8%
I have never taken public transportation in Beverly Hills, but I plan to start when the Metro Purple Line stations open in the City. ¹	20.4%

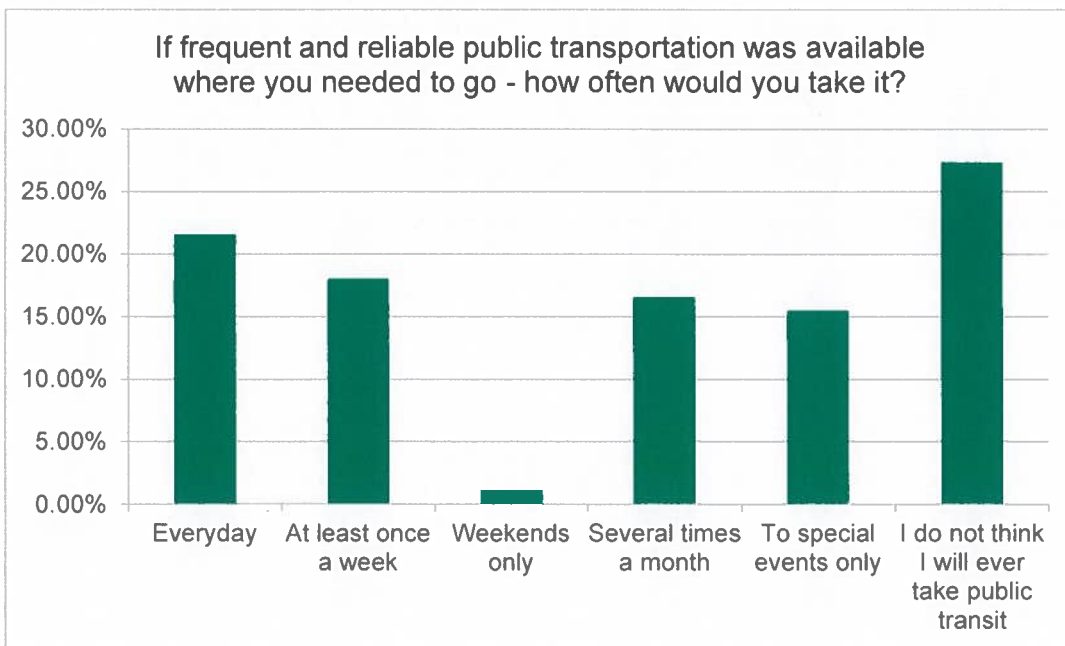
This question was open to all respondents.

¹This answer was used to determine the survey “skip logic” for follow up questions. These respondents were not asked questions specific to existing ridership behavior such as how they get to local transit stops.

To explore the scenarios in which the "I have never taken public transit in Beverly Hills" cohort would consider riding, these respondents were asked "If frequent and reliable public transportation was available where you needed to go, how often would you take it?". Under this scenario, nearly 40 percent of users indicated a likelihood of using public transit everyday or at least once a week (

Figure 4). Of the remaining 60 percent, roughly half (32 percent) indicated that they would consider transit for occasional use or to get to special events and 27 percent indicated they would still not consider transit a viable mobility option. Overall, this suggests that transit may transform a percentage of the "I have never taken public transit in Beverly Hills" cohort into riders by operating a frequent and reliable service that provides access to popular community destinations.

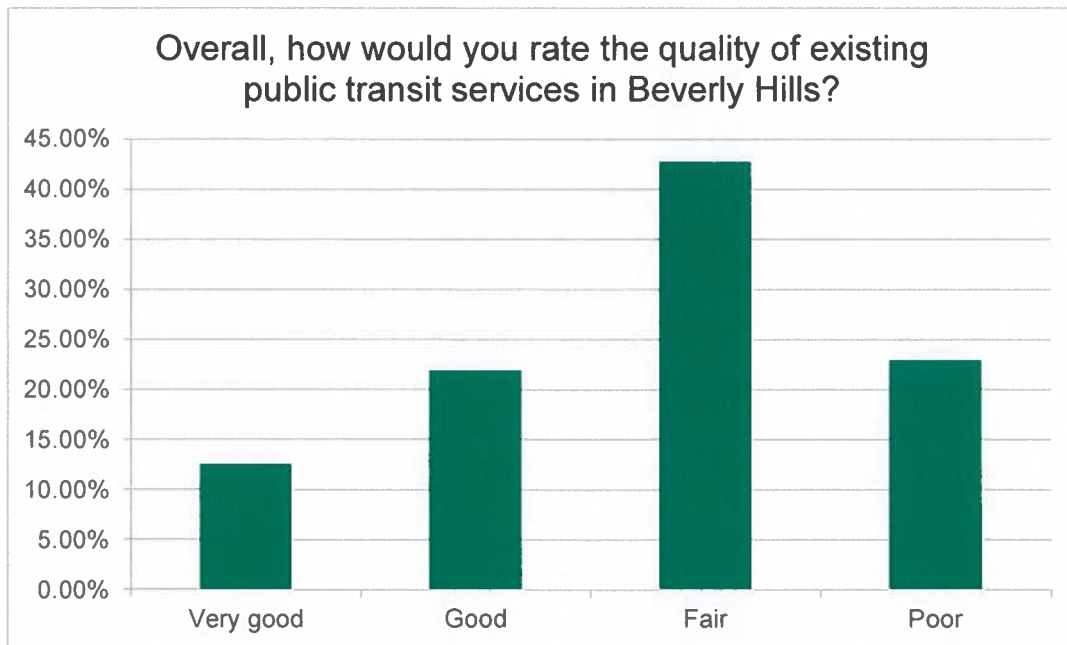
Figure 4 Willingness to Take Transit In Future



Satisfaction

35 percent of users rated current transit services within the city as "very good" or "good" (**Figure 5**). However, the modal response was a "fair" rating. The following section explores the barriers that riders experience which may contribute to the "fair" or "poor" ratings. This question was only asked of people who indicated they had taken public transit in Beverly Hills.

Figure 5 Satisfaction with Current Transit Services in Beverly Hills



Barriers to Transit

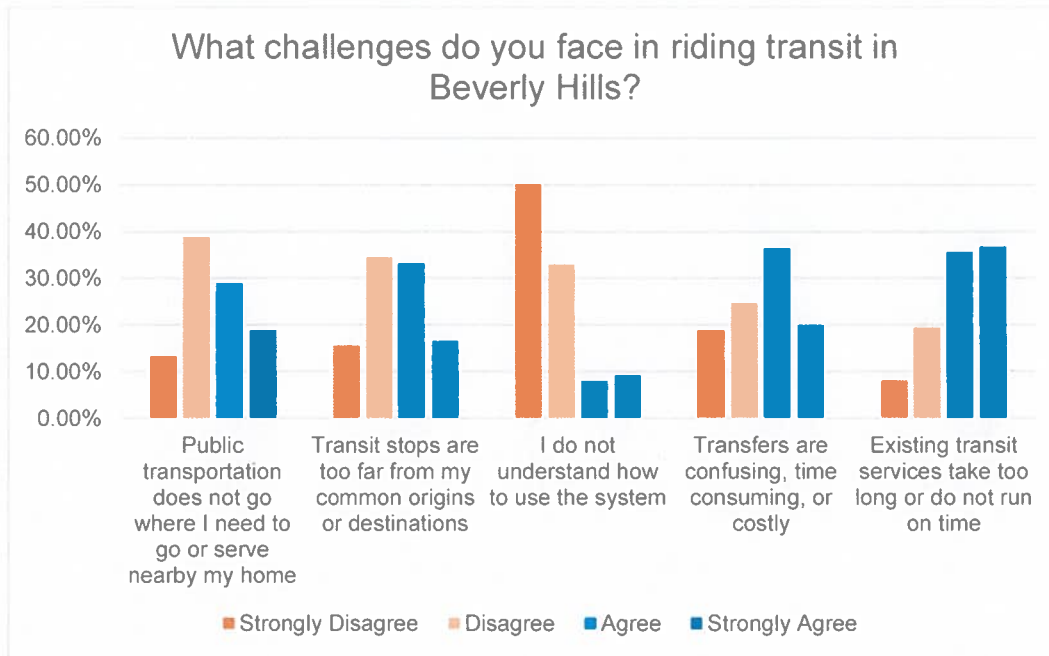
Barriers to accessing or comfortably navigating a transit network prevent people from perceiving or experiencing transit as a viable and quality way to get around. This depresses transit ridership and undermines its ability to be a competitive transportation alternative. The "I have used public transit in Beverly Hills" cohort was asked to evaluate a list of barriers for relevance to their ridership experience (on a scale of "strongly disagree" to "strongly agree") (

Figure 6). A weighted average was applied to these responses and resulted in the following barrier rankings from most significant to least:

1. Existing transit services take too long or do not run on time
2. Transfers are confusing, time consuming, or costly
3. Public transportation does not go where I need to go or serve nearby my home
4. Transit stops are too far from my common origins or destinations
5. I do not understand how to use the system

Additional barriers were provided via the write-in option. Comments highlighted difficulties accessing transit stations due to distances between the stops and the rider origin or destination; uncomfortable or unsafe connections to transit for people walking, using a wheelchair, and biking; and safety concerns while riding transit.

Figure 6 Challenges Riding Public Transit (Asked of Transit Riders)



Destinations

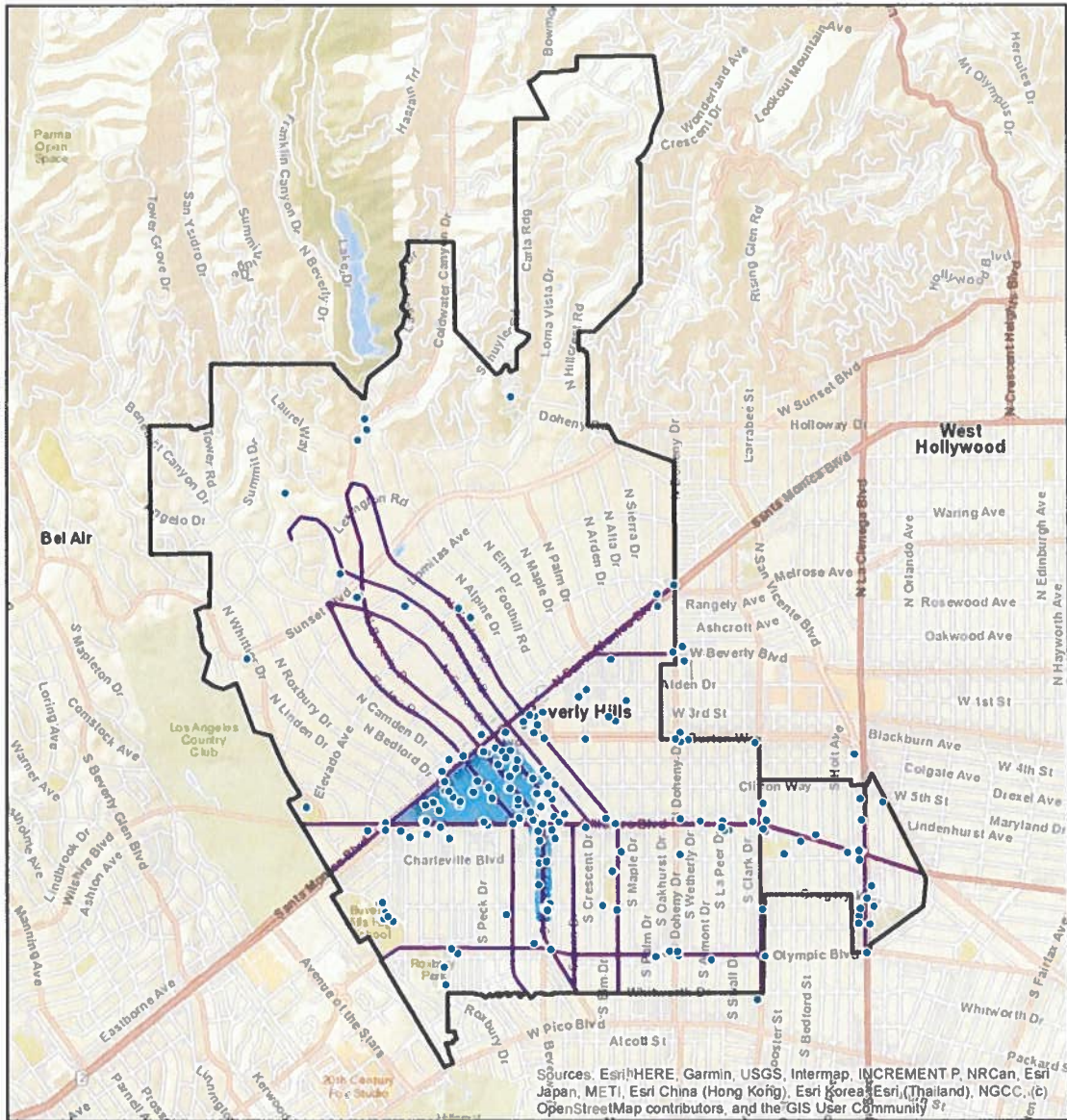
Determining where people want to go is an important aspect of understanding whether the current transit system is making those connections at all – agnostic of quality of service – or where future service may be most successful. The survey asked every user to list their “[up to] top three destinations when travelling within Beverly Hills”. This question received a 61 percent response rate and asked people to answer in comment form rather than selecting from a pre-determined list. All comments were compiled (regardless of which order the destinations were listed) and mapped. In addition, responses from the live exercise conducted during the public workshops were preserved and added to the map. Figure 7 shows a concentration of destinations within and near the Golden Triangle and along Wilshire Blvd. Several travel corridors were highlighted by users:

- North-South Corridors⁴
 - Rodeo Dr
 - Beverly Dr
 - Canon Dr
 - Rexford Dr
 - Robertson Blvd
- E-W Corridors
 - Santa Monica Blvd
 - Olympic Blvd
 - Beverly Blvd

⁴ In most instances, corridors stated in responses did not indicate corridor segments, such as north or south of a given cross street. Because of this, the full corridor was included for mapping purposes.

Frequent location types cited by users included medical facilities such as urgent cares and Cedars-Sinai Medical Center, parks, public schools, commercial/retail areas (e.g. coffee shops and restaurants), civic centers (e.g. Post office, library), and religious institutions.

Figure 7 Top Destinations Within Beverly Hills



Source: Kittelson and Associates, Inc. 2022

Legend

- Key Destinations
- Key Corridors
- Key Areas
- Beverly Hills City Limits

0 0.25 0.5 1 Miles



**Desired Destinations/Corridors
 Beverly Hills, CA**

These destinations are sourced from an online survey and public workshops (Summer 2022) in which users responded to the question "What are your top destinations when traveling within Beverly Hills?" Some destinations just outside the City boundary are included to acknowledge the "grey zone" for nearby inter-community connections.



Limitations

It is prudent to note the factors which may have shaped the survey response pool. While outreach occurred both online, in person, and through traditional media outlets, the survey itself was distributed exclusively online and in English. Access to the internet, language barriers, and lack of discretionary time to spend responding to a City survey or attend City events – such as the public workshop – may have resulted in under-representation of certain populations or on specific answers such as those that asked for “write-in” responses (e.g. the Destination question). To keep the survey focused on critical community feedback, demographic questions were limited. However, a comparison of age, which was collected, to 2020 American Community Survey (5 Year) data shows that the median age in Beverly Hills is 47 years old which falls within the largest responding cohort 35-49(46 percent). Only 1 percent of people responding indicated they were under 18 (this is less than the 5 percent of the population between the age of 15-17). The Survey was distributed to Beverly Hills Unified School district social media and Parent Teacher Association channels, potentially leading to overrepresentation of guardians who participate in these forums.

PEER AGENCY DISCUSSIONS

Discussions with Los Angeles Metro (Metro), West Hollywood, and Culver City were organized in order to explore the successes and experiences of different transit services, models, and networks. These peer agencies were chosen based on the following criteria:

- Presence of transit services that supplement Metro lines
- Similar rider demographics and experiences to those of Beverly Hills
- Locality to Beverly Hills

The **Plan Review, Existing Conditions Analysis, Peer Benchmarking memo** identified additional potential peers (Huntington Beach, Laguna Beach, and Santa Monica). However, while the service of these peer cities was analyzed, the selected benchmarking conversations focused on peers with experiences operating locally to gain additional input on local considerations and coordination with relevant Los Angeles County institutions.

Key takeaways from each peer agency discussion are discussed below.

Los Angeles County Metropolitan Transportation Authority (Metro)

The project team organized a virtual discussion with Metro on Monday, August 15, 2022. The following sections summarize key topics mentioned throughout the conversation.

EXISTING SERVICE

LOCAL BUS SERVICE

The northern part of Beverly Hills is served primarily by Line 2. The central and southern parts of Beverly Hills are served by Lines 4, 20, 28, 105, 617, and 720. Currently, Lines 4, 20, and 720 carry the majority of passengers within Beverly Hills, and are among Metro's most productive lines in the system. Most of the transit service provided is primarily along east-west corridors. Only Lines 105 and 617 partially travel along north-south corridors within the City.

Table 2 summarizes the existing Metro lines that currently serve the City of Beverly Hills.

Table 2: Existing Metro Service in Beverly Hills

Route Number	Service	Route Description	Peak Frequency (minutes)
2	Metro Local Line	East-West travel via Sunset Blvd	7.5
4	Metro Local Line	East-West travel via Santa Monica Blvd	9.5
20	Metro Local Line	East-West travel via Wilshire Blvd	15
28	Metro Local Line	East-West travel via Olympic Blvd	7.5
105	Metro Local Line	North-South travel via La Cienega Blvd	10

617	Metro Local Line	East-West travel via Burton Way North-South travel via Robertson Blvd and Beverly Dr	60
720	Metro Rapid Line	East-West travel via Wilshire	15

Source: Metro, 2022

NEXTGEN BUS PLAN

In 2018, Metro launched an effort to reimagine the bus system to better meet the needs of current and future riders through goals such as (1) doubling the number of frequent Metro bus lines and (2) providing more than 80 percent of current bus riders with 10 minute or better frequency. The NextGen Bus Plan was developed through consideration of technical data and public outreach that included over 400 meetings, events, and workshops over two years. It was approved by the Metro Board of Directors in October 2020.

Research supporting the plan showed a trend toward more people using Metro for shorter trips than longer trips. The restructuring plan sought to meet these needs with higher service frequency and a simplified network focused on local service with rebalanced bus stop spacing targeting ¼ mile between stops, and subsequently transitioning away from a comprehensive, longer-distance Rapid bus network. The NextGen Bus Plan service changes were developed to improve the speed, reliability, and accessibility of the transit system. These service changes are summarized in Table 3.

Challenges related to COVID-19, including an operator shortage, have currently disrupted Metro's ability to operate full service, and as a result, service frequencies in Beverly Hills and across the Metro network are lower than envisioned for full implementation of the NextGen plan.

Table 3: NextGen Service Changes Impacting Beverly Hills

Transit Agency	Route	Route Name	High level description of NextGen service changes	Weekday Frequency, Pre-NextGen (minutes)			NextGen Weekday Service Change Targets		
				Peak Hour	Midday	Evening	Peak Hour	Midday	Evening
Metro	2	Downtown LA – Westwood via Sunset Blvd	More Frequency, Simpler network Merges Lines 2, 302, and 200	11	15	27	7.5	10	15
Metro	4	Downtown LA – Santa Monica via Santa Monica Blvd	More Frequency, Simpler network Merges Lines 4 & 704 on Santa Monica Blvd	14	15	21	6	7.5	10
Metro	20	Downtown LA – Westwood/Santa Monica via Wilshire Blvd	More Frequency, Simpler network Merges Lines 20 & 720 between downtown Santa Monica and Downtown LA via Wilshire	15	12	28	5	5	7.5
Metro	28	Century City – Downtown LA via Olympic Blvd	More Frequency, Simpler network New high frequency line. Merges 28 & 728.	18	27	36	7.5	10	15
Metro	105	West Hollywood – Vernon via La Cienega Blvd/ Vernon Ave	More Frequency, Simpler network New high frequency line. Merges 105 & 705.	18	20	45	10	10	15-30
Metro	617	Beverly Dr – Burton Way – Robertson Blvd Shuttle	New Line Simplifies network with a higher frequency. E Line Culver City station to Cedars-Sinai Medical Center/Beverly Center via Robertson Blvd, west via Burton Wy and South on Beverly Dr. to Pico Blvd (replacing Lines 14 & 16 & 17 on those streets)	30	60	60	45	45	45
Metro	720	Santa Monica – Downtown LA via Wilshire Blvd	More Frequency, Simpler network New High Freq line 20 merging 20 & 720. Peak service only.	8	11	16	10	–	–

Source: Metro, 2022

METRO MICRO

In 2020, Metro launched a three year on-demand rideshare service pilot project called Metro Micro. They offer trips within their five service zones across Los Angeles County. The new service is designed to serve shorter local trips and uses small vehicles with seating for up to 10 passengers. Metro Micro as a concept was envisioned to form part of a family of Metro services, and service area pilot zones were designed to be incorporated into the Metro network in conjunction with the NextGen Bus Plan. The service is designed to be a fast, safe, and convenient option for quick trips around town.

Within the context of the Westside, the pilot has so far proven reasonably successful among college students in the Westwood area. Digital familiarity is viewed by Metro staff as key for microtransit and thus adoption has not been as successful among older residents. However, Metro has experienced that once passengers become familiar with how to request and use the service, they enjoy the service.

Metro Micro implementation also has not had a perceivable negative impact on fixed-route bus ridership. The following data provides a high-level summary of current pilot performance to date:

- Trip length of 2-3 miles on average
- 3 passengers per hour on average
- Operational cost of \$30 per ride, which is higher than the average fixed route operational costs
- 60 percent of the rides are shared with other community members
- High trip-reject rate
- Consistent growth that may be capped by service availability

RIDERSHIP IMPACTS FROM THE OPENING OF THE E (EXPO) LINE

Given the similarity of intent and geographic location of the D (Purple) Line, its opening may trigger similar ridership trend impacts as the opening of the fully-completed E (Expo) Line. With the full opening of the E Line, parallel east-west bus lines decreased in ridership by about 25 percent. There was some increase along the north-south lines connecting to the E Line, but the bulk of the increase in ridership was seen by the municipal agencies (Culver City and Santa Monica) responsible for the majority of connecting bus service in the new portion of the service area.

LIMITATIONS OF AND OPPORTUNITIES FOR SERVICE ENHANCEMENTS

There is a prime opportunity for both Metro and Beverly Hills to work together to improve local and regional transit network connectivity around future D Line stations. Metro staff interviewed feel there can be a beneficial role for additional municipal service in these areas to meet demand. As long as these services do not conflict, Metro is supportive of the City's effort to improve transit services. Metro staff also identified opportunities to connect the residents of Beverly Hills by providing better north-south transit service connections.

With the NextGen Bus Plan, Line 617 was planned to receive increased service frequency of up to 15 minutes; however, this target has not been met due to Metro's ongoing operator shortage. Metro staff also identified addition Line 617 improvement opportunities, namely a reroute onto Canon Drive to provide a more direct connection to the future Purple Line station at Wilshire and Rodeo.

Metro staff also shared a concern that some riders making longer trips may find the changes introduced with the NextGen bus plan to inconvenience with multiple bus transfers. The completion of the D Line extension to Westwood and the Veterans Administration hospital will hopefully reduce this burden.

West Hollywood

The project team organized a virtual discussion with West Hollywood's Social Services division on Thursday, August 11, 2022. The following sections summarize key topics discussed throughout the conversation.

EXISTING SERVICE

The City of West Hollywood is served by fixed route and on-demand services operated by LA Metro and the City. It also offers specialized and subsidized services to seniors (age 62+) and people with disabilities. Table 4 summarizes the existing services West Hollywood currently offers.

Table 4: Existing West Hollywood Transit Services

Service	Description
CityLine Local	Free daytime shuttle (M-Sat 9AM-5:30PM) that runs every 30 minutes and serves stops throughout the City of West Hollywood. The shuttle serves all purpose intra-community trips.
CityLine Commuter	Free rush hour and Saturday evening service connecting the City of West Hollywood and the Hollywood/Highland Metro B (Red) Line Station. The shuttle runs 15-minute frequency on weekdays 7AM-9AM and 5PM-8PM and Saturdays 5PM-8PM.
PickUp	Launched in August 2013 as a free entertainment shuttle that ran Fri-Sat (8PM-3AM) along Santa Monica Blvd between Fairfax Ave and Doheny Drive. It operates Friday through Saturday (8PM-3AM) and on Sunday (2PM-10PM) with a frequency of 15 minutes between Robertson Blvd and La Brea Avenue.
Dial-A-Ride	Free shared-ride transportation service. Trips are scheduled by appointment only and can be scheduled up to a week in advance. Regular shuttles provide trips for grocery shopping, to UCLA Medical Center, and VA West Los Angeles. Serves anywhere within West Hollywood, UCLA, VA, Kaiser (Cadillac and Sunset) and West Hollywood social service agencies. Only available for West Hollywood residents aged 62 or older and community members with disabilities at any age. All vehicles are ADA accessible. Curb-to-curb and Door-to-door options are available.
On-Call Transportation (Lyft/Uber)	Registration required service that is available on short notice, without advanced reservations. They are operating 24/7 and advertise to pick up riders within 15 minutes. Serves anywhere within the City of West Hollywood and up to a 10 mile radius from the border of the City of West Hollywood boundaries. Only available for West Hollywood residents aged 62 or older and community members with disabilities at any age. ADA accessible vehicles are available.

Source: West Hollywood, 2022

RIDERSHIP TRENDS ACROSS SERVICES

During the pandemic, ridership across all services decreased sharply. However, ridership is presently trending slightly upward. Prior to the pandemic, the CityLine Commuter route was highly popular, representing 60 percent of West Hollywood municipal transit ridership. CityLine Commuter route ridership is

still well below pre-pandemic ridership, which City staff attribute to the shift toward working from home. CityLine Local ridership volume is also still below pre-pandemic ridership; however, it is recovering faster than CityLine Commuter given changing worksite dynamics among the conventional daytime commuter population.

Anecdotal evidence from City staff in the absence of surveys conducted since the onset of the COVID-19 pandemic suggests that each service has unique demographics, which had in the past been supported by survey data. CityLine Local serves an older population, with many city seniors using the service to access community resources and grocery stores, while CityLine Commuter service users are demographically more similar to the city population as a whole.

The Pickup service is currently performing higher than pre-pandemic with approximately 2,000 trips per weekend compared to 1,700 trips. Based on 90 percent of participants of a 2019 survey, most riders are local residents, under the age of 40, and male⁵. On Sunday, there are more older participants.

UPCOMING OPPORTUNITIES

As ridership increases, the City of West Hollywood will continue to find ways to improve local and regional connectivity. With the opening of the D Line extension, the City of West Hollywood would like to accommodate future demand by providing a second commuter route.

Recently, the council approved the proposal for a microtransit pilot project. The intent of this project is to transition away from Dial-A-Ride and provide a citywide, general public microtransit service with a priority for city seniors and residents with disabilities served by the current Dial-A-Ride service. While trips will still be offered to qualifying populations for free, West Hollywood plans to charge non-qualifying riders a fare.

Since the West Hollywood shares a border with Beverly Hills, City staff agree there is a great opportunity for collaboration to improve connections between the two cities, such as along Doheny Drive.

Culver City

The project team organized a virtual discussion with Culver City's Transportation department on Wednesday, September 7, 2022. The following sections summarize key topics mentioned throughout the conversation.

EXISTING SERVICE

The City of Culver City provides several varieties of transit services to help residents, workers, and visitors travel around the city. Table 5 summarizes the existing Culver City transit service classifications.

Table 5: Existing Culver City Transit Services

Service	Description
CityBus	CityBus operated fixed-route service provides connections throughout Culver City and communities in Los Angeles including Century City, Marina del Rey,

⁵ <https://www.weho.org/services/social-services/community-study>

	and Westwood. The services interface with major destinations from UCLA to Metro C (Green) and E (Expo) Lines.
CityBus Local Circulator	<p>Pilot circulator routes to provide additional frequency to existing fixed-route alignments and support recent investments in dedicated transit infrastructure on key city arterial streets.</p> <p>Route 1C1 Culver City Downtown Circulator offers free rides between downtown and the Arts District via the Metro E Line. The circulator uses an electric, low-floor minibus and runs every 10 minutes at peak hour and 15 minutes in the off-peak. Routes 5C1 and 5C2 are weekday circulators that operate when school is in session, serving Culver City Middle School and High School as well as Downtown and La Cienega Blvd. 5C1 connects the Arts District and Clarksdale to Washington Blvd while 5C2 connects Overland Ave and Fox Hills to Washington Blvd.</p>
Circuit	Free electric shuttle service (microtransit) that connects destinations between downtown Culver City, the Art District, and Hayden Tract. It operates weekdays 8AM-5PM and on weekends 10AM-8PM.

Source: *Culver City, 2022*

LESSONS LEARNED FROM E (EXPO) LINE DEVELOPMENT

In 2005, Culver City was starting to prepare for the opening of Metro's E (Expo) Line. The Culver City station was proposed as an intermodal transit facility with an off-street transit center in Metro's right-of-way. During its design, the culture of Culver City was more car-oriented, thus concerns primarily involved traffic impacts of buses coming in and out of Metro's right-of-way. Negotiations with Metro resulted in an above-grade rail station and improved integration of the bus transit center to improve intermodal connections.

After the Culver City station opened, the city experienced significant development around the station area, with the City working with developers to incorporate transit-oriented principles into new developments and support improvements to streetscape planning. However, even with enhancements to bus transit connectivity, station access by car still experienced overwhelming demand, and the 300 parking spaces that were provided were insufficient to meet the demand for parking at the station. This experience led City staff to advance the Move Culver City project to improve transit connectivity throughout Culver City's urban core and station area and improve the bus transit experience to encourage more transit use.

MOVE CULVER CITY INITIATIVE

Move Culver City is implementing the vision set forth in the City's TOD Visioning Plan (adopted in 2017) & the Bicycle and Pedestrian Action Plan to implement holistic transportation options for pedestrians, bicyclists, and transit riders. To achieve this, the Culver City Transportation Department is looking to implement three Tactical Mobility Lane Pilot Projects through the quick-build process in three different phases:

- Phase 1: Tactical Mobility Lane on Washington Boulevard
- Phase 2: Tactical Mobility Lane on Sepulveda Boulevard
- Phase 3: Tactical Mobility Lane on Jefferson Boulevard

These pilot projects will serve as the opportunity for Culver City to learn how the permanent infrastructure improvement would work and demonstrate the benefits of such infrastructure to maximize the use of the roadway.

CIRCULATOR INTEGRATION

In November 2021, Culver City introduced an electric, low-floor minibus circulator scheduled to run every 10 minutes at peak times and every 15 minutes off-peak. Until January 2023, the circulator will remain free and open to the public. The intent behind the addition of the circulator to the Move Culver City pilot project, as well as the use of converted electric passenger vans instead of conventional transit buses, was to help make service more accessible and convenient for residents and reduce the stigma of riding transit. During the school year, additional circulator routes that serve Culver City Middle School and High School are now offered after organizing by the school district and parents. Unlike the initial 1C1 circulator route, the school routes are not free to the public, but in practice are free for students through a subsidized transit pass program developed in coordination with the school district.

Ridership is currently lower than anticipated due to a variety of challenges, including some technology challenges with the vehicles used for service, operator shortages, and overlapping services with Metro's Line 1. Since the 1C1 service area expanded in June 2022, ridership has grown slightly. Additional marketing and branding is planned to better publicize the circulator's availability and benefits to the community.

PROSPECTIVE SERVICE DESIGN AND MODE SUITABILITY ANALYSIS

Beverly Hills is well-suited for a variety of transit options, with a compact footprint, a strong grid pattern, and a mix of land uses that provides consistent all-day sources of travel demand. Two complementary options are most well-suited for consideration in the form of an early pilot. Advancement of either of these two options – or a combination of both – will help to better inform actual transit needs of the community through real-world practical experience, and can be further adjusted or serve as a basis for an informed transition to a different service configuration.

The two options proposed for further consideration under this study are City-controlled fixed-route transit and City-controlled microtransit. Fixed route transit operates like conventional public transportation as seen within Beverly Hills today provided by Metro, operating along defined routes on defined schedules, serving defined stops. Microtransit is an emerging technology option that offers on-demand routing between more widely spaced origins and destinations using smaller transit vehicles.

It is recommended that any service be first offered in the form of a limited pilot period under the administration of the City of Beverly Hills. This will allow the City to explore alternatives and respond more quickly to needs that may arise.

Prospective Service Design

Based on the existing service provided within Beverly Hills, the future regional connections provided by the upcoming D Line extension, current and future demographics and land use patterns, as well as community input from public outreach and community preference surveys, a combination of one or more fixed-route circulator routes and a microtransit service area would provide the desired service throughout Beverly Hills, appropriate connections to maximize the effectiveness of the regional transit network, and provide the most effective means of reducing vehicle miles traveled (VMT) throughout the city. Conceptual details of each component and their respective roles in a community transit network are explored below.

Fixed-Route Circulator

The fixed-route service model uses multi-passenger vehicles operating along defined routes on defined schedules to serve passengers at defined stops without reservations. While routes can be of any length, what is commonly referred to as a "circulator" model often operates shorter routes targeted to intra-community local circulation needs, and often uses smaller vehicles. The fixed-route circulator model is recommended to be the primary service incorporated into a Beverly Hills transit pilot due to the geography served, anticipated passenger volumes, existing complementary regional transit connections, and the highest relative cost efficiency.

Fixed-route service allows for trips to be aggregated into a more efficient footprint, offering potential for reductions in vehicle miles traveled (VMT), especially if paired with other priority measures that can improve travel times to match or fall below single-occupancy vehicle travel times such as dedicated transit lanes, shared bus/bike lanes, or emerging options such as municipal high-occupancy vehicle (HOV) lanes.

Public input received over the course of this study indicated that interest was strong throughout the community in a fast connection into the upcoming D Line stations being constructed along Wilshire

Boulevard at La Cienega Boulevard and Rodeo Drive, which can be best achieved with a dedicated linear bus route focusing on a limited number of arterial streets. The greatest transit circulation need within the community is for north-south connectivity, as identified through community input and LA Metro peer discussions, since the regional east-west connectivity continues to be strong with the upcoming D Line and surface transportation options along Sunset, Santa Monica, Wilshire, and Olympic Boulevards.

Fixed-route transit propensity is greatest from Santa Monica Boulevard to the south of the city, as the intensity of commercial activity and greater relative density provides the concentration of residents and commercial points of interest that offers the greatest potential ridership base. The residential land use patterns north of Santa Monica Boulevard are traditionally associated with lower all-day transit propensity and utilization, and it is not evident through public outreach that there is strong unmet demand in this portion of the city, but this area may be suitable for alternative service delivery mechanisms such as microtransit to ensure citywide transit coverage.

From the community survey and public workshop feedback in addition to lessons learned from peer city benchmarking, there is also evidence to suggest other time-limited service could be effective, particularly morning and afternoon service connecting the parts of the city with the greatest concentrations of enrolled students to local schools. It is not evident that there is strong unmet demand north of Santa Monica Boulevard for all-day fixed-route service, but exploring extending a fixed-route, commute-oriented service to connect the Flats region to the upcoming D Line stations as part of a pilot program if resources are available, or if other potential pilot resources like microtransit vehicles are made available for time-limited service.

Microtransit

Microtransit is an emerging transit mode that builds on the traditional Dial-A-Ride model by chaining individual trip requests together with on-demand routes generated through third-party software. Trips may be requested using an app similar to those used by ride-hailing services or by phone through a dispatch center. In areas where fixed-route service is less attractive due to longer distances to access service or longer trip times – generally areas of moderate to lower density – microtransit can offer a connection to the public transit network.

A key advantage of microtransit is that a broader area with lower demand can remain connected to the greater transit network using fewer resources than would be required to provide appropriate coverage with fixed-route service. Service can be deployed only as needed, and can remain available at key connection points such as the future D Line stations to capture outbound demand immediately during periods of lower utilization.

However, Microtransit can become capacity-constrained as ridership increases, and popular service at peak travel times can introduce longer wait times. Microtransit is also more resource-intensive on a per-passenger basis, as local experience through LA Metro's Metro Micro program indicates that service efficiency is limited to approximately four passengers per service hour, while peer region experience in San Diego County with fixed-route circulators in lower-density suburban areas saw its least efficient routes averaging ten passengers per revenue hour.

Microtransit is also challenged in areas with low all-day demand but higher concentrations of demand at specific times, such as office parks or school trips, as the lower-capacity vehicles are less suited to dealing with larger levels of demand. Regular customers with routine travel needs may also find daily trip reservations and changing daily wait time variability to be an impediment to perceived service reliability.

However, microtransit also offers a way of collecting travel demand data in real-time to determine where future fixed-route service can offer capacity to meet demand that may exceed the constraints of microtransit service more effectively. Examples from an early pilot in Eugene, Oregon that replaced underperforming fixed-route service saw demand exceed supply quickly, with many microtransit riders in the pilot region making consistent trips throughout the week, and data from that pilot was used to relaunch several fixed-route lines that better matched the changes in demand observed through the microtransit pilot. Similarly, in San Diego, previous Dial-A-Ride service assets connecting business parks in the Sorrento Valley region with the North County Transit District's Sorrento Valley COASTER commuter rail station were transitioned into fixed-route services, as MTS discovered that standing trip reservations for repeated weekday trips significantly outnumbered unreserved trips.

Within Beverly Hills, a microtransit pilot is likely to be the most successful service strategy for portions of the city north of Santa Monica Boulevard. Depending on the limitations of any prospective partner platform, which will have their own recommended criteria for service zones based on specific operating model configurations (such as whether to limit pickups to certain virtual stops), it may be possible for the full portion of the city north of Santa Monica Boulevard to be served by a single microtransit zone. As with fixed-route transit, network connectivity is critical to the success of any transit service, and limited specific connections into the regional network outside of the microtransit zone would be strongly advised, such as incorporating the future D Line stations along Wilshire Boulevard as exclaves of the microtransit zone.

If evidence of peak commute-oriented demand exists within the microtransit zone, it may be more efficient to instead operate peak service along a fixed route to more efficiently capture demand and reduce overall trip times, while transitioning back to a microtransit model outside peak commute hours. This would require the use of vehicles that would support both operating models, which will be discussed later in this memorandum.

Prospective Service Costs

Detailed costs will need to be developed based on an evaluation of exact route alignments using reasonable and realistic real-world travel speeds, but for purposes of high-level estimations of recommended service volumes, certain variables can be used.

Service costs are more predictable with contracted service, with most contracts offering service on a per-hour basis. Additional detailed benchmarking into costs associated with contracting should be conducted to develop a more detailed independent cost estimate, as the range of costs can vary widely depending on the responsibilities of the contractor, including to what extent any vehicle costs are associated with the contract. For simplicity in adjusting further estimations, an estimated contract rate of \$100 per vehicle per hour is assumed, but additional vetting is required and is a recommended future task.

A draft circulator routing was developed, operating with a one-way distance of 5.2 miles on an alignment using Beverly Drive, Olympic Boulevard, La Cienega Boulevard, Robertson Boulevard, Burton Way, Doheny Drive, Beverly Boulevard, and Foothill Road to represent an approximate all-day circulator route. With an estimated in-service average travel speed of 12 miles per hour, including stops for passengers and traffic signals, one bus could complete one loop in under half an hour. To operate this loop bidirectionally with 15-minute frequency, four buses would be required per hour. Assuming an eighteen-hour service day and 365 days a year of service, one fixed circulator route would have a gross annual operating cost of \$2,628,000. Further adjustments could be made to increase service in peak hours or to decrease service frequency much later in the evenings on weekdays when demand may be lower if included in a contract and staffing levels are feasible.

Microtransit service costs are more difficult to calculate if being operated directly, but a similar hourly cost on the part of the contractor could be reasonably expected since labor will be the primary cost driver. Providing one additional staffed bus to operate within the city for eighteen hours a day with similar cost assumptions adds another annual marginal cost of \$657,000.

Similarly, a peak overlay service extending further into residential areas and connecting to Beverly Hills High School could require an additional two peak vehicles per hour for two hours a day, depending on resource availability, service design, and input from school officials and parents depending on need, and would add \$68,000 per year in gross costs based on a 170-day academic calendar with similar assumptions.



Figure 8: A sample circulator alignment used for rough service costing purposes. More detailed service planning is necessary to determine more accurate potential service costs.

It should be strongly cautioned that these are very rough, high-level cost estimates intended as a basis for order-of-magnitude level consideration for approximate budgeting purposes, and that more information with respect to service design and current real-world costs given recent inflation must be taken into consideration.

It is advised to start a new service with a "best foot forward" approach, ensuring that initial service levels upon launch are convenient and competitive to attract and retain passengers. Launching service with lower levels of investment short of the previously mentioned attractive frequent service levels and making plans to scale up service if demand increases will result in a first impression of service that is not useful enough to meet enough needs for enough people, and additional demand is less likely to materialize.

Options Not Currently Recommended for Further Consideration

While the urban form and demands of Beverly Hills could likely support one or more of several different transit operating models, at this time this study does not recommend immediate advancement of several concepts. Among several concepts considered but not advanced are:

- Partnerships with Los Angeles Metro to subsidize additional Metro service
- Partnerships with neighboring municipalities to share existing models of transit service
- Neighborhood Electric Vehicle (NEV) microtransit
- Transportation Network Company (TNC) subsidies
- Streetcar

PARTNERSHIP WITH LA METRO

A compelling option for many cities across the United States is to enter partnership arrangements with their regional transit operator, in this case LA Metro, to support additional transit service that otherwise is difficult

for Metro to feasibly support within the financial constraints under which they operate. This model would pose a low-risk alternative for Beverly Hills by supporting the operations of the regional provider already operating within City limits to increase service levels, and depending on the exact arrangements of a potential agreement, allow the City to exert stronger influence over service decisions. Challenges with this model are a lack of precedent within Los Angeles County as explored by this memorandum's authors as of the time of this writing, particularly given Los Angeles County's long history with standalone municipal operators supplementing regional service, as well as the considerable unknowns of acceptance of any arrangement by an outside Board of Directors and unknowns over any agency-wide regional equity considerations. **While this model could prove cost-effective to the City with lower administrative burden by leveraging existing public resources, the number of remaining variables are challenging to the success of a service given a goal of entering a demonstration pilot period on a short time horizon.**

PARTNERSHIP WITH NEIGHBORING MUNICIPALITIES

Similarly, entering into a contractual relationship with neighboring municipalities either directly operating (such as Culver City or Santa Monica) or contracting transit service of their own (such as West Hollywood) is also a practical and generally financially viable option. The City of Beverly Hills already offers an excellent example of this arrangement through their relationship with the City of West Hollywood for on-demand Dial-A-Ride service for qualifying residents. However, similar challenges to the above case of Metro exist in the unknowns that arise in any negotiations with outside parties. **A partnership of this nature leverages economies of scale for efficient use of resources; however, due to the greater demand on timeline and resources, this is an option that is recommended for further consideration at a later date if a standalone City-led pilot proves successful.**

NEV MICROTRANSIT

A service option benchmarked in other communities such as downtown Santa Monica and Huntington Beach is the prospect of a microtransit service operated by smaller neighborhood electric vehicles, or NEVs. These vehicles are lower-capacity, with up to six seats, and are speed-restricted to operate solely on lower-speed urban streets. This option has also been so far implemented within denser entertainment and retail districts where vehicular congestion is generally already high. While these vehicles are most commonly operated in partnership with third-party service providers and supported by advertising revenue to keep overall cost to municipalities or contracting business improvement districts low, their capacity limitations limit the upper range of their service efficiency on a passenger per hour basis, and often do not offer the congestion reduction goals within their service areas since they are less able to efficiently pool trips. **While effective service in the Triangle is critical to the success of a prospective Beverly Hills service, and while there is viability for a microtransit pilot in other portions of the city, the existing implementation model for this service is not seen as a good match for Beverly Hills' climate and circulation needs and goals at this time.**

TNC SUBSIDIES

An option explored by several less-dense municipalities in Southern California and across the United States is entering into partnership arrangements with Transportation Network Companies (TNCs), also referred to as ride-hailing services, with major examples being the Uber and Lyft platforms. This approach itself can take several different shapes, with discounted trips throughout a defined zone, discounted trips originating or terminating in a zone but with discounts available for trips leaving the zone, or discounted trips originating or terminating at defined transit centers. This option has found qualified success in more suburban areas such as San Clemente, California and Pinellas County, Florida, but in most instances structurally relies upon demand within a given region being low enough to warrant a subsidy for an outside

service proving more cost-effective – or freeing up enough resources that can be more successfully deployed elsewhere – than investment in standalone alternatives. In addition, the finances of TNCs over the course of the COVID-19 pandemic and the changing regulatory environment in California raises concerns over the long-term sustainability of a program dependent on third-party platforms. The lower-occupancy vehicle operating model has also demonstrated negative traffic congestion impacts that are contrary to the climate and traffic goals shared by the City.

STREETCAR

Finally, the idea of a streetcar was considered but dismissed primarily on the basis of significant upfront capital costs relative to unproven ridership demand. Streetcars are a popular mode in the United States in downtown regions for circulation, but pose significant challenges in operations – especially in mixed-traffic environments where streetcars share their operating space with other private vehicles and can become subject to delay. Maintenance space needs also pose a significant challenge given the limited land available within city limits. Streetcars are commonly viewed as offering a degree of transit permanence to downtown regions and have proven to be a popular economic development strategy, but when passenger surveys ask transit riders and the community (including the Beverly Hills community) about priorities in transit service, usability and timeliness are more important than the specific mode. **Streetcars may have a role in the future if other transit services prove to offer consistent passenger demand along a particular alignment, but demand should first be proven through other modes with lower upfront capital costs such as fixed-route bus before consideration of more permanent investment.**

UNMET TRANSIT NEEDS

A thorough review of the 2020 Westside Cities Council of Governments Mobility Study, 2021 Beverly Hills Complete Streets Plan, and recent community surveys and outreach was conducted to identify the unmet transit needs in Beverly Hills. Throughout these discussions and review, several recurring themes became apparent:

- A majority of survey respondents view the current transit network's service within Beverly Hills as "fair" or "poor"
- The existing transit network is viewed as unreliable and inconvenient
- Several destinations of interest are missing from the current network

This section will highlight the specific weaknesses referenced through this project's outreach with respect to missing connections, as well as key community points of interest that have been identified as integral to any municipal service network.

Gaps in Existing Transit Network

There are currently seven primary Metro lines that the City of Beverly Hills rely on to get to their destinations: Lines 2, 4, 20/720, 28, 105, and 617. These lines are not only limited in frequency, but also limited in destinations. These lines serve the following respective corridors: Sunset Boulevard, Santa Monica Boulevard, Wilshire Boulevard, Olympic Boulevard, La Cienega Boulevard, Burton Way, and Beverly Drive. Despite strong coverage along east-west corridors with frequent crosstown service, there are little to no lines that connect these corridors together.

Only one route is designed to provide some level of intra-community circulation within Beverly Hills – Line 617, a new service that combined segments of previous routes in place prior to the NextGen bus network rollout – but the frequency levels that Metro has been able to operate given current operator shortages have left this service categorized as more of a "lifeline" service, operating once per hour per direction to ensure that service is available for those without any other option, but remaining very difficult for most current and prospective riders to incorporate into routine travel.

Bridging the transit connection gap between the northern part of the City (above Sunset Boulevard) and the southern part of the City (south of Santa Monica Boulevard) is important since the northern part of Beverly Hills offers community members access to high-quality community public space and outdoor activity areas identified as key destinations during outreach. These areas include, but are not limited to, Greystone Mansion, Will Rogers Memorial Park, The Maltz Park, Virginia Robinson Gardens, Coldwater Canyon Park, and Franklin Canyon Park.

On a smaller scale, much interest has been shared with the project team on improving circulation within the Triangle, especially among visitors that may currently be compelled to travel between parking areas to visit multiple destinations within the city. A transit solution that can help visitors arriving to Beverly Hills by car that can connect existing City parking structures near other destinations to key community destinations is considered valuable.

There has also been a desire to integrate local schools such as Beverly Hills High School into the transit network. However, this desire is unable to be met with the transit network in the City today given its location away from the major crosstown travel corridors.

The opening of the D Line stations along Wilshire Boulevard will bring an influx of demand for transit connections along this corridor. Lines 20 and 720 alone are operationally unable to meet this incoming demand, and their structure will help to carry passengers incrementally further in the same direction of travel, but will not themselves serve to meaningfully expand the reach of this new rail service. Moreover, there currently aren't enough transit lines traveling north-south that are able to connect community members to these future stations.

It is also key to note that transit is only a part of the solution to completely bridge the gaps within the network. Non-motorized connections will be important to think through and tie into the transit network resolve first and last mile accessibility, especially with the opening of the D Line stations along Wilshire Boulevard. The Beverly Hills Complete Streets Plan has identified several nonmotorized links within the community that will be crucial in expanding the effective reach of the new rail service in addition to any added surface transit service.

Key Destinations Identified from Outreach

There are several key destinations that have been identified by the community through the online survey and the interactive mapping exercise from public meetings. The following destinations are points within the City of Beverly Hills where the community members currently go to or wishes to go to:

- Commercial and retail shops within the Business Triangle
- Community assets such as City Hall, City Public Library
- Schools including Beverly Hills High School, Beverly Vista Middle School, and Horace Mann Elementary School
- Outdoor activity areas including La Cienega Park, Roxbury Park, Greystone Mansion, Will Rogers Memorial Park, The Maltz Park, Virginia Robinson Gardens, Coldwater Canyon Park, and Franklin Canyon Park

- Grocery stores (e.g. Ralphs on Beverly Boulevard, Whole Foods Market on Crescent Drive, and Pavilions on Olympic Boulevard)

These destinations should be considered in any future route recommendation to continue to create an interconnected transportation system that allows a shift in travel from private passenger vehicles to alternative modes.

SERVICE DESIGN CONSIDERATIONS

Principles of Service Design

For any public transit system to be successful, there are several key service area and service design attributes that need to be met, namely the concentration of origins and destinations both in geographic and temporal proximity, a degree of linearity in trip patterns that can be captured by one or more routes, and for areas with multiple routes, support for use of the complete network in route design and policy.

For a new transit service to be successful with respect to ridership and cost effectiveness, it needs to achieve most or all above goals. Listed below are strategies consistent with these goals that should be prioritized in any transit network development:

- **Routes should connect areas and people with the highest transit propensity in as direct of a path as possible.** These include areas with the greatest concentrations of residents and jobs, areas with the strongest retail and economic activity, and areas of greatest network interconnectivity. Linearity is also important to ensure that service can carry riders as far as possible as quickly as possible with as few operating resources as possible, such as buses, operator labor hours, and fuel.
- **Routes should be operated with the highest practical frequency, and with a span of service to match demand.** In most urban areas with consistent all-day activity, rider expectations are increasingly supporting high service frequencies, or the time between bus arrivals at a given stop, of no more than 15 minutes. At high service frequencies of 10 minutes or better, riders feel comfortable using transit without consulting a schedule, arriving to a stop knowing that service will be available soon. As service frequencies approach 15 minutes, more riders may seek out additional information such as schedules or real-time information to plan their trips, making using transit less intuitive and less convenient. As service frequencies exceed 15 minutes, more specific planning will be required by riders, leaving these trips only suitable for those with more predictable schedules and travel behavior, such as commutes to school or work, or riders with more travel flexibility such as retirees. Span of service, or the start and end times for the service day, should also be consistent with relative activity levels, and ensure that transit remains a viable option
 - *West Hollywood has found success emerging from the COVID-19 pandemic with its PickUp service, offering a frequent circulator during evenings and weekends targeted toward the community's peak entertainment hours.*
- **Routes should form (or contribute to) a comprehensive transit network.** Much as a city is made up of a comprehensive set of streets that connect and operate as a uniform, cohesive network, so too does a successful transit network. Ensuring that each route adds value in connecting riders between different parts of the community while also connecting to other services that can facilitate complementary connections outside the community will ensure that service investments yield the greatest possible benefit. In the case of Beverly Hills, it is imperative that any new service leverages the regional investments made by the new Purple Line stations by providing connecting service. Routes should be spaced to minimize effective overlapping and duplicative service coverage, bearing in mind that the customary walking distance to access a service corridor is generally one-quarter mile.

Funding Sources

State, federal, and local resources exist to support funding capital infrastructure like vehicles, bus stop amenities, and transit facilities, and to varying extents, ongoing operations. Communities throughout Los

Angeles County also benefit from local Measure M transportation funding, and municipalities have a history of trading Measure M funding allocations with other local dollars as needs arise. For example, West Hollywood purchases excess Measure M funding from other Los Angeles County communities for arranged prices in unassigned budget dollars to support its transit operations. As the federally designated Metropolitan Planning Organization (MPO) for Los Angeles County, LA Metro will be able to provide further guidance on resources to support a transit pilot and potential permanent transit operation.

An important note is that while many transit operators provide commute-specific services tailored to certain segments of the population like school students, public transit funding support from the federal and state government is conditional upon the basis that service is open to the public without discrimination and cannot be exclusive to school students or other subsets of the population.

Below are sources of potential funding to explore:

- City of Beverly Hills
 - Fare revenues
 - City General Fund support
- Los Angeles County
 - Measure M funding, including bolstering the set local allocation with additional funding swaps
- State of California
 - State Transit Assistance (STA)
 - Transit Development Act (TDA)
 - Transit and Intercity Rail Capital Program (TIRCP)
- United States Government
 - Formula Grants (to be coordinated with LA Metro)
 - 5311 Urbanized Area Grants
 - Surface Transportation Block Grant (STBG)
 - Congestion Mitigation and Air Quality (CMAQ) Grant Program
 - Discretionary Grants
 - 5339(c) Low- or No-Emission Vehicle Program
 - Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Grant Program

ADA Access and Bus Stops

Transit operations must operate with accessibility at the forefront. All public transit vehicles are required to support personal mobility devices such as wheelchairs and mobility scooters by providing wheelchair ramps or lifts, and all public transit infrastructure including bus stops and bus shelters must be fully accessible to passengers with mobility limitations. Capital funding may be required to establish new bus stops in portions of the city not currently served by transit to ensure accessibility.

In addition, fixed-route transit operation also requires the provision of complementary ADA paratransit service. It is possible that new service may be fully within the existing Access Services service area, but future analysis and detailed service planning will be required to fully determine any additional paratransit service needs.

OPERATIONAL CONSIDERATIONS

Fundamentals

The operation of transit service in any form requires several key non-negotiable attributes to be delivered. These attributes must be incorporated into any model from the beginning to ensure the greatest chance for system success.

- **Passenger safety and comfort:** Service should include on-board security cameras, security at major transfer points, adequate lighting on board vehicles and at waiting areas, and operator training to ensure that all riders feel comfortable and empowered to make use of the system without reservation or concern. Early system development discussions should include input on security, including obtaining a security contractor and developing an ambassador program to provide a face for the service, or developing a relationship with the Beverly Hills Police Department for select oversight in limited circumstances. Bus stop and station areas, as well as primary travel paths to access these areas, should also be identified in conjunction with Public Works staff to ensure that illumination at night is sufficient, blind spots are limited, and that any related concerns at key bus stop locations can be addressed. Finally, vehicles and bus stop areas should be regularly maintained to ensure a continued perception of cleanliness.
- **Marketing and branding:** While fast and frequent service can be enough to attract new passengers (as well as essential to retaining riders), ensuring a successful product launch will provide the greatest chance for system success. Innovative branding to produce a mobility product that feels consistent with the character of Beverly Hills will help increase public interest and awareness in the service and could encourage skeptics to try the service. West Hollywood provides an good local example with the distinctive artistic branding of their CityLine service, which draws attention to the vehicles in operation.
- **Regional interconnectivity:** The Los Angeles region has made great strides in producing a transit landscape that combines several different regional and municipal service providers into a coherent and consistent regional user experience. Shared attributes like the TAP fare payment system and integrated public information through Metro's transit maps help to empower riders to make use of the transit network more broadly instead of limiting trips to one familiar operator. A Beverly Hills transit service should seek to build on the model of other municipal operators like Culver City and Santa Monica in partnering with Metro to share fare payment systems (if fares are to be charged) and public information.

Contracting

Public transit service can either be contracted or operated directly by cities or transit districts. **A contracted approach would be recommended for a pilot project to reduce risk to the City by limiting assets on hand if the pilot is not continued, as contractors can also provide vehicles.**

Research has shown that there is not a clear advantage to either approach with respect to operating costs, and local governments can still take on some portions of the overall cost of building and operating a transit service while relying upon an outside contractor for administration of maintenance and operations. A hybrid setup is common in many large California transit agencies such as Foothill Transit and municipal fleets such as those operated by the City of Pasadena, with the agencies and cities taking on responsibility for real estate, facilities, and vehicle procurement to take advantage of capital funding opportunities available to government agencies, but outsourcing operations and maintenance to outside contractors.

If a Beverly Hills pilot were to continue into a permanent fixture a more detailed financial analysis would be recommended to determine the most cost-effective path forward, but given time constraints and the lack of adequate land to support an appropriately sized transit operating facility within city limits, beginning with a turn-key contract would offer the greatest flexibility and responsiveness, but may result in above-average operating costs compared to more mature operations.

Vehicles

A wide range of vehicles could be considered for fixed-route services, while microtransit operations would benefit from a narrower range of smaller vehicles. There are vehicle types that would be appropriate for both operating models and could add additional flexibility to change the nature of a pilot program or alternate between service models in a region over the course of a day.

In either circumstance, all vehicles must provide accommodation for riders using personal mobility devices such as wheelchairs and mobility scooters, such as through a wheelchair ramp or lift. Vehicles with wheelchair ramps are preferable on routes where high volumes of mobility devices can be expected, as wheelchair lift operation is a more time-consuming process that requires the operator to exit the vehicle, introducing additional delay to service.

As well, transit operators in California are now required to meet the California Air Resources Board's Innovative Clean Transit regulation, with non-zero-emission vehicles operated in revenue service to be fully phased out by 2035. **Given the stated community environmental goals for this project, the state of current operating technology, and the need for a future transition, a transit pilot project should seek to use battery electric vehicles.**

Fixed-route service along major corridors is most commonly provided using a standardized 40-foot transit bus and 60-foot articulated transit bus model, while circulator service like that operated by the Los Angeles Department of Transportation's DASH service may use 30- and 35-foot transit buses that are more maneuverable on streets with tighter turns and with the same heavy-duty build quality rated for FTA-required 12 year, 500,000 mile minimum vehicle lifespans, but at the expense of reduced passenger capacity compared to larger vehicles. Other circulator services like West Hollywood's CityLine make use of cutaway buses, using bus bodies placed on conventional passenger van frames. These vehicles are generally less expensive and can be somewhat more maneuverable, but are not tested to the same standards as transit buses and are rated for a shorter service lifespan. Most commercially available cutaway buses for transit use also include wheelchair lifts.

Operating costs can decrease with the use of smaller vehicles as energy efficiency will generally increase, but it should be noted that the energy cost associated with vehicle operation is a relatively small portion of overall operating costs, with most operating cost associated with labor, both in the form of drivers as well as maintenance overhead.

Microtransit service is generally operated using smaller vehicles, such as cutaway buses or large passenger vans modified to include wheelchair capabilities. A distinct advantage to the use of passenger vans, more specifically those rated to seat 10 or fewer people, is that a commercial driver's license is not required for operation in California. However, the reduced capacity of these vehicles limits their successful use in more conventional higher-capacity applications.

It is likely that securing a cutaway van fleet for a pilot program would offer the greatest flexibility for pilot program development while likely providing appropriate capacity for a fixed-route circulator.

SERVICE PERFORMANCE MEASUREMENT

Transit service performance can be measured in several ways, but common metrics for urban transit system planners and administrators to track closely are passengers per revenue hour, or how many passengers are carried for every hour a vehicle operated in revenue service, and passenger subsidy, which is the overall cost of providing service on a per-passenger basis. It is recommended that performance targets be defined in advance of a pilot program to help guide evaluation of whether the program is operating sustainably and whether resources are being used to the greatest benefit of the community. For comparison, the below are fiscal year 2019 systemwide passengers per revenue hour metrics for neighboring transit operators' fixed-route bus service as reported to the Federal Transit Administration:

- Los Angeles Metropolitan Transit Authority: 39.0 passengers/revenue hour
- Los Angeles DASH: 28.3 passengers/revenue hour
- Culver CityBus: 27.1 passengers/revenue hour
- Santa Monica Big Blue Bus: 22.5 passengers/revenue hour
- West Hollywood CityLine: 6.0 passengers/revenue hour

However, while performance metrics can inform planners of the relative efficiency of different services, it is important to note that metrics focusing only on performance of the service in isolation can only form part of an overall analysis of the role of service in the community. To this end, the State of California has been openly considering revisions to its Transit Development Act (TDA) funding guidelines for several years to reduce an emphasis on farebox recovery, or the share of revenue contributed toward transit operations from passenger fares, noting that meeting broader community goals may require the operation of service that places less of an emphasis on absolute cost efficiency. In addition, the remaining effects of changes in travel patterns resulting from the COVID-19 pandemic make it challenging to compare service performance today to service performance prior to March 2020. Most agencies have seen declines in overall ridership levels, and consequently declines in overall service efficiency indicators.

For example, many communities and agencies have set goals toward reducing community Vehicle Miles Traveled (VMT), which measures overall vehicle travel volumes, and can be a metric that rises and falls in parallel with carbon dioxide (CO₂) emissions and air pollutants like fine particulate matter depending on the community's vehicle fleet mix. A strategy toward achieving this goal would be to ensure that service alternatives exist and are attractive to capture trips, which may require operating more transit vehicles in service to provide more attractive service frequency than may be most cost-efficient.

NEXT STEPS

This project sought to provide a needs assessment for the feasibility of additional transit service within the City of Beverly Hills, and has found that there are gaps in existing transit service and potential new connections that can be made to better support regional transportation investments and improve local circulation. This project has also found that this need can be practically met by the City of Beverly Hills on its own, with viable options for exploring a pilot program using contracted service.

As establishment of a pilot program is explored further, there are several additional recommended considerations to explore:

- A second community survey focused on community preferences to determine what service attributes and which potential benefits or incentives would encourage use of public transportation within Beverly Hills

- More detailed route planning to provide specific fixed-route service alignments and operating cost units to inform prospective future Requests for Information (RFIs), including any capability of operating microtransit service using a third-party platform
- Release of an RFI to explore microtransit suitability in more detail with third-party technology providers
- Early partner discussions with LA Metro to explore available finances that could support development of a standalone City transit operation, including federal, state, and county funding opportunities and whether outside funds could be available for a pilot program
- Development of a strategy to transition existing City operating assets and programs, specifically for Dial-A-Ride and trolley service, to be guided by the results of a pilot program

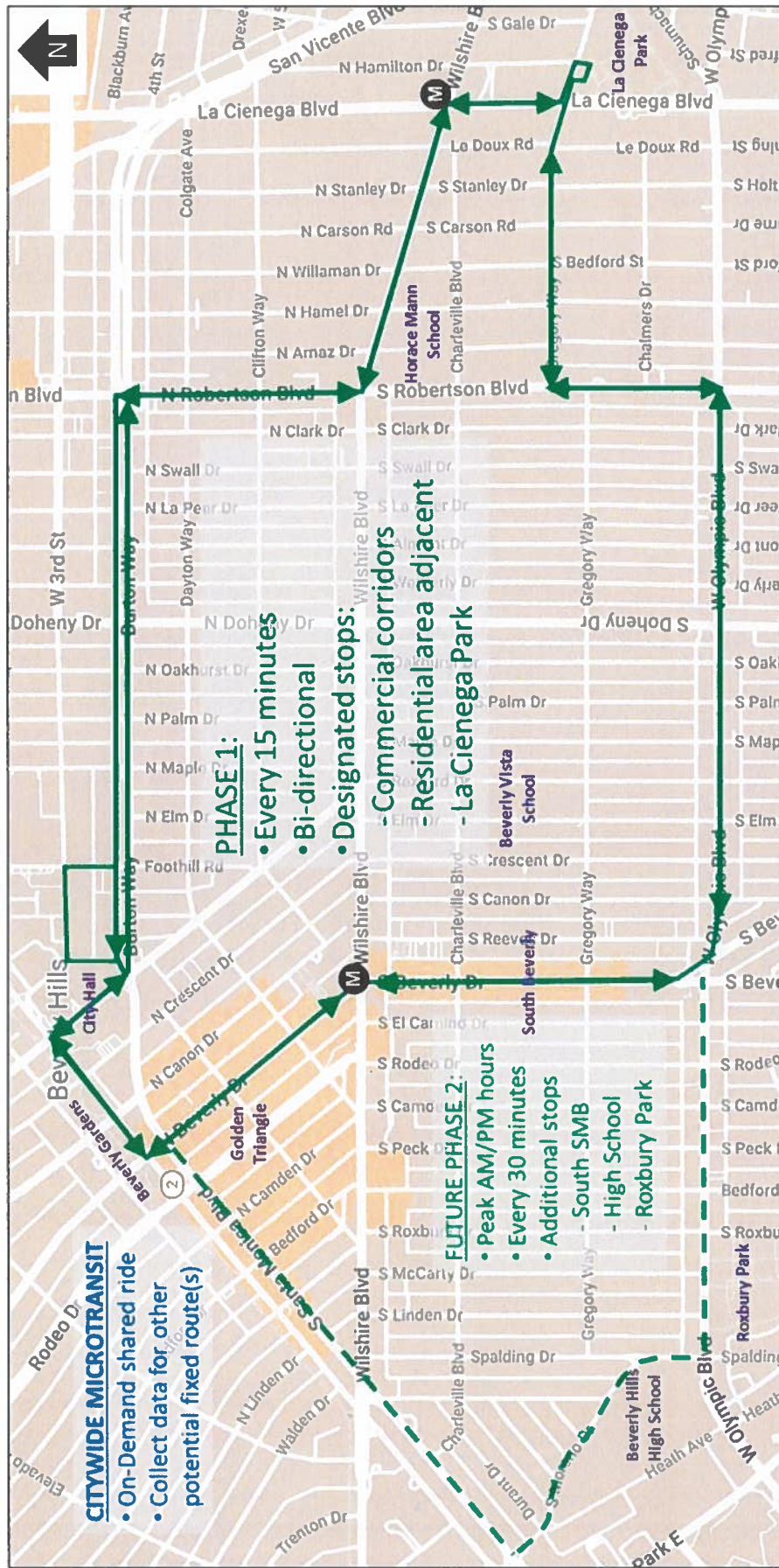
ACKNOWLEDGEMENTS

The Kittelson & Associates project team would like to recognize the following individuals for contributing their time and knowledge to our understanding of the transportation landscape in the surrounding region:

- Francisco Gomez, Transportation Planner, City of West Hollywood
- Diana Chang, Manager of Mobility, City of Culver City
- Carl Torres, Transportation Planning Manager, LA Metro
- Joe Forgiarini, Senior Director, Service Performance & Analysis, LA Metro

ATTACHMENT 2

PROPOSED TRANSIT FIXED-ROUTE
November 2022



Attachment 2

**REQUEST FOR PROPOSALS
TO PROVIDE
MICTROTRANSIT TURNKEY SERVICES**

RFP No. 25-350-7



**CITY OF BEVERLY HILLS
Public Works Department
345 Foothill Road
Beverly Hills, CA 90210**

November 15, 2024

Submittal Deadline: 5:00 p.m., December 18, 2024

**Contact:
Martha Eros, Transportation Planner
Email: transportation@beverlyhills.org**



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1.0 INTRODUCTION

The City of Beverly Hills Complete Streets Plan includes goals and policies for exploring a fast, reliable local transit system with connections to the upcoming Metro D (Purple) Line subway stations. With the absence of convenient parking at both Metro subway stations, interest in local transit connections is expected when one of the subway stations opens in late 2025. The City’s Climate Action & Adaptation Plan also recommends developing a locally operated transit system to help shift away from single-occupancy vehicles and reduce carbon emissions. A transit needs assessment, including public surveys and outreach, was conducted in 2022, and the findings recommend a pilot demand-based microtransit program that would serve both commercial and residential areas within the City of Beverly Hills.

The City of Beverly Hills’ (City) Public Works Department Transportation Bureau invites qualified transportation contractors (Contractor) to respond to a Request for Proposals (RFP) for microtransit turnkey services for the City. The City is looking for a Contractor that can develop and implement a flexible transit service for an 18-month pilot program (Program) in the form of mobility on-demand or microtransit services for general public use within the City of Beverly Hills and identified destinations. The City seeks a turnkey/all-in-one service to include the necessary technology, labor, and vehicles for complete operations management.

The vehicles provided by the Contractor shall be zero-emission, accommodate 8-10 passengers, accommodate wheelchairs/bikes, and traverse all City streets (including the hillside areas). The City encourages autonomous technology for the proposed fleet. The Program shall provide the option for passengers to request rides via mobile app, website, and phone/call center to book a ride.

Tentative Proposal Evaluation Schedule

The City has established the following target dates for evaluation and scheduling purposes. The following dates are tentative, non-binding, and are subject to change without prior notice.

RFP Release	November 15, 2024
Deadline for Contractors to Submit Questions.....	November 22, 2024
Anticipated Deadline for City to Respond to Questions.....	December 4, 2024
Proposals Due and Received by.....	December 18, 2024
Recommend City Council to Award (tentative).....	February/March 2025

The deadline for Contractors to submit questions via PlanetBids is **November 22, 2024 at 5 p.m.** Proposals for this program will be due on **December 18, 2024 at 5 p.m.**, and must include all requirements. Late or incomplete proposals will not be accepted. The City reserves the right to modify these dates at any time, with appropriate notice to prospective contractors.

Submit Questions To:

Please submit questions regarding the RFP via PlanetBids.



Obtaining RFP Documents and Submitting Proposals

The RFP documents may be viewed on and downloaded from the City's PlanetBids portal:

<https://vendors.planetbids.com/portal/39493/portal-home>

Section 4.0 of this RFP provides a list of items that must or may be included in a complete proposal. All Contractors are required to submit their proposals electronically to the PlanetBids website. The electronic bid system will close exactly at the date and time set forth in this RFP or as changed by addenda. Contractors are responsible for submitting complete proposals before the closing time set forth in this RFP or as changed by addenda.

NOTE: Pushing the submit button on the electronic bid system may not be instantaneous; it may take time for the Contractor's documents to upload and transmit before the proposal is accepted. It is the Contractor's sole responsibility to ensure their documents are uploaded, are transmitted, and arrive in time electronically. The City of Beverly Hills will have no responsibility for proposals that do not arrive in a timely manner, no matter what the reason.

All proposals and accompanying documentation will become the property of the City and will not be returned.

Any questions regarding any error, omission, or ambiguity, and any requests for clarification, should be submitted through the PlanetBids website no later than the given deadline. Questions or requests for clarification received after the deadline or sent/posed directly to staff will be disregarded.

For any other questions, please contact the City at transportation@beverlyhills.org.

2.0 SCOPE OF WORK

The following is a list of tasks that are intended to be the responsibility of the Contractor pursuant to this RFP. Submittals are encouraged to propose a comprehensive service approach, describing a specific operational model, technology platform, service territory, vehicle acquisition scheme, and a marketing and performance monitoring plan.

Task 1: Project Management

All communications between the City and the Contractor shall be coordinated through their respective Project Managers and/or their designee. In the area of Project Management, the Contractor shall:

- Schedule and facilitate monthly Project Development Team (PDT) meetings, including a kick-off meeting and meetings at key milestones interagency meetings, field reviews, advisory and/or stakeholder group meetings, and other project related meetings.
- Contractor shall prepare agendas, minutes, and sign in sheets for all meetings.



- The City Project Manager must be kept abreast of all coordination with outside agencies, prior to any meeting with an outside agency or organization.
- The Contractor will prepare and maintain a detailed work plan in accordance with any major milestones and deadlines to launch, expand, and/or make changes to the service. The Contractor will maintain and update the work plan as approved in writing by the City Project Manager.
- Coordinate project resources and work so that milestones are met in an efficient manner. Tasks will be laid out to minimize implementation time and cost while taking into consideration resource and time constraints such as City staff availability.
- Oversee activity of subcontractors, subconsultants, or other contracting parties (collectively, “Subcontractors”), if any. The Contractor's Project Manager will ensure that individuals performing tasks have appropriate skill levels and credentials.
- Coordinate all required deliverables including but not limited to service launch, operations, vehicle acquisition, installation and configuration of software and hardware, documentation and training, branding and marketing, and/or performance monitoring and reporting, per the final contract agreement.
- Contractor shall submit to the City Project Manager invoices monthly to include expenses for the preceding month. Invoices shall include documentation for all services rendered during the period of the invoice. Contractor shall provide additional documentation upon request by the City to further substantiate expenses submitted for reimbursement, as feasible.

Task 2: Service Planning & Parameters

The Contractor shall coordinate with the City Project Manager and staff to develop, approve, and/or refine the service model, including specific stops, routes, schedules, service coverage areas, and cost structure, as it applies.

Tentative Service Performance Standards

- **Service Operating Hours**
 - The service shall operate seven (7) days per week, including holidays, from 6:00 AM to 10:00 PM Pacific Time.
 - The Contractor may propose modified service hours for holidays subject to City written approval. Any changes to service hours must be communicated to the public at least 30 days in advance.
- **Passenger Wait Times**
 - Average wait time shall not exceed 15 minutes from request to pickup
 - 90% of all rides must be picked up within 20 minutes of request
 - During peak hours (7:00-9:00 AM and 4:00-7:00 PM weekdays), average wait times shall not exceed 18 minutes
 - The Contractor shall provide real-time notifications to passengers if estimated wait times will exceed these thresholds



- Service Reliability
 - Minimum 98% completion rate for accepted ride requests
 - Maximum 2% cancellation rate by service provider
 - Vehicle availability shall be maintained at minimum 90% of contracted fleet size during service hours
- Coverage Requirements
 - Services must be available throughout the entire City of Beverly Hills and specific locations adjacent to the City
 - Maximum walking distance to pickup location shall not exceed 1/8 mile in commercial areas and 1/4 mile in residential areas, unless specifically agreed to by the City Project Manager

Some considerations for the service model may involve consideration of regularly occurring special events. The Contractor shall be available for field visits to assess safety, ADA access, pedestrian amenities, and other considerations when developing the service model. The Contractor will perform all planning and work necessary to launch and continue operations on agreed-upon service plan for the Program and to implement any future Council-approved expansions of hours of operation and fleet supply. The Contractor will coordinate with the City on updates related to the technology platform and related rider and driver apps, and the coordination of the delivery and integration of additional vehicles to be operated on the platform in the city. This may include coordination on additional product features, as made available by the Contractor.

Task 3: Deployment Plan and Operations

The Contractor shall coordinate, manage, and control all necessary Program activities which shall include operating the services, dispatch, vehicle maintenance and management personnel; providing driver and other personnel training; preparing administrative procedures, performance statistics, and financial records; and developing methods to maximize service efficiency. The Contractor shall submit a draft plan for City Project Manager approval detailing all tasks necessary to deploy the Program showing the relationship across all components. Include timelines and indicate responsible parties. Please share a deployment plan consistent with a April 2025 target launch date. Deployment tasks shall include but are not limited to:

- Vehicle procurement, lease, or vehicle availability
- Stop or station preparation (i.e., signage, installation of amenities)
- Operator procurement and training
- Administrative processes
- Test runs
- Promotional events and marketing
- Full-service deployment

The Contractor shall work closely with the City to incorporate stakeholder and community feedback into the service model, as appropriate. The final service plan is subject to the written approval of the City. Should changes be proposed to the service, an updated deployment plan for the change must be shared with and approved by the City in writing.



Task 4: Marketing and Outreach

The Contractor shall develop a comprehensive marketing and promotions plan based upon previous experience deploying a new transit, rideshare, or similar service. The City envisions a combination of hard copy marketing materials, promotional events and subsidies, and online advertising. Contractor shall continually work with the City to implement a unified marketing and promotional program that increases community awareness of the Program and maximizes its success in a matter that is context sensitive with the City's various communities and population to successfully engage various community members that may be hard to reach - zero-car households, non-English speakers, persons without internet access, elderly, persons with disabilities, etc. As reasonable, the City will cooperate with and provide support to the Contractor to promote the service and create local awareness. The City will provide ongoing support to the Contractor's team by providing useful local insights and leveraging existing marketing platforms to amplify the Program. Contractor and the City shall collaborate on the following key marketing activities during the course of the Program:

- Press releases and media campaigns
- Rider acquisition campaigns
- Ongoing promotional campaigns
- Outreach to major employers within the City
- Partnerships with key City stakeholders and community organizations

Task 5: Data Collection, Visualization, and Ownership

The Contractor should be able to provide program operational records and additional statistical information as requested to assist the City in complying with other funding and/or legislative requirements. The City will use the information requested in this section to monitor and evaluate the productivity of the service. Information should be accessible to the City through a backend dashboard or information must be regularly submitted to the City according to the reporting schedule to be established by the City. All data generated as a result of the Program service shall become the property of the City. Data listed below are preferable:

- Data on each unique ride request that includes date/time of request, number of passengers, Wheelchair Accessible Vehicle (WAV) request, origin and destination (in both address and longitude/latitude), ride price, ride distance, ride duration, ride rating, etc.
- Number of ride requests and breakdown of detailed status of ride request (completed ride, unaccepted proposal, rider no show, booked out of service hours, seat unavailable, other error)
- Scheduled pick-up time and actual pick-up time - wait time for pick-up for all trips, difference between estimated wait time and actual wait time for all trips (e.g., on-time and not on-time trips)
- Walking distance from origin location to planned pick-up location - not necessary if operating a curb-to-curb service model
- Travel time (i.e., pick-up to drop-off) for all trips, difference between estimated travel time and actual travel time for all trips



- Travel distance (i.e., pick-up to drop-off) for all trips.
- Utilization - average number of riders per vehicle per hour
- Trip cancellations and no-show hotspots/concentrations by day and time of day, as well as methods for diagnosis (e.g., increased wait time due to traffic congestion)
- Percentage of trips paid by various payment methods (if applicable)
- Percentage of trips booked through app, through phone-based service, and through web-based platform
- Rideshare/shared rides percentage (i.e., percent of vehicle hours with more than one trip/multiple passengers who did not book a “group trip” on a vehicle at the same time, for vehicle hours with no group trips)
- Rideshare/shared ride counts (i.e., all vehicle hours with trip counts, broken down by day and hour with group trips factored in)
- Percentage of passengers requiring assistance with mobility devices
- Customer satisfaction data including comments, complaints, ratings, and other information submitted through the app/web-based platform
- Rider demographics- age, gender, ethnicity, etc. - if feasible.
- Vehicle miles travelled
- Ability to aggregate data and see averages, medians, mode, standard deviation, etc. as determined useful planning purposes
- Ability to manage data by various time frames (days, hours of the day, days of the week, weeks, months, years)
- Ability to manage data by geographical zones or subsets of the City

The Contractor shall provide reporting that is consistent/compliant with funding requirements such that the City can seek potential grant funding opportunities. For example, the City must be able to access the following data:

- Vehicle revenue hours - The hours that vehicles are scheduled to or actually travel while in revenue service. Vehicle revenue hours include: layover/recovery time. Vehicle revenue hours exclude: deadhead, operator training, vehicle maintenance testing; and other non-revenue uses of vehicles.
- Vehicle revenue miles - The miles that vehicles are scheduled to or actually travel while in revenue service. Vehicle revenue miles include: layover/recovery time. Vehicle revenue hours exclude: deadhead, operator training, vehicle maintenance testing; and other non-revenue uses of vehicles.
- Passengers per Revenue Hour
- Passengers per Revenue Mile
- Accidents/Vehicle roadcalls/breakdowns
- On-time performance
- Passenger complaints and compliments



Technical Specifications

The Contractor shall furnish all tools, materials, supplies, and equipment to perform the tasks outlined in the Scope of Work. This may require a technology platform that can achieve the following functions:

A. In real time, aggregate riders traveling from multiple origins to multiple destinations in an exceptionally efficient way that optimizes the balance between maximizing vehicle utilization across the fleet and maintaining excellent quality of customer experience.

B. Support fully automated scheduling, dispatch, and reservations, allowing passengers to book trips in real-time via phone, mobile application, and/or web browser. If pre-scheduled bookings are recommended as part of the transit model, indicate how is demand managed with pre-scheduled rides.

C. Flexible in developing pricing models to meet the City's various service goals and objectives such as pricing by distance, day/time of ride, location, or additional passenger pricing. The platform should also have the ability to apply different rate structures to passengers (i.e. elderly, disabled, student, etc.). Please indicate what pricing models can be developed. Please indicate whether City staff may have the ability to apply discounted rate structures to passengers who meet eligibility requirements.

D. Provide promotional pricing such as free rides, promo codes, or vouchers if requested by the City.

E. Allow an option for people to request a wheelchair/mobility device on-demand vehicle. If the service can provide bike racks and are not available on all vehicles, the platform should allow people to request a vehicle with a bike rack.

F. Enhance connections to other mode choices - such as biking, walking, or taking existing fixed route transit. Please indicate if the platform can provide real time information regarding other transportation options, recommend optional trip routes, or allow multi-modal booking. Please indicate if the platform is able to integrate with third party fare collection systems utilized by other transportation/mobility options in the region.

G. Access to related ridership and performance data and the ability to create reports with ease. The technology platform should allow the City to self-generate standard reports, graphs, and/or spatial data or the Contractor should provide assistance in organizing data through graphs or spatial analysis. Data should be available for direct download in a format accessible by the City (CSV, excel, shapefiles for ArcGIS, etc.).

Equipment and Supplies

The Contractor shall furnish all tools, materials, supplies, and equipment to perform the tasks outlined in the Scope of Work. This may require providing vehicles, vehicle maintenance, mobile data terminals, tablet computer, or other equipment. The Contractor shall work closely with the



City to develop a vehicle plan that clearly outlines the fleet size, fixed and variables costs, operations and maintenance needs.

The City is looking for a turnkey microtransit demand responsive service, so vehicle supply throughout the service period may be different through the day or day of week (i.e. peak commute hours may have more vehicles available to manage demand or holidays may have less vehicles due to lower anticipated ridership) adjust based on historic or anticipated ridership trends.

The City desires vehicles that are zero-emission, can accommodate 8-10 passengers, can accommodate wheelchairs/bikes, and can traverse all City streets (including the hillside areas). The City also encourages autonomous technology for the proposed fleet.

Vehicle Specifications

- Zero-Emission Vehicle Requirements:
 - Primary preference: Battery-electric vehicles (BEV)
 - Secondary preference: Plug-in hybrid electric vehicles (PHEV)
 - Minimum range for BEVs: 150 miles per charge under typical operating conditions
 - For PHEVs: Minimum 30 miles of electric-only range
 - If zero-emission vehicles are not available in sufficient quantities, the Contractor must provide a timeline for fleet transition to zero-emission vehicles within the first 6 months of service
- Passenger capacity: 8-10 passengers minimum
- Accessibility: At least 50% of fleet must be ADA-compliant Wheelchair Accessible Vehicles
- Maximum vehicle age: 3 years at service start, not to exceed 5 years during contract term
- All vehicles must have:
 - Automatic door systems
 - Security cameras
 - GPS tracking systems
 - Climate control
 - Bike racks (minimum 2 bike capacity)
 - Service branding and vehicle identification information
 - Ability to traverse all City streets (including the hillside areas).

All vehicles and vehicle equipment required by this RFP shall be maintained in good repair and in a condition satisfactory to the City. All vehicles, including wheelchair accessible vehicles, must meet all safety and mechanical standards established by Federal, State, County, and local law, rules, or regulations. Contractor shall assume all responsibility for the proper maintenance of the vehicles. It shall be the expressed responsibility of the Contractor to assume all coordination with the original manufacturer of the vehicles if necessary to keep the vehicles in safe and good operating condition. This shall include negotiating and processing all vehicle warranty claims through the manufacturer's own warranty department, and is responsible for collection of any monies, extended warranties, or credits as a result, for the length of time the warranty is in effect.



The extent of the proposed preventive maintenance program shall be an important consideration in the selection of the Contractor.

The Contractor, in collaboration with the City, shall develop a brand and logo suitable for multilingual users and campaigns that builds upon, and integrates with, the City's existing brand. Vehicles should have decals or be wrapped with an agreed-upon design that indicates the vehicles are for the City of Beverly Hills' program.

Each vehicle must receive a daily pre-trip inspection by the operator prior to being placed in service. Daily pre-trip inspections must be supplemented by regular time and mileage maintenance inspections to ensure safe and proper operating condition of vehicles. Inspection of each vehicle shall be completed after its daily service to ensure all lights are functioning, all seating is secure and that all tires, wheels, lugs, air brake systems (if applicable), wheelchair lifts (if applicable) and exit doors are in proper operating condition.

Proposals will be evaluated on the ability of the Contractor's fleet to service the general populations, as well as elderly and limited mobility clients. Contractors shall describe the proposed fleet in detail, showing how the fleet meets ADA requirements and the service needs of the City. The driver/operator user interface should be safe and easy to use, and include audible and clear messaging indicating passenger updates and stop changes. Driving instructions should be available in list, map, and turn-by-turn voice instructions to ensure safe operation.

The Contractor shall provide a vehicle storage and maintenance facility site that is within reasonable distance (within approximately 6-8 miles) and a response time of 30 minutes from the City. The Contractor shall also provide a plan on where/how the vehicles will be charged/fueled.

Autonomous Vehicle Integration

The City seeks to position this service for future integration of autonomous vehicle technology. The Contractor shall maintain awareness of autonomous vehicle developments and provide the City with regular updates on potential implementation opportunities. Any autonomous vehicle deployment shall require separate City written approval and must comply with all applicable federal, state, and local regulations.

Staffing and Support Services

The Contractor shall provide staffing and support services necessary to perform the tasks outlined in the Scope of Work.

Vehicle Operator

The Contractor will provide all driver personnel, as well as be responsible for providing driver and other personnel training. The City does not require the Contractor to have a specified number of affiliated drivers, so long as the Contractor can ensure that it will provide a sufficient number of drivers to provide its proposed level of service at any given time during service hours, including periods of peak demand. Vehicle operators must have all appropriate California Driver's Licenses and Certificates as well as any other licenses, certificates or training required by applicable Federal,



State, and local regulations. Contractor shall indicate their hiring standards in their proposal including their background check policies and procedures. All drivers shall be employees of Contractor and Contractor shall be solely responsible for payment of all employees' wages and benefits.

Vehicle operators must be trained in all operational procedures relating to the system. Training must include customer service techniques for interacting with the public in a helpful and courteous manner, basic information about the route and the City of Beverly Hills, and sensitivity and empathy training directed towards the needs of elderly and passengers with limited mobility, in compliance with the Americans with Disabilities Act. Contractor shall describe how it will maintain an ongoing employee safety and training program. Contractor shall provide City with incident reports and notify the City if any incident may affect the available fleet.

Dispatching and Customer Service

Although the City expects that users will utilize a mobile app or web browser to book their trips and seek customer service assistance, an option for users without a smart phone or internet access is necessary to create an equitable program. The Contractor shall have capable and courteous personnel who are responsible for taking requests, accurately record appointments; properly manage complaints and customer service requests and responding to telephone inquiries regarding transportation services. Customer service support should also be available by email.

Training and Technology Support

The Contractor shall provide training and manuals for the City staff needed to monitor, assess, access data and develop reports using the dashboard and other tools provided by the Contractor. The Contractor shall provide training to City staff such that they are well-equipped and understand the technology aspects of the service to provide assistance and general support to the end user (public). The Contractor shall provide technology support and assistance as issues or questions arise with City staff, via phone and email during service hours. The Contractor shall provide any training to City staff to understand any products or platforms available to City staff. The Contractor will work with the City to determine the most effective and cost-efficient method of training.

Term of Contract

The initial term of the Contract is 2 years at the City's discretion. The City also reserves the right to extend the Contract for up to 3 additional 1-year terms (individually, "Extension") upon the same terms and conditions as parties agreed to in the Contract. Thus, parties agree the Contract may be for a total of 5 years upon the same terms and conditions as parties agreed in the Contract.

Notwithstanding the foregoing, the City is not obligated to extend the Contract for any amount of time. If there is outstanding work within the Scope of Work at the end of the initial two year term of the Contract and the City requires time to solicit for and secure an alternative contractor, Contractor shall continue to provide the services within the Scope of Work on a month-to-month basis, not to exceed six (6) months, at the same cost, terms, and conditions in effect at the termination of the Contract. The City shall give Contractor at least thirty (30) days written notice of such a need and the anticipated timeline to secure an alternative contractor.



3.0 QUALIFICATIONS

The minimum requirements Contractors must meet to be eligible are:

- Qualification to conduct business in Beverly Hills
- Not have been debarred by Federal, State, or local government
- Current or previous experience operating similar programs in at least three (3) cities
- W2 employees and local-hire plan/program
- Ability to provide ride data and metrics, including map-based data

4.0 SUBMISSION AND EVALUATION

Contractors wishing to be considered shall submit the following:

1. Format

- Submit electronically via PlanetBids as discussed in Section 1.0 of this RFP
- The proposal shall be signed by an official authorized to bind the company
- Include a table of contents in the proposal
- Submit Cost Proposal rates and budget in a **separate file** electronically on PlanetBids via the Cost File section
- Include company name and RFP number in files submitted electronically

2. Cover Letter

Provide a cover letter that includes the following:

- Complete name, or business name, of the Contractor preparing the proposal
- Name, title, email address, mailing address, and phone number of the person the City should contact regarding the proposal
- Statement that the proposal is an offer to complete the Scope of Work listed in the RFP and the offer (including the Cost Proposal rates and budget) remains valid for at least ninety (90) business days after the Proposal due date.
- Statement whether the Contractor, or any individual who would perform work under the Contract, has a possible conflict of interest and, if so, the nature of that conflict. The City reserves the right to terminate the Contract if its execution would or could create, or give the appearance of creating, a conflict of interest. The City, at its sole discretion, shall make all determinations on the existence or appearance of a conflict of interest.
- Statement of acknowledgment that the City's standard contract and insurance have been reviewed and accepted by the Contractor with or without qualification.
- Statement whether the Contractor intends to use Subcontractors to complete the Scope of Work. If so, identify the name of each proposed Subcontractor, their mailing address, email address, and phone number. Include the service related to the Scope of Work that the Subcontractor is anticipated to perform.
- Signature of a person empowered to bind the Contractor to the provisions of the RFP and any contract awarded pursuant to it.



3. Work Proposal

The proposal narrative should provide a straightforward, concise delineation of capabilities to satisfy the RFP and should include the following:

- Experience:
 - Describe why the Contractor is qualified to provide the services described in the RFP.
 - Describe the length of time the Contractor has been providing the services described in the RFP.
 - Describe the total number of clients for which the Contractor has provided the services outlined in the RFP.
 - Describe the Contractor's experience with public agency transportation programs.
 - Describe how the Contractor has promoted its services and/or encouraged communities to utilize the services outlined in the RFP.
- Staffing:
 - Provide a plan overview for how the Program will be staffed (e.g., managers, drivers, operational staff), including organizational charts, shift hours, local hiring, and employment plan.
 - Name the key staff that would be involved in the Program. List all relevant licenses, specialties and trainings held by the key staff.
 - State how many employees the Contractor has in total.
 - List the office location(s) and identify the office(s) from which services will be performed.
- Method of Approach:
 - Provide a narrative detailing the operational and organizational approach the Contractor will take to timely fulfill the Scope of Work
 - Describe how the Contractor will complete the Scope of Work, communicate with the City throughout the work, advance the Program goal/objectives, and provide continuity on work efforts.
 - Describe how the Contractor will address or mitigate the following potential risks or challenges:
 - Operational shortfalls due to staffing issues, vehicle issues/maintenance, or mobile app issues.
 - Vehicles involved in collisions or vandalism.
 - Unruly or uncooperative passengers
 - Recharging/fueling of vehicles during service hours (if necessary)
 - Explain the data and reporting systems that will be used to routinely evaluate program performance. Provide a sample metric report from a previous/current program as an appendix.
 - Provide an outline of what you will need from the City (if any) to implement the contract successfully.



- Subcontractor Information (if any)
 - Describe the specific requirements of the RFP that the Subcontractor will perform.
 - Describe why the Subcontractor is qualified to provide the services described in the RFP.
 - Describe the length of time the Subcontractor has been providing the services described in the RFP.
 - Provide a plan overview for how the Subcontractor will staff the Program. Include organizational charts, shift hours, local hiring, and employment plan.
 - Name the key Subcontractor staff that would be involved in the Program. List all relevant licenses, specialties and trainings held by the key staff.
 - State how many employees the Subcontractor has in total.
 - List the office location(s) and identify the office(s) from which services will be performed.

4. References

- Include a list of three (3) references for whom the services required to complete the Scope of Work have been performed by the Contractor within the last three (3) years.
- The list of references should include name, email address, mailing address, brief description of services completed relevant to the RFP, and point of contact who can attest to the quality and effectiveness of the services.

5. Cost Proposal

- The Cost Proposal should provide information about hours of operation, number of vehicles per day, monthly cost, and total annual cost.
- Submit Cost Proposal rates and budget in a separate file (preferably Excel format) electronically on PlanetBids via the Cost File section

6. Business License

- Attach a copy of a proof of registration with the Secretary of State to conduct business in the State of California

7. Insurance

(a) Contractor shall at all times during the term of this Agreement carry, maintain, and keep in full force and effect, insurance as follows:

(1) A policy or policies of Comprehensive General Liability Insurance, with minimum limits of Two Million Dollars (\$2,000,000) for each occurrence, combined single limit, against any personal injury, death, loss or damage resulting from the wrongful or negligent acts by Contractor.



(2) A policy or policies of Comprehensive Vehicle Liability Insurance covering personal injury and property damage, with minimum limits of One Million Dollars (\$1,000,000) per occurrence combined single limit, covering any vehicle utilized by Contractor in performing the Scope of Work required by this Agreement.

(3) Workers' compensation insurance as required by the State of California.

(b) Contractor shall require each of its sub-contractors to maintain insurance coverage which meets all of the requirements of this Agreement.

(c) The policy or policies required by this Agreement shall be issued by an insurer admitted in the State of California and with a rating of at least a A+;VII in the latest edition of Best's Insurance Guide.

(d) Contractor agrees that if it does not keep the aforesaid insurance in full force and effect City may either immediately terminate this Agreement or, if insurance is available at a reasonable cost, City may take out the necessary insurance and pay, at Contractor's expense, the premium thereon.

(e) At all times during the term of this Agreement, Contractor shall maintain on file with City's Risk Manager a certificate or certificates of insurance on the form set forth in Exhibit C, attached hereto and incorporated herein, showing that the aforesaid policies are in effect in the required amounts. Contractor shall, prior to commencement of work under this Agreement, file with City's Risk Manager such certificate or certificates. The general liability insurance shall contain an endorsement naming the City as an additional insured.

(f) The general liability and vehicle liability policies required under this Agreement shall contain an endorsement providing that the policies cannot be canceled or reduced except on thirty (30) days prior written notice to City, and specifically stating that the coverage contained in the policies affords insurance pursuant to the terms and conditions as set forth in the Agreement.

(g) The insurance provided by Contractor shall be primary to any coverage available to City. The policies of insurance required by this Agreement shall include provisions for waiver of subrogation.

(h) Any deductibles or self-insured retentions must be declared to and approved by City. At the option of City, Contractor shall either reduce or eliminate the deductibles or self-insured retentions with respect to City, or Contractor shall procure a bond guaranteeing payment of losses and expenses.

(i) The insurance coverage amounts required under the Agreement do not limit City's right to recover against Contractor and its insurance carriers.

- Affirmative statement of compliance with indemnity and insurance. Requirements are specified in this section and Attachment A.



8. Acknowledgment of All Addenda
 - If any addenda are posted, all firms planning to submit proposals must acknowledge addenda via PlanetBids.

Please Note: Any substitution of key personnel during the Program shall require the prior written approval of the City and submittal of the above information for the proposed new team members for City review.

5.0 EVALUATION PROCESS AND CRITERIA

The City's review process will emphasize the following criteria:

- A. Contractor's history and capacity to perform the service (15%)
- B. Contractor's qualifications and experience with programs of similar size and scope (15%)
- C. Contractor's familiarity with and proximity to the program (10%)
- D. Contractor's proposed program approach and schedule (30%)
- E. Contractor's proposed technology and fleet (20%)
- F. Submitted references from programs of similar size and scope (10%)

Submittals will be evaluated by a review panel from the City's Public Works Department. The City will provide the answers to any questions submitted by an interested party after the release of the RFP to all parties that have indicated interest in the RFP via PlanetBids.

After the closing date, the City intends to hold oral interviews and select a recommended contractor, after which a negotiated agreement between the City and recommended contractor will be presented to the City Council for consideration. Work will commence on the Commencement Date set forth in the Contract. .

6.0 GENERAL TERMS AND CONDITIONS

The City of Beverly Hills shall not, in any event, be liable for any pre-contractual expenses incurred by the Contractor. Pre-contractual expenses are defined as expenses incurred by the Contractor in:

1. Preparing the response to this RFP.
2. Submitting the proposal to the City.
3. Negotiating with the City in any matter related to this proposal.
4. Any other expenses incurred by the Contractor prior to the date of the executed agreement.

The City of Beverly Hills reserves the right to reject any and all proposals. Further, the City makes no representations that any agreement will be awarded to any contractor responding to this RFP.



The City reserves the right to cancel the services at any phase or at any point in any phase and pay the Contractor only for costs of services satisfactorily performed and incurred to that date. All data, documents and other products used or developed during the course of facilitating the Complete Streets Planning services will remain the property of the City.

6.1 Contract between Contractor and City

The City will prepare an agreement for implementation between the Contractor and the City. See Attachment A for a sample of the City's services contract. Please indicate in your proposal any exceptions taken to the requirements of the agreement.

6.2 Late Proposals It is the Contractor's sole responsibility to ensure that proposals are received prior to the scheduled closing time specified in this RFP. Proposals will not be accepted after the deadline.

6.3 Withdrawal of Proposals

Proposals may be withdrawn if written notification of withdrawal of the proposal is signed by an authorized representative of the Contractor and received by the City prior to the closing time for receipt of proposals. Proposals cannot be changed or withdrawn after the time designated for receipt.

6.4 Rejection of Proposals

The City reserves the right to reject any and all proposals received in response to this RFP and to waive any informality in any proposal if it is determined to be in the best interest of the City to do so.

6.5 Proposal Validity Period

Submission of a proposal will signify the Contractor's agreement that the proposal, and contents thereof, are valid for ninety (90) days following the submission of the proposal and shall become part of the agreement that is negotiated with the Contractor.

6.6 Documents to be Construed Together

The RFP proposal and all documents incorporated by reference in a contract entered into between the Contractor and the City, and all modifications of said documents, shall be construed together as one document.

6.7 Extra Work or Materials

The City shall have the right to make alterations, eliminations and additions in the scope of work. Exercise of such right shall in no way void the agreement. The value of such extra work shall be agreed upon by the City and the Contractor in writing in accordance with the agreement.



6.8 News Releases

News releases pertaining to the award of any agreement resulting from this RFP shall not be made without prior written approval of the City. The City's name shall not appear on customer lists, advertising or other materials used to promote the Contractor's services without prior written approval of the City.

6.9 Closing

The City reserves the right to accept or reject any and all proposals, waive any defects or irregularity, modify the proposal terms or the selection process or negotiate a contract, along with a revised Scope of Work, schedule and fees with the Contractor. The City reserves the right to eliminate or add tasks identified in the Scope of Work with a corresponding reduction or increase in the fee. Staff shall present its recommendation to the City Council and is subject to its approval.

ATTACHMENT A

SAMPLE AGREEMENT

AGREEMENT BETWEEN THE CITY OF BEVERLY HILLS AND
CONTRACTOR'S NAME FOR BRIEFLY DESCRIBE PURPOSE
OF CONTRACT

NAME OF CONTRACTOR: Insert name of contractor

RESPONSIBLE PRINCIPAL OF CONTRACTOR: Insert name, title

CONTRACTOR'S ADDRESS: Insert street address
Insert city, state, zip code
Attention: Insert name, title

CONTRACTOR'S E.I.N/TAX I.D. NO.: Insert contractor's Tax I.D. No.

CITY'S ADDRESS: City of Beverly Hills
455 N. Rexford Drive
Beverly Hills, CA 90210
Attention: Dept. Head's Name, Title

COMMENCEMENT DATE: Insert date of commencement

TERMINATION DATE: Insert date of termination

CONSIDERATION: Not to exceed \$ Insert consideration amount



**AGREEMENT BETWEEN THE CITY OF BEVERLY HILLS AND
CONTRACTOR'S NAME FOR BRIEFLY DESCRIBE PURPOSE
OF CONTRACT**

THIS AGREEMENT is made by and between the City of Beverly Hills (hereinafter called "CITY"), and **insert contractor's name** (hereinafter called "CONTRACTOR").

RECITALS

- A. CITY desires to have certain services and/or goods provided as set forth in Exhibit A (the "Scope of Work"), attached hereto and incorporated herein.
- B. CONTRACTOR represents that it is qualified and able to perform the Scope of Work.

NOW, THEREFORE, the parties agree as follows:

Section 1. CONTRACTOR's Scope of Work. CONTRACTOR shall perform the Scope of Work described in Exhibit A in a manner satisfactory to CITY and consistent with that level of care and skill ordinarily exercised by members of the profession currently practicing in the same locality under similar conditions. CITY shall have the right to order, in writing, changes in the Scope of Work. Any changes in the Scope of Work by CONTRACTOR must be made in writing and approved by both parties. The cost of any change in the Scope of Work must be agreed to by both parties in writing.

Section 2. Time of Performance.

CONTRACTOR shall commence its services under this Agreement upon the Commencement Date or upon a receipt of a written notice to proceed from CITY. CONTRACTOR shall complete the performance of services by the Termination Date set forth above.

The City Manager or her designee may extend the time of performance in writing for two additional one-year terms or such other term not to exceed two years from the date of termination pursuant to the same terms and conditions of this Agreement.

Section 3. Compensation.

- (a) Compensation

If compensation is based on an hourly rate or other rates

CITY agrees to compensate CONTRACTOR for the services and/or goods provided under this Agreement, and CONTRACTOR agrees to accept in full satisfaction for such services, a sum not to exceed the Consideration set forth above and more particularly described in Exhibit B, attached hereto and incorporated herein, based on the rates set forth in Exhibit B.



If compensation is based on a flat fee

CITY agrees to compensate CONTRACTOR for the services and/or goods provided under this Agreement, and CONTRACTOR agrees to accept in full satisfaction for such services, a sum not to exceed the Consideration set forth above and more particularly described in Exhibit B.

(b) Expenses

If no reimbursable expenses

The amount set forth in paragraph (a) shall include reimbursement for all actual and necessary expenditures reasonably incurred in the performance of this Agreement (including, but not limited to, all labor, materials, delivery, tax, assembly, and installation, as applicable). There shall be no claims for additional compensation for reimbursable expenses.

If CITY reimburses for certain expenses in addition to compensation

CONTRACTOR shall be entitled to reimbursement only for those expenses expressly set forth in Exhibit B. Any expenses incurred by CONTRACTOR which are not expressly authorized by this Agreement will not be reimbursed by CITY.

(c) Additional Services. CITY may from time to time require CONTRACTOR to perform additional services not included in the Scope of Work. Such requests for additional services shall be made by CITY in writing and agreed upon by both parties in writing.

Section 4. Method of Payment. CITY shall pay CONTRACTOR said Consideration in accordance with the method and schedule of payment set forth in Exhibit B.

Section 5. Independent Contractor. CONTRACTOR is and shall at all times remain, as to CITY, a wholly independent contractor. Neither CITY nor any of its agents shall have control over the conduct of CONTRACTOR or any of CONTRACTOR's employees, except as herein set forth. CONTRACTOR shall not, at any time, or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of CITY.

Section 6. Assignment. This Agreement shall not be assigned in whole or in part, by CONTRACTOR without the prior written approval of the City Manager. Any attempt by CONTRACTOR to so assign this Agreement or any rights, duties or obligations arising hereunder shall be void and of no effect.

Section 7. Responsible Principal(s)

(a) CONTRACTOR's Responsible Principal set forth above shall be principally responsible for CONTRACTOR's obligations under this Agreement and shall serve as principal liaison between CITY and CONTRACTOR. Designation of another Responsible Principal by CONTRACTOR shall not be made without prior written consent of CITY.

(b) CITY's Responsible Principal shall be the City Manager or his designee set forth above who shall administer the terms of the Agreement on behalf of CITY.



Section 8. Personnel. CONTRACTOR represents that it has, or shall secure at its own expense, all personnel required to perform CONTRACTOR's Scope of Work under this Agreement. All personnel engaged in the work shall be qualified to perform such Scope of Work.

Section 9. Permits and Licenses. CONTRACTOR shall obtain and maintain during the Agreement term all necessary licenses, permits and certificates required by law for the provision of services under this Agreement, including a business license.

Section 10. Interests of CONTRACTOR. CONTRACTOR affirms that it presently has no interest and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of the Scope of Work contemplated by this Agreement. No person having any such interest shall be employed by or be associated with CONTRACTOR.

Section 11. Insurance.

(a) CONTRACTOR shall at all times during the term of this Agreement carry, maintain, and keep in full force and effect, insurance as follows:

(1) A policy or policies of Comprehensive General Liability Insurance, with minimum limits of Two Million Dollars (\$2,000,000) for each occurrence, combined single limit, against any personal injury, death, loss or damage resulting from the wrongful or negligent acts by CONTRACTOR.

(2) A policy or policies of Comprehensive Vehicle Liability Insurance covering personal injury and property damage, with minimum limits of One Million Dollars (\$1,000,000) per occurrence combined single limit, covering any vehicle utilized by CONTRACTOR in performing the Scope of Work required by this Agreement.

(3) Workers' compensation insurance as required by the State of California.

(4) Professional Liability Insurance

A policy or policies of Professional Liability Insurance (errors and omissions) with minimum limits of One Million Dollars (\$1,000,000) per claim and in the aggregate. Any deductibles or self-insured retentions attached to such policy or policies must be declared to and be approved by CITY. Further, CONTRACTOR agrees to maintain in full force and effect such insurance for one year after performance of work under this Agreement is completed.

(b) CONTRACTOR shall require each of its sub-contractors to maintain insurance coverage which meets all of the requirements of this Agreement.

(c) The policy or policies required by this Agreement shall be issued by an insurer admitted in the State of California and with a rating of at least a A+;VII in the latest edition of Best's Insurance Guide.

(d) CONTRACTOR agrees that if it does not keep the aforesaid insurance in full force and effect CITY may either immediately terminate this Agreement or, if insurance is available at a reasonable cost, CITY may take out the necessary insurance and pay, at CONTRACTOR's expense, the premium thereon.



(e) At all times during the term of this Agreement, CONTRACTOR shall maintain on file with CITY's Risk Manager a certificate or certificates of insurance on the form set forth in Exhibit C, attached hereto and incorporated herein, showing that the aforesaid policies are in effect in the required amounts. CONTRACTOR shall, prior to commencement of work under this Agreement, file with CITY's Risk Manager such certificate or certificates. The general liability insurance shall contain an endorsement naming the CITY as an additional insured.

(f) The general liability and vehicle liability policies required under this Agreement shall contain an endorsement providing that the policies cannot be canceled or reduced except on thirty (30) days prior written notice to CITY, and specifically stating that the coverage contained in the policies affords insurance pursuant to the terms and conditions as set forth in the Agreement.

(g) The insurance provided by CONTRACTOR shall be primary to any coverage available to CITY. The policies of insurance required by this Agreement shall include provisions for waiver of subrogation.

(h) Any deductibles or self-insured retentions must be declared to and approved by CITY. At the option of CITY, CONTRACTOR shall either reduce or eliminate the deductibles or self-insured retentions with respect to CITY, or CONTRACTOR shall procure a bond guaranteeing payment of losses and expenses.

(i) The insurance coverage amounts required under the Agreement do not limit CITY's right to recover against CONTRACTOR and its insurance carriers.

Section 12. Indemnification.

(a) CONTRACTOR agrees to indemnify, hold harmless and defend CITY, City Council and each member thereof, and every officer, employee and agent of CITY, from any claim, liability or financial loss (including, without limitation, attorney's fees and costs) arising from any intentional, reckless, negligent, or otherwise wrongful acts, errors or omissions of CONTRACTOR or any person employed by CONTRACTOR in the performance of this Agreement.

(b) All duties of CONTRACTOR shall survive termination or expiration of the Agreement.

Section 13. Termination.

(a) CITY shall have the right to terminate this Agreement for any reason or for no reason upon five calendar days' written notice to CONTRACTOR. CONTRACTOR agrees to cease all work under this Agreement on or before the effective date of such notice.

(b) In the event of termination or cancellation of this Agreement by CITY, due to no fault or failure of performance by CONTRACTOR, CONTRACTOR shall be paid based on the percentage of work satisfactorily performed at the time of termination. In no event shall CONTRACTOR be entitled to receive more than the amount that would be paid to CONTRACTOR for the full performance of the services required by this Agreement. CONTRACTOR shall have no other claim against CITY by reason of such termination, including any claim for compensation.



Section 14. CITY's Responsibility. CITY shall provide CONTRACTOR with all pertinent data, documents, and other requested information as is available for the proper performance of CONTRACTOR's Scope of Work.

Section 15. Information and Documents. All data, information, documents and drawings prepared for CITY and required to be furnished to CITY in connection with this Agreement shall become the property of CITY, and CITY may use all or any portion of the work submitted by CONTRACTOR and compensated by CITY pursuant to this Agreement as CITY deems appropriate.

Section 16. Records Retention and Examination. CONTRACTOR shall retain, protect, and maintain in an accessible location all records and documents, including paper, electronic, and computer records, with respect to all matters covered under this Agreement for five (5) years after receipt of final payment by CITY under the Agreement. CONTRACTOR shall make all such records and documents available for inspection, copying, or other reproductions, and auditing by authorized representatives of CITY, including the City Manager or designee, free of charge. CONTRACTOR shall make available all requested data and records at reasonable locations within the County of Los Angeles at any time during normal business hours, and as often as CITY deems necessary. If records are not made available within the County of Los Angeles, CONTRACTOR shall pay CITY's travel, hotel and meal costs to the location where the records are maintained. CONTRACTOR must include this provision in all subcontracts made in connection with this Agreement. This provision shall survive the termination of the Agreement.

Section 17. Nondiscrimination by CONTRACTOR. In the performance of this Agreement, CONTRACTOR assures that no person shall, on the basis of race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information, sexual orientation or other basis prohibited by law, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under this Agreement or under any project, program or activity supported by the Agreement, as required by Title VI of the Civil Rights Act of 1964, as amended, the Civil Rights Restoration Act of 1987, and Federal Executive Order 12898 (Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations). CONTRACTOR shall not discriminate against any employee, subcontractor, or applicant for employment because of race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information, sexual orientation or other basis prohibited by law, and shall take affirmative action to ensure that subcontractors and applicants are employed, and that employees are treated during employment, without regard to their race, color, religious creed, sex, gender, gender identity, gender expression, marital status, national origin, ancestry, age, physical disability, mental disability, medical condition, genetic information or sexual orientation.

Section 18. Notice. Any notices, bills, invoices, etc. required by this Agreement shall be deemed received on (a) the day of delivery if delivered by hand during the receiving party's regular business hours or by facsimile before or during the receiving party's regular business hours; or (b) on the second business day following deposit in the United States mail, postage prepaid to the addresses set forth above, or to such other addresses as the parties may, from time to time, designate in writing pursuant to this section.



Section 19. Attorney's Fees. In the event that either party commences any legal action or proceeding to enforce or interpret the provisions of this Agreement, the prevailing party in such action shall be entitled to reasonable attorney's fees, costs and necessary disbursements, in addition to such other relief as may be sought and awarded.

Section 20. Entire Agreement. This Agreement represents the entire integrated agreement between CITY and CONTRACTOR, and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by a written instrument signed by both CITY and CONTRACTOR.

Section 21. Exhibits; Precedence. All documents referenced as exhibits in this Agreement are hereby incorporated in this Agreement. In the event of any discrepancy between the express or implied subject matters of this Agreement and the provisions of any document incorporated herein by reference, the provisions of this Agreement shall prevail.

Section 22. Governing Law. The interpretation and implementation of this Agreement shall be governed by the domestic law of the State of California.

Section 23. CITY Not Obligated to Third Parties. CITY shall not be obligated or liable under this Agreement to any party other than CONTRACTOR.

Section 24. Severability. Invalidation of any provision contained herein or the application thereof to any person or entity by judgment or court order shall in no way affect any of the other covenants, conditions, restrictions, or provisions hereof, or the application thereof to any other person or entity, and the same shall remain in full force and effect.

EXECUTED the ____ day of _____ 20__, at Beverly Hills, California.

CITY OF BEVERLY HILLS
A Municipal Corporation

Insert Name of Dept Head / Dir. of Fin. / CM
Insert Title

CONTRACTOR:

Insert Contractor Name
Insert Title

Insert Contractor Name
Insert Title

APPROVED AS TO CONTENT:



Insert Dept Head Name
Title

Insert Risk Manager Name
Risk Manager

Insert Purchasing Services Manager Name
Purchasing Services Manager

DRAFT



EXHIBIT A
SCOPE OF WORK

I. SCOPE OF WORK

CONTRACTOR shall perform the following services:

[Describe the services in detail. Include schedule for deliverables and/or services. If there is a need for a Project schedule, insert a Project schedule or insert "The City Manager or his designee may establish a project schedule in writing."]

II. INFECTIOUS DISEASE

A. CONTRACTOR shall be required to know and adhere to the California Occupational Safety and Health Act of 1973 ("CalOSHA") [COVID-19 Prevention Non-Emergency Regulations](#), the [California Department of Public Health](#) orders and all state, federal and local regulations regarding COVID-19 and other infectious diseases that may pose a risk to public health.

B. CONTRACTOR shall advise employees who have any symptoms of COVID-19, the common cold, influenza or infectious disease not to report to work.

C. CONTRACTOR shall notify their CITY Responsible Principal and the Risk Manager immediately upon learning that an employee who was working onsite at a CITY facility has been diagnosed with COVID-19 or any infectious disease.

For questions, please contact CITY's Responsible Principal or Risk Management at 310-285-1073.



EXHIBIT B
SCHEDULE OF PAYMENT AND RATES

(a) Rates/Compensation

- (b) CONTRACTOR shall submit to CITY a detailed invoice, on a monthly basis or less frequently, for the services performed pursuant to this Agreement. Each invoice shall itemize the services rendered during the billing period and the amount due. Within 30 days of receipt of each invoice, CITY shall pay all undisputed amounts included on the invoice. CITY shall pay CONTRACTOR said Consideration in accordance with the schedule of payment set forth in this Exhibit.

DRAFT



EXHIBIT C

CERTIFICATE OF INSURANCE

This is to certify that the following endorsement is part of the policy(ies) described below:

NAMED INSURED

COMPANIES AFFORDING COVERAGE

- A.
- B.
- C.

ADDRESS

COMPANY (A. B. C.)	COVERAGE	POLICY NUMBER	EXPIRATION DATE	B.I.	LIMITS P.D.	AGGREGATE
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> GENERAL LIABILITY <input type="checkbox"/> PRODUCTS/COMPLETED OPERATIONS <input type="checkbox"/> BLANKET CONTRACTUAL <input type="checkbox"/> CONTRACTOR'S PROTECTIVE <input type="checkbox"/> PERSONAL INJURY <input type="checkbox"/> EXCESS LIABILITY <input type="checkbox"/> WORKERS' COMPENSATION <input type="checkbox"/>					

It is hereby understood and agreed that the City of Beverly Hills, its City Council and each member thereof and every officer and employee of the City shall be named as joint and several assureds with respect to claims arising out of the following project or agreement:

It is further agreed that the following indemnity agreement between the City of Beverly Hills and the named insured is covered under the policy: Contractor agrees to indemnify, hold harmless and defend City, its City Council and each member thereof and every officer and employee of City from any and all liability or financial loss resulting from any suits, claims, losses or actions brought against and from all costs and expenses of litigation brought against City, its City Council and each member thereof and any officer or employee of City which results directly or indirectly from the wrongful or negligent actions of contractor's officers, employees, agents or others employed by Contractor while engaged by Contractor in the (performance of this agreement) construction of this project.

It is further agreed that the inclusion of more than one assured shall not operate to increase the limit of the company's liability and that insurer waives any right of contribution with insurance which may be available to the City of Beverly Hills.

In the event of cancellation or material change in the above coverage, the company will give 30 days written notice of cancellation or material change to the certificate holder.

Except to certify that the policy(ies) described above have the above endorsement attached, this certificate or verification of insurance is not an insurance policy and does not amend, extend or alter the coverage afforded by the policies listed herein. Notwithstanding any requirement, term, or condition of any contract or other document with respect to which this certificate or verification of insurance may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies.

DATE: _____

BY: _____
Authorized Insurance Representative

AGENCY: _____

TITLE: _____
ADDRESS: _____

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Attachment 3

Key RFP Requirements

Service Parameters:

- Operating hours: 7 days per week, 6:00 AM to 10:00 PM (16-hour service day)
- Service area: Entire City of Beverly Hills (5.7 square miles) and identified adjacent destinations
- Booking options: Mobile app, website, and phone/call center

Fleet Requirements:

- Zero-emission vehicles
- Capacity: 8-10 passengers per vehicle
- Wheelchair/bike accessible
- Capable of traversing all City streets including hillside areas
- Autonomous technology encouraged

Performance Standards:

- Average wait time: ≤15 minutes (≤18 minutes during peak hours)
- 90% of pickups within 20 minutes of request
- 98% completion rate for accepted ride requests
- Maximum 2% cancellation rate by service provider
- 90% minimum vehicle availability during service hours
- Maximum walking distance: 1/8 mile in commercial areas, 1/4 mile in residential areas

Technology Platform Requirements:

- Real-time scheduling, dispatch, and reservations
- Flexible pricing models
- Comprehensive data reporting and analytics
- Integration capabilities with regional transit systems

Turnkey Service Scope: The RFP required a comprehensive turnkey solution including:

- Complete technology platform (rider app, driver app, dispatch systems)
- All operational delivery (vehicles, drivers, dispatchers)
- Vehicle maintenance and management
- Driver recruitment, screening, and training
- Customer service and call center support
- Marketing and community engagement
- Data collection, reporting, and performance monitoring

Contract Terms:

- Initial term: 2 years
- Optional extensions: Up to 3 additional one-year terms (5 years total maximum)

Attachment 4



Circuit Inc.
501 E. Las Olas Blvd
Suite 300
Fort Lauderdale, FL 33301

Re: Protest of Intent to Award – RFP No. 25-350-7 Microtransit Turnkey Services

Dear Assistant Director Grilley and Members of the Evaluation Committee:

Circuit respectfully submits this protest regarding the City's stated intent to award RFP No. 25-350-7 for Microtransit Turnkey Services.

This protest is not based solely on comparative pricing. Rather, it is based on a fundamental procedural concern: **the City is proceeding toward award more than one year after proposals were submitted, without requesting updated qualifications, service plans, or pricing.**

Given the rapid evolution of the microtransit industry and the City's reliance on a qualifications-based selection process, proceeding to contract based on December 2024 submissions materially undermines the integrity of the competitive process and creates avoidable risk for the City.

1. The Evaluation Is Based on Stale Proposals

Proposals were due on December 18, 2024. The staff report recommending award is dated January 7, 2026 — more than twelve months later.

Microtransit operations are not static. Over the past year:

- Fleet technology has evolved significantly (including new EV platforms and ADA configurations),
- Software routing and dispatch systems have materially advanced,
- Safety integrations and reporting tools have expanded,
- Insurance, labor, and operating cost structures have shifted,
- Service deployment strategies have improved based on live-market data.

The RFP was evaluated using weighted criteria that emphasized program approach (30%) and technology/fleet (20%). When those elements are central to scoring, evaluating year-old technical submissions without refresh unfairly freezes the competitive field in time.

A best-and-final-offer (BAFO) round would not "re-score" the past. It would ensure the City is awarding a two-year, \$3.1 million pilot based on **current capabilities**, not outdated snapshots.



Many of Circuit's recent enhancements resulted in Circuit being awarded a contract instead of Via to bring a **microtransit pilot to Warner Center** in the San Fernando Valley, supported by the Los Angeles County Board of Supervisors and Los Angeles City Councilmembers.

2. Circuit's Capabilities Have Materially Improved Since Submission

Since December 2024, Circuit has:

- Expanded its Southern California operations footprint,
- Deployed Volkswagen ID. Buzz EV fleets in multiple markets,
- Enhanced ADA and safety monitoring systems,
- Improved launch timelines and deployment processes,
- Refined service optimization strategies based on live operational data.

These advancements were not reflected in the 2024 proposal because they did not yet exist.

Awarding a contract in 2026 without permitting proposers to present current capabilities deprives the City of evaluating the best available version of each vendor.

3. Qualifications-Based Selection Heightens the Need for Updated Review

The City utilized a qualifications-based selection approach, evaluating firms first on experience, technical approach, and operational merit before reviewing cost.

Because cost was not initially scored, the competitive differentiation rests heavily on:

- Demonstrated operational capacity,
- Technology maturity,
- Fleet strategy,
- Familiarity with the service environment,
- References and recent performance.

All of these factors are time-sensitive.



A vendor’s relative position in late 2024 may not reflect their relative position in early 2026. A brief BAFO process would allow the City to confirm whether the originally identified ranking still reflects current market reality.

4. Public Interest and Fiscal Stewardship Require Updated Assumptions

The staff report estimates a two-year pilot cost of approximately \$3.1 million.

Committing public transit funds based on year-old pricing and deployment assumptions creates several risks:

- Cost structures may no longer reflect market conditions,
- Fleet availability and EV supply chains have changed,
- Insurance and labor costs have shifted,
- Ridership forecasting models have evolved,
- Grant funding landscapes have changed.

A short best-and-final-offer round would protect the City’s fiscal interests by confirming that pricing, service levels, and operational assumptions remain accurate and competitive.

5. Service Levels Remain a Material Value Consideration

While cost was not a weighted evaluation criterion, the City’s stated goals emphasize reliability, wait times, and rider satisfaction — all of which are driven by vehicle service hours.

For reference:

Metric	Circuit Option 1	Circuit Option 2	Via Proposal
Vehicles	5	4	4
Weekly Vehicle Hours	~511	~409	~327
2-Year Cost	~\$2.9M	~\$2.38M	~\$3.1M



Even under a qualifications-based framework, service capacity directly affects pilot success outcomes. A refreshed comparison using standardized service parameters would allow the City to confirm the optimal balance of supply, reliability, and fiscal stewardship.

Requested Remedy

Circuit respectfully requests that the City:

1. Pause contract execution, and
2. Issue a short Best and Final Offer (BAFO) request to both Circuit and Via, based on clearly defined and uniform service parameters (fleet size, service hours, performance standards, reporting requirements).

This step would:

- Ensure the City is evaluating current capabilities,
- Confirm pricing reflects present-day market conditions,
- Protect the integrity of the competitive process,
- Reduce legal and fiscal risk associated with a delayed award,
- Strengthen public confidence in the procurement outcome.

Circuit remains fully committed to partnering with the City of Beverly Hills and stands ready to submit updated materials immediately upon request.

Thank you for your consideration.

Respectfully,

A handwritten signature in black ink, appearing to read "D. Kramer".

Daniel Kramer
Vice President, Business Development (West)
Circuit

Attachment 5

Proposal for Turnkey Microtransit Services

City of Beverly Hills Public Works Department
Request for Proposals | No. 25-350-7

January 6, 2025



Submitted by Crosby Street Transit, LLC
(A wholly owned subsidiary of Via Transportation, Inc.)



Crosby Street Transit, LLC

(a wholly owned subsidiary of Via Transportation, Inc.)
114 5th Avenue, 17th Floor
New York, NY 10011

Subject: Proposal for Turnkey Microtransit Services

To: City of Beverly Hills Public Works Department

Attn: Martha Eros, Transportation Planner

January 6, 2025

Dear Ms. Eros,

Crosby Street Transit, LLC ("Via") is delighted to present our proposal to the City of Beverly Hills for the delivery of a turnkey microtransit service. We understand that the City is seeking a forward-thinking partner to enhance local connectivity, with a clearly stated goal to integrate microtransit with the planned expansion of the Metro D Purple Line subway stations. We value and share the City's commitment to reducing use of single-occupancy vehicles and greenhouse gas emissions. As the world's leading provider of microtransit and integrated transit solutions and with our deep local commitment to Los Angeles County, Via is uniquely positioned to bring this vision to life. Our team is excited to partner with Beverly Hills to design and deliver a successful and sustainable microtransit pilot program for the City.

The following proposal is an offer to complete the Scope of Work listed in the RFP. The offer, including the cost proposal and budget, will remain valid for at least 90 business days after the proposal due date. Our legal team has reviewed the contractual and insurance requirements in the City's standard contract and has assured us that they are generally acceptable. Should our submission be of interest, we would seek a brief discussion to propose options for mutually agreeable revisions to the (i) intellectual property ownership; (ii) indemnification provision(s); and (iii) termination for convenience provisions. Via has no conflicts of interest that would interfere with the performance of this contract, and no subcontractors will be used in the completion of our work.

We hope this proposal demonstrates our excitement to partner and build a modern, sustainable, and high-quality microtransit service for Beverly Hills. In the pages that follow we have provided a more detailed description of our operational model and service offering.

Sincerely,

Binding Signatory:

Alex Lavoie
Manager
Crosby Street Transit, LLC
Chief Operations Officer
Via Transportation, Inc.
114 5th Avenue, 17th Floor
New York, NY 10011

Authorized Contacts:

Jack Klempay
Strategy Associate
Via Transportation, Inc.
(888) 501-7511, ext. 4
114 5th Avenue, 17th Floor
New York, NY 10011
jack.klempay@gmail.com

Brian Nelson
Partnerships Principal
Via Transportation, Inc.
(818) 620-6996
2707 S Genesee Ave
Los Angeles, CA 90016
brian.nelson@ridewithvia.com

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1. Work Proposal

1.1 Executive Summary

Via is delighted to present our proposal to the City of Beverly Hills for the delivery of a turnkey microtransit service. Our turnkey solution includes our end-to-end software platform, planning and mobilization services, driver hiring and training, a call center for multilingual customer service, vehicles and maintenance, marketing and community engagement services, and more. This approach ensures that all aspects of the service are managed seamlessly by Via, with appropriate oversight and participation by Beverly Hills' stakeholders. With Via as the City's single point of contact for the delivery of the turnkey pilot, our teams will:



Execute a collaborative service design that directly addresses the City's goals using proprietary technology and our in-house transit planning team, Via Strategies. Our experts anticipate running a service that meets or exceeds the performance standards described in the RFP.



Manage a seamless launch process leveraging our local experts and existing operational infrastructure across the Los Angeles metropolitan area. Via is prepared to launch the City's microtransit pilot in as little as 8 weeks.



Supply and grow a fully-electric fleet to support the City's sustainability goals. We recommend a fleet consisting of two Volkswagen ID.Buzz electric buses and two Ford E-Transit electric WAVs (wheelchair accessible vehicles).



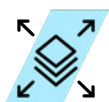
Offer a high-quality rider experience with intuitive passenger-facing technology and intelligent vehicle routing. Our Rider App has been downloaded by millions of passengers and consistently receives glowing reviews.



Enhance local connectivity with our integrated transit technology, facilitating in-app first- and last-mile connections to transit hubs. Via is the undisputed leader in building microtransit services that connect to fixed route networks.



Develop a recognizable brand that is customized for Beverly Hills, with localized marketing materials and a white-labeled Rider Application. Our marketing team works in a range of languages, including English and Spanish.



Provide end-to-end support resources and innovative features to help transform the City's microtransit pilot into a sustainable permanent service, including grant support, service planning, AV technology, and more.

Below, we have summarized the core components of our offering for the turnkey delivery of the City's microtransit pilot program.

Experience Providing Turnkey Microtransit Services

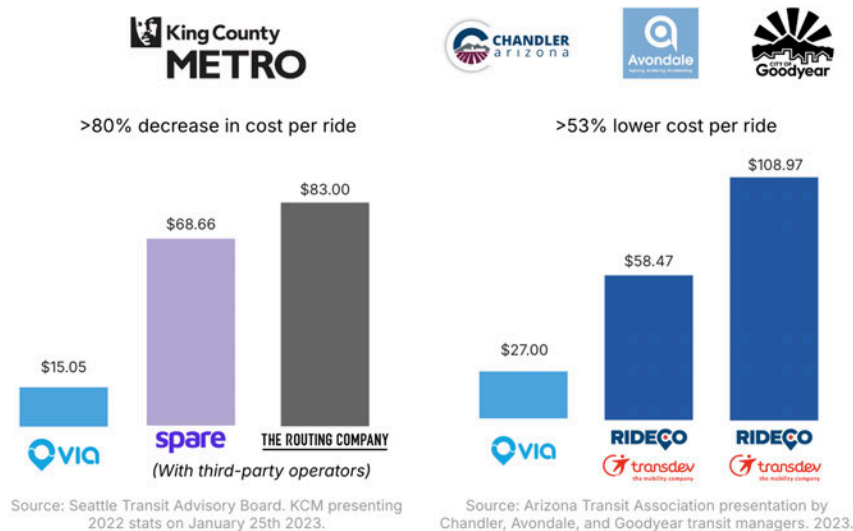
Via is the world's leading provider of on-demand, flexible transportation systems: no other vendor has more experience powering and operating turnkey microtransit services in the United States. Over the past decade we have launched nearly **100 microtransit pilots** that have grown into staples of public mobility in the communities that we serve. We are especially proud of our contributions to the growth of microtransit in California, where we operate or provide software for **30 microtransit services** and have powered more than **4 million rides** to date. For example, we recently launched two microtransit services in Los Angeles County supported by the LA Metro Visionary Seed Fund, including one service in the City of Torrance and another in West Covina. We were also selected as the operations partner for LA Metro's Metro Micro program, an eight-zone microtransit service throughout Los Angeles County. These partnerships, combined with our services in communities like San Diego and Imperial County, make us by far the largest and most experienced microtransit operator in Southern California. Beyond our commitment to local and regional connectivity, Via has a significant global footprint, with offices in New York, San Francisco, London, Berlin, and Tel Aviv.



A Unified Provider for Software, Operations, and End-to-End Support Services

Via is the only vendor offering best-in-class public mobility technology, world-class transit operations, and end-to-end support services in a **unified turnkey solution**. Partnering with Via through our turnkey model means Beverly Hills will have a single provider for everything needed to operate, grow, and optimize its microtransit service. This includes market-leading applications for riders, drivers, and dispatchers; intelligent electric vehicle and driver supply planning; full staffing and management; and unmatched subject matter expertise in areas like service design, marketing, community engagement,

grants, and more. With a single turnkey provider, the City will benefit from faster troubleshooting and an operator who fully leverages their software platform for the best operational results. This synchronization between operations and technology is critical for success, and **has allowed us to consistently deliver the lowest cost per ride among our competition.** In situations where Via services were compared head to head with competitors in nearby services, we have consistently delivered a meaningfully lower cost per ride. This can be seen in the data below from case studies in Seattle, WA (in pilots run by King County Metro) and in suburban services outside Phoenix, AZ.



Integrated Transit Capabilities

The City of Beverly Hills' commitment to building an integrated transit network, as outlined in the Complete Streets Plan, calls for an on-demand microtransit service that complements the existing fixed-route system and aligns with the future expansion of the Metro D (Purple) Line. Leveraging our experience with partners in Los Angeles County and across the state of California — including a recently-announced partnership with LA Metro along with deployments in Torrance and West Covina — Via can deploy adaptable on-demand mobility options that enhance local connectivity, providing residents with seamless access to major transit hubs. **Multi-modal trip planning** enables riders to understand the best trip options across all transit modes, while **intermodal routing** facilitates first- and last-mile connections by coordinating the arrival times of microtransit trips to align with the timetables of fixed-route buses. **Mode preference** will enable the City to control when microtransit and fixed route options are displayed, ensuring that microtransit complements the fixed route network. With these features, Via is uniquely positioned to assist the City in bridging first- and last-mile gaps, offering seamless connections to local transit networks while enhancing mobility within the City.



Via's turnkey microtransit service in **Miami-Dade** seamlessly integrates the County's fixed routes, city trolleys, and on-demand services. This collaboration has led to impressive outcomes: **50% of rides connect to other transit options**, passenger **wait times have decreased by 5x**, and **walking distances to transit are 3x shorter** than before the rollout of the service.

Holistic Service Design Expertise and Sustainable Funding Support

Via Strategies, our dedicated **in-house transit planning and consulting practice**, will support the success of the pilot by designing, evaluating, and optimizing a microtransit service that realizes the City's forward-thinking vision for urban connectivity while effectively addressing transportation barriers. As a global leader in transit feasibility studies, integrated network design, and electric vehicle service planning, Via Strategies draws on extensive experience in designing and operating advanced mobility solutions across diverse use-cases, geographies, and contexts. As part of our turnkey proposal, Via Strategies will work with the City to track and analyze service data and ensure that the pilot program consistently aligns the City's goals. This data-driven feedback will allow us to make iterative improvements in real-time, adjusting service zones and points of interest (in-zone and out-of-zone) to optimize performance. Furthermore, as the service matures, our Grants and Public Policy team will assist the City in pursuing additional funding at the federal, state, and local levels to ensure the longevity and sustainability of the service.



In October 2019, the **City of Cupertino** partnered with Via to address rising emissions, increased traffic congestion, and limited alternatives to single-occupancy vehicle travel. After several highly successful years of on-demand service, Cupertino joined forces with the City of Santa Clara to secure an **\$8.5M state grant** to improve regional connectivity and reduce emissions. The expanded service zones enable connections to two key fixed-route transit hubs, operating with a **100% EV fleet**.

Local Presence and Commitment to the Region

By partnering with Via, the City of Beverly Hills will benefit from the strength of our local presence and existing operations in Southern California. Over the past year, Via has made significant investments in the operational infrastructure required to support the expansion

of our microtransit services in Los Angeles County, including the development of local business partnerships, driver recruitment channels, vendor relationships, and **vehicle depots in Burbank and Compton**. We also have significant regulatory and compliance experience with the California Department of Transportation, as demonstrated by the number and variety of services that we operate. To ensure a strong transit program for Beverly Hills, the City's pilot will be fully supported by our West Coast office in San Francisco and more than 150 team members located across the state — including several members of our proposed project team who are lifelong residents of Los Angeles.



"As a lifelong Angeleno and LMU alum, I am excited about this opportunity to expand public mobility in my community. I'm in the neighborhood every week as part of the Beverly Hills basketball recreation league at Beverly Hills High, and an avid fan of Funke for date nights with my wife; this partnership literally hits home for me!"

— Brian Nelson, Via Partnerships Lead for Beverly Hills

We hope this proposal demonstrates our excitement to partner and build a modern, sustainable, and high-quality transit service for Beverly Hills. In the pages that follow we have provided a more detailed description of our operational model and service offering.

1.2 Experience

At Via, we power efficient operations and build innovative software that enables our customers to transform their transportation systems into smart, data-driven, technology-enabled networks. Founded in 2012, we provide services across the public mobility spectrum including microtransit, paratransit, multimodal transit network planning, electric vehicle service management, and more. To date, we have deployed transit solutions in partnership with over **750 cities and transit agencies** in 40 countries, powering **165 million rides** around the world.

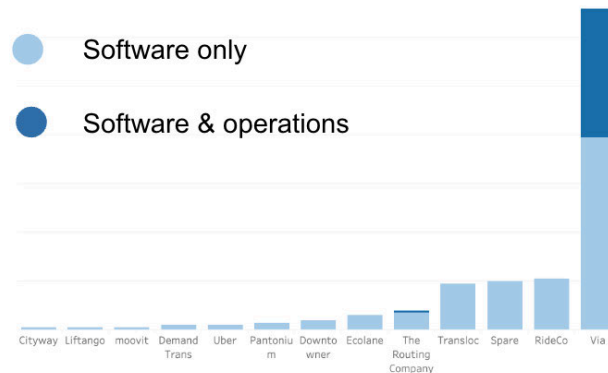
In particular, over the past **12 years** we have become the undisputed leader in flexible and on-demand transportation systems: no other vendor has more experience delivering turnkey microtransit services in the United States. To date, Via has deployed more than **100 turnkey microtransit services** worldwide, with over 1,200 vehicles on average on the roads every day. In California alone, we have delivered nearly **4 million rides** and directly

operate or provide software for **30 microtransit services** across the state, including all-electric services in communities like Cupertino, Richmond, and Palo Alto.

Today, Via employs many of the world’s foremost experts on algorithms, navigation systems, artificial intelligence, machine learning, and user experience. Throughout the duration of our partnership, the City of Beverly Hills will have access to support from Via’s global team, including: over **1,000 full-time employees** focused

on operations, partner success, community engagement, and service planning; and over **500 full-time software engineers** with deep experience in advanced algorithms, data science, digital mapping, database architecture, and product design.

TransitTech Deployments



1.2.1 Public Agency Transportation Experience

The world’s largest and most innovative public agencies (including the San Francisco Municipal Transportation Agency and the Los Angeles County Metropolitan Transportation Authority) trust Via to transform their microtransit systems because of our technical capabilities, extensive experience, and commitment to collaboration and innovation. No other vendor can match our level of public agency experience, as demonstrated by the following partial list of municipal and transit agency partners:



Trusted by cities and transit agencies large and small

We are excited by the opportunity to continue leveraging this experience to enhance mobility for local residents in Beverly Hills. For more detailed information about our work with public agency partners in California and beyond, please see section [2. References](#).

1.2.2 Community Outreach and Promoting Rider Growth

Via has more than a decade of experience developing and executing marketing, communications, and community engagement strategies for microtransit pilots. Our in-house microtransit marketing team has leveraged this experience to develop effective programs for growing pilots and shifting riders onto Via-powered transit services, with a particular focus on reaching communities that are typically underserved by transit, including populations with limited English proficiency. Examples of successful strategies in past campaigns include programs for free and discounted rides; partnerships with community organizations; on-the-ground engagement events; and the distribution of targeted outreach materials. For more details on our proposed marketing plan for the City of Beverly Hills, please refer to section [1.4.1 Approach to Project Tasks](#).



Examples of marketing materials from a selection of Via's services in California

Chandler Flex

Chandler Flex in Chandler, Arizona launched in July 2022 as a microtransit service primarily designed for students, providing reliable, efficient transportation to support their needs. Recognizing its potential to serve a wider audience, **Via and the City of Chandler expanded marketing efforts** to include seniors, commuters, and other community groups. These efforts drove a **31% YoY increase in non-student ridership** and transformed the service into a vital transit option for residents accessing public transit stops, shopping centers, and recreational hubs. Since its inception, Chandler Flex has grown into a dynamic and inclusive mobility solution, completing over **85,000 rides** to date.

1.3 Staffing

Via has assembled a comprehensive project team to design, operate, and optimize the City's microtransit service, leveraging the team's local experience in delivering microtransit services across the state of California. Our Project Manager for Beverly Hills, **Alex Battisti**, is a seasoned member of Via's Partner Success team who is based in Los Angeles. Alex will be responsible for the overall success of the turnkey service and will serve as the main point of contact between Via and the City throughout the duration of our partnership. He will coordinate the work of our teams of experts in contracting, service launch, daily operations, and technical support, ensuring a seamless implementation and the ongoing optimization of the service:



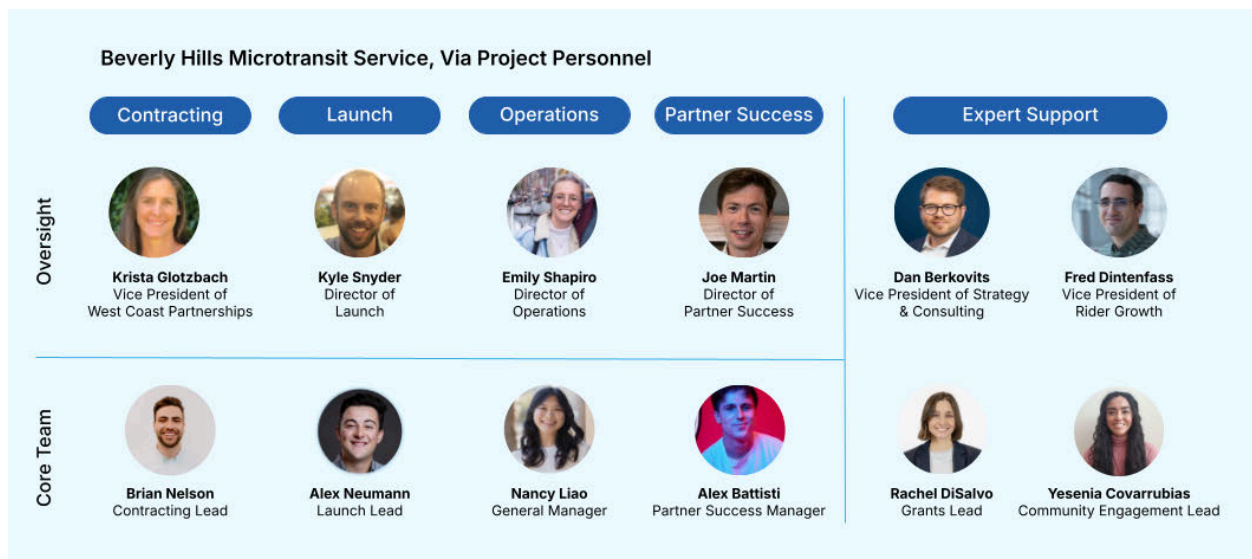
- **Contracting:** Our team of contracting experts will work closely with the City to finalize project goals, key performance indicators (KPIs), and the initial service design. Lifelong Angeleno **Brian Nelson** will be Beverly Hills' point of contact from the Contracting team, under the leadership of **Krista Glotzbach**, Via's Vice President of West Coast Partnerships.
- **Launch:** Our Launch team will manage the implementation of Via's turnkey solution, including the hiring of drivers and training of any relevant City personnel. **Alex Neumann** will serve as the project's Launch Manager with **Kyle Snyder** advising from Launch leadership. Alex will be on-site throughout the implementation phase to ensure a smooth rollout for the service.
- **Operations:** Our Operations team will be responsible for day-to-day service delivery, including driver recruitment, vehicle supply, and safety. **Nancy Liao**, an experienced General Manager, will leverage our local expertise and infrastructure from operating services across Southern California to ensure success for Beverly Hills' day-to-day service delivery, while Director of Operations **Emily Shapiro** will provide operational oversight and coordinate support from Via's central teams.
- **Partner Success:** Partner Success will provide consistent support for the City, orchestrating business review meetings, continuously monitoring service performance, and driving iterative improvements. As Project Manager, **Alex Battisti** will be responsible for overall success of the service with oversight from **Joe Martin**, who also lives in Los Angeles and serves as Via's Director of Partner Success for the West Coast region.

- **Expert Support:** In addition to the core project team outlined above, the service will be supported by a number of value-added offerings here at Via, including Via Strategies (our in-house transit planning team), Rider Growth & Marketing, Community Engagement, and Grant Writing.

All members of the core project team for Beverly Hills are based in California and report to Via’s West Coast headquarters in **San Francisco**. In addition to the personnel identified in this proposal, the City will benefit from the full support of Via’s global resources, including more than **70 employees located in-state** and more than **1,500 employees working around the world**.

1.3.1 Organizational Chart

Below is an organizational chart outlining the structure of the proposed project team, along with oversight from senior leadership in Via’s Contracting, Launch, Operations, and Partner Success organizations.



1.3.2 Qualifications of Key Personnel

Profiles outlining the qualifications of key personnel assigned to the Beverly Hills pilot are provided below. We would be happy to provide the City with full-length resumes of project personnel upon request.



Alex Battisti

PROJECT MANAGER/PARTNER SUCCESS MANAGER

As a Partner Success Manager, Alex works closely with each partner to ensure their deployment's success. He is based in Los Angeles and brings extensive experience managing partnerships in and around LA County, including recent launches of microtransit services in communities like Torrance and West Covina, as well as several other deployments throughout the state of California. In addition to his work with Via, Alex is deeply invested in LA's public spaces, and sits on the Board of Directors of the Los Angeles Forum for Architecture and Urban Design. He holds an MBA from the University of California, Los Angeles.



Joe Martin

DIRECTOR OF PARTNER SUCCESS

Joe oversees Via's partnerships across the West Coast, collaborating closely with cities and transit agencies to ensure the success of their programs. He has played a key role in the ongoing success of services in communities like Cupertino, Palo Alto, and Richmond. Prior to Via, Joe led partnerships at a medical technology startup, and worked as a consultant at a company that helped clients reach data-driven decisions through in-market experimentation. He holds a BS in Finance and a BA in Mathematics from the University of Virginia. Joe lives in Los Angeles.



Brian Nelson

CONTRACTING LEAD

Part consultant, part project manager, part salesperson, Brian will help Beverly Hills achieve its goals and priorities, and will advise the City on building the most optimal tech-enabled mobility solutions to help solve unique challenges within the local community. Brian supports our partners across Southern California, including in communities such as San Diego, Torrance, and West Covina. He received his BS in Business Management and Marketing from Loyola Marymount University. He is a lifelong resident of Los Angeles County.



Krista Glotzbach

VICE PRESIDENT OF WEST COAST PARTNERSHIPS

Krista Glotzbach will oversee Via's Partner Success team for Beverly Hills, during implementation and beyond. Krista brings 30 years of experience

to this role, and has been at Via since 2019. Krista oversees all of our Partnerships and Partner Success team members on the West Coast of the United States and has a deep understanding of the needs of our West Coast partners in Southern California and beyond. Krista is based in California and is the most senior member of our West Coast team. She holds an MBA from Harvard University.



Alex Neumann
LAUNCH LEAD

Alex will directly manage the launch of the City's microtransit service, including the implementation of Via software and the training of any City staff. Based in California, Alex works with public transit agencies and private operators to launch new services across Via's entire product suite. He has helped partners launch services in on-demand, pre booking microtransit, and paratransit. He also has specific expertise launching services with third-party product integrations (including AV deployments) and setting up operations for first mile/last mile services. Alex holds a BA in Political Science from Northwestern University.



Kyle Snyder
DIRECTOR OF LAUNCH

Kyle will support Alex and the launch team through the transition and implementation of Via's software and microtransit service, leveraging his experience in transitioning, launching, and operating transit services across the country. Kyle has over 10 years experience as a project manager and engineer in transportation. Today, Kyle leads our launch team, launching 20 services for Via. He holds an MBA from the Kellogg School of Management (Northwestern University), and a BS in Civil Engineering from Clarkson University.



Nancy Liao
GENERAL MANAGER

As General Manager, Nancy leads operations, strategy, and community engagement for Via in Richmond, West Sacramento, and Calexico, along with corporate deployments at LinkedIn and Meta. She has grown ridership in each market, improved both rider and driver satisfaction, and built strong relationships with local leaders to drive expansion of these services. Prior to Via, Nancy worked in Strategy & Operations at Lime

delivering micromobility services to city governments, and as a management consultant at Bain & Company. Nancy holds an MBA from Stanford University and a BS in Business Administration from the University of California, Berkeley.



Emily Shapiro

DIRECTOR OF OPERATIONS

Emily will act as a senior operations advisor for the City, ensuring operational success through support, oversight, and management of our various operations teams. As Via's Director of Operations, Emily oversees service operations for our partners in the Western US, ensuring service continuity and ongoing operational excellence. Prior to Via, she led the US strategy for a sales technology project implemented with Anheuser Busch's distribution network. She holds a BS in Systems Engineering from Washington University in St. Louis.



Dan Berkovits

VICE PRESIDENT OF STRATEGY & CONSULTING

Dan leads Via Strategies, Via's dedicated transit consulting team. His team will advise and guide the City as service needs evolve. Dan brings extensive experience working in and for the public sector to solve complex challenges related to new infrastructure. Prior to joining Via, Dan managed a variety of interdisciplinary consulting engagements for public and private-sector clients at AECOM; led an award-winning, participatory long-term recovery and resiliency program to address the impacts of Hurricane Sandy; and worked as a land-use lawyer. He holds a JD and a MUP from Harvard University.



Fred Dintenfass

VICE PRESIDENT OF MARKETING & RIDER GROWTH

Fred and his team lead marketing initiatives to drive ridership. They will focus on the full funnel, from raising awareness to rider retention, replicating the success we have seen in services from Jersey City, NJ to Cupertino, CA. Prior to Via, Fred led marketing for New Products and Ventures at The New York Times. During his tenure, subscriptions from the Crossword and Cooking apps became a key part of the company's growth strategy. He also founded his own digital agency, Think Barrel, and worked at Isobar, a global marketing consultancy. Clients at Isobar

included Sotheby's, Avis Budget Group, and General Motors.



Yesenia Covarrubias

COMMUNITY ENGAGEMENT LEAD

Yesenia will work with the City to develop a custom community engagement and outreach strategy to align Via's service with the priorities of the community. She specializes in outreach to riders who live with disabilities, lack bank accounts or smartphones, or have limited English proficiency. Prior to this role, Yesenia worked within the Community offices for organizations such as St. Jude Children's Research Hospital - ALSAC, the New York Mets, the United States Olympic Committee, and Major League Soccer. Yesenia holds a degree in Sports Marketing from California State University, Fresno.



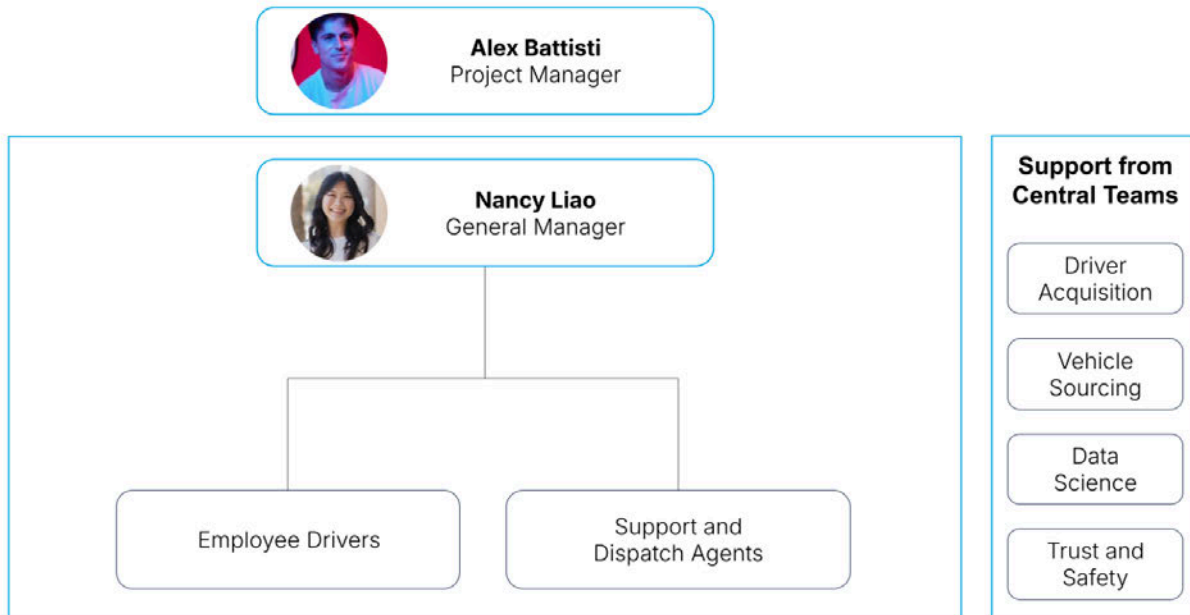
Rachel DiSalvo

GRANTS LEAD

Rachel will partner with the City to sustain the services by identifying and securing additional grant opportunities at the local, state, and federal levels. Rachel has helped to secure grant funding for Via's partners across the United States, including funding to support the electrification of services in Cupertino and Richmond, CA. Prior to Via, Rachel worked in the non-profit space to secure grants for organizations such as The Door and University Settlement Society of New York. Rachel holds a Bachelor's degree from Colgate University, and Master's degrees from Columbia University, and the London School of Economics and Political Science.

1.3.3 Local Hiring and Employment Plan

Via combines the resources of a global company with a highly localized approach to deliver turnkey microtransit services in the wide range of communities we serve. **Alex Battisti**, Beverly Hills' designated Project Manager, lives in Los Angeles and will be the main point of contact for the City throughout the duration of our partnership. **Nancy Liao**, Via's General Manager for services in Southern California, will leverage support from Via's central teams and conduct frequent site visits to ensure the smooth running of the microtransit program. She will also be responsible for the hiring and oversight of Via's employee drivers. Below, we have outlined the organizational structure of this local team.



Driver Recruitment and Qualifications

Beverly Hills’ microtransit service will be operated by an engaged, qualified, and reliable pool of employee drivers. Our driver recruitment program will prioritize the hiring of drivers from the local community, offering competitive wages, benefits, and training to create stable employment opportunities. For the City’s microtransit service, we anticipate hiring 12-14 highly qualified drivers with an average pay of \$24 per hour, with a complete benefits package. Via’s Driver Operations team has been highly successful in recruiting and retaining pools of qualified drivers in a range of markets across the United States, including Southern California and the Los Angeles metropolitan area.

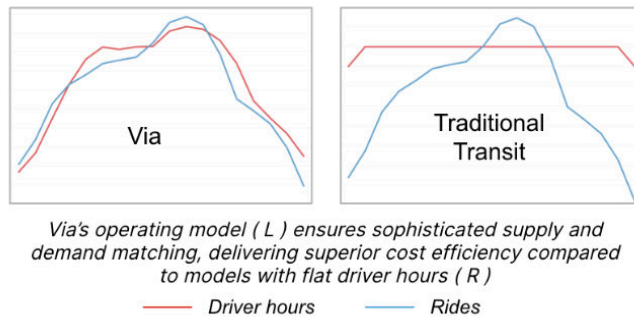
Drivers for the City of Beverly Hills will hold all required licenses and certifications, including a valid California drivers license, and will receive in-depth training on passenger assistance, sensitivity, and defensive driving, among other topics. Via partners with nationally-recognized organizations to provide the highest possible quality of driver training, including the National Safety Council (NSC), Drivege, and the Community Transportation Association of America (CTAA). For more details on our driver training program, please see section [1.4.5 Staffing and Support Services](#).

Dynamic Shift Scheduling

As an operator, Via takes a fundamentally different approach than our competitors. We leverage innovative technology and robust data to inform, power, and optimize all aspects of our operations, including shift scheduling. While other providers rely on long, 8-10 hour

driver shifts and fixed driver schedules, Via's driver model is built to match driver availability to dynamic rider demand. Our shift optimization tools leverage machine learning to forecast demand and generate hour-by-hour daily plans for required driver supply and associated driver shifts, while

considering any labor restrictions and local regulatory requirements. We offer updated shift options each week, and drivers are able to choose short driving slots or irregular hours to ensure we're best matching rider demand. Our ability to adjust these driving slots in response to changing demand patterns — whether weekly or even daily — is a key factor that sets our model apart from other providers. This highly efficient supply plan results in fewer driver hours and lower costs per trip.



1.4 Method of Approach

Via is proposing a **turnkey solution** for the delivery of the City of Beverly Hills' microtransit pilot, which includes our end-to-end software platform, full operational delivery, and expert support services from the global Via team. This approach ensures that all aspects of the service — from technology implementation to daily operations — are managed seamlessly by Via, allowing the City and their riders to benefit from an integrated, end-to-end solution. In this section, we provide a narrative detailing our proposed approach to ensure the timely delivery of the service, including plans to complete each task outlined in the Scope of Work; a high-level overview of our technology platform; operational plans for vehicle supply, staffing, and support services; and our approach to mitigating potential risks of challenges that could arise over the course of this project.

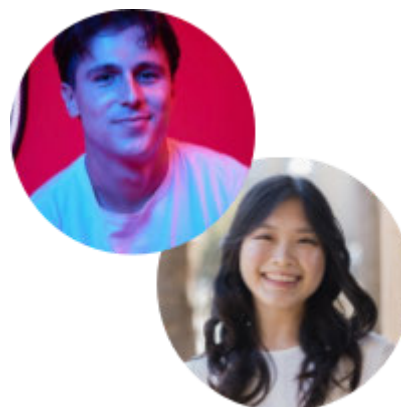
1.4.1 Approach to Project Tasks

Task 1: Project Management

From implementing complex transit services with hundreds of partners globally, Via understands that exceptional project management is key to the success of any deployment. Via takes an agile approach to both product development and project governance; we rapidly test and iterate ideas, communicate frequently with our partners, and quickly incorporate feedback without causing delays later in the process. Through

productive partner communication and nimble project management, our team meets deliverables with agreed-upon timelines while maintaining the flexibility to course-correct as necessary.

Throughout our partnership with the City of Beverly Hills, Via will provide comprehensive support, including 24/7 technical assistance and guidance from the Via project team. We will manage all aspects of the service required for a successful microtransit launch and operation, such as workflow management, fleet provision, customer support, and safety planning. After launch, we will continuously refine the solution based on performance data and rider feedback. As outlined in section [1.3 Staffing](#), **Alex Battisti** (left) will serve as the designated Project Manager for the City and **Nancy Liao** (right) will lead the Operations Team. Together, they will be available to answer any questions by phone and/or email during normal work hours.



Via's project management approach includes the following key elements:

- **Transparent stakeholder communication:** Alex will schedule and facilitate regular Project Development Team meetings, including an initial kick-off meeting, weekly check-ins, and quarterly business reviews. Quarterly business reviews will be held in Beverly Hills — both Alex and Nancy, as well as other members of Via's leadership team, will be on-site to present updates in-person. Alex will be responsible for preparing all agendas, minutes, and sign-in sheets for these meetings. The City Project Manager will be informed prior to any meeting with an outside agency or organization.
- **Seamless and expedited launch process:** With the support of the Via project team, Alex will produce a detailed Work Plan during the mobilization period and will meet regularly with key stakeholders during the implementation phase to ensure the timely delivery of the City's pilot service. This includes coordinating with the City Project Manager to ensure alignment on major project milestones and deadlines, and to secure approval for any changes to the service.
- **Coordination of project resources:** Alex and Nancy will coordinate project resources and tasks according to the Work Plan to minimize implementation time and cost, while addressing resource constraints such as City staff availability. This

includes coordination of all required deliverables, including service launch, driver recruitment, vehicle acquisition, software and hardware installation, branding and marketing, performance monitoring, and planning for future service expansions. Alex will also be the main point of contact for technical support, working with Via's technical teams to answer the City's questions or address issues as necessary.

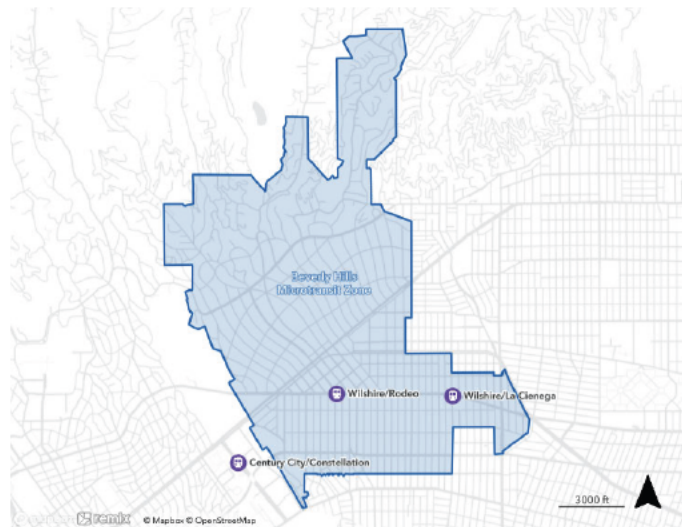
- **Invoicing and documentation:** Alex will submit monthly invoices to the City Project Manager, detailing services rendered during the period of the invoice. These invoices will include supporting documentation, and Alex will provide additional details upon request to substantiate expenses.



In 2024, Via's project teams launched an average of **3 to 4 new services every week.**

Task 2: Service Planning & Parameters

Via's proposed service design for the City of Beverly Hills features **on-demand service** across a 5.7 square mile zone covering the entire city, with service running every day from 6:00 am to 10:00 pm. To enable more efficient routing and lower trip times, we recommend for the pilot to be operated as a **corner-to-corner** service, where riders will be asked to walk a block or two to reach their pickup or drop-off point. We can also direct riders to existing transit stops to take advantage of shelters and other infrastructure, such as the planned Purple Line subway stations along Wilshire Boulevard. To ensure accessibility, seniors and riders with disabilities will automatically receive **curb-to-curb** service, in which riders are picked up and dropped off directly at their requested locations.



Via also has experience leveraging our turnkey model to service regularly occurring special events. With our software, new service zones and/or additional operating hours can easily be configured and launched to accommodate unique rider behavior during festivals, sporting events, and celebrations. For example, we partnered with the City of

Birmingham, Alabama to leverage our existing Birmingham On-Demand service to support the Birmingham World Games, a large-scale international sporting event lasting more than a week. We also leveraged our Breeze On-Demand service in Sarasota County, Florida to assist hurricane response and recovery efforts across the County.

Via Strategies, our in-house transit planning and consulting team, has conducted a preliminary analysis of service parameters based on the Beverly Hills geographic area, the City of Beverly Hills Complete Streets Plan, and local demographic data using our Remix On-demand Planning tool. Based on this analysis, we anticipate operating a high-performing service for Beverly Hills with the following characteristics:

Estimated Performance	With Via
Daily Demand Expected Ridership	~200
Avg. Wait Time Request time vs. pickup time	15 min
Max. Walk Distance Walk time to pickup and drop off locations	< 1/8 mi (commercial) < 1/4 mi (residential)
Fleet Size # of active vehicles	Weekdays: 4 Weekends: 3
Service Hours Hours of operation	6 am - 10 pm, every day Peak: 7 - 9 am and 4 - 7 pm, weekdays

Via employs an iterative, feedback-based process to ensure that each service is designed around the unique needs of our partners, coordinating closely with stakeholders throughout the planning and implementation phases. In our transit planning studies, we conduct robust analyses of the existing service area, local demographic information, and direct community input to advise partners on the optimal parameters for their desired services. This includes designing customized solutions for service areas, fleet size, routing, and scheduling. Our in-house consultants, transit planners, and operations specialists leverage Remix On-demand Planning — our proprietary simulation and planning tool — to explore how services would operate in real-world conditions, including specific field assessments for safety, ADA access, and pedestrian amenities. By doing so, we ensure that our approach supports Beverly Hills' service goals, from integrating

updates across the dispatch platform and enhancing communication channels for riders and drivers, to coordinating vehicle fleet expansion and future service needs.

Task 3: Deployment Plan and Operations

To implement Beverly Hills' microtransit pilot, we recommend a 8-week launch timeline to meet the City's desired launch date of **April 1, 2025**. However, we remain flexible and can expand or contract this timeline depending on the City's requirements and availability.

Upon contract signing, Via will promptly begin recruiting, vetting, and training drivers, as well as sourcing the necessary vehicles for service. Leveraging our experience in launching turnkey microtransit services around the globe, we are confident in our ability to assemble and prepare the team well ahead of the desired launch date, allowing ample time for promotional events and marketing; the refinement of key performance indicators (KPIs) and administrative procedures; and dry-run testing.

Throughout the launch process, we will collaborate closely with the City to incorporate stakeholder and community feedback. If any service adjustments are proposed, we will promptly submit an updated deployment plan for the City's review and approval. Our Launch team, led by our Launch Lead **Alex Neumann**, will be on-site in Beverly Hills to ensure the smooth implementation of the service. Below, we outline our overall approach to launching the City's service and are available to discuss and refine this plan as needed.

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Task 4: Marketing and Outreach

Via has more than a decade of experience successfully marketing microtransit and growing ridership on behalf of our partners. Our marketing strategy will focus on increasing community awareness of the program in a manner that is sensitive to local context and the various communities residing within the City. We recommend using a mix of channels and continuously reviewing and optimizing the growth plan based on those channels that prove to be most effective. Our teams will also ensure that community members with the highest barriers to entry — including those without smartphones, non-English speakers, riders with disabilities, and senior citizens — are ready to ride when the service launches. As part of our marketing strategy, we will:



- **Build a bespoke brand for the Beverly Hills microtransit service** including custom logos and vehicle wraps, a white-labelled Rider Application, and a marketing campaign that is tailored to the specific needs of the City.
- **Develop materials that engage and educate new riders** including pamphlets, mailers, videos, and physical or digital advertisements. Using in-app tools such as promo codes, referral campaigns, and direct rider communications will encourage regular use of the City's service.
- **Conduct high-touch, individualized outreach** for hard-to-reach groups like zero-car households, non-English speakers, persons without internet access, senior citizens, and persons with disabilities. Our accessible materials, including pamphlets, flyers, how-to-ride videos, and digital advertising materials can be prepared in English, Spanish, and any other languages that the City requires.
- **Engage local businesses** whose customers and employees are potential users of the City's pilot service. For example, we can develop partnerships with major employers to encourage the use of microtransit by commuters.

- **Hold in-person and virtual information sessions** with community stakeholders to describe how the service will work. These information sessions can be hosted in partnership with community organizations, like libraries and senior centers, or in proximity to local transit hubs. Our community engagement team has identified candidate sites for in-person information centers at the Beverly Hill Public Library, the Roxbury Park Community Center, and the La Cienega Community Center. We can also send street teams to engage commuters near major transportation hubs.
- **Craft and execute customized surveys** to monitor passenger trends and feedback throughout the service area. Via's Rider Growth team has extensive experience assisting partners in data collection efforts, including surveys, on-board feedback, and in-app push questions.



In the Detroit suburb of **Dearborn, MI**, our SMART Flex service deployed the use of on-the-ground street teams at transit hubs and local events to connect with commuters and explain the benefits of the service. **Ridership in these areas increased by double-digit percentages within three months.**

Task 5: Data Collection, Visualization, and Ownership

Via understands the value of data and analytics to our partners. Our world-class data science team has developed sophisticated tools to optimize the performance of our deployments and to help inform our partners' future transportation decisions. As described in section [1.4.2 Technical Specifications](#), the City of Beverly Hills will have 24/7 access to dashboards with daily, weekly, monthly, quarterly, and yearly views of key performance indicators as well as self-service tools to aggregate, filter, and download data in various formats. The City of Beverly Hills will have full access to its service data both during and after the conclusion of our partnership.

As a complement to these self-service tools, Beverly Hills will also receive regular reports and assistance in data analysis from **Alex Battisti**, the City's designated Project Manager. Alex is an expert user of Via's backend systems and will be the key point of contact for all the City's data and reporting needs. In addition to presenting historical data at quarterly business review meetings, Alex will develop customized reports and dashboards to support investigations into topics of special interest and at the City's request. He will also be a resource in training City staff in the effective use of Via's dashboards and self-service tools.

Via's reporting capabilities cover all the operational records and statistical data requested by the City, including but not limited to the following:

Description of Data Request	Self-Service	Via Project Manager
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]		■
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[REDACTED]		■
[REDACTED]	■	■
[REDACTED]		■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■
[REDACTED]	■	■

To better illustrate the scope of Via’s reporting and data-generating capabilities, we have attached a Sample Metric Report from a comparable microtransit service in [Appendix A](#). This summary of service-level metrics is just one of the reports that the City will be able to access with Via’s turnkey microtransit solution, in addition to the raw underlying data as described in section [1.4.2 Technical Specifications](#).

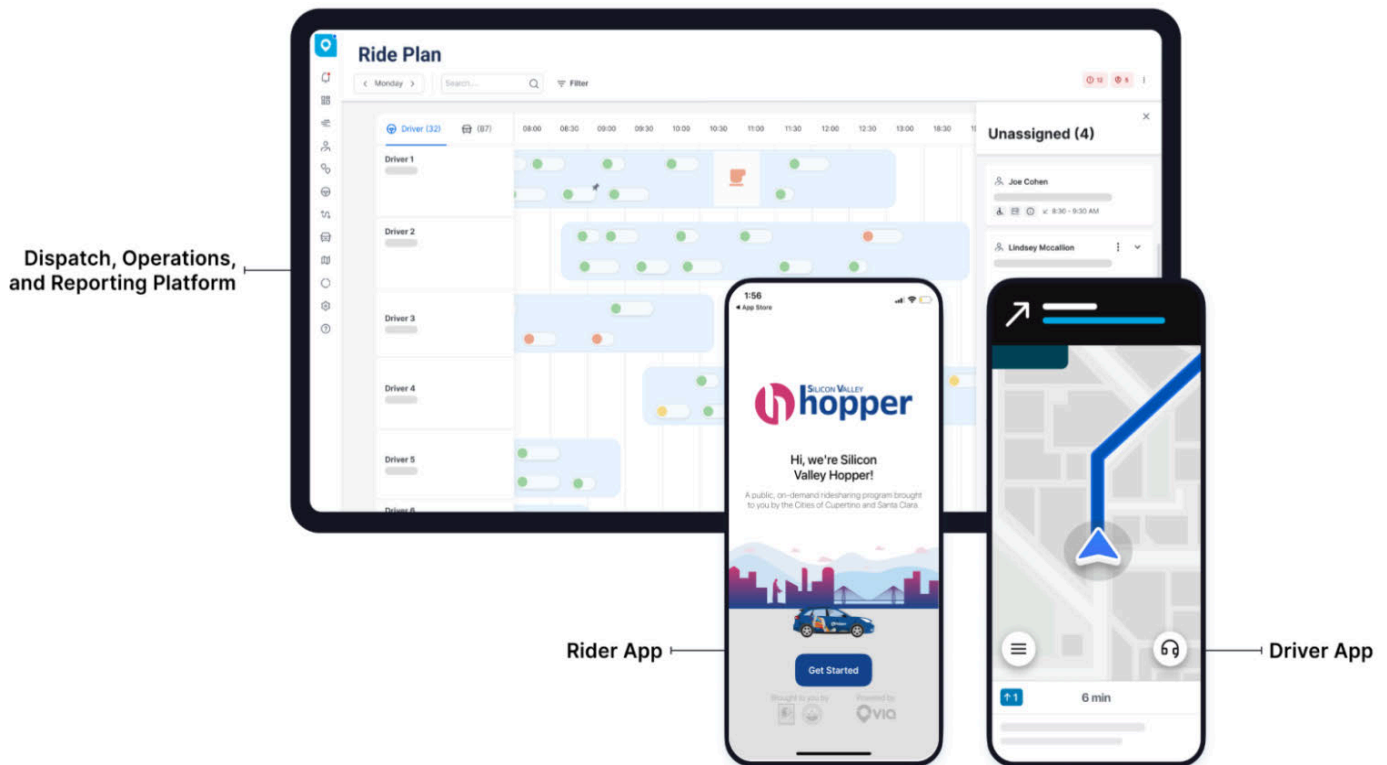
1.4.2 Technical Specifications

By partnering with Via, the City of Beverly Hills and its riders will benefit from the combined power of our market-leading transit software and our tech-enabled operational approach. As global operators with extensive experience delivering microtransit service on our platform, we have prioritized the development of features that directly address the day-to-day needs of delivering microtransit service, offering unparalleled efficiency, an exceptional rider experience, and high quality of service. The Via platform consists of three main components:

- **Rider Application:** Via will provide the City of Beverly Hills with a white-labeled Rider Application, which will be both iOS and Android compatible. Our Rider Application provides riders with an all-in-one location for booking, tracking, and

canceling rides, providing feedback, and contacting support in real-time. The application also offers configurable rider communications to ensure transparency through events such as service changes, expansions, or disruptions. Via's Rider Application has been downloaded by millions of passengers and consistently receives glowing reviews.

- **Driver Application:** Our driver-facing application has been developed to make drivers' jobs safer and easier, enabling them to deliver an exceptional rider experience. For more details on these safety and productivity-enhancing features, please refer to section [1.4.3 Equipment & Supplies](#).
- **Via Operations Center:** The Via Operations Center (VOC) is the central application that our local team will use to manage every aspect of the City's service. The VOC allows our operators to optimize service performance and maximize cost efficiency through sophisticated automations and robust data reporting (described in more detail below). The VOC also preserves significant flexibility to allow Via operators to manually respond to complex service incidents in real-time when needed, ensuring ongoing oversight, strong customer support, and a consistently high quality of service for riders.



Algorithms to Maximize Service Quality and Efficiency

All components of the Via software suite are powered by **ViaAlgo**, our proprietary routing, aggregation, dispatch, and demand prediction algorithms. These algorithms are the foundation of our platform, achieving the lowest cost per ride in the industry while maintaining a high-quality customer experience. With machine learning and artificial



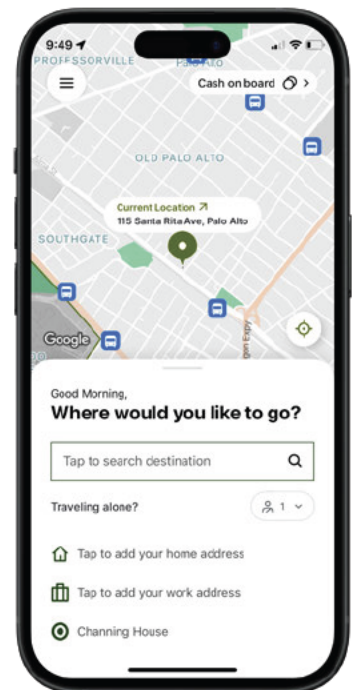
Key Performance Indicators for a selection of Via's turnkey microtransit services in California

intelligence, our algorithms become smarter over time, continuously optimizing pickups, drop-offs, and routing while dynamically updating riders, drivers, and administrators with real-time information. These algorithms are configurable and can be adjusted to accommodate a diverse and nuanced set of local needs, ensuring that we can optimize the use of our technology platform to best meet the City's service goals and objectives.

Automated Scheduling, Dispatch, and Reservations

As described above, the Via platform supports fully automated scheduling, dispatch, and reservations, allowing passengers to book trips in real-time via phone, mobile application, and/or web browser. Once a rider has selected their pick-up and drop-off locations, the Via algorithm matches the requested ride with available seats across the fleet, assigning the rider to a vehicle for a convenient personal trip that also optimizes for efficiency across the entire service. This guarantees reliable service, including high rates of on-time performance and customer satisfaction.

For microtransit services like the one envisioned for Beverly Hills, Via's Service Design team recommends a fully on-demand service, without prescheduled rides. For more details on our analysis of the proposed service design, please see section [1.4.1 Approach to Project Tasks](#).



Flexible Pricing Models

Riders can pay for their trips directly through the Rider App or over the phone using a variety of payment methods, including digital transit passes, credit or debit cards, subscription passes, cash cards, or vouchers. We support a range of pricing models and fare structures, which can be further tailored to meet the City's unique service goals and objectives. Possible configurations include the following:

- **Discounted Fares:** Via can charge different fares for individuals eligible for customer-specific discounts, such as students, seniors, and riders with disabilities, based on their rider profiles. We are also able to offer discounted rates for additional passengers.
- **Fares by Journey Path:** Via can assess fare structures that incentivize riders to use existing fixed route services where available. In one of our deployments, for instance, a Via partner offers rides for \$2.50 for most journeys, but \$5 for any rides that replicate existing bus service, as determined by origin and destination.
- **Fares by Origin or Destination:** Via's technology can designate focal points, such as business or transit hubs, as eligible for reduced fares, either permanently or during specific time windows. This means that Beverly Hills could charge a different fare for trips to/from transit hubs versus general trips.
- **Distance, Time, and Location:** Via can configure the service to charge different fares based on distance, time of ride, or location, helping to increase cost efficiency for the City.

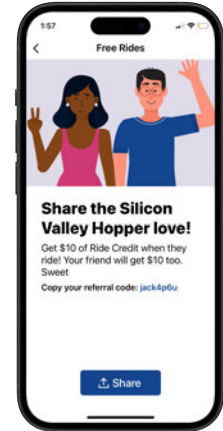
Our Service Design and Rider Growth teams look forward to working with the City to determine the optimal fare structure to meet the City's service goals and objectives.

Promotional Pricing

The Via Platform supports a full range of promotional pricing options, including free rides, promo codes, and vouchers. Examples of promotional pricing that we have successfully deployed in other services include the following:

- **Promo Codes:** Via's system accepts promotional codes which can be distributed on any basis desired by the City. Riders enter the code to receive ride credit, which can be used to book rides. We recommend launching the service with promotional fares during the first month to grow ridership (e.g., first 3 trips free).

- **Transfer Discounts/Vouchers:** Via can configure vouchers to be used in the service to accommodate multi-ride passes and transfer discounts, supporting the integration of the service within the broader transit network.
- **Fare Passes:** We can also work with the City to define various levels of subscription-style passes. For example, riders could purchase a weekly pass for a flat fee, allowing them to ride up to 4 times per day at no additional cost. Riders can also purchase “packages” of ride credit at a discounted rate.



Requesting Accessible Vehicles

Riders are able to request wheelchair-accessible vehicles or vehicles with bike racks using the Rider App or over the phone. Via’s system logs unique rider preferences and automatically personalizes the trip experience based on these needs. After riders create a Via account, our system populates a Rider Profile that tracks customized rider needs, such as:

- The need for a wheelchair accessible vehicle (WAV)
- If the rider travels with a care attendant or service animal
- Whether the customer is visually- or hearing-impaired
- Contact information of a family member or care attendant in case of emergencies
- Option for curb-to-curb service for seniors and riders with disabilities

The data stored about each rider influences the decisions made by our routing and scheduling algorithms. For example, once a rider logs their need for wheelchair accessibility, our system will automatically dispatch a wheelchair accessible vehicle (WAV) for all future trips. For riders traveling with a care attendant, our system will account for the additional space requirement and dispatch a vehicle with the appropriate capacity. Further, our system sends rider-specific notes to the assigned driver (e.g., instructions to speak clearly for hearing-impaired riders), and for riders in wheelchairs and those who have requested walking/boarding assistance, our algorithms build in extra time for these pickups and drop-offs — allowing for sufficient boarding time without compromising overall system efficiency.

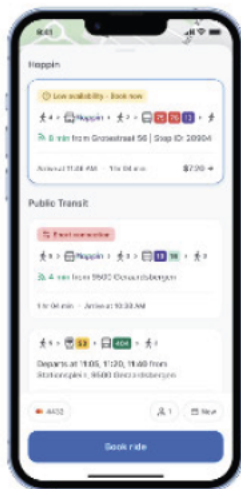


Via has a proven track record of both caring deeply about riders requiring accessible transit and delivering innovative advancements to the paratransit space. We operate paratransit and paratransit overflow services for large agencies like **Trinity Metro** in Texas, as well as core paratransit fleets for smaller agencies like **Capital Area Transit System** in Louisiana and **Green Bay Metro** in Wisconsin.

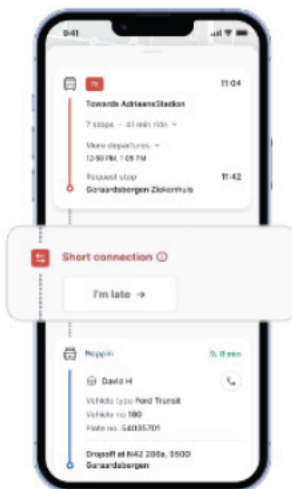
Additionally, our Rider Application has been designed with accessibility at the forefront and includes features for those in need of visual, audio, cognitive, or mobility accommodations. This also includes Voice Over and Talkback, screen readers for iOS and Android devices respectively, adaptive font sizes and contrast, and switch control. Via relies on broadly-adopted, recognized accessibility standards — such as compliance with the Web Content Accessibility Guidelines (WCAG) at the 2.0 AA level, as well as the American with Disabilities Act (ADA) — to ensure all riders can easily digest and engage with all service communication.

Enhancing Connections to Other Mode Choices

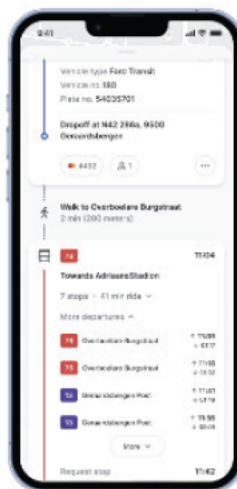
Via's **Integrated Transit** features will enable seamless connections with other mode choices, such as biking, walking, or taking existing fixed-route transit (including the Purple Line extension anticipated in late 2025). Within the Rider Application and web portal, riders are able to view all available public transit options for their requested trip, including stop-by-stop fixed route information, and book trips that span microtransit, fixed route, or a combination of both. **Mode Preference** logic also allows the City to control when microtransit and fixed route options are displayed, ensuring that microtransit acts as a complement to the existing fixed route network.



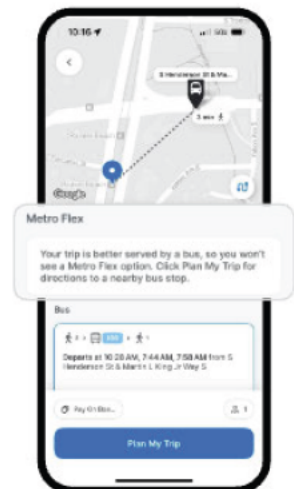
Multimodal



Intermodal



Fixed Route Schedules



Mode Preference

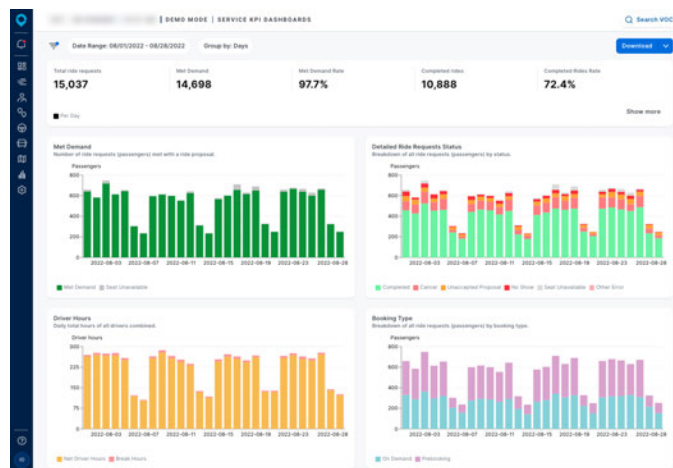
Via's platform is designed for a high level of integration; our modular and open architecture is purpose-built for ease of integration with other platforms using our proven APIs. This system architecture reflects our mission, which is to help our partners manage all transportation modes within a single holistic platform. For example, we support **integrations with third-party fare collection systems**, allowing riders to pay for Via trips using the same payment method they use for other public transit modes.

Access to Ridership and Performance Data

Through the Via Operations Center, the City of Beverly Hills will have 24/7 access to daily, weekly, monthly, quarterly, and yearly views of key performance indicators as well as the ability to aggregate, filter, and download data in various formats. Regulatory reports can be automated to present the required service data in the format requested by regulatory and grant-making agencies, including the FTA. Below we provide a high-level overview of these self-service tools.

Service KPI Dashboards

These dashboards function as the central view for service analysis and management. Through this interface, our partners can organize and visualize the thousands of data points our system collects every minute based on their unique needs and concerns, and leverage our filtering and grouping tools to generate reports that range from simple to highly complex. These reports ensure that partners understand core service indicators, such as total ridership and on-time performance, and can make data-driven changes to service parameters such as maximum wait time, fleet size, and/or vehicle supply throughout the day.



Data Generator

The Data Generator provides more than a dozen raw data tables that will enable the City to conduct original, granular performance analyses. Staff will be able to organize tables for a detailed view of rider and/or driver activity, passenger feedback, trip cost, vehicle

information, and more, and pull data for any time period. Further, staff can easily download the data in a range of formats (including CSV, excel, and shapefiles for ArcGIS) and export it to their preferred data analysis software, allowing them to conduct analyses and create reports that incorporate additional datasets to investigate questions of specific interest. This will enable the City to gain an in-depth understanding of the impact of the service on broader trends, such as access to transportation hubs or reduction in the use of single occupancy vehicles.

Compliance Reporting



As a contractor to many recipients and subrecipients of federal and state funding, Via understands the importance and considerable effort involved in reporting for compliance purposes. To address these challenges, we offer pre-built dashboards that contain all the data fields that may require reporting over the course of the year (e.g., total hours, total miles, revenue hours, revenue miles, deadhead miles, unlinked passenger trips, passenger miles traveled, and average passenger trip length). With this information, our system automatically populates reports with the required service-related data on a monthly and/or annual basis, providing a complete package that can be shared directly with grant-making and regulatory agencies.

1.4.3 Equipment & Supplies

Via's turnkey model includes all the tools, materials, and equipment to perform the tasks outlined in the Scope of Work. In this section, we outline our proposal for an all-electric fleet for the City of Beverly Hills, as well as our general approach to vehicle acquisition and maintenance.

Proposed Fleet for the City of Beverly Hills

To support the City's service and sustainability goals, Via recommends a four-vehicle fleet consisting of two **Volkswagen ID.Buzz** electric buses and two **Ford E-Transit** electric WAVs (wheelchair accessible vehicles). A spare vehicle will be provided to guarantee a consistently reliable service. This fleet composition ensures our ability to effectively serve the general population, as well as elderly riders and riders with limited mobility. Please see below for detailed descriptions of our proposed zero-emissions vehicles:

Volkswagen ID.Buzz Electric Bus	Ford E Transit Electric WAV
	
Range	
<ul style="list-style-type: none"> ● 234 miles per charge under typical operating conditions 	<ul style="list-style-type: none"> ● 159 miles per charge under typical operating conditions
Seating and Accessibility Features	
<ul style="list-style-type: none"> ● Seating for up to 7 passengers, with comfortable seating configurations to accommodate passengers and cargo. ● Ample legroom and headroom ensures passenger comfort on longer trips. 	<ul style="list-style-type: none"> ● Seating for 8-10 passengers, including one wheelchair position with fold-away seats ● Rear-entry, non-slip ramp with a low incline for wheelchair access ● Wheelchair securement options with Q'Straint or Sure-Lok systems
Convenience and Comfort Features	
<ul style="list-style-type: none"> ● Multiple USB ports for passenger convenience ● Automatic climate control ● Power sliding doors for easy entry and exit ● Comfortable cloth upholstery with power-adjustable front seats 	<ul style="list-style-type: none"> ● Automatic climate control ● Power sliding doors for easy entry and exit ● Comfortable cloth upholstery with power-adjustable front seats

Each vehicle in the City’s fleet will be equipped with bike racks, security cameras, GPS tracking, and a computer tablet pre-loaded with Via’s Driver App to track all routes and communicate instructions to drivers during active service. Our vehicle plan is fully flexible and we look forward to collaborating with the City to finalize the seating configurations and the composition of the proposed fleet. We also have extensive experience designing and operating services with autonomous vehicle (AV) technology, as described in section [1.4.4 Autonomous Vehicle Integration](#).

Brand, Logo, and Vehicle Wrapping

All vehicles in the proposed fleet will be custom-wrapped with uniform branding. For illustrative purposes, an example of vehicle branding for Beverly Hills is included below.

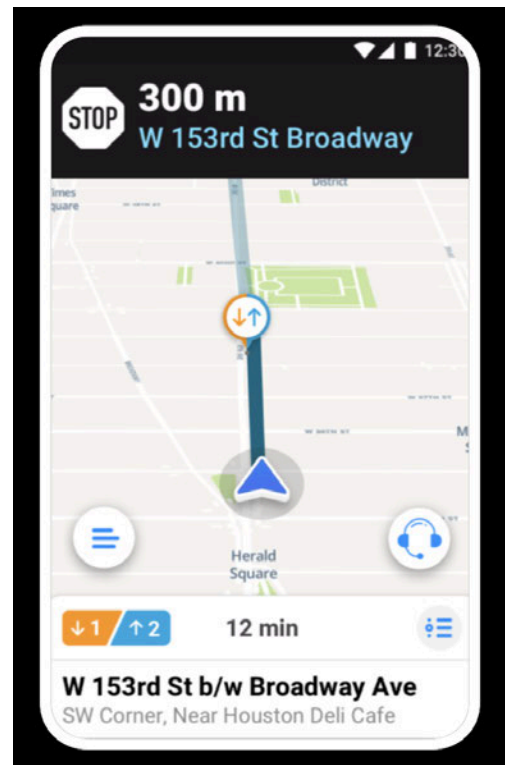
Via's Marketing team will refine this design in consultation with the City such that all vehicles are easily identifiable, appealing, and conform with the City's approved branding guidelines.



As described in section [1.4.1 Approach to Project Tasks](#), Via's Marketing and Rider Growth teams have extensive experience conducting outreach campaigns and building ridership among multilingual users and other transportation-disadvantaged groups. We look forward to working closely with the City to develop a brand and microtransit program that effectively serves these communities.

Driver/Operator User Interface

Our driver/operator user interface, the Driver App, has been developed to make drivers' jobs safer and easier, enabling them to deliver an exceptional rider experience. The application provides a single interface where a driver can access everything they need before, during, and after their shifts. This includes turn-by-turn navigation (including list, map, and voice instructions), a ride manifest that updates in real-time as new rides are booked, automated notifications, and one-click task acknowledgements. Via's Driver App offers several opportunities for customization, including fully configurable requirements for driver wait times at pickup stops. The Driver App ensures operational transparency by tracking real-time vehicle location, and driver safety through features like the "Silent Alarm", which automatically alerts dispatchers if drivers are in need of assistance.



Vehicle Acquisition and Supply

Leveraging our existing vehicle acquisition and leasing channels in Southern California, Via will work with our trusted national leasing partners, such as Avis or VGM, to procure a microtransit fleet that is clean, well-maintained, accessible, and tailored to the needs of the City's service. Our close relationships with our leasing partners allow us to launch services quickly at very competitive rates, and enable us to flexibly support a variety of fleet configurations as service needs evolve. Via works closely with our partners on an ongoing basis to determine the optimal fleet size based on overall expected ridership, demand patterns according to time of day, day of week, and season, and ongoing vehicle maintenance needs. Leveraging our proprietary supply optimization tools and robust performance data, we will ensure that we deploy active vehicles to match expected demand in the most cost-efficient way possible, while also effectively meeting rider needs.

Our partnerships with national leasing partners are also unique in that they provide access to the significant national fleets that both companies maintain for their other business lines. As a result, we are able to quickly "flex" additional fleet into our services, allowing us to immediately respond in the event of operational challenges such as higher than predicted maintenance issues or service expansion needs. We are able to rapidly deploy temporary Avis or VGM vehicles, typically within 1-3 weeks. Should we choose to increase fleet size because of a change in service design, we can access additional permanent, branded fleet vehicles within 2-4 weeks.

Vehicle Maintenance and Preventative Maintenance Program

Via's Maintenance Program is a critical component of our operational excellence. We leverage a data-driven software system to set and monitor maintenance intervals according to a vehicle's use case and manufacturer specifications, in addition to local, state, and federal guidelines. All of this information is stored in our **Vehicle Database**, which contains complete vehicle histories including past preventative maintenance, repairs, and other key data. This data-driven approach enables us to meet or exceed the manufacturer's recommended service plan for vehicles being used as part of the project.

In the Vehicle Database, a preventative maintenance schedule is created for each vehicle in the fleet based on vehicle and manufacturer requirements, mileage, and maintenance history. Preventative maintenance is scheduled through our tracking software, and all performed maintenance is recorded and linked to a vehicle's VIN. The system will issue reminders to maintenance personnel when required maintenance is approaching.

Additionally, drivers complete **Daily Vehicle Inspection Reports (DVIRs)** prior to their shifts to ensure that the vehicles are in good operating condition. After daily service, vehicles are inspected to ensure that all lights are functioning, all seating is secure and that all tires, wheels, lugs, air brake systems (if applicable), wheelchair lifts (if applicable) and exit doors are in proper operating condition.

Custom Name: _____ Plate# _____ Vin# _____	Maintenance Plan - Thousands Miles																										
TASK	7	14	21	28	35	42	49	56	63	70	77	84	91	98	105	112	119	126	133	140	147	154	161	168	175	1	
Rotate the tires, inspect tire wear and measure tread depth	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Change oil and filter	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Inspect the Wheels and Rotors	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Perform multi-point inspection	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Battery Check	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Exterior and Interior Visual Inspection	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Doors Inspection	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Lifts and Stairs	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Interior - Seats, Belts, Dashboard, Console, Interior Lighting	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	1
Inspect engine cooling system level, strength and hoses	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	1
Inspect exhaust system and heat shields	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	1
Inspect steering linkage, ball joints, suspension, tie-rod ends, drive shaft and U-joints. Lubricate if equipped with grease fittings.	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	1
Inspect the automatic transmission fluid level (if equipped with a dipstick).	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	1
Inspect brake pads, shoes, rotors, drums, break linings, hoses and parking break.	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	1
Replace engine air filter(s).	NO	NO	NO	YES	NO	NO	NO	YES	NO	NO	NO	YES	NO	NO	NO	YES	NO	NO	NO	YES	NO	NO	NO	YES	NO	NO	1
Replace front wheel bearing grease and grease seals if non-sealed bearings are used.	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	YES	1
Change rear axle fluid.	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	1
Balance rear wheels (if fitted).	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	1

Maintenance checklist in the Vehicle Database (by mileage)

In addition, vehicle cleanliness is a top priority for our operations teams, given the impact on customer satisfaction and safety. We will develop specifications and checklists ensuring that all vehicles meet Via’s and the City’s cleanliness standards, remaining consistently free of trash, debris, and odors. Our maintenance team will vacuum seats and floors, wipe down surfaces in vehicles, including, but not limited to, dashboards, consoles, seatbelts, and door handles. Vehicles will undergo professional deep cleanings at least once per week by a professional service and daily maintenance cleanings by in-house personnel. We are happy to adjust any aspect of our cleaning regimen to accommodate specific requests by the City.

A sample Vehicle Maintenance Plan for a similarly-sized turnkey microtransit service is attached to this proposal as [Appendix B](#).

Storage and Maintenance Facility

Via will rent a lot inside or near the service area to store vehicles outside of service hours. This facility will be equipped with EV charging stations to support the overnight charging of vehicles. Our Operations team has initiated a search with a local broker to identify suitable locations ahead of service launch, leaving us with ample time to coordinate installation if a suitable location with preexisting charging infrastructure cannot be

identified. Vehicle repairs beyond basic daily maintenance will be conducted off-site and coordinated with our national leasing partners.

1.4.4 Autonomous Vehicle Integration

Innovation is at the core of Via’s approach to designing and operating turnkey microtransit services. Our commitment to advancing public mobility has set new industry standards by integrating ultra-modern technology with forward-thinking strategies. To date, Via is the only mobility company with direct experience deploying AVs across a variety of vehicle form factors, geographies, and transit use cases to provide tens of thousands of autonomous rides around the world. Our vehicle-agnostic software platform has also been proven to be the most reliable, comprehensive, and effective solution for deploying autonomous demand-response services. Leveraging our world-class software platform, we successfully design, deploy, and operate AVs as public microtransit services around the world — from students in Texas to seniors in Australia.

Should the City be interested at any point during our partnership, we are able to leverage our existing partnerships with AV providers to secure the type of vehicle that meets the City’s expectations, including May Mobility, Beep, and multiple other providers. Before any autonomous vehicle deployment, we will work closely with the City Project Manager and other stakeholders in Beverly Hills to secure written approval and ensure that the deployment aligns with the City’s service goals and objectives. Autonomous vehicles will comply with all applicable federal, state, and local regulations.



The **Arlington RAPID** pilot program (a joint venture between Via and May Mobility) was the first in the United States to integrate on-demand autonomous vehicles into an existing public transportation service. Since launching in 2019, the service has provided more than **60,000 rides** to residents, university students, and visitors around Downtown and the University of Texas at Arlington campus.



In September 2024, Via and May Mobility partnered with the Contra Costa Transportation Authority to launch **PRESTO**, a shared AV service in Martinez, California. A goal of the service is to improve access to healthcare in the area by providing another reliable and convenient mode of transportation for Contra Costa Regional Medical Center patients and members of the general public.

1.4.5 Staffing and Support Services

Via's turnkey model includes a full range of staging and support services. Below we describe our approach to driver training and recruitment, dispatching and customer service, and technical support.

Vehicle Operators

Beverly Hills' microtransit service will be operated by an engaged, qualified, and reliable pool of employee drivers, many of whom will be hired directly from the local community. By focusing on local hiring in Los Angeles County, we ensure that drivers are invested in providing quality service to their community, while reducing the risk of costly driver shortages that have affected providers nationwide. We deliver these results through a combination of incentives, including above-market wages, targeted driver marketing, high-touch support, a mentorship program with senior drivers, a shift-claim model that gives drivers significant input into their own schedules, and hands-on, in-vehicle training. For details on Via's local hiring and employment plan, please refer to section [1.3 Staffing](#).



"It feels good to be able to provide a service and help people accomplish the things they need to do during the day."

– Ligia Alicea, Via driver in Jersey City since 2020

Driver Screening

Via's hiring procedure for our microtransit drivers includes a robust screening and vetting process, which we will align with the City's requirements. All drivers are required to undergo detailed background checks, driving record reviews, and criminal record reviews. Key requirements include, but are not limited to:

- Valid California driver's license
- Prior employment verification
- State motor vehicle records check
- Criminal background check
- Road test certification
- Annual list of violations
- FTA-compliant mandatory drug and alcohol testing
- English proficiency test

- Outstanding customer service skills

Once drivers have passed the application phase, and have conducted the necessary checks, tests, and reviews specified above, they are subject to a comprehensive final review process on their first day to ensure that they have met and exceeded our hiring requirements before they begin the onboarding and training process described below.

Driver Training

The Via team has successfully trained tens of thousands of drivers across our global deployments, facilitating both behind-the-wheel training and classroom programs to cover the essentials of providing safe and reliable service. We also work with organizations such as the National Safety Council (NSC), Drivege, and the Community Transportation Association of America (CTAA) to furnish safety training, first aid training, sensitivity



training, passenger assistance training, drug and alcohol awareness training, wheelchair securement training, and defensive driving training, among other topics. As part of the onboarding process, and at regular intervals as part of ongoing, annual refresher training, drivers participate in an intensive series of workshops, including sessions on:



Introduction to Beverly Hills

Basic information about Beverly Hills' service, including service hours, service area boundaries, and service rules.



How to Use the Via Driver App

Workshops on using the Via Driver App for safe and reliable service, including sessions on troubleshooting and reporting technical issues.



Customer Service Training

How to provide outstanding customer service, including instructions on greeting passengers, providing assistance to those who may not understand how to use the service, and handling customer complaints.



Sensitivity and Accessibility Training

How to assist elderly passengers with and passengers with limited mobility in a sensitive manner, in compliance with the requirements of the Americans with Disabilities Act (ADA).



Mandatory Safety Training

Series of workshops on topics such as defensive driving and safely navigating roads; vehicle and equipment operation; and following safety and emergency instructions, including how to handle and report accidents and major incidents.

Once they are on the road, drivers are continuously evaluated based on rider feedback, continuous driver record monitoring, and observation by our local field staff. Via regularly runs reports on driver performance including for metrics such as on-time performance and customer feedback to identify drivers who may require additional training. Drivers who fail to improve with additional training, or who are failing to meet Via or the City's service standards, will undergo retraining or in some cases may be removed from the service altogether.

Safety Program

With more than **5.8 million miles driven every month**, Via's drivers and vehicles are the cornerstone of our safety program. Our driver recruitment and vetting processes, onboarding and training, strict vehicle requirements, and comprehensive vehicle inspection plans ensure that we are able to provide industry-leading safety in our services. In addition to these general safety measures, Via has invested in tech-enabled operational advances to ensure that we can be proactive when it comes to safe driving. This includes in-vehicle video recording with auto-save features to ensure any traffic violations or near-violations are clearly documented; preventative tools such as AI programs that detect potentially risky in-vehicle behavior; and audio alerts to help drivers avoid accidents before they ever occur.

Via has established rigorous operational processes to ensure that every driver maintains the highest professionalism standards, prioritizes rider safety, and delivers reliable service. Our driver recruitment and vetting processes, onboarding and training, strict vehicle requirements, and comprehensive vehicle inspection plans ensure that we are able to provide industry-leading safety in our services: **out of the almost 5 million trips that we served in 2023, only 0.005% of Via-provided rides had a substantiated safety-related incident.**



In April 2024, Via hosted our first **Safety Month** to elevate safety awareness across our services. In total, about **500 drivers** attended a safety workshop, about **800 vehicles** underwent an audit, and **700 riders** received a preventative safety message in this highly successful celebration of Via's safety culture.

In the unlikely event of an accident, Via will provide the City with a report and notify the City if an incident could affect the fleet. Please see section [1.4.6 Mitigation of Risks and Challenges](#) for more details on how we respond to these incidents.

Dispatching and Customer Service

From our experience as both operators and software providers for transit services around the world, we understand that high-quality customer service and technical support is incredibly important for our on-demand public transportation riders, drivers, and partners. Within our turnkey model, we leverage this experience to provide full-spectrum customer support, covering all aspects of operational and technical assistance. Our Customer



Support agents are available to assist riders via phone, text, in app, and email queues in multiple languages, such as English and Spanish. Agents are able to provide support with booking rides, troubleshooting service issues, documenting customer feedback, and other rider needs as necessary. Customer Support performance is regularly monitored to ensure service compliance, and all agents are subject to random quality assurance checks. We have developed predefined escalation procedures to ensure that all concerns are addressed with the appropriate level of support and oversight, and that all relevant parties are kept apprised of updates and resolution timelines.

Training and Technology Support

As described in section [1.3 Staffing](#), **Alex Battisti** will serve as our dedicated Partner Success Manager, the City's main point of contact for training and technology support. Alex will be available to support the City via email and over the phone during service hours. He will also provide training and manuals for City staff, offer refresher sessions on

an as-needed basis, and provide additional training after significant software updates. As a unified provider for software and operations, Via is able to offer this training and support at no additional cost to the City. All of our project staff are Via experts, ensuring rapid troubleshooting and the optimal use of the platform.

Additionally, Beverly Hills will have around-the-clock access to Via's technical support platform. A rotating team of support engineers is on call at all times to resolve any problems that may arise. Incidents are escalated using a predefined alert protocol, which instantly notifies the on-call member of the team. The technical team member will immediately examine the issue to begin the process of issue resolution and resource allocation. All issues will be resolved based on their level of severity and associated response times, and Via will provide the City with regular status updates on resolution.

1.4.6 Mitigation of Potential Risks and Challenges

Operational Shortfalls

Through our experience providing software and turnkey microtransit services for more than 750 partners around the world, we understand how important it is to maintain continuity of service in case of unforeseen staffing shortages, vehicle issues, and technology failures. We have developed the following strategies to mitigate potential risks and challenges due to these operational shortfalls:

- **Staffing Issues:** We know that running excellent transit operations depends on fostering strong retention and consistency among our drivers. We have developed a high-touch driver engagement program that we leverage throughout our operations to minimize turnover, including frequent office hours, 1:1 support provided by the local team, and ongoing learning and development opportunities. We also perform ongoing compensation benchmarking to ensure that we are always providing fair and competitive driver rates. We also offer various incentive programs and performance-based bonuses to improve retention when necessary.
- **Vehicle Issues/Maintenance:** Via's preventative maintenance program takes a proactive approach to vehicle maintenance, detecting issues early through regularly scheduled inspections. Whenever possible, preventative maintenance and general repairs will be scheduled to avoid service disruption. Via will maintain a spare vehicle to ensure full coverage in the event of unexpected vehicle issues. As described in section [1.4.3 Equipment & Supplies](#), we are also able to deploy temporary vehicles to replace vehicles that cannot be quickly returned to service,

typically within 1-3 weeks. Permanent vehicles with the City's custom branding can be accessed within 2-4 weeks.

- **Mobile App Issues:** Our system is highly stable, delivering 99.9% uptime. As described in section [1.4.5 Staffing and Support Services](#), a rotating team of support engineers is on call at all times to resolve any problems that may arise.

Vehicles Involved in Collisions or Vandalism

If a vehicle has been involved in a collision and/or has a mechanical defect that impairs safe operation, Via's team will immediately remove the vehicle from service until it is repaired and able to operate safely. For roadside incidents, Via will ensure the driver is safely transported back to the lot while the impacted vehicle is towed away, and Via will also make arrangements to have another driver in service pick up any passengers on board and transport them to their destinations. Via will coordinate the repair of any issue identified as expeditiously as possible and we will keep the City informed of details regarding the incident and the resolution timeframe.

Unruly or Uncooperative Passengers

Via has developed policies and procedures for drivers to follow in the event of passenger issues and/or disturbances. For any real-time issue with a rider, drivers are advised to de-escalate a situation when within their control. For example, if the number of passengers at pick-up does not match the number of passengers recorded in the app, drivers are advised to ask the rider to correct the value. If this is not well-received by the passenger, drivers have the ability to update passenger count by using the chat function within the Driver App. If there is a customer-related issue that cannot be de-escalated at the point of boarding, the driver is advised to either refuse the ride if their safety feels compromised or to call support to advise them of the situation, if they can do so safely. In any circumstance that involves criminal behavior, the driver is instructed to call 911 and then report the situation to the support team immediately.

Recharging/Fueling of Vehicles During Service Hours

Managing EV services requires a complex interaction between hardware (vehicles and charging stations), software (shift planning, routing, and charge cycle management) and people (passengers, drivers, fleet teams, and shift supervisors). Via's turnkey solution for Beverly Hills includes both proprietary technology and operational strategies for planning and optimizing each of these components, which will enable us to deliver a seamless EV service for the City's pilot. For example, Via's platform includes built-in capabilities that support electric fleets, including proprietary simulation tools that factor in vehicle

charging requirements to ensure vehicles have enough charge capacity to serve demand throughout the day. The platform also displays each vehicle's battery status and remaining range, allowing dispatchers the ability to notify drivers if their vehicle is at risk of running low on charge. Although our vehicle charging plan prioritizes the overnight charging of EVs at designated parking spaces, we will leverage publicly-available charging infrastructure in the City of Beverly Hills to recharge vehicles during service hours if necessary.



Vehicle State of Charge by Shift

2. References

Via has extensive experience designing and operating turnkey microtransit services that enable cities like Beverly Hills to achieve their public mobility goals, including supporting a shift away from single-occupancy vehicles, reducing greenhouse gas emissions, and improving connectivity to local and regional transportation networks. Below, please find a list of three references who can speak to the quality and effectiveness of our services. Brief descriptions of these reference case studies for the implementation of Via's turnkey microtransit solution are provided on the following pages. We have also included an additional case study for our partnership with Richmond, CA, as it displays a successful all-electric microtransit service in California.

<p>Silicon Valley Hopper (City of Cupertino, CA)</p>	
<p>Bayview Shuttle (SFMTA)</p>	
<p>Link On-Demand (City of Lone Tree, CO)</p>	

Silicon Valley Hopper

In October 2019, the City of Cupertino partnered with Via to deliver their first on-demand service and address key goals such as increasing traffic congestion, limited alternatives to single-occupancy vehicle travel, and no first- and last-mile connection to fixed-route transit throughout the greater Silicon Valley area. After several highly successful years of on-demand service in the city of Cupertino, the cities of Cupertino and Santa Clara joined forces with Via to apply



for an **\$8.5M grant** from the California State Transportation Agency (CalSTA) to improve regional connection and advance the state’s mission of reducing transportation emissions. In addition to expanding service to Santa Clara the zones also serve two key fixed-route transit hubs in Mountain View. The service and our ability to drive ridership have both been extremely successful: over **70% of riders switched from single occupancy vehicles to microtransit**, and we have already delivered more than 100,000 rides. Today, the service operates with a **100% electric fleet**, leading to the elimination of 76,000 metric tons of carbon dioxide equivalent (MTCO₂e).

Bayview Shuttle

This year, Via partnered with the San Francisco Municipal Transportation Agency (SFMTA) and the California Air Resources Board to bring an on-demand shuttle service to Bayview-Hunters Point, an historically underserved neighborhood with limited transportation options. Via worked closely with community stakeholders to address the agency’s ongoing commitment to equity and design a service that is fully responsive to local needs. The goal is to seamlessly ferry passengers within the service area and to external points of interest, such as the 22nd St Caltrain Station, the San Francisco General Hospital, the 24th St./Mission BART Station, and the Bayshore Caltrain Station. The initiative also aims to create local workforce pathways by recruiting Bayview residents to be shuttle drivers, with the goal of eventually getting jobs with the municipal transit agency. The service, which launched in November, has been popular among community



members and ridership continues to grow, with a recent record of **111 rides per day**. “For too long, this neighborhood has needed safer and easier access to transportation,” said Supervisor Shamann Walton, whose district includes the Bayview. “I’m proud that we’re rolling out a shuttle service that can help break down the obstacles that our residents have historically had to navigate on their own.”

Link On-Demand

Lone Tree, CO is a fast-growing suburb of Denver. Local residents previously had few options for reaching local business and major employers in the area, and limited access to the regional light-rail commuter line. In 2019, the City partnered with Via to power their

first- and last-mile microtransit service. The Via platform provided the City with enhanced service visibility and comprehensive reporting tools, which their previous technology provider lacked. The City was also able to **decrease their cost per ride by 30%** while **increasing daily rides by 41%**. Building on this success, the City expanded its software partnership with Via to include turnkey microtransit



operations, unlocking efficiencies by choosing a unified provider for software and operations. Since Via took over operations in 2023, the service has achieved a nearly **3x increase in utilization**, as measured by passengers served per vehicle hour.

Richmond MOVES

In April 2022, Via partnered with the City of Richmond to launch Richmond MOVES, the city's first on-demand public shuttle service, with a fleet of **100% plug-in hybrid electric vehicles** to reduce energy consumption. Richmond MOVES' goal is to fill access gaps in the city's transportation network, which has historically lacked intra-city transit options and faced challenges from heavily polluted air. The service enables residents to easily connect with key transit hubs — such as Amtrak and BART stations and the Ferry Terminal — without a private car. The popularity of Richmond MOVES has continued to grow month over month, hitting an all-time high with nearly **5,897 monthly rides** served in



October 2024. Initially funded by the California Clean Mobility Options (CMO) Voucher Pilot Program, Via helped the City of Richmond secure an additional **\$3.2M in state funding** to support the existing pilot and expand service to nearly the entire city. New data validates Richmond Moves is making a positive environmental impact on the city, with nearly **50% of rides replacing trips previously served by single-occupancy vehicles**.

3. Cost Proposal

Via offers a transparent pay-as-you-go cost structure that includes regular reporting to keep Via accountable to meeting the City's ridership and budget targets. We will only deploy the hours that the City needs to meet demand, guaranteeing controlled costs and optimal service efficiency. Our pricing model is designed to maximize efficiency over time, allowing costs to gradually ramp up as the service scales, and ensuring the long-term sustainability of the pilot service.

Our cost proposal for the City of Beverly Hills assumes a service operating from 6:00 am to 10:00 pm every day, with peak hours from 7:00 am to 9:00 am and 4:00 pm to 7:00 pm on weekdays. We anticipate deploying 4 vehicles to satisfy peak demand on weekdays and 3 vehicles on the weekends, for an estimated total of 327 vehicle hours per week. Rates and budget for this proposal are included in a separate file, as per the instructions in the RFP. The rates provided are for a fleet consisting of two Volkswagen ID Buzz EV busses and two Ford E-Transit EV WAVs with one additional spare, as outlined in the proposal narrative. We would be happy to provide the City with refreshed pricing as this service model is refined or if the City has a different fleet preference.

Our pricing structure includes two fee categories:

- **One-Time Upfront Costs:** This category includes the launch and implementation costs associated with getting the service up and running, including technology localization, quality assurance and system testing, launch preparation, WAV retrofits, vehicle wraps, and charging infrastructure.
- **Per-Vehicle Hour Fees:** Via's all-inclusive per-vehicle hour fee covers all operating and ongoing technology costs required to deliver an outstanding quality of service for the City and its riders. This fee is charged on a monthly basis according to the number of vehicle hours actually used. This all-inclusive fee also covers the delivery of ongoing support from all positions required for service.

Any fares collected by Via will either be credited back to the City or reinvested in service enhancements at the City's sole discretion. Potential savings to the City from fare credits are outlined in the cost file, assuming a \$2 flat fare for rides inside the proposed service area. Fares are fully customizable, and we look forward to working with the City to determine the optimal fare structure according to the City's ridership goals and needs.

Alternative Pricing Scenarios

Via is committed to developing creative solutions with our partners to deliver the highest possible quality of service for every budget. For example, the overall cost to the City could be reduced in the following ways:

- **Charging Infrastructure:** Via's Operations team is currently reviewing suitable locations for vehicle storage and charging in and around the service area. If we are able to identify lots that are adequately supplied with charging stations, we would deduct the cost of installation from the one-time upfront fees, [REDACTED]
[REDACTED]
- **Modified Service Design:** In our initial service analysis, Via Strategies has already identified several opportunities for cost savings without diminishing the overall quality of service, such as slight reductions in the total number of service hours, the number of active vehicles, or the extent of the service zone.
- **Independent Contractor (IC) Drivers:** While our core proposal fulfills the City's requirement for W2 employee drivers, we have found that in services of this type an IC model can result in greater flexibility for drivers at a significantly lower cost to our partners. IC drivers benefit from the same above-market wages as employees and the freedom to set their own availability and schedule. We have successfully deployed this model in many microtransit services that we operate, both in California and across the United States. [REDACTED]
[REDACTED]
[REDACTED]

We would be delighted to discuss our proposal further with the City and work to design a high-quality, efficient service that aligns with the City's goals and funding availability.

4. Business License

Proof of Via's registration with the Secretary of State to conduct business in the State of California is attached.



Secretary of State

Certificate of Qualification / Registration

I, SHIRLEY N. WEBER, PH.D., California Secretary of State, hereby certify:

Entity Name: Crosby Street Transit LLC
Entity No.: 202464110938
Registration Date: 10/03/2024
Filing Type: Limited Liability Company - Out of State
Formed In: DELAWARE

The above referenced entity complied with the requirements of California law in effect on the Registration Date for the purpose of qualifying to transact intrastate business in the State of California, and that as of the Registration Date, said entity became and now is duly registered, qualified and authorized to transact intrastate business in the State of California, subject however, to any licensing requirements otherwise imposed by the laws of this State and that the entity shall transact all intrastate business within California under the Entity Name as set forth above.

No information is available from this office regarding the financial condition, status of licenses, if any, business activities or practices of the entity.



IN WITNESS WHEREOF, I execute this certificate and affix the Great Seal of the State of California this day of October 04, 2024.

SHIRLEY N. WEBER, PH.D.
Secretary of State

Certificate No.: 253899132

To verify the issuance of this Certificate, use the Certificate No. above with the Secretary of State Certification Verification Search available at bizfileOnline.sos.ca.gov.

5. Insurance

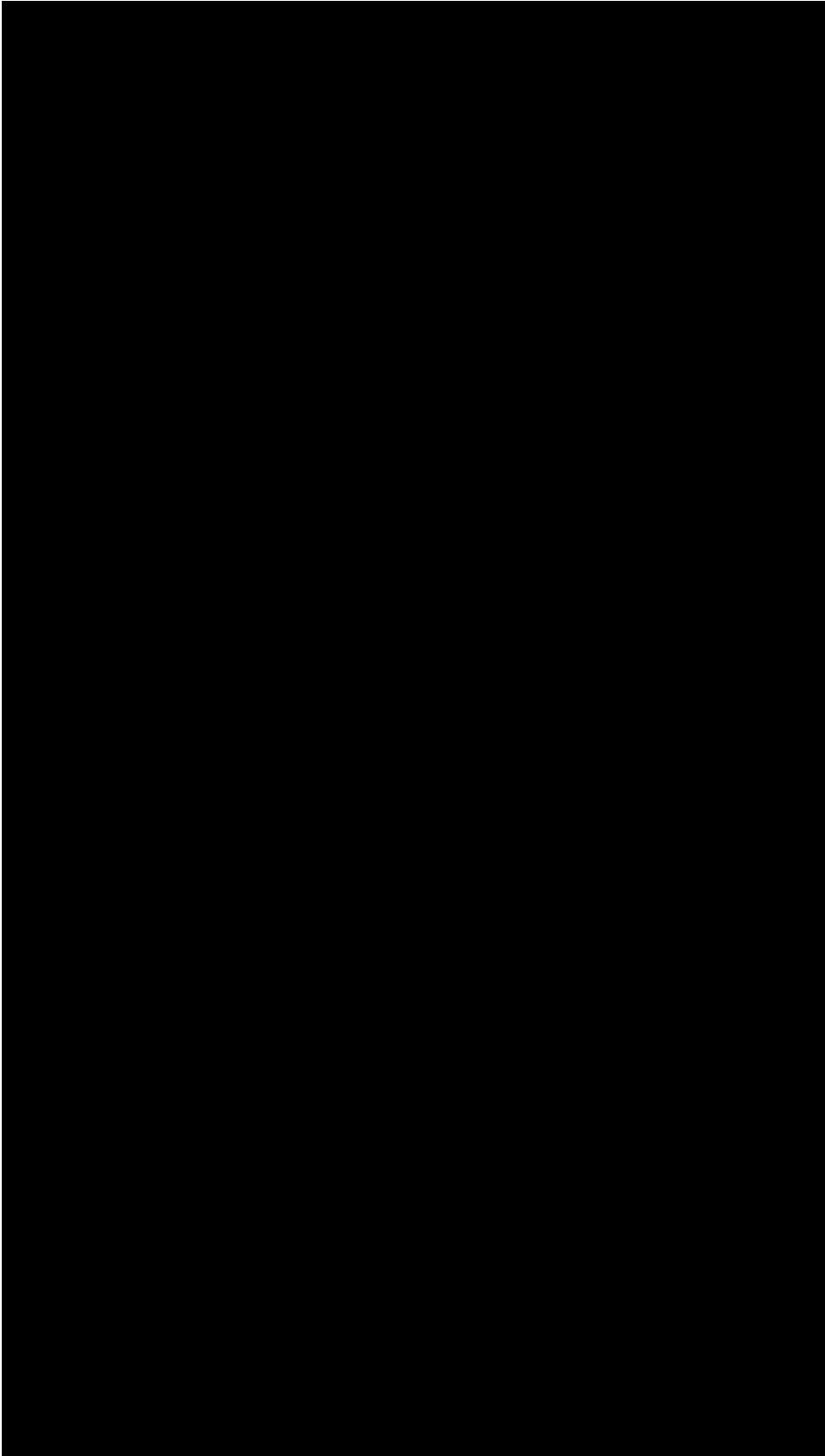
Via maintains coverage that is fully compliant with the indemnity and insurance requirements stated in the sample contract.

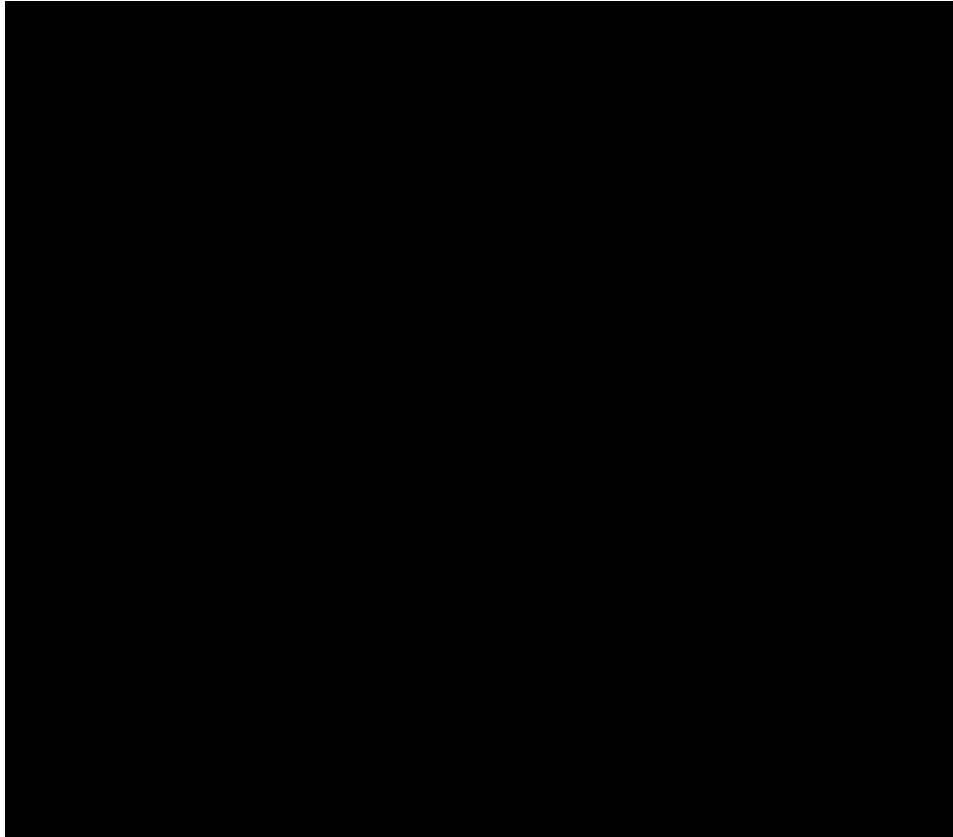
Appendix A: Sample Metric Report

Below we have included screenshots of dashboards that Beverly Hills will be able to access through the Via Operations Center (described in section [1.4.2 Technical Specifications](#)). The sample reports reflect a ten-day snapshot of activity for a similarly-sized service in California:


















Other dashboards provide deeper insight into rider growth and rider experience, key indicators of success for any microtransit service:



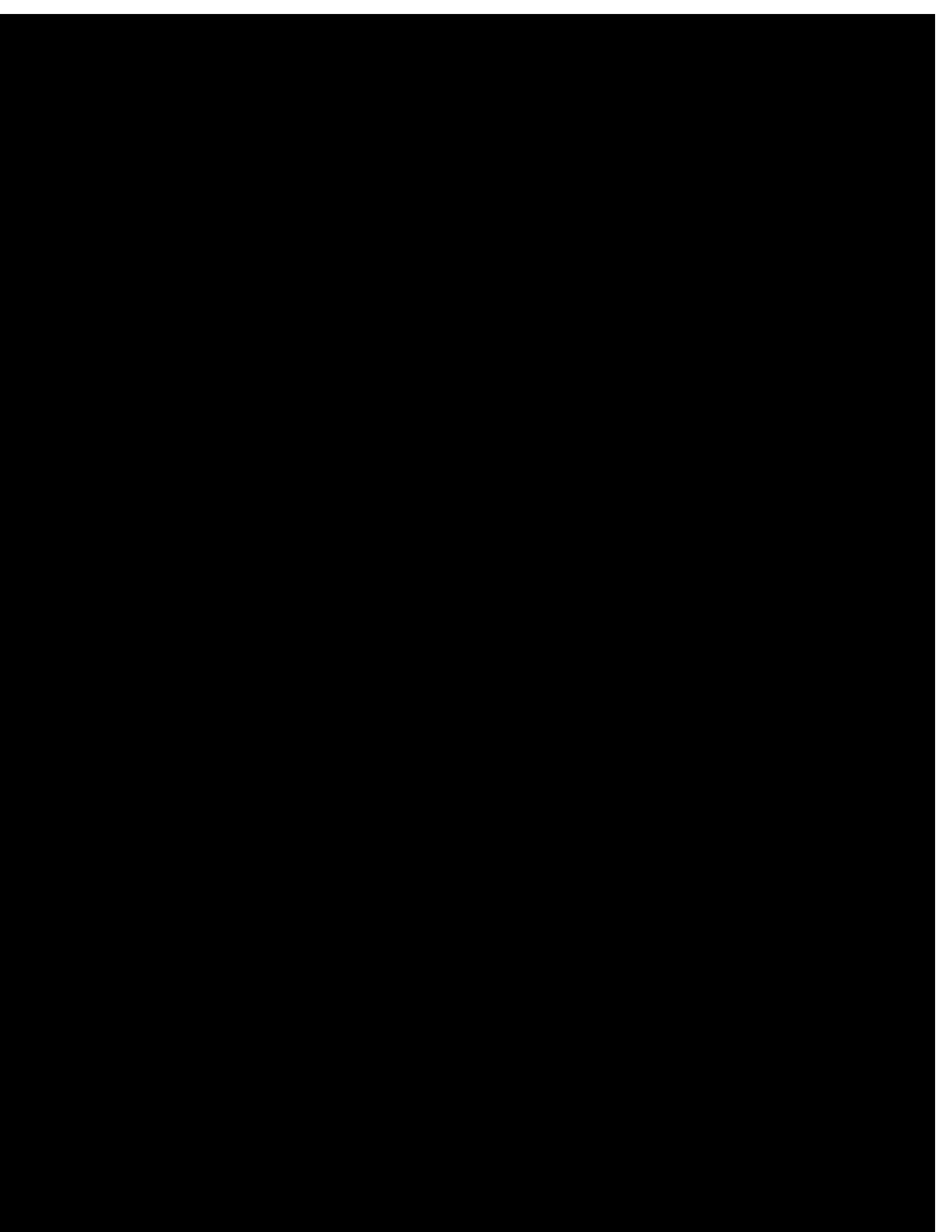


In addition to these dashboards, Beverly Hills will have access to all the underlying data, which can be exported in a range of formats. The table below summarizes the data and graphs that are provided in our standard service package.

Dashboard	Data / Graphs provided
	<ul style="list-style-type: none">■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ 

Appendix B: Vehicle Maintenance Plan

A sample Vehicle Maintenance Plan for one of Via's turnkey microtransit services is attached. Specific details in this plan may be changed according to the vehicle choice for the City of Beverly Hills' fleet.



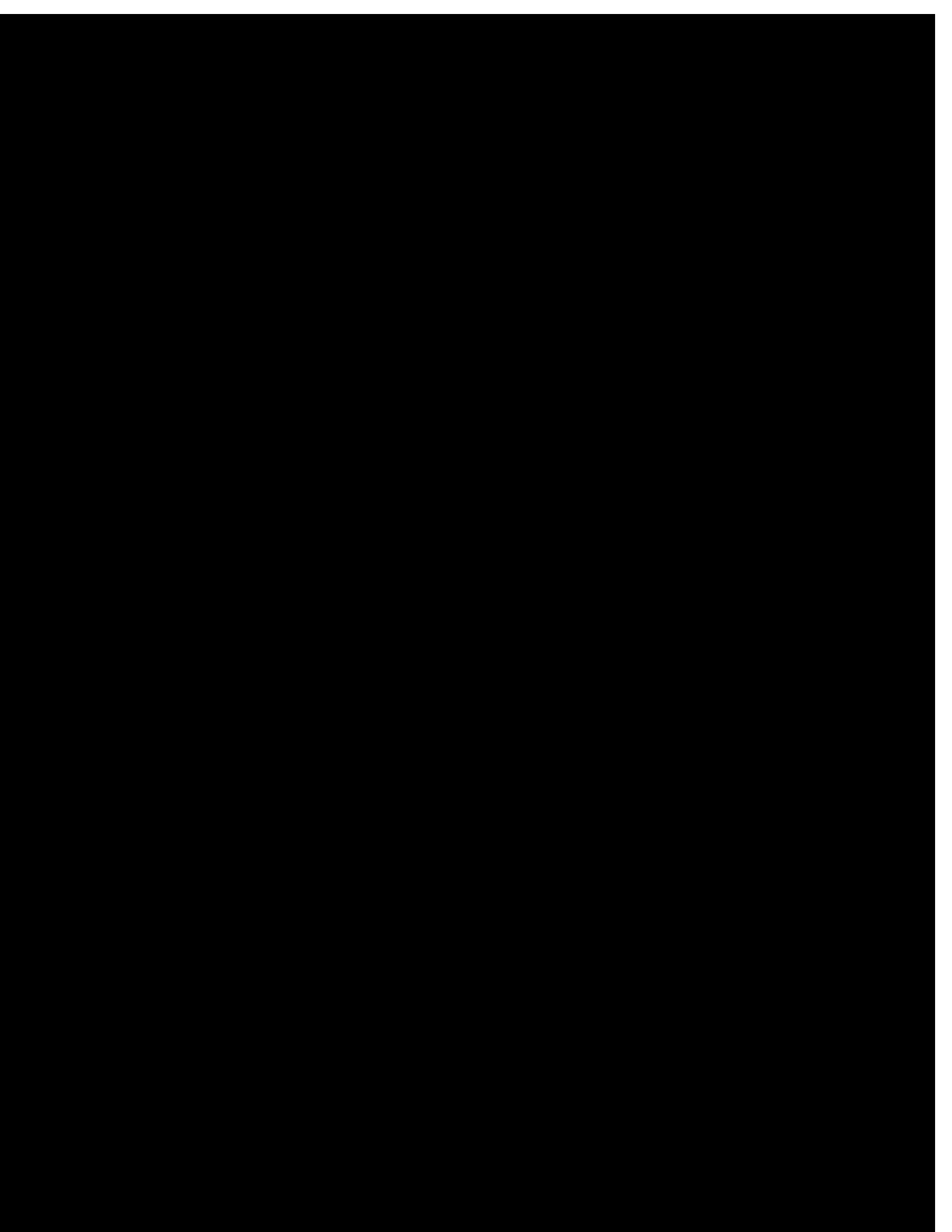




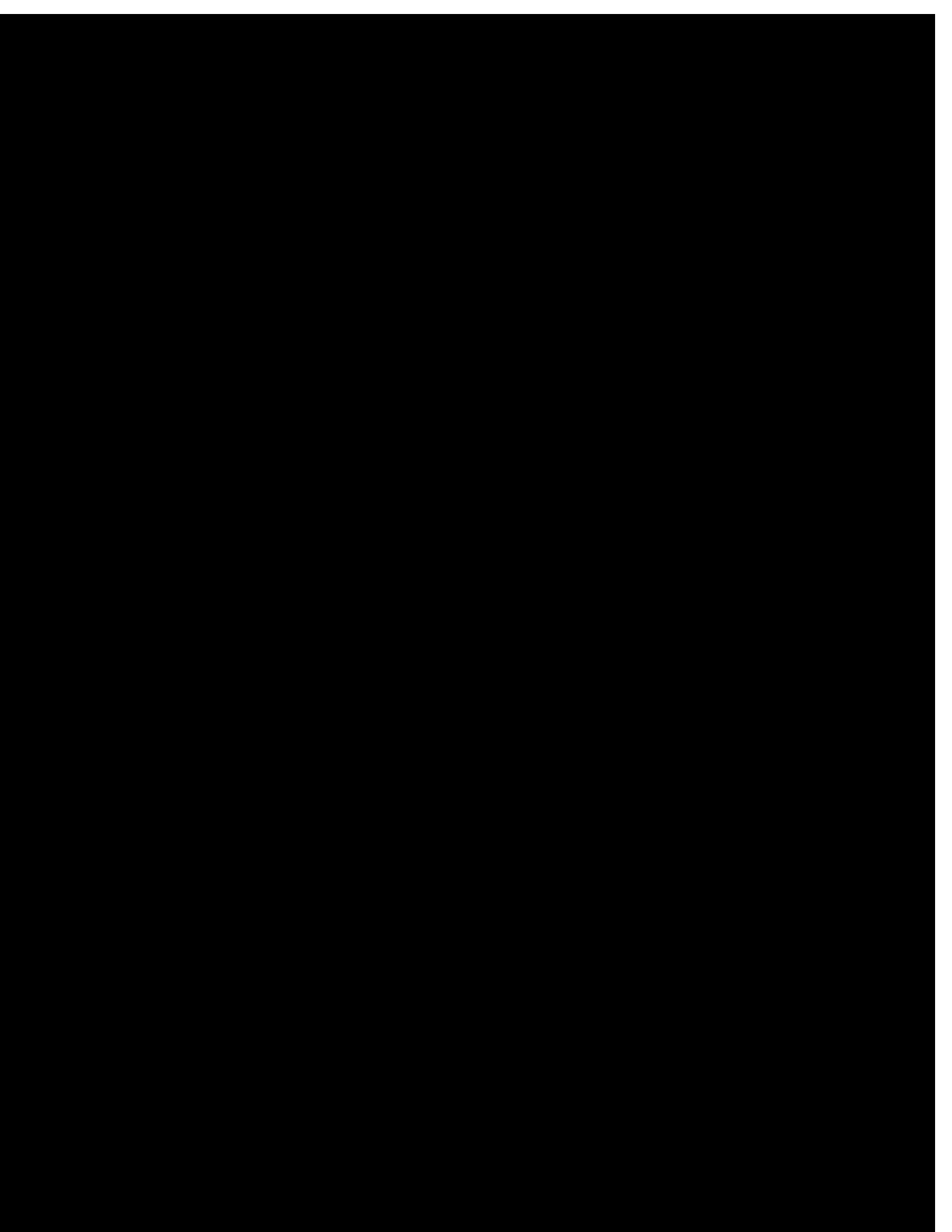


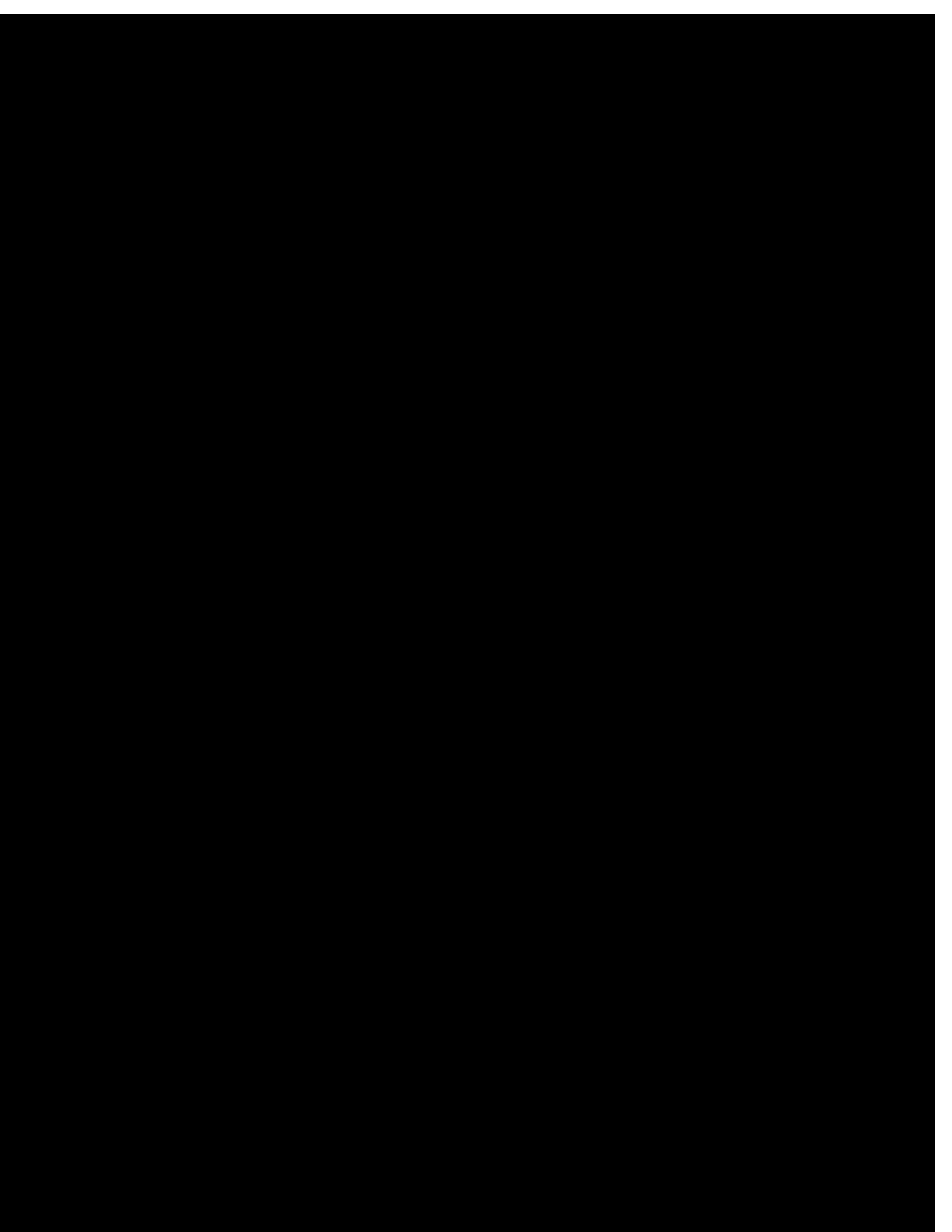




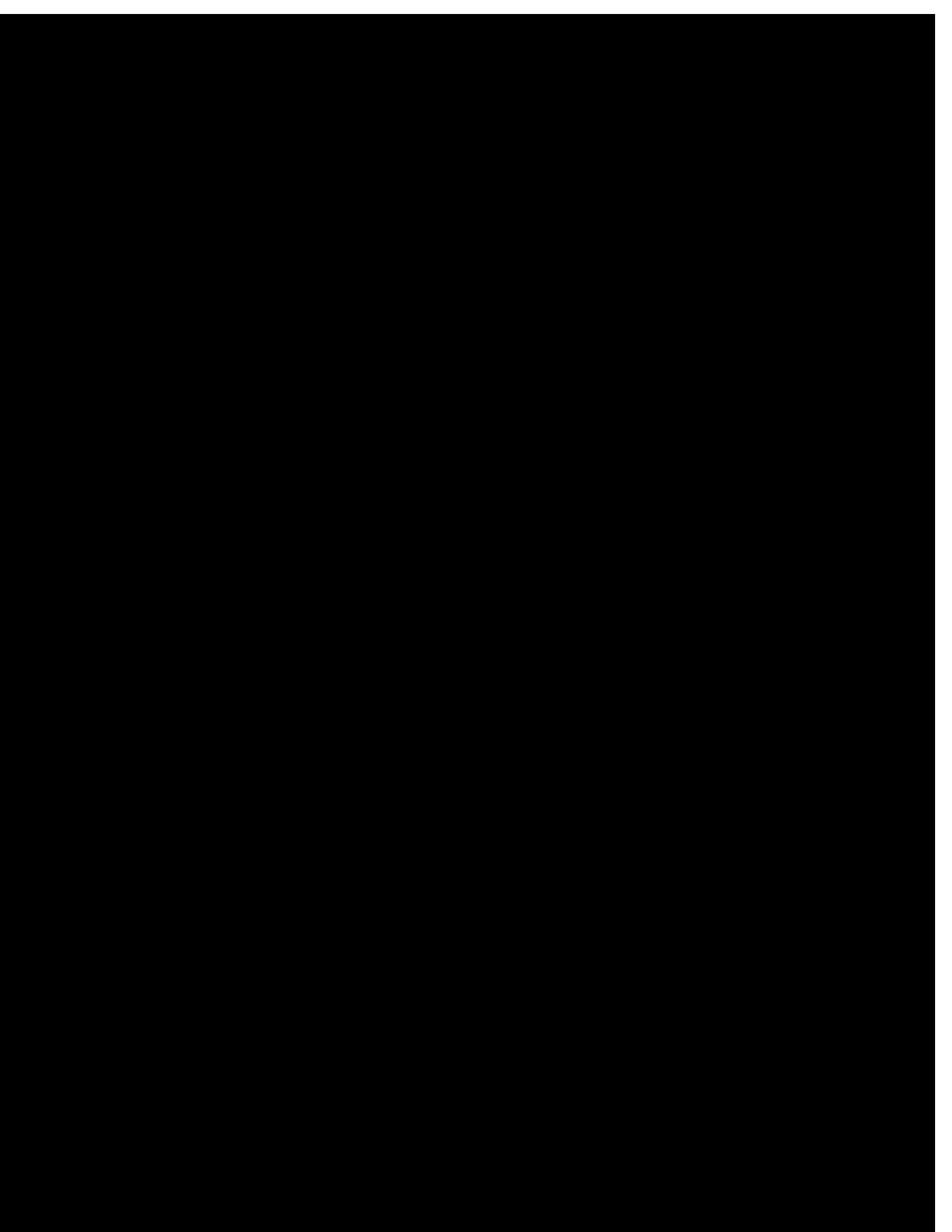


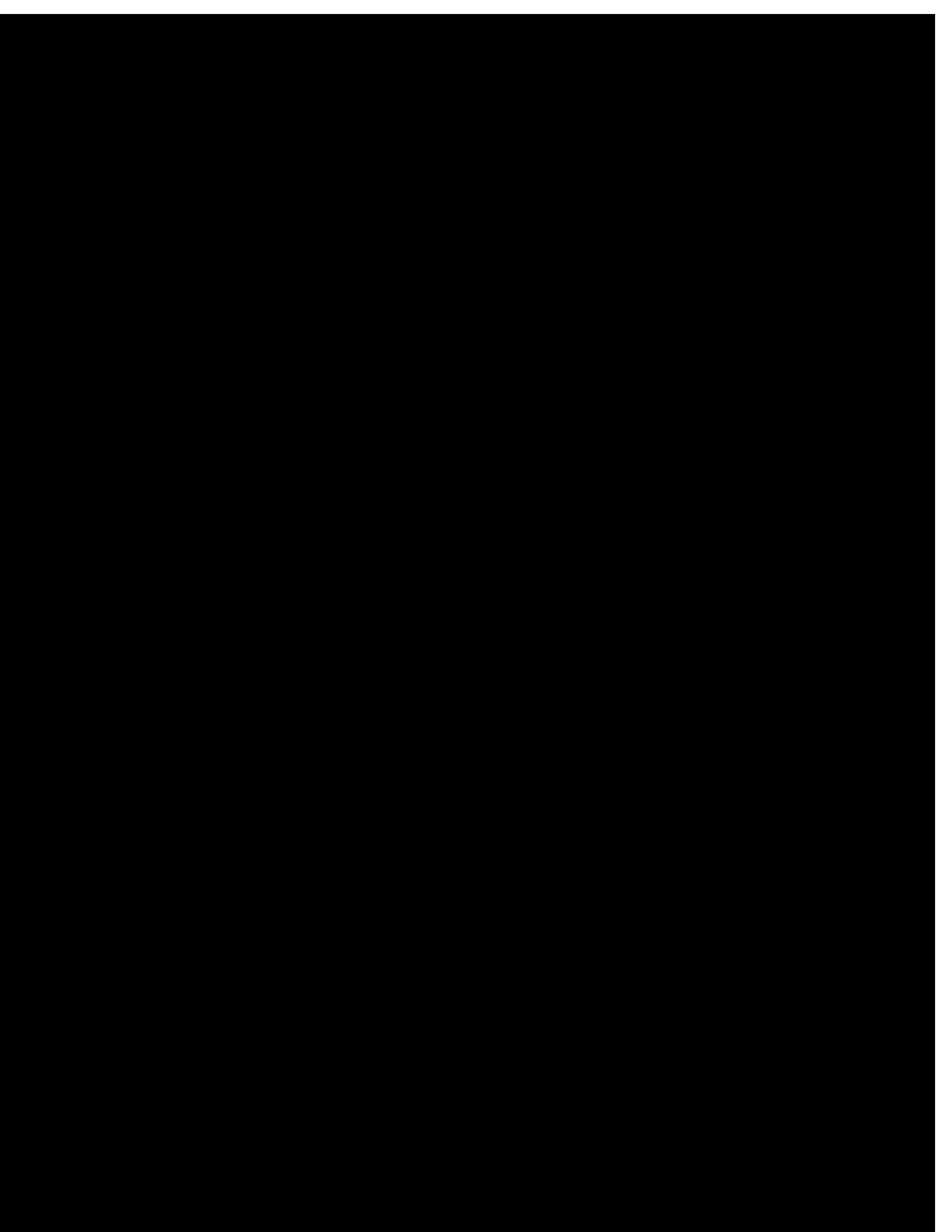




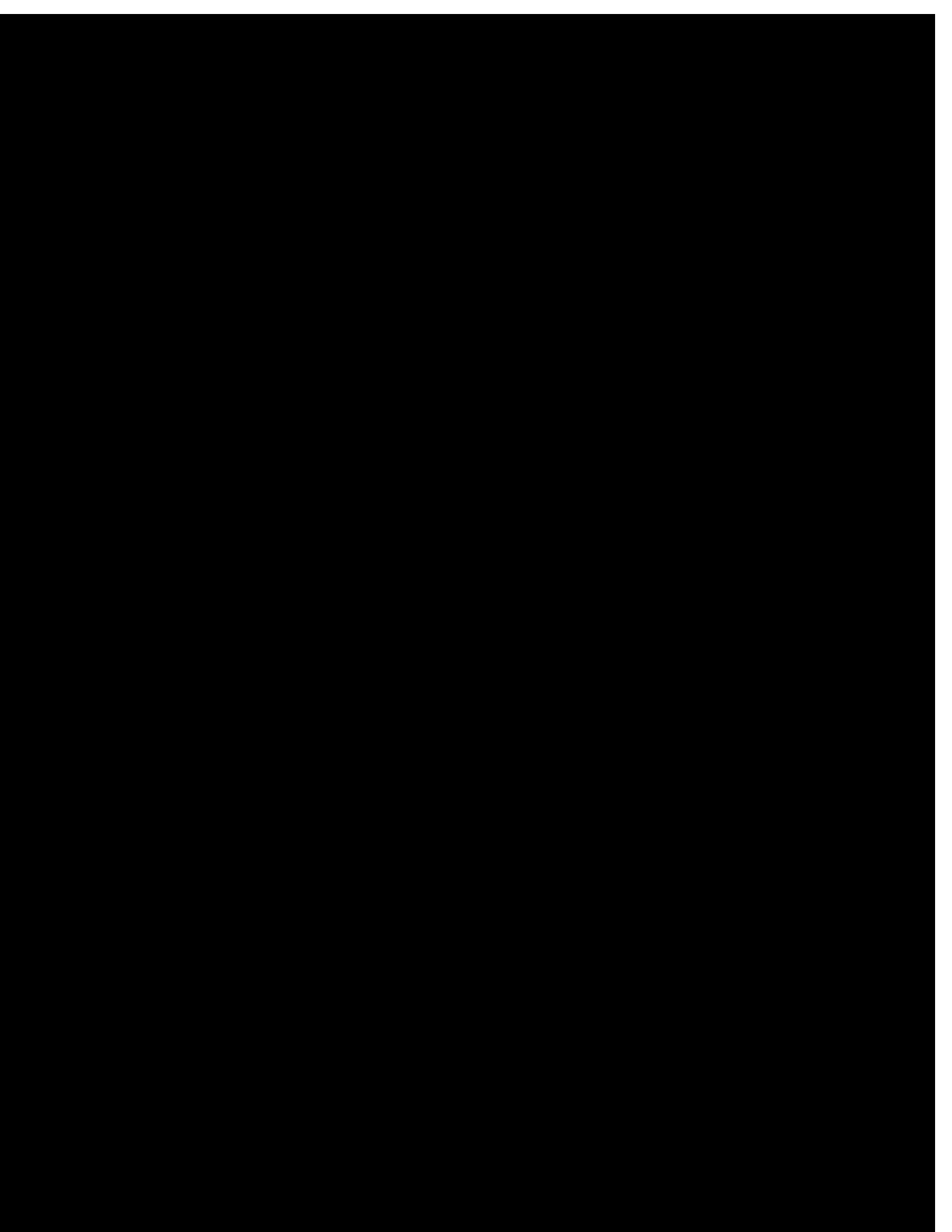












Proprietary and Confidential Information

Crosby Street Transit LLC's ("Via") response and all supporting documentation, including associated exhibits and appendices, comprise proprietary, confidential, and trade secret information, exempt from disclosure under California Government Code ("C.G.C.") § 7920 et al. ("California Public Records Act"). Information presented in our response relating to the pricing of Via's services, back-end application processes, proprietary algorithms, unique business methodologies, and sensitive information on key performance indicators are our confidential business information, which qualify as trade secrets under California and federal law. This information is exempt from disclosure under several provisions of the California Public Records Act, including but not limited to, C.G.C. § 7927.705 (disclosure is "prohibited pursuant to federal or state law," including laws protecting trade secrets such as Section 1060 of the California Evidence Code, the federal Defend Trade Secrets Act, the California Uniform Trade Secrets Act and state common law) and C.G.C. § 7922.000 (balancing of public interests). If this proprietary and confidential information is disclosed, it would harm Via by giving its competitors an unfair advantage. In addition, the public has an overwhelming interest in maintaining the confidentiality of proprietary information disclosed in the RFP process to avoid discouraging companies from full participation in public procurement processes. Via's response and accompanying materials also include personal information about Via's employees and other individuals, which is exempt from disclosure under both C.G.C. § 7927.700 (disclosure would constitute an "unwarranted invasion of personal privacy") and C.G.C. § 7927.705 (disclosure is prohibited by state law, which would include California's Constitutional right to privacy in Article I, section 1, and the California Consumer Protection Act). Accordingly, we request that your office maintain the confidentiality of our responses and provide us with notice of any request for information under the California Public Records Act prior to production by contacting compliance@ridewithvia.com.

Intellectual Property

The Via Transportation, Inc. products are protected by one or more of the following U.S., European or International Patents:

US: 9,816,824 ; 9,562,785 ; 10,197,411 ; 10,677,604 ; 10,168,168 ; 10,168,167 ; 10,458,803 ; 10,677,602 ; 11,107,352 ; and other patents pending.

Europe: EP3355028; NL3355028; FR3355028; GB3355028 ; DE3355028 ; and other patents pending.

ATTACHMENT 2

FY27 DRAFT

Los Angeles County Metropolitan Transportation Authority

**Prop A, Prop C, MR & MM LOCAL RETURN
TDA ARTICLE 3 & 8**

LOCAL JURISDICTION	Population DOF Report 2025 data ⁽¹⁾	Population as % of County	Proposition A Local Return Estimate ⁽²⁾	Proposition C Local Return Estimate ⁽²⁾	Measure R Local Return Estimate ⁽²⁾	Measure M Local Return Estimate	TDA Article 3 Ped & Bike (A)	TDA Article 8 (S & H)		Total
								Population	Article 8 Allocation	
1 AGOURA HILLS	19,904	0.2015%	\$ 521,213	\$ 432,332	\$ 324,249	\$ 367,482	\$ 16,746		\$ -	\$ 1,662,023
2 ALHAMBRA	82,374	0.8340%	2,157,073	1,789,236	1,341,927	1,520,850	69,252			6,878,338
3 ARCADIA	56,116	0.5682%	1,469,472	1,218,889	914,167	1,036,055	47,183			4,685,766
4 ARTESIA	16,359	0.1656%	428,382	355,332	266,499	302,032	13,767			1,366,012
5 AVALON	3,383	0.0343%	88,588	73,482	55,111	62,459	5,000	3,383	167,800	452,441
6 AZUSA	48,988	0.4960%	1,282,816	1,064,062	798,047	904,453	41,191			4,090,570
7 BALDWIN PARK	70,848	0.7173%	1,855,250	1,538,881	1,154,161	1,308,049	59,565			5,915,904
8 BELL	33,315	0.3373%	872,398	723,631	542,723	615,086	28,018			2,781,857
9 BELLFLOWER	76,656	0.7761%	2,007,340	1,665,036	1,248,777	1,415,280	64,446			6,400,879
10 BELL GARDENS	38,471	0.3895%	1,007,415	835,624	626,718	710,280	32,352			3,212,389
11 BEVERLY HILLS	31,945	0.3234%	836,523	693,873	520,405	589,792	26,867			2,667,460
12 BRADBURY	902	0.0091%	23,620	19,592	14,694	16,653	5,000			79,560
13 BURBANK	106,146	1.0747%	2,779,575	2,305,584	1,729,188	1,959,747	89,233			8,863,327
14 CALABASAS	22,797	0.2308%	596,970	495,171	371,378	420,895	19,178			1,903,592
15 CARSON	91,812	0.9296%	2,404,220	1,994,237	1,495,678	1,695,102	77,185			7,666,422
16 CERRITOS	47,871	0.4847%	1,253,566	1,039,800	779,850	883,830	40,253			3,997,299
17 CLAREMONT	37,299	0.3776%	976,724	810,167	607,625	688,642	31,367			3,114,525
18 COMMERCE	12,146	0.1230%	318,059	263,822	197,866	224,249	10,226			1,014,222
19 COMPTON	93,692	0.9486%	2,453,450	2,035,072	1,526,304	1,729,812	78,765			7,823,404
20 COVINA	51,090	0.5173%	1,337,860	1,109,720	832,290	943,262	42,958			4,266,089
21 CUDAHY	22,132	0.2241%	579,556	480,726	360,545	408,617	18,619			1,848,064
22 CULVER CITY	40,403	0.4091%	1,058,007	877,589	658,191	745,950	33,976			3,373,713
23 DIAMOND BAR	53,539	0.5421%	1,401,990	1,162,914	872,186	988,477	45,017			4,470,583
24 DOWNEY	111,871	1.1327%	2,929,492	2,429,936	1,822,452	2,065,446	94,045			9,341,371
25 DUARTE	23,746	0.2404%	621,821	515,784	386,838	438,416	19,976			1,982,835
26 EL MONTE	107,986	1.0933%	2,827,758	2,345,551	1,759,163	1,993,718	90,779			9,016,969
27 EL SEGUNDO	16,983	0.1719%	444,723	368,886	276,664	313,553	14,291			1,418,117
28 GARDENA	60,263	0.6101%	1,578,067	1,308,965	981,724	1,112,620	50,668			5,032,045
29 GLENDALE	192,212	1.9461%	5,033,328	4,175,013	3,131,260	3,548,761	161,571			16,049,934
30 GLENDORA	51,254	0.5189%	1,342,155	1,113,282	834,961	946,290	43,096			4,279,783
31 HAWAIIAN GARDENS	13,561	0.1373%	355,113	294,557	220,918	250,373	11,415			1,132,376
32 HAWTHORNE	85,653	0.8672%	2,242,938	1,860,458	1,395,344	1,581,390	72,008			7,152,138
33 HERMOSA BEACH	19,014	0.1925%	497,907	413,001	309,751	351,051	15,998			1,587,707

FY27 DRAFT

	LOCAL JURISDICTION	Population DOF Report 2025 data ⁽¹⁾	Population as % of County	Proposition A Local Return Estimate ⁽²⁾	Proposition C Local Return Estimate ⁽²⁾	Measure R Local Return Estimate ⁽²⁾	Measure M Local Return Estimate	TDA Article 3 Ped & Bike (A)	TDA Article 8 (S & H)		Total
									Population	Article 8 Allocation	
34	HIDDEN HILLS	1,746	0.0177%	45,721	37,925	28,443	32,236	5,000			149,325
35	HUNTINGTON PARK	53,051	0.5371%	1,389,211	1,152,314	864,236	979,467	44,606			4,429,835
36	INDUSTRY (B)	431	0.0044%	11,286	9,362	7,021	7,957	-			35,627
37	INGLEWOOD	106,305	1.0763%	2,783,739	2,309,038	1,731,778	1,962,682	89,366			8,876,603
38	IRWINDALE	1,509	0.0153%	39,515	32,777	24,583	27,860	5,000			129,735
39	LA CANADA-FLINTRIDGE	20,160	0.2041%	527,917	437,893	328,420	372,209	16,962			1,683,400
40	LA HABRA HEIGHTS	5,503	0.0557%	144,103	119,530	89,647	101,600	5,000			459,881
41	LAKESWOOD	80,596	0.8160%	2,110,514	1,750,616	1,312,962	1,488,023	67,758			6,729,873
42	LA MIRADA	48,233	0.4883%	1,263,046	1,047,663	785,747	890,514	40,557			4,027,527
43	LANCASTER	177,768	1.7999%	4,655,093	3,861,277	2,895,958	3,282,085	149,431	177,768	8,817,477	23,661,321
44	LA PUENTE	37,546	0.3801%	983,192	815,532	611,649	693,202	31,574			3,135,150
45	LA VERNE	32,300	0.3270%	845,819	701,584	526,188	596,347	27,165			2,697,103
46	LAWNDALE	30,860	0.3124%	808,110	670,306	502,730	569,760	25,955			2,576,862
47	LOMITA	20,407	0.2066%	534,385	443,258	332,443	376,769	17,169			1,704,024
48	LONG BEACH	462,561	4.6833%	12,112,778	10,047,231	7,535,423	8,540,146	388,800			38,624,378
49	LOS ANGELES CITY	3,835,263	38.8310%	100,431,489	83,305,277	62,478,958	70,809,486	3,663,045			320,688,254
50	LYNWOOD	66,660	0.6749%	1,745,581	1,447,914	1,085,935	1,230,727	56,045			5,566,202
51	MALIBU	10,604	0.1074%	277,680	230,328	172,746	195,779	8,930			885,463
52	MANHATTAN BEACH	34,051	0.3448%	891,671	739,618	554,713	628,675	28,637			2,843,314
53	MAYWOOD	24,496	0.2480%	641,461	532,075	399,056	452,263	20,606			2,045,460
54	MONROVIA	38,920	0.3941%	1,019,172	845,377	634,032	718,570	32,729			3,249,881
55	MONTEBELLO	62,732	0.6351%	1,642,721	1,362,594	1,021,946	1,158,205	52,743			5,238,209
56	MONTEREY PARK	59,269	0.6001%	1,552,038	1,287,375	965,531	1,094,268	49,833			4,949,045
57	NORWALK	101,075	1.0234%	2,646,784	2,195,438	1,646,578	1,866,122	84,971			8,439,893
58	PALMDALE	167,097	1.6918%	4,375,658	3,629,493	2,722,120	3,085,069	140,462	167,097	8,288,185	22,240,988
59	PALOS VERDES ESTATES	12,999	0.1316%	340,396	282,350	211,762	239,997	10,943			1,085,448
60	PARAMOUNT	52,371	0.5302%	1,371,405	1,137,544	853,158	966,912	44,035			4,373,054
61	PASADENA	140,631	1.4239%	3,682,611	3,054,629	2,290,972	2,596,434	118,217			11,742,863
62	PICO RIVERA	60,858	0.6162%	1,593,648	1,321,889	991,417	1,123,606	51,168			5,081,728
63	POMONA	153,042	1.5495%	4,007,609	3,324,207	2,493,155	2,825,576	128,649			12,779,195
64	RANCHO PALOS VERDES	40,727	0.4123%	1,066,491	884,626	663,470	751,932	34,248			3,400,767
65	REDONDO BEACH	68,091	0.6894%	1,783,054	1,478,996	1,109,247	1,257,147	57,248			5,685,692
66	ROLLING HILLS	1,677	0.0170%	43,914	36,426	27,319	30,962	5,000			143,622
67	ROLLING HILLS ESTATES	8,545	0.0865%	223,762	185,605	139,204	157,764	7,199			713,534
68	ROSEMEAD	50,501	0.5113%	1,322,436	1,096,926	822,695	932,387	42,463			4,216,907
69	SAN DIMAS	34,209	0.3464%	895,808	743,049	557,287	631,592	28,770			2,856,507
70	SAN FERNANDO	23,692	0.2399%	620,407	514,611	385,958	437,419	19,930			1,978,326

FY27 DRAFT

	LOCAL JURISDICTION	Population DOF Report 2025 data ⁽¹⁾	Population as % of County	Proposition A Local Return Estimate ⁽²⁾	Proposition C Local Return Estimate ⁽²⁾	Measure R Local Return Estimate ⁽²⁾	Measure M Local Return Estimate	TDA Article 3 Ped & Bike (A)	TDA Article 8 (S & H)		Total
									Population	Article 8 Allocation	
71	SAN GABRIEL	38,953	0.3944%	1,020,036	846,093	634,570	719,179	32,757			3,252,636
72	SAN MARINO	12,330	0.1248%	322,878	267,818	200,864	227,646	10,380			1,029,586
73	SANTA CLARITA	232,377	2.3528%	6,085,102	5,047,432	3,785,574	4,290,317	195,330	232,377	11,526,141	30,929,897
74	SANTA FE SPRINGS	18,680	0.1891%	489,161	405,746	304,309	344,884	15,718			1,559,818
75	SANTA MONICA	93,212	0.9437%	2,440,881	2,024,646	1,518,485	1,720,949	78,362			7,783,323
76	SIERRA MADRE	10,870	0.1101%	284,645	236,106	177,079	200,690	9,153			907,674
77	SIGNAL HILL	11,421	0.1156%	299,074	248,074	186,056	210,863	9,616			953,683
78	SOUTH EL MONTE	19,535	0.1978%	511,550	424,317	318,238	360,670	16,436			1,631,211
79	SOUTH GATE	92,955	0.9411%	2,434,151	2,019,064	1,514,298	1,716,205	78,146			7,761,864
80	SOUTH PASADENA	26,287	0.2661%	688,360	570,977	428,233	485,330	22,111			2,195,011
81	TEMPLE CITY	36,322	0.3678%	951,140	788,946	591,709	670,604	30,546			3,032,945
82	TORRANCE	143,261	1.4505%	3,751,481	3,111,755	2,333,816	2,644,991	120,428			11,962,471
83	VERNON	207	0.0021%	5,421	4,496	3,372	3,822	5,000			22,111
84	WALNUT	28,214	0.2857%	738,821	612,833	459,625	520,908	23,731			2,355,918
85	WEST COVINA	109,428	1.1079%	2,865,518	2,376,872	1,782,654	2,020,341	91,991			9,137,377
86	WEST HOLLYWOOD	35,284	0.3572%	923,959	766,399	574,800	651,440	29,673			2,946,271
87	WESTLAKE VILLAGE	7,918	0.0802%	207,343	171,986	128,989	146,188	6,672			661,179
88	WHITTIER	87,850	0.8895%	2,300,470	1,908,179	1,431,134	1,621,952	73,855			7,335,590
89	UNINCORP LA COUNTY	1,004,490	10.1702%	26,303,914	21,818,404	16,363,803	18,545,643	1,869,766	136,022	6,746,833	91,648,362
90	TOTAL	9,876,811	100.0000%	\$ 258,637,500	\$ 214,533,000	\$ 160,899,750	\$ 182,353,050	\$ 9,789,899	716,647	\$ 35,546,436	\$ 861,759,635

NOTES:

(1) Population estimates are based on State of California Department of Finance's (DOF) 2025 population estimates. The Unincorporated Population figure for TDA Article 8 is based on 2007 estimates by Urban Research.

(2) Proposition A, Proposition C, Measure R and Measure M Local Return funds are allocated their share of estimated revenues (minus administration) without carryover since payments are made based on actual revenues received.

TDA Article 3 Allocation:

(A) 15% of the estimated revenue is first awarded to the City of Los Angeles and Los Angeles County (30%-70% split) as Supplemental Allocation.

(B) City of Industry has opted out of the TDA Article 3 program indefinitely.

ATTACHMENT 3

GUIDELINES

Proposition A and Proposition C LOCAL RETURN



Metro Board Approved
FY 2006-07

**PROPOSITION A AND PROPOSITION C
DISTRIBUTION**

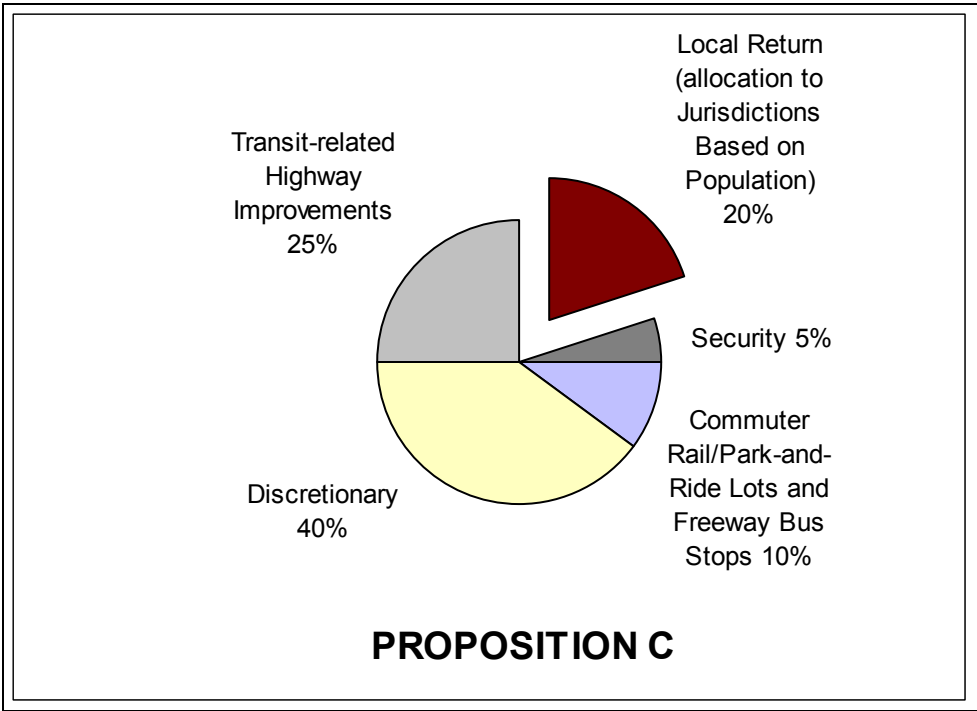
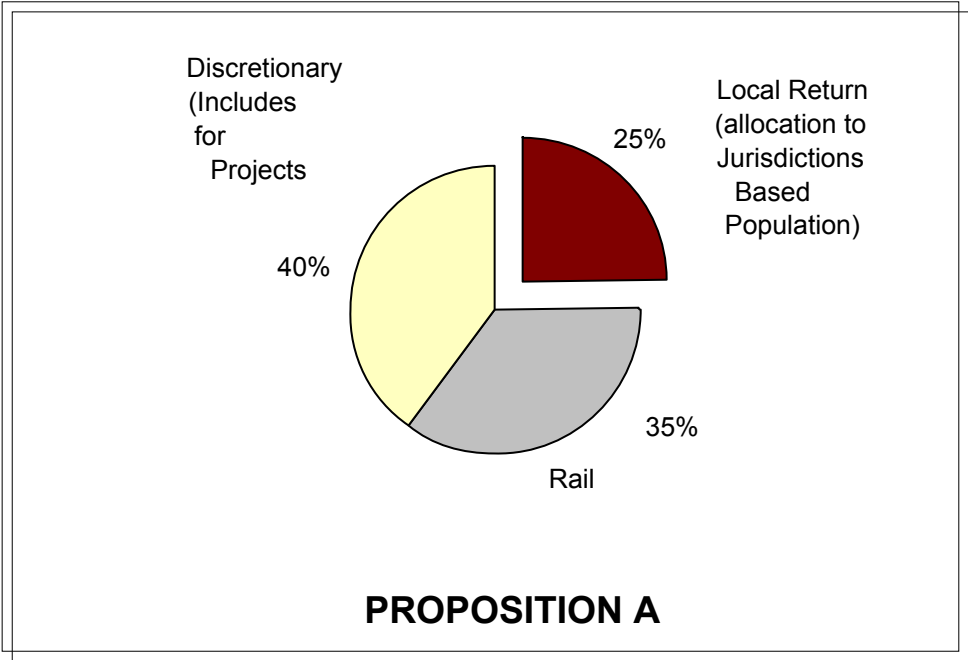


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I. PROGRAM SUMMARY

A. INTRODUCTION

The Proposition A and Proposition C Programs are funded by two 1/2 cent sales tax measures approved by Los Angeles County voters to finance a Transit Development Program. The Proposition A tax measure was approved in 1980 and the Proposition C tax measure was approved in 1990. Collection of the taxes began on July 1, 1982, and April 1, 1991, respectively.

Twenty-five percent of the Proposition A tax and twenty percent of the Proposition C tax is designated for the Local Return (LR) Program funds to be used by cities and the County (Jurisdictions) in developing and/or improving public transit, paratransit, and the related transportation infrastructure.

LR funds are allocated and distributed monthly to Jurisdictions on a "per capita" basis by the Los Angeles County Metropolitan Transportation Authority (Metro).

1. PROPOSITION A LOCAL RETURN FUNDS

The Proposition A Ordinance requires that LR funds be used exclusively to benefit public transit. Expenditures related to fixed route and paratransit services, Transportation Demand Management, Transportation Systems Management and fare subsidy programs that exclusively benefit transit are all eligible uses of Proposition A LR funds. Proposition A LR funds may also be traded to other Jurisdictions in exchange for general or other funds.

2. PROPOSITION C LOCAL RETURN FUNDS

The Proposition C Ordinance directs that the LR funds also be used to benefit public transit, as described above, but provides an expanded list of eligible project expenditures including, Congestion Management Programs, bikeways and bike lanes, street improvements supporting public transit service, and Pavement Management System projects. Proposition C funds cannot be traded.

The tables in Appendix I, page 36, summarize the Proposition A and Proposition C LR Programs and the respective eligible project expenditures.

B. GENERAL PROVISIONS CONCERNING PROPOSITION A AND PROPOSITION C LOCAL RETURN EXPENDITURES

Jurisdictions are required to use LR funds for developing and/or improving public transit service. As a general rule, an expenditure that is eligible for funding under one or more existing state or federal transit funding programs would also be an eligible LR fund expenditure provided that the project does not duplicate an existing regional or municipal transit service, project or program.

Allocation of LR funds to and expenditure by Jurisdictions shall be subject to the following conditions:

1. **TIMELY USE OF FUNDS**

Metro will enforce regulations to insure the timely use of LR funds. Under the Proposition A and Proposition C Ordinances, Jurisdictions have three years to expend LR funds. Funds must be expended within three years of the last day of the fiscal year in which funds were originally allocated. Therefore, by method of calculation, each Jurisdiction has the Fiscal Year of allocation plus three years to expend Proposition A and/or Proposition C funds. For example, a Jurisdiction receiving funds during FY 2005-06 must expend those funds, and any interest or other income earned from Proposition A and/or Proposition C projects, by June 30, 2009.

2. **AUDIT OF PROPOSITION A AND PROPOSITION C FUNDS**

Jurisdictions shall annually account, through a fiscal and compliance audit, to Metro on the use of LR funds. The Audit Section, (Section V, page 33), details Project Expenditure Criteria, Allowable Costs, Audit Deliverables, and Administrative Accounting Procedures.

3. **INELIGIBLE USE OF FUNDS**

If LR funds have been expended prior to Metro approval and/or used for ineligible purposes, Jurisdictions will be required to reimburse their Proposition A or C LR account, including interest and/or earned income, as indicated in the Audit Section (page 33).

Stand alone projects, such as, lighting, landscaping, traffic signals, storm drains, or Transportation Planning projects unrelated to an eligible project, are not eligible.

4. **STANDARD ASSURANCES**

If a new Jurisdiction is formed within Los Angeles County, Metro will require that a Standard Assurances and Understanding agreement be submitted prior to participation in the LR Program. A sample Standard Assurance and Understanding Agreement form is included as Appendix II (see page 37).

C. **PROPOSITION A AND PROPOSITION C FORMS AND SUBMITTAL REQUIREMENTS**

To maintain eligibility and meet LR Program compliance requirements, Jurisdictions shall submit a Project Description (Form A) as required, an Annual Project Update (Form B) and Annual Expenditure Report (Form C). Form submittal information is detailed in the Administrative Process section, page 21. Sample forms along with instructions for their completion are included as Appendix VIII (page 49). An electronic version is available on the website @www.Metro.net (under Projects/Programs; Local Return Program).

Project Description Form (Form A)

Jurisdictions shall submit for approval a Project Description Form prior to the expenditure of funds for: 1) a new project; 2) a new route; 3) a 25 percent change (increase or decrease) in route or revenue vehicle miles for an established LR funded transit service; 4) a 0.75 miles or greater service change that duplicates/overlays an existing transit service; or 5) a 25 percent or greater change in an approved LR project budget or scope on all operating or capital LR projects.

Annual Project Update (Form B)

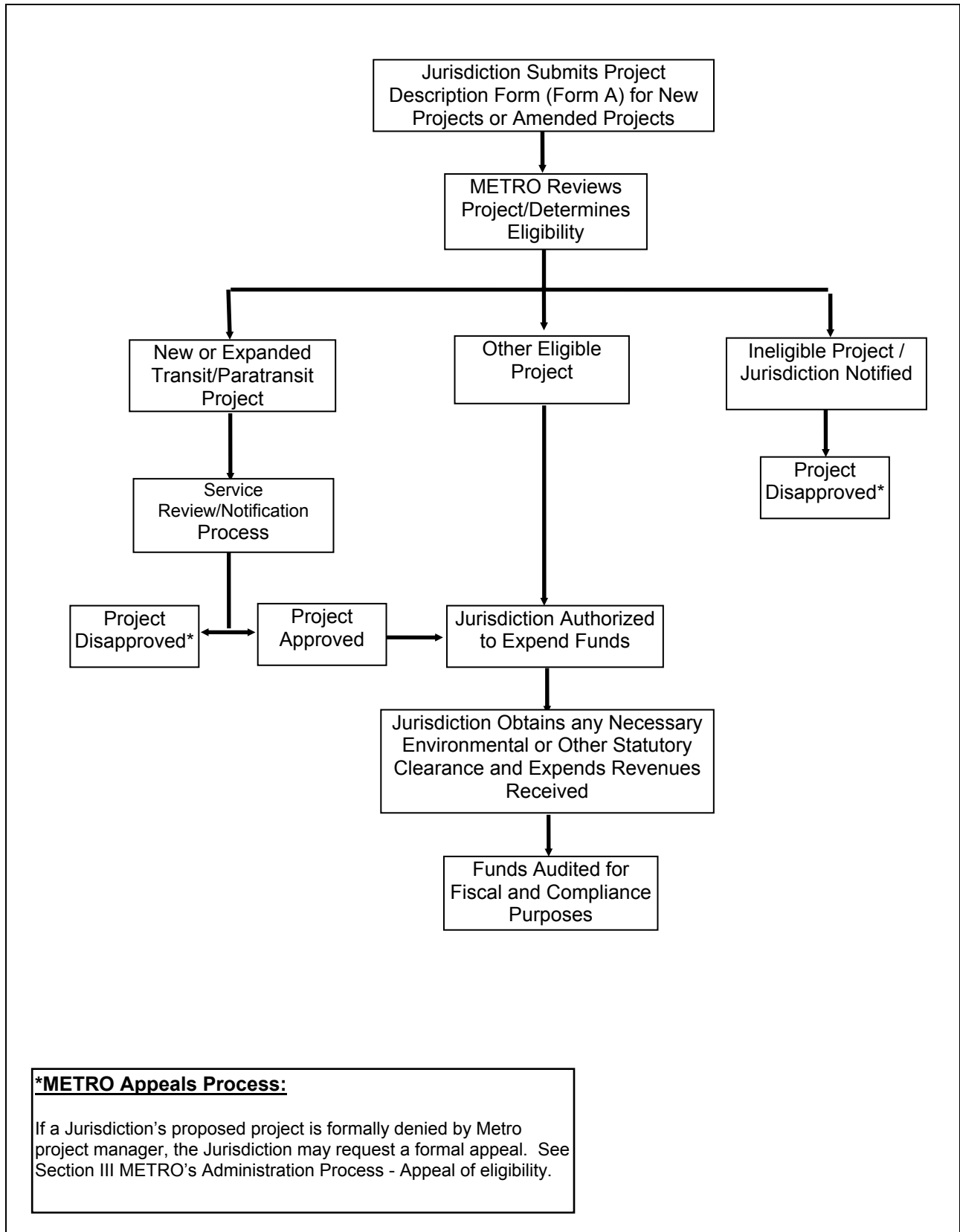
Jurisdictions shall submit on or before August 1 of each fiscal year an Annual Project Update to provide current information on all approved on-going and carryover LR projects. Metro will review and accept or return the report for changes. Cities shall report the anticipated expenditure cash flow amounts for the covered fiscal year.

Annual Expenditure Report (Form C)

On or before October 15th of each fiscal year, the Jurisdictions shall submit an Annual Expenditure Report to provide an update on previous year LR fund receipts and expenditures.

The following provides a summary of form use and due dates:

<u>FORM</u>	<u>DETERMINATION</u>	<u>DUE DATE</u>
Project Description Form - Form A	New and amended projects	Any time during the year
Annual Project Update - Form B	All on-going and/or capital (carryover) projects	August 1 st of each year
Annual Expenditure Report - Form C	Report expenditures	October 15 th of each year



***METRO Appeals Process:**
 If a Jurisdiction's proposed project is formally denied by Metro project manager, the Jurisdiction may request a formal appeal. See Section III METRO's Administration Process - Appeal of eligibility.

II. PROJECT ELIGIBILITY

The Proposition A and Proposition C Ordinances specify that LR funds are to be used for “public transit purposes” as defined by the following: “A proposed expenditure of funds shall be deemed to be for public transit purposes to the extent that it can reasonably be expected to sustain or improve the quality and safety of and/or access to public transit services by the general public or those requiring special public transit assistance”.

For simplification and user ease, project categories that share common eligibility requirements and/or project code designations are defined and listed as either Proposition A and Proposition C Eligible, Proposition A Exclusive, or Proposition C Exclusive. Local Return can be used as a match to grant programs such as the Metro Call for Projects, the Safe Routes to School, and the Hazard Elimination and Safety programs, so long as the projects are LR eligible. Note: The following project eligibility criteria provide for general guidance only and are not the sole determinant for project approval. The authority to determine the eligibility of an expenditure rests solely with Metro. Jurisdictions may appeal projects deemed ineligible as described in Section III, Metro’s Administrative Process, page 23.

A. ELIGIBLE USES OF PROPOSITION A AND PROPOSITION C

1. PUBLIC TRANSIT SERVICES - OPERATING (Codes 110,120, 130 & 140)

New or expanded Transit or Paratransit services are subject to review under the Service Coordination Process (SCP) as detailed in Section III, page 24. The process will, in part, determine the proposed service’s compatibility with the existing regional bus transit system provided by Metro and services provided by the municipal transit operators. Metro may request that modification be made to proposed services that duplicate or compete with existing services. Proposed services must also meet the criteria outlined under Non-exclusive School Service and Specialized Transit discussed on the following page. Note that Emergency Medical Transportation is not an eligible use of LR funds.

Examples of Fixed Route, Paratransit, and Recreational Transit Service projects follow:

1.1 FIXED ROUTE SERVICE (Project Code 110)

- New fixed route or Flexible Destination bus service
- Extension or augmentation of an existing bus route(s)
- Contracting with a transit operator or private provider for commuter bus service
- Contracting with a transit in an adjacent county to provide transit within Los Angeles County
- Operating subsidy to existing municipal or regional bus operator
- Service enhancements related to Bus/rail Interface
- ADA improvements to fixed route operations
- Shuttle service between activity centers

1.2 PARATRANSIT SERVICE (Project Codes 120 & 130)

- Expansion/ coordination of existing paratransit service
- Subsidized, shared-ride taxi service for disadvantaged residents
- Taxi coupon programs used to provide intermittent or temporary capacity to support paratransit systems for senior and disabled patrons
- New paratransit service
- General public paratransit service
- ADA-related improvements to paratransit operations

Non-Exclusive School Service

Fixed-route bus services or Demand-responsive services available to the general public, which also provide school trips, are eligible for LR funding. Exclusive school bus services are not eligible. **Projects must meet the following conditions:**

- The bus Vehicles utilized cannot be marked "School Bus" or feature graphics that in any way indicate they are not available to the general public. Yellow paint schemes should not be for the specific purpose of meeting the vehicle code definition of a school bus
- The bus Head Sign is to display its route designation by street intersection, geographic area, or other landmark/destination description and cannot denote "School Trip" or "Special." In cases where the service includes an alternate rush-hour trip to provide service by a school location, the dashboard sign is to indicate the line termination without indicating the school name
- Timetables for such services will be made available to the general public, shall provide the given schedule and route but must not be labeled "school service"
- Drivers must be instructed that such service is available to the general public and board and alight all passengers as required at designated stops
- The same fare payment options must be made available to all users
- The overall transportation service provided in the Jurisdiction must not be for school service hours only

Specialized Public Transit

Metro will approve special-user group service or social service transit where it can be incorporated into the existing local transit or paratransit program. Jurisdictions must demonstrate that existing services cannot be modified to meet the identified user need. Projects must meet the following conditions:

- The special user group identified does not discriminate on the basis of race, religion, sex, disability or ethnicity
- Service shall be available to all members of the general public having that specialized need and not be restricted to a specific group or program
- Service shall be advertised to the general public
- Metro may require, as a condition of approval, inter-jurisdictional project coordination and consolidation
- LR funds may only be used for the transportation component of the special user group program, i.e., direct, clearly identifiable and auditable

transportation costs, excluding salaries for specialized escorts or other program aides

- The designated vehicle(s) used must be made available for coordination with other paratransit programs if space permits

1.3 RECREATIONAL TRANSIT SERVICE (Project Code 140)

Jurisdictions shall submit a listing of Recreational Transit Services no later than October 15 after the fiscal year. Recreational Transit Service projects must meet the following conditions:

- Travel within the area of Los Angeles, Orange and Ventura Counties, and portions of Kern, Riverside and San Bernardino Counties (see map Appendix VII, page 48) are eligible expenditures. Trip segments to areas shown on the proportionately eligible areas of the map must be funded through other sources. Trips to locations not within either the eligible or proportionately eligible area are not eligible.
- Trips may be limited to certain general age groups (e.g., children under 18, senior citizens, persons with disabilities), however, trips must be made available to all individuals within that designated group.
- Special events or destinations (e.g., city parks, concerts, special events) may be served, however, all members of the general public including individuals with disabilities must be allowed to use, the service.
- LR funds may not be used to pay the salaries of recreation leaders or escorts involved in recreational transit projects.
- All recreational transit trips must be advertised to the public, such as through newspapers, flyers, posters, and/or websites.

2. BUS STOP IMPROVEMENTS AND MAINTENANCE (Codes 150, 160 & 170)

Examples of eligible Bus Stop Improvement and Maintenance projects include installation/replacement and/or maintenance of:

- Concrete landings - in street for buses and at sidewalk for passengers
- Bus turn-outs
- Benches
- Shelters
- Trash receptacles
- Curb cuts
- Concrete or electrical work directly associated with the above items

Amenities shall be integral to the bus stop. Improvements must be located within 25 feet of the bus stop signpost, or have one edge or end within that area. At high volume stops, where more than one bus typically uses the stop at a time, improvements must be placed at the immediate locations where buses normally stop.

Curb cuts may be located on or adjacent to street segments (blocks) with bus stops.

Conditions:

Jurisdictions shall coordinate bus stop improvements (excluding curb cuts) with effected Transit Operators. A letter of coordination must be submitted with the Project Description Form. Jurisdictions that propose replacing privately owned benches or shelters must notify the Operator before requesting City Council project approval. The Operator shall have seven (7) days to respond to the notification before the Jurisdiction takes further action.

3. PUBLIC TRANSIT - CAPITAL (Project Codes 180, 190 & 200)

Public Transit Capital projects will be approved only for the percentage of vehicle or equipment use, as determined by Metro staff, exclusive to public transit service.

A list of sample Public Transit Capital projects follows:

- a. Vehicles/parts purchases and repairs
 - Transit vehicles for passenger service
 - Mechanical parts and supplies for buses or vans
 - Non-revenue support vehicles, such as supervisor's cars, service trucks
 - ADA-related improvements to vehicles
 - Retrofits or additions to buses or vans, such as lifts, fare boxes, or radios
 - Security equipment, for example, cameras on buses
- b. Equipment
 - New or modified transit maintenance facilities
 - Maintenance equipment for new or existing transit or paratransit operations
 - Office equipment and furnishings for new and existing transit and paratransit operations

NOTE: Jurisdictions shall reimburse their LR Account, in the amount of the current appraised value or purchase price from resale, for Public Transit Capital projects no longer used for public transit purposes.

4. TRANSPORTATION SYSTEMS MANAGEMENT (TSM) (Project Code 210)

TSM projects are relatively low-cost, non-capacity-enhancing traffic control measures that serve to improve vehicular (bus and car) flow and/or increase safety within an existing right-of-way. Proposals must include an element demonstrating the project's benefit to public transit. **A list of sample TSM projects follows:**

- Reserved bus lanes (no physical separation) on surface arterials
- Contra-flow bus lanes (reversible lanes during peak travel periods)
- Ramp meter by-pass (regulated access with bus/carpool unrestricted entry)
- Traffic signal priority for buses (to allow approaching transit vehicles to extend green phase or change traffic signal from red to green)
- Preferential turning lanes for buses
- Other traffic signal improvements that facilitate bus movement

If a Local Return funded project is or has an Intelligent Transportation System (ITS) component, it must be consistent with the Regional ITS Architecture. ITS projects must comply with the Countywide ITS Policy and Procedures adopted by

the Metro Board including the submittal of a completed, signed self-certification form. Please go to <http://RIITS.net/RegITSDocs.html> and choose “Los Angeles Countywide ITS Policy and Procedures Document” or see Appendix VI (page 45) for information on Countywide ITS Policy and Procedures, and the self-certification form.

5. TRANSIT SECURITY (Project Codes 220 & 230)

Transit Security projects may include Transit Safety, Security Operations and Safety Education Programs, provided that they demonstrate a direct benefit to public transit service and do not supplant general law enforcement programs.

A list of sample Transit Security Programs follows:

- Local police deployment for direct and specific transit security
- Private security (state licensed) deployment for transit security
- Contracted police services for direct and specific transit security
- Capital improvements for transit security
- Innovative and/or advanced technology transit security
- Community-based policing activities in direct support of transit security
- Security awareness, graffiti prevention, Safety education and/or crime prevention programs
- Transit security at commuter rail stations and park and ride facilities

NOTE: Jurisdictions are encouraged to participate in existing local and regional transit security efforts, which should be coordinated through Metro.

6. FARE SUBSIDY (Project Codes 240 & 250)

Fare Subsidy programs provide residents within Jurisdictions a discount fare incentive for using public transit. The method, amount of subsidy and user group(s) shall be determined by Jurisdictions. **A list of sample Fare Subsidy Programs follows:**

A list of sample Fare Subsidy Programs follows:

- User-side subsidies (buy down of passes, tickets, or coupons) for the general public or segments of the general public (i.e., elderly, individuals with disabilities, or low-income residents)
- Subsidy of bus/rail passes, tickets or tokens for transit riders-

7. TRANSPORTATION PLANNING (Project Code 270)

Planning, coordination, engineering and design costs incurred toward the implementation of eligible LR projects are eligible when the following conditions are met:

- The projects being planned (designed, coordinated, etc.) are LR eligible.
- Coordination includes: local jurisdictions’ start up costs or dues for Councils of Governments (COG’s) and Transportation Management Associations (TMA’s); advocacy; and funding for Joint Powers Authorities (JPA’s) by local jurisdictions or (COG’s).
- If some of a COG’s, TMA’s or JPA’s projects or activities are LR eligible and some are not, partial payment of dues must be made, in proportion to the organization’s budget for LR eligible projects.

- Proposition A must be used to plan for Proposition A eligible projects.
- Proposition C must be used to plan for Proposition C eligible projects.

8. TRANSIT MARKETING (Project Code 280)

Transit Marketing projects may include:

- Transit user guides, maps, brochures
- Transit information Kiosks
- Transit information/pass sales centers
- New rider subsidy programs

9. PARK-AND-RIDE LOTS (Project Code 290)

Park-and-Ride Lot projects must be coordinated with Metro and appropriate affected transit operator(s). Additional justification including, for example, surveys or studies that provide a basis for determining the project's level of public transit use and related funding, may be requested prior to project evaluation.

Park-n-Ride Lot projects shall:

- be located adjacent to (no greater than 0.25 mile away from) a fixed route service bus stop, HOV lanes and/or rail stations.
- be located on unimproved land unless a specific Metro waiver is granted.
- have received environmental clearance by the Jurisdiction prior to Metro approval for construction funds
- require a letter from the affected transit operator(s) to the Jurisdiction and Metro, as reasonable assurance, that park-and-ride lot users will be assured of continued access to services.
- be used primarily by transit/rideshare patrons during commute hours.
- have appropriate exclusive-use signage posted and enforced.
- be open for general parking during non-transit use time, e.g., evenings and weekends, provided that transit user demands are not adversely impacted. All revenues, (for example, parking, advertising or related revenue) generated during the non-transit use time must be returned to the Jurisdictions' LR Account in the same proportion as the original LR investment in the facility. In the event that the facility ceases operation, the Jurisdiction shall be required to repay its LR Account as determined by the audit, see page 33.

10. TRANSIT FACILITIES/TRANSPORTATION ENHANCEMENTS (TE) (Project Codes 300 & 310)

Examples of Transit Facility projects include:

- Bus-only transit malls or stations
- Transit/paratransit accessible Transfer Centers that feature, for example, shelters, telephones, information displays/centers, and other related amenities)
- Eligible as match to TE grants.
- Eligible projects may include building rehabilitation and restoration for transit-related purposes.
- Project itself must be LR eligible.

Conditions:

Jurisdictions shall submit a project budget and scope of work that specifies the proposed facility's public transit and, if applicable, joint development. Additional documentation may be required to determine project eligibility and level of funding.

If the facility ceases to be used for public transit purposes, LR funds used toward land purchase for a facility must be returned at the original purchase price or present appraised value, whichever is greater, to the Jurisdiction's LR Account. Repayment of facility expenditures shall be based on the schedule outlined on page 31.

Prior to land and/or facility purchases, Jurisdictions shall provide the following:

- Documentation of the financial resources for facility implementation, operation and maintenance
- Assurance(s) from the affected transit carrier(s) to provide facility service
- Land appraisal
- Assurance that the Jurisdiction will proceed with the project per the implementation schedule outlined in the application
- Environmental clearance in conformance with, wherever applicable, all local, state and federal requirements. Jurisdictions preparing an Environmental Impact Report (EIR) must coordinate with Metro Regional Transportation Planning and Development Department.

11. METRO RAIL CAPITAL (Project Codes 320)

Metro Rail Capital projects may include, for example, Metro Red, Blue, Green, or Gold Line or Mid-City Exposition Light Rail Transit station or line improvements, local match toward Metro Rail Capital projects, Metro Art or related Metro Rail enhancements.

12. RIGHT-OF-WAY IMPROVEMENTS (Project Code 350)

Right-of-Way Improvements or land purchases must be coordinated through Metro to ensure consistency with adopted regional corridors, priorities or preferred alignments. Right-of-Way Improvement project proposals must also demonstrate direct, quantifiable, environmental and/or economic benefit to given LR-eligible projects.

13. COMMUTER RAIL (Project Codes 360 & 370)

Rail (commuter system and station enhancement) projects must be consistent with Metro's existing and planned program of rail projects. Eligible project may include match to TE grants for building rehabilitation and restoration for transit-related purposes. Project itself must be LR eligible. **Examples of Rail projects include:**

- Signal upgrades at rail crossings
- Signage and marketing materials to promote increased commuter rail ridership
- Landscaping, lighting, fencing and environmental enhancements at or along commuter rail facilities

- System safety
- Safety education programs
- Commuter rail station operating, maintenance, insurance, or other station-related costs
- Commuter rail station capital costs

14. CAPITAL RESERVE (Project Code 380)

A Capital Reserve project provides Jurisdictions the opportunity to accumulate LR funds (over and above the year of allocation and three year expenditure requirement see page 30, Timely Use of Funds) to finance a large project. Projects are limited to construction of bus facilities, bus purchases, transit centers, park-and-ride lots, construction of major street improvements or rail projects along Metro's planned and adopted rail corridors.

A Capital Reserve project constitutes a long-term financial and planning commitment. For specific information on the Capital Reserve approval process, see Section III, Metro's Administration Process, page 26.

15. DIRECT ADMINISTRATION (Project Code 480)

Direct Administration is defined as those fully burdened costs which are directly associated with administering Local Return program or projects, and includes salaries and benefits, office supplies and equipment, and other overhead costs.

Direct Administration project conditions:

- All costs shall be associated with developing, maintaining, monitoring, coordinating, reporting and budgeting specific LR project(s)
- Expenditures must be reasonable and appropriate to the activities undertaken by the locality
- The administrative expenditures for any year shall not exceed 20 percent of the total LR annual expenditures, based on year-end expenditures, and will be subject to an audit finding if the figure exceeds 20%;
- The annual expenditure figure will be reduced by fund trades to other cities and/or funds set aside for reserves; conversely, the annual expenditure figure will be increased by expenditure of reserves or LR funds received in fund exchanges;
- Jurisdictions are required to report all administrative charges to Direct Administration in order to verify compliance of 20% administration cap.

16. OTHER (Project Code 500)

Projects that do not fit under any of the project codes, but are for public transit purposes, may be included in the "other" category. Note that "public transit purposes" are defined as follows: "A proposed expenditure of funds shall be deemed to be for public transit purposes to the extent that it can reasonably be expected to sustain or improve the quality and safety of and/or access to public transit services by the general public or those requiring special public transit assistance".

B. EXCLUSIVE USES OF PROPOSITION A FUNDS

Projects listed below are eligible for Proposition A LR funding only. Jurisdictions must certify that all project conditions will be met and include all supporting documents with submittal of the Form A. Stand alone amenities such as traffic signals, landscaping and storm drains are ineligible. Note: The following project eligibility criteria provide general guidance only and are not the sole determinant for project approval. The authority to determine the eligibility of an expenditure rests solely with Metro. Jurisdictions may appeal projects deemed ineligible as described in Section III, page 23.

1. SIGNAL SYNCHRONIZATION (Project Code 400)

Signal Synchronization projects must meet the following eligibility conditions:

- Bus priority must be included as an element of the project
- The project arterial must be used by a minimum of ten transit buses, counted bi-directionally, per hour, or five buses hourly in each direction
- Projects may be implemented only on major arterials
- Documentation of coordination with affected public transit operators is required for approval (e.g., correspondence between the Jurisdiction and the transit operator with written concurrence between the transit operator and Metro)
- Local return funds shall not be used to alter system/signal timing that was implemented under a traffic forum project/grant unless coordinated with all affected jurisdictions in the corridor.

If a Local Return funded project is or has an Intelligent Transportation System (ITS) component, it must be consistent with the Regional ITS Architecture. ITS projects must comply with the Countywide ITS Policy and Procedures adopted by the Metro Board including the submittal of a completed, signed self-certification form. Please go to <http://RIITS.net/RegITSDocs.html> and choose “Los Angeles Countywide ITS Policy and Procedures Document” or see Appendix VI (page 45) for information on Countywide ITS Policy and Procedures, and the self-certification form.

2. FUND EXCHANGE (Project Code 405)

Proposition A funds may be given, loaned, or exchanged by Jurisdictions provided that the following conditions are met:

- Participants are responsible for insuring that the traded funds will be utilized for public transit purposes
- The exchange of funds should not result in a net loss of revenues available for public transit in Los Angeles County (i.e., trade of Proposition A funds for farebox or other transit revenues)
- Traded Proposition A LR funds retain their original date of allocation and lapse date. Jurisdictions submitting Fund Exchange projects shall note the year of allocation on their Form A so that the fund lapse policy may be monitored.

In addition, Jurisdictions shall provide the following detail in submitting Fund Exchange projects for approval:

- Source of funds to be exchanged
- Fund amounts to be exchanged
- Period of exchange
- Assurance that the end use of Proposition A LR funds will be for eligible transit uses
- Provision for circumstances should source of funds (one or both) become unavailable during the exchange period.
- Certification by participating Jurisdictions (e.g. City Council action)

A sample Fund Exchange Agreement is included in Appendix V page 43.

NOTE: Jurisdictions participating as the “seller” in a Proposition A Fund Exchange projects will, for two years from the date of transaction, be subject to disqualification or reduced project application scores in the Transportation Improvement Program (TIP) Call for Projects.

3. TRANSPORTATION DEMAND MANAGEMENT (Project Code 410)

Transportation Demand Management (TDM) projects are defined as strategies/actions intended to influence the manner in which people commute, resulting in a decrease in the number of vehicle trips made and vehicle miles traveled during peak travel periods.

TDM projects funded by Proposition A require a public transit element and will be evaluated on their projected impact on reduction of single-occupancy vehicle trips, corresponding vehicle miles traveled, and potential to increase transit use.

A list of sample TDM projects follows:

- Formation and operation of vanpool and/or vanpool incentive programs, including ride matching programs (must be made available to all employers and/or residents within the Jurisdiction boundaries)
- Community-based shuttles for employees as long as such services complement existing transit service
- Parking Management incentive programs, such as, parking cash outs or parking pricing strategies
- Employer or citizen ride-matching programs and subsidies
- Formation or ongoing operation of a Transportation Management Association to administer and market local TDM programs (provided that the 20 administrative cost stipulated for Proposition A and Proposition C is not exceeded)
- Transit and TDM-related activities required by the Congestion Management Program (CMP) including: preparation of TDM ordinances; administration and implementation of transit or TDM-related projects pursuant to CMP deficiency plans; and monitoring of transit standards by transit operators
- Funding Transportation Management Organization's (TMO) insurance costs or individual employer's vanpool programs under the umbrella vehicle insurance policy of the Jurisdiction

- Providing matching funds for LR eligible Safe Routes to School projects.

Jurisdictions are encouraged to adopt monitoring and evaluation performance standards for funding TDM projects. Jurisdictions are encouraged to utilize regionally adopted standards, and demonstrate, for example, how AQMD trip reduction targets are addressed through the TDM measure.

In conformity with regional, state and federal air quality objectives, Metro encourages use of alternative-fuel vehicles (e.g. LNG, CNG, Methanol) for any TDM-related shuttle, vanpool or paratransit vehicles.

If a Local Return funded project is or has an Intelligent Transportation System (ITS) component, it must be consistent with the Regional ITS Architecture. ITS projects must comply with the Countywide ITS Policy and Procedures adopted by the Metro Board including the submittal of a completed, signed self-certification form. Please go to <http://RIITS.net/RegITSDocs.html> and choose “Los Angeles Countywide ITS Policy and Procedures Document” or see Appendix VI (page 45) for information on Countywide ITS Policy and Procedures, and the self-certification form.

C. **EXCLUSIVE USES OF PROPOSITION C FUNDS**

Projects listed below are eligible for Proposition C LR funding only. Jurisdictions must certify that all project conditions will be met and include all supporting documents with submittal of the Form A. Jurisdictions are encouraged to use LR funds for improved public transit services and for multi-jurisdictional cooperation of arterial traffic signal control operations. Agency costs for operating a centralized traffic signal system, including those costs linked to a local agency’s participation in the countywide Information Exchange Network (IEN), are now eligible for reimbursement. Stand alone amenities such as landscaping and storm drains are ineligible. Note: The following project eligibility criteria provide for general guidance only and are not the sole determinant for project approval. The authority to determine the eligibility of an expenditure rests solely with Metro. Jurisdictions may appeal projects deemed ineligible as described in Section III, page 23.

1. **SIGNAL SYNCHRONIZATION & TRAFFIC MANAGEMENT (Project Code 400)**

Synchronized Signalization projects must meet the following conditions:

- Projects shall be implemented only on major arterials.
- Operation costs associated with centralized traffic signal control systems, including updating traffic signal coordination timing and costs associated with multi-jurisdictional or inter-community systems, (such as the IEN or ATSAC/ATCS) or with transit signal priority systems, are eligible. Costs may include: lease lines for communication; software licenses and maintenance; hardware maintenance, maintenance and repair of hardware, vehicle detection devices and interconnect lines; warranties; and upgrades and enhancements for software or hardware. Cities shall coordinate the signal timing or systems with other affected jurisdictions.

- The major arterial targeted for implementation must have full-sized transit buses operating on regularly scheduled fixed routes.
- Documentation of coordination with affected public transit operators is required for approval (e.g., correspondence between the Jurisdiction and the transit operator with written concurrence from the transit operator to Metro)
- Local return funds shall not be used to alter system/signal timing that was implemented under a traffic forum project/grant unless coordinated with all affected jurisdictions in the corridor.

Installation or modification of traffic signals which are not part of a larger transit project are not eligible, except as detailed in this section. Maintenance and replacement of traffic signals are not eligible.

Traffic signal projects will be reviewed and considered on a case by case basis to evaluate the transit benefit of the project. The following information may be requested and evaluated, depending on the type of traffic signal project:

- Number of transit boardings at the affected transit stop or station
- Transit patrons as a proportion of pedestrian volume
- Transit vehicles as a proportion of vehicle flow
- Letter from affected transit operator requesting and justifying traffic signal installation or modification
- Proximity of proposed signal to transit stop or station
- The affected transit stop(s) must be served by transit with 15 minute or greater frequency to be eligible.
- Proximity to adjacent controlled intersection

Based on the review, all or a proportion of the project costs may be eligible for Local Return funds.

If a Local Return funded project is or has an Intelligent Transportation System (ITS) component, it must be consistent with the Regional ITS Architecture. ITS projects must comply with the Countywide ITS Policy and Procedures adopted by the Metro Board including the submittal of a completed, signed self-certification form. Please go to <http://RIITS.net/RegITSDocs.html> and choose “Los Angeles Countywide ITS Policy and Procedures Document” or see Appendix VI (page 45) for information on Countywide ITS Policy and Procedures, and the self-certification form.

2. TRANSPORTATION DEMAND MANAGEMENT (Project Code 410)

Transportation Demand Management (TDM) projects are defined as strategies/actions intended to influence the manner in which people commute, resulting in a decrease in the number of vehicle trips made and vehicle miles traveled during peak travel periods.

TDM projects funded by Proposition C will be evaluated on their proposed impact on reduction of single-occupancy vehicle trips and corresponding vehicle miles traveled.

A list of sample TDM projects follows:

- Formation and operation of vanpool and/or vanpool incentive programs, including ride matching programs (must be made available to all employers and/or residents within the Jurisdiction boundaries)
- Community-based shuttles for employees as long as such services complement existing transit service
- Parking Management incentive programs, such as, parking cash outs or parking pricing strategies
- Employer or citizen ride-matching programs and subsidies
- Formation or ongoing operation of a Transportation Management Association to administer and market local TDM programs (provided that the 20% administrative cost stipulated for Proposition A and Proposition C is not exceeded)
- Transit and TDM-related activities required by the Congestion Management Program (CMP) including: preparation of TDM ordinances; administration and implementation of transit or TDM-related projects pursuant to CMP deficiency plans; and monitoring of transit standards by transit operators
- Funding Transportation Management Organization's (TMO) insurance costs or individual employer's vanpool programs under the umbrella vehicle insurance policy of the Jurisdiction
- Providing matching funds for LR eligible Safe Routes to School projects.

Jurisdictions are encouraged to adopt monitoring and evaluation performance standards for funding TDM projects. Jurisdictions are encouraged to utilize regionally adopted standards, and demonstrate, for example, how AQMD trip reduction targets are addressed through the TDM measure.

In conformity with regional, state and federal air quality objectives, Metro encourages use of alternative-fuel vehicles (e.g. LNG, CNG, Methanol) for any TDM-related shuttle, vanpool or paratransit vehicles.

If a Local Return funded project is or has an Intelligent Transportation System (ITS) component, it must be consistent with the Regional ITS Architecture. ITS projects must comply with the Countywide ITS Policy and Procedures adopted by the Metro Board including the submittal of a completed, signed self-certification form. Please go to <http://RIITS.net/RegITSDocs.html> and choose "Los Angeles Countywide ITS Policy and Procedures Document" or see Appendix VI (page 45) for information on Countywide ITS Policy and Procedures, and the self-certification form.

3. CONGESTION MANAGEMENT PROGRAM (CMP) (Project Code 420)

The following provides a list of sample CMP projects:

- Land use analysis as required by CMP
- Computer modeling as required to support CMP land use analysis
- Administration, monitoring and implementation of transit- or TDM-related projects as part of deficiency plans
- Monitoring of transit standards by transit operators

4. BIKEWAYS AND BIKE LANES (Project Code 430)

Bikeway projects include bikeway construction and maintenance, signage, information/safety programs, and bicycle parking, and must meet the following conditions:

- Shall be linked to employment or educational sites
- Shall be used for commuting or utilitarian trips
- Jurisdictions must have submitted a PMS Self Certification (see page 20, and Appendix III on page 39).

5. STREET IMPROVEMENT AND MAINTENANCE (Codes 440, 450 & 460)

Proposition C Local Return funds are to be used for the maintenance and improvements to street and highways used as public transit thoroughfares. Street Improvement and Maintenance Projects Capacity enhancements include repair and maintenance projects with a direct benefit to transit. **Projects must meet the following conditions and reporting requirements:**

A. CONDITIONS:

Public Transit Benefit

Projects must demonstrate a public transit benefit or be performed on streets “heavily used by public transit,” where such streets carry regularly-scheduled, fixed-route public transit service, and where service has operated for a minimum of one (1) year and there are no foreseeable plans to discontinue such service.

If there are no fixed-route systems within a Jurisdiction, or if all the streets supporting fixed-route systems are already in a satisfactory condition as documented by the required Pavement Management System (PMS), a Jurisdiction may use LR funds for street improvements and maintenance and repair on streets within their community on which they can demonstrate that public paratransit trips, that have been in service for a minimum of one year, concentrate.

The method of demonstrating heavy-use by paratransit vehicles is to document trip pick-up and drop-off locations, including street-routing, for a consecutive three month time period. The data will be used in making a determination on which street segments have heavy-use by this form of transit.

Pavement Management System (PMS)

If Proposition C LR funds are to be used for street improvement or maintenance, a jurisdiction must have a PMS in place, and use it. (See PMS code 470 for self certification requirements, page 20).

Maintenance of Effort (MOE) Requirement

The goal of the Proposition C LR Program is to improve transportation conditions, including the roadways upon which public transit operates. When used to improve roadways, the additional funds provided to local jurisdictions through the Proposition C LR Program are intended to supplement existing local revenues being used for road improvement purposes. Cities and counties shall maintain their existing commitment of local, discretionary funds for street and

highway maintenance, rehabilitation, reconstruction, and storm damage repair in order to remain eligible for Proposition C LR funds to be expended for streets and roads.

Metro will accept the State Controller's finding of a Jurisdiction's compliance with the California Streets and Highways Code as sufficient to demonstrate the required Maintenance of Effort during any fiscal year in which Proposition C LR funds are expended for streets and roads.

B. REPORTING REQUIREMENTS

Street maintenance, rehabilitation or reconstruction projects should be submitted individually. Jurisdictions shall submit a Project Description Form listing all new project street segments prior to undertaking each street maintenance or improvement project. Jurisdictions will be advised as to any eligible and ineligible street segments within 30 days of project submittal.

The projects must be reflected on subsequent Annual Project Update (Form B) submittals and Annual Expenditure Reports (Form C) until the project is completed or deleted from the work program. Once deleted, a segment must be re-submitted for approval if a new street maintenance project on the segment is subsequently planned.

Eligible Street Improvement and Maintenance Projects

1. Exclusive Bus Lane Street Widening

Such projects are for exclusive bus lanes (physically separated) on surface arterials.

2. Capacity Enhancement

Capacity Enhancement projects are level-of-service and/or capacity improvements capital projects. These projects must include a public transit element that is comprised of transit vehicles on streets that are "heavily used by transit." Examples of these projects include street widening or restriping to add additional lanes.

3. Street Repair and Maintenance

Eligible Street Repair and Maintenance projects are limited to pavement maintenance, slurry seals, and chip seals, pavement rehabilitation and roadway reconstruction. Required curb, gutter, and catch basin repair (storm drains) on streets "heavily used by transit" that are part of a rehabilitation or reconstruction project are eligible. Betterments are not eligible for LR funding.

4. Safety

Street improvement projects to increase safety are eligible, but must have a direct and clearly demonstrable benefit to both safety and transit. At Metro's discretion, a project may be approved on a down-scoped demonstration basis. The local jurisdiction would be required to conduct a before and after evaluation prior to Metro approval of the full project scope.

5. Americans with Disabilities Act Related Street Improvements

In compliance with the Americans with Disabilities Act (ADA), the provision of curb cuts or passenger boarding/alighting concrete pads at or adjacent to bus stops and other accessible improvements on roadways “heavily used by transit” is an eligible use of Proposition C LR funds. Such modifications must meet ADA and California Title 24 specifications.

7. **PAVEMENT MANAGEMENT SYSTEM (PMS)** **(Project Code 470)**

Sample Pavement Management System projects include:

- Cost to purchase, upgrade or replace a Pavement Management System.
- The ongoing cost of maintaining a PMS equal to the proportion of a Jurisdiction’s eligible street mileage to total street mileage; or 50% of the PMS maintenance cost, whichever is greater.

Note: Jurisdictions are required to certify that they have conducted and maintain Pavement Management Systems when proposing "Street Repair and Maintenance" or “Bikeway” projects (see Appendix III, page 39). The requirement for a PMS is consistent with Streets & Highways Code Section 2108.1.

PMS must include the following:

- Inventory of existing pavements including, as a minimum, arterial and collector routes, reviewed and updated triennially;
- Inventory of existing Class I bikeways, reviewed and updated triennially;
- Assessment of pavement condition including, as a minimum, arterial and collector routes, reviewed and updated triennially;
- Identification of all pavement sections needing rehabilitation/replacement; and
- Determination of budget needs for rehabilitation or replacement of deficient sections of pavement for current and following triennial period(s)

Self-certifications (included in Appendix III) executed by the Jurisdiction’s Engineer or designated, registered civil engineer, must be submitted with a Form A for new street maintenance or bikeway projects, or Form B (biannually) for ongoing projects, to satisfy “Street Repair and Maintenance” and “Bikeway” project eligibility criteria.

III. METRO'S ADMINISTRATIVE PROCESS

A. REPORTING REQUIREMENTS FOR JURISDICTIONS

STANDARD ASSURANCES

In the event that a new Jurisdiction is formed within Los Angeles County, Metro will require that a Standard Assurances and Understanding agreement be submitted prior to participation in the LR Program. A sample Standard Assurance and Understanding agreement form is included as Appendix II, see page 37.

PROPOSITION A AND PROPOSITION C FORMS

To maintain legal eligibility and meet LR Program compliance requirements, Jurisdictions shall submit to Metro a Project Description Form as required, an Annual Project Update and Annual Expenditure Report. A Project Description Form, Annual Project Update and Annual Expenditure Report (Forms A, B and C along with instructions) are included in Appendix VIII, starting on page 49.

PROJECT DESCRIPTION FORM (FORM A)

A new project that meets the eligibility criteria listed in Section II, Project Eligibility, must be submitted to Metro on Project Description Form (Form A) prior to the expenditure of funds. Metro will review the project to determine if it meets the statutory eligibility requirement and notify Jurisdictions of the project's LR funding eligibility. If a Jurisdiction expends Proposition A or Proposition C LR funds for a project prior to Metro approval, the Jurisdiction will be required to reimburse its LR Account. Additionally, approvals cannot be retroactive.

A Project Description Form (Form A) may be submitted any time during the fiscal year. Metro will review and accept or return the report for changes. All projects must be identified with their own unique sequence and project code, e.g. 01-200, and the form must be filled out completely. Once a Jurisdiction decides to proceed on a new or revised project, the Jurisdiction should comply with the following process before expending any funds:

STEP 1 - Form Submittal

A Project Description Form (Form A) shall be submitted whenever a Jurisdiction proposes a 1) a new project; 2) a new route; 3) a 25 percent or more (increase or decrease) in route or revenue vehicle miles for an established LR funded transit service); 4) a 25 percent or greater change in an approved LR project budget or scope, or 5) a service change that duplicates/overlays an existing transit service equal to or greater than .75 miles.

A change is defined as any modification to route, budget, service area, stops, frequency, fare or clientele for the project as originally approved or subsequently approved by Metro.

NOTE: a.) All new transit or paratransit service projects, existing services with a change of 25% or more (increase or decrease), or cancellation of services, are subject to review under the Service Coordination Process (as described on page 24).

- b.) If transit service is canceled, Jurisdictions should notify Metro in writing, secure review by the Service Review Process, and inform the public.

STEP 2

Metro staff will review Form A to determine if the project is eligible for LR expenditure.

STEP 3

After it is determined that the project is eligible, Metro staff will notify Jurisdictions in writing authorizing the expenditure of the LR funds. This will be done within thirty days of receipt of Form A. However, if additional information/justification for the project is required, it may take longer for the approval.

STEP 4

Form A will be used as the basis for a Jurisdiction's annual compliance audit required under the LR Program. Records should be maintained as stated in Audit Section V, page 33.

ANNUAL PROJECT UPDATE (FORM B)

Jurisdictions shall submit on or before August 1 of each fiscal year an Annual Project Update (Form B) to provide Metro with an update of *all* approved, on-going and carryover LR projects. Jurisdictions will be informed in writing of approval for project continuance. Metro will review the report and accept or return the report for changes. Staff review will consist of verification that the status of the projects listed corresponds to the originally approved projects. All projects should have their own identifying code, e.g. 01-200.

Projects for service operations whose anticipated start-up date is in the middle of the fiscal year, should be budgeted for services through the end of the fiscal year only. After the first year of service operations, project updates should be submitted annually, by August 1 of the new fiscal year.

ANNUAL EXPENDITURE REPORT (FORM C)

On or before October 15 of each fiscal year, Jurisdictions shall submit an Annual Expenditure Report (Form C) to notify Metro of previous year LR fund receipts and expenditures. Metro will review the report and approve or return for changes.

For Jurisdictions with Recreational Transit projects, Jurisdictions are required to annually submit an accounting of Recreational Transit trips, destinations and costs. This information should be submitted along with the Form C, no later than October 15 after the fiscal year.

Jurisdictions are required to call out administration charges to Direct Administration (Project Code 480) in order to verify compliance of 20% cap on administration costs.

The following provides a summary of form use and due dates:

<u>FORM</u>	<u>DETERMINATION</u>	<u>DUE DATE</u>
Project Description Form - Form A	New and amended projects	Any time during the year
Annual Project Update - Form B	All on-going and/or capital (carryover) projects	August 1 st of each year
Annual Expenditure Report - Form C	Report expenditures	October 15 th of each year

B. APPEAL OF ELIGIBILITY

Jurisdictions submitting a project, which has been classified by Metro staff as ineligible, may appeal the determination. An appeal should be submitted in writing to the Chief Planning Officer of Countywide Planning & Development. The project will then be reviewed for eligibility.

Should the project be denied eligibility status by the Chief Planning Officer, a final appeal may be submitted in writing to the Chief Executive Officer. The project will then come before the Metro Board for final determination of eligibility.

The appeal process is administered as a Board Public Hearing by the Board Secretary's office at the regularly scheduled Planning and Programming meetings. The Board has the authority to act on the transcript of the Hearing or to conduct its own hearing. The Metro Board decision is final.

Once the determination is final (either by an administrative determination that is not appealed within the 10-day statute of limitations, or as a result of the appeal process), Metro staff will send a notice of final determination of project eligibility to the Jurisdiction with conditions described or attached.

C. GOVERNING BODY AUTHORIZATION

While Metro does not require Jurisdictions to file a governing body authorization when submitting LR Forms (e.g., a city resolution or minute order), it is the responsibility of the Jurisdiction to keep these documents on file for audit purposes.

D. ENVIRONMENTAL REVIEW RESPONSIBILITY

Jurisdictions are the lead agencies for the projects with which they propose to implement using LR funds. Therefore, those agencies are responsible for preparing the necessary state and/or federal environmental documentation, and must comply with all applicable provisions of the California Environmental Quality Act, or if federal funds are involved, the National Environmental Policy Act.

E. PROJECT DESCRIPTION FORMS AND THE PROPOSITION A AND PROPOSITION C 40% DISCRETIONARY PROGRAM

If a Jurisdiction submits a project description for operating assistance for an included transit operator, the amount of operating assistance applied for will be considered as an operating subsidy in the fiscal year specified in Forms A or B. The full LR operating assistance amount shown in Form A or B will be considered when determining the eligible Proposition A or C Discretionary grant amount in accordance with the Proposition A and Proposition C 40% Discretionary Program Guidelines. Any changes must be approved prior to the close of the specific fiscal year. No changes will be approved after November 1 of the following fiscal year (e.g., changes in FY 2006-2007 projects must be received by Metro prior to November 1, 2007 to allow adequate time for staff review).

In addition, depreciation is not an eligible operating expense for which LR funds can be allocated, committed, encumbered, or claimed.

F. ANNUAL PROJECT UPDATE SUBMITTALS BY RECIPIENTS OF METRO FORMULA FUNDS

Jurisdictions with municipal bus operations receiving Metro formula funds (e.g. TDA Article 4, FTA Section 5307 and State Transit Assistance funds) should submit projects with the regular Transportation Improvement Program (TIP) and TIP-amendment cycle to facilitate processing and coordination. Other Jurisdictions may submit Project Description Forms at any time. LR projects and revenue may be shown in the Los Angeles County TIP for information purposes.

G. OTHER RESPONSIBILITIES OF JURISDICTIONS

It is the responsibility of Jurisdictions to ensure that all applicable federal, state and local requirements are met with regard to public health and safety, affirmative action, fair labor practices, transit accessibility to disabled persons, etc. Metro has no responsibilities in these areas with regard to local transit projects carried out by Jurisdictions receiving Proposition A or C revenues.

H. AMERICANS WITH DISABILITIES ACT MAINTENANCE OF EFFORT (MOE)

Metro will continue to monitor the operations of LR funded paratransit services to ensure that ADA paratransit-eligible riders continue to receive non-discriminatory transportation service on local paratransit systems pursuant to ADA and TDA. If Metro determines that ADA paratransit-eligible individuals are disproportionately being denied service, Metro will work with the LR funded agency to resolve the issue, up to and including a Maintenance of Effort.

Jurisdictions that currently provide paratransit service are required to continue to provide either ADA-eligible individual transportation service, or fund transportation trips that are completely within their jurisdictional boundaries, when requested. This obligation may not exceed 20 percent of the total LR allocation to the jurisdiction. If no requests for service within the jurisdiction are received, there will be no obligation to provide service or funding.

To better determine the accessibility of pathways to and from bus stops in Los Angeles County, all jurisdictions and the County of Los Angeles are requested to submit their projects on the Project Description Form (Form A) indicating what accessible features are being updated. Examples include curb cuts, installation or repair of pedestrian walkways, bus pads, and/or removal of sidewalk barriers (telephone poles, light poles, and other barriers). This form shall be submitted as required under these Guidelines.

I. SERVICE COORDINATION PROCESS

If a Jurisdiction is proposing to use LR funds for a new or expanded paratransit or transit service project, it is required to comply with the following Service Coordination Process:

The Service Coordination Process has four principal steps: Early Consultation by the proposing Jurisdiction with Metro Operations, and Contract Departments as the service is being developed at a local level; Proposition A or Proposition C LR eligibility review; service coordination administrative review; Metro Board Appeal Process to review the administrative determination, if requested. The following instructions should assist Jurisdictions in completing the service coordination review process:

Under the Proposition A and Proposition C Ordinances, transit services provided by Jurisdictions with LR funds should not duplicate existing transit or paratransit services.

The Proposition A and Proposition C LR Guidelines require Jurisdictions to follow the service coordination process under the following conditions: when a new service is proposed or when current service is modified by expanding service by 25 percent (increase or decrease) in route miles, revenue vehicle miles, service areas, stops, frequency or fare; when a proposed new route or change duplicates an existing route for 0.75 miles or more; or if a service is canceled.

1. **Implementing A Proposed New or Modified Transit or Paratransit Service**

When implementing a new or modified transit service or paratransit service project Jurisdictions should comply with the following process:

- a. Prior to Submittal of the Project Description Form -- Metro encourages Jurisdictions to work closely with Programming and Policy Analysis staff and Metro's Operations Unit (Sector General Managers and Deputy Executive Officer of Service Development) when a service project is being developed, in order to avoid or reduce service duplication impacts.
- b. Submitting a Project Description Form -- Similar to other LR projects, Jurisdictions are required to submit a Form A describing the new or modified service.
- c. Letter of Conditional Approval Will Be Sent to Jurisdictions -- After Metro Operations staffs have reviewed Form A, a letter of conditional approval is sent to Jurisdictions, subject to Metro Service Development Team review. This letter is then forwarded with a recommendation to the ***Service Development Team***, to potentially affected Jurisdictions and transit operators, with the Form A and any route maps, service schedules and fare information provided by the proposing Jurisdiction.
- d. Role of Service Development Team – Metro Service Development Team is an executive level committee that is chaired by Metro Chief Executive Officer (CEO). This committee reviews key issues concerning agency transportation and planning projects. The Service Development Team will use the following criteria for evaluating the impacts of new or expanded services funded:
 - Potential for passenger and revenue diversion from the existing transit services, resulting from service duplication, to the proposed new or expanded service
 - Operational considerations such as available street capacity, bus zone curb space, street configuration and traffic congestion
 - Type of service and/or markets served by the new service, compared to existing services in the area
 - Early coordination and project development with existing service providers and Jurisdictions (efforts beyond the minimum 60 days)Metro will encourage fare coordination and connectivity with other interfacing transit operators.
- e. Letter of Final Approval or Disapproval -- Based on the evaluation criteria, the Service Development Team will either grant approval or deny a Jurisdiction's request. The Committee will notify the Jurisdiction of the outcome.
- f. Board Appeal Process -- If the project is disapproved, the Jurisdiction may file an appeal. See Appeal of Eligibility, page 23.

2. **Seasonal or Emergency Temporary Service**

Seasonal service lasting less than 60 days will be administratively reviewed and considered for approval without Metro Board review, unless an Metro Board action is specifically requested. In the event of an emergency, staff reserves the right to temporarily waive the service coordination requirements. Any projects begun under emergency waiver conditions must undergo the New Service Coordination review process within 60 days after the emergency has ended, in order to continue to be eligible for expenditure of LR funds. Seasonal or emergency services are not considered ongoing projects. Equipment purchased during the emergency waiver period will not be subject to prior approval. Emergency service may continue during the subsequent New Service Review process.

3. **Contracting With Other Service Providers**

Jurisdictions may use their LR funds to contract with other public or private service providers for new or improved transit services, subject to non-duplication/competition requirements.

J. **CAPITAL RESERVE PROCESS - APPROVAL PROCEDURE**

Jurisdictions who wish to establish a Capital Reserve fund with LR revenues should note that establishing a Capital Reserve fund constitutes a long term financial and planning commitment. The approval procedure is as follows:

- a. The Project Description **Form (Form A)**, submitted by the Jurisdiction, must be reviewed by Metro staff and approved by Metro Board;
- b. If the project is approved, the Jurisdiction is required to:
 - Enter into a Capital Reserve Agreement (see sample in Appendix IV, page 40) with Metro to reserve funds
 - Establish a separate account, or a sub-account, for Capital Reserve funds. Any interest accrued on the Capital Reserve Account would remain in said account
 - Include the Capital Reserve amount and the current project status in their Project Annual Update (Form B) and on the Annual Expenditures Report (Form C, including any expenditures or interest accrued.
- c. Conditions of the Capital Reserve Agreement:
 - The annual audit will include a detailed audit of the jurisdiction's capital reserve account.
 - Every three (3) years, Metro must evaluate the Capital Reserve Account as it pertains to the status of the project; and the projected amount of funds available.
 - If the funds are expended for projects other than the originally-approved capital project, the jurisdiction must pay the funds back to Metro.
 - If the capital project is not completed within the time specified under the terms of the Capital Reserve Agreement, its funds will be subject to lapse. However, if the project is delayed, Jurisdictions should request in writing to Metro approval to extend the life of the reserve. Such projects will be reviewed on a case-by-case basis.
 - For rail projects, if it is decided by Metro that the Rail corridor is no longer a high priority, the agreement will be terminated and the Jurisdiction must:
 1. Dissolve the Capital Reserve fund and return the accumulated funds, including any interest earned, to the Jurisdiction's LR fund; and

2. Reprogram the funds, within the next three (3) years from the Agreement termination date (see Appendix IV for Sample Agreement, page 40). While the Jurisdiction is not required to expend all of the funds within these three years, Metro reserves the right to impose a reasonable limit on the period of expenditure for reprogrammed funds.
 - If there is action by Metro to suspend a rail project, the Jurisdiction may continue to hold onto the reserve until such time the project is reinstated as active or terminated.
 - If, at any time a Jurisdiction, independent of any Metro action, desires to reprogram all or part of the funds in the Capital Reserve Account, the Jurisdiction must indicate the proposed use of the accumulated funds to be reprogrammed, and receive Metro approval.
 - If, at any time either party decides to terminate the Capital Reserve Project, a letter shall be submitted giving 30 days notice of the termination.
 - If the Capital Reserve Project is terminated, the Timely Use of Funds period on the lapsing date of the reserved funds will be reviewed and determined by the audit.
- d. Metro approval for reprogramming funds will be based on the following:
 - If after exhausting all LR funds, additional funds are necessary to meet critical immediate or pending transit needs
 - If the reprogramming request is approved, the agreement between Metro and the Jurisdiction will be either terminated or amended accordingly
 - If the reprogramming request is disapproved, the Jurisdiction would be required to continue the capital reserve account as stipulated or apply to draw the fund down for another Metro approved capital-related project.

K. FUND EXCHANGE

Only Proposition A funds may be exchanged or traded. Refer to page 13 for conditions.

L. LOANING LR FUNDS BETWEEN JURISDICTIONS (FOR PROPOSITION A ONLY)

In order to meet short-term project needs while preserving longer-term reserves or to avoid loss of funds due to the timely-use provisions, the Jurisdictions may arrange a mutually acceptable temporary transfer or loan from one Jurisdiction to another. These loans are to be made on terms to be negotiated between the involved parties. The participating Jurisdictions are held mutually responsible for ensuring that the end use of Proposition A is for statutorily-allowed purposes. The timely use provision as indicated on page 30 will apply to loaning of such funds. Metro must be notified of the amount, terms and period of such arrangements within thirty days of such arrangements.

Note: Metro reserves the right to temporarily reallocate funds. Any temporary reallocation would be subject to full review by the Planning and Programming Committee and approved by Metro Board.

M. GIVING PROPOSITION C LR FUNDS TO ANOTHER JURISDICTION

Since the Proposition C Ordinance does not allow trades or exchanges of these funds, a Jurisdiction can give its Proposition C funds to another Jurisdiction for the implementation of a mutual project. However, the Jurisdiction giving the funds away cannot accept an exchange or gift of any kind in return. Jurisdictions involved in giving funds should obtain Metro approval and keep official agreements on file.

N. REIMBURSEMENT

LR funds may be advanced for other grant funds as long as the project itself is eligible under LR Guidelines. The grant funds must be reimbursed to the LR fund.

IV. FINANCE SECTION

A. METRO'S METHOD OF APPORTIONMENT

The Proposition A Ordinance specifies that twenty-five percent (25%) of all Proposition A revenues, while the Proposition C Ordinance specifies that twenty percent (20%) of all Proposition C revenues, are to be allocated to Jurisdictions for local transit on a "per capita" basis. The annual estimate of Proposition A and Proposition C revenues will be derived by Metro staff based on projections by the State Board of Equalization.

After administrative costs of the Proposition A and Proposition C Programs are deducted, apportionments are made to all Jurisdiction within Los Angeles County, currently 88 cities and the County of Los Angeles (for unincorporated areas), on the basis of population. These population shares are based on the projected populations derived from annual estimates made by the California State Department of Finance.

B. METRO'S FUND DISBURSEMENT

The Proposition A and Proposition C funds are disbursed by Metro on a monthly basis. The disbursements to an individual Jurisdiction will equal that Jurisdiction's population-based share of actual net receipts for the month.

C. ACCOUNTING FOR PROPOSITION A AND PROPOSITION C REVENUES AND EXPENDITURES BY JURISDICTIONS

1. ESTABLISHING A SEPARATE ACCOUNT

Jurisdictions which do not use the State Controller's Uniform System of Accounts and Records must establish a separate Proposition A and Proposition C Local Transit Assistance Account and deposit all Proposition A and Proposition C LR revenues, interest earnings received, and other income earned from Proposition A and Proposition C LR in that account.

In accordance with the State Controller's instructions, Jurisdictions which use the Controller's Uniform System do not need to establish a separate Proposition A and Proposition C Local Transit Assistance Account but will list all Proposition A and Proposition C revenues (including interest) and expenditures as special line items in the Uniform System. In any case, all Jurisdictions will be required to account for and identify all Proposition A and Proposition C receipts, interest, and expenditures. This will enable financial and compliance audits to be conducted in an organized and timely fashion. Sufficient unrestricted cash or cash equivalent must be available at all times to meet the needs of general Jurisdiction operations without impairment of the Proposition A and Proposition C Local Transit Assistance Accounts.

2. EXCEPTIONS FOR RECIPIENTS OF TDA ARTICLE 4 FUNDS

A separate account or fund is not mandatory when Proposition A and Proposition C LR funds are accounted for in an enterprise fund and are exclusively used as transit operating subsidies as long as the Jurisdiction/operator is able to maintain accounting records. These records should allow for the preparation of financial statements, which present assets, liabilities, revenues, expenditures (if any) and transfers out. While it is necessary that Proposition A and Proposition C Program recipients be able to demonstrate that they have complied with applicable guidelines in expending Proposition A and Proposition C funds as operating subsidies, it is not necessary that such expenditures be separately identifiable for audit purposes.

3. POOLING OF FUNDS

Metro will allow Jurisdictions to pool Proposition A and Proposition C LR funds in order to obtain maximum return on investments. Such investment earnings must be reported and expended consistent with these guidelines. As in fund exchanges or transfers, Jurisdictions involved in such arrangements should keep adequate records of such transactions in order to allow for subsequent audits.

4. INTEREST AND OTHER EARNED INCOME

Jurisdictions are entitled to retain any and all interest revenues, which they may earn on their Proposition A, and Proposition C revenues. Other income earned from Proposition A and Proposition C projects such as fare revenues, revenue from advertising, etc., may also be retained by Jurisdictions in their LR accounts. Such earnings must be reported and expended consistent with these guidelines. Jurisdictions must maintain accurate records for the amount of interest earned each year. Interest must be allocated to the Local Transit Assistance Account on an annual basis, and reported as part of the annual audit.

5. PROJECT REVENUE

The Jurisdictions need only report project-generated revenues, such as fares, when such revenues are retained and recorded by the Jurisdiction. Revenues should be reported on the accrual basis.

6. INTER-FUND TRANSFERS

On an accrual basis of accounting, Jurisdictions should make note of the following: expenditures for an approved project, which are made from a fund other than the Proposition A or Proposition C LR fund and will be reimbursed by Proposition A and Proposition C LR funds, should be included in the Annual Expenditure Report to Metro in the period such expenditures are made and not in the period in which the disbursing fund is reimbursed for such expenditures.

7. UNEXPENDED PROJECT FUNDS

All unexpended project funds remaining upon completion of an approved project must be re-programmed.

8. ONGOING OPERATING PROJECTS

Continuing administration, transit or paratransit projects, are ongoing projects. Such projects which have unexpended funds at the year end (excluding any outstanding liabilities) may not carry fund balances into the next fiscal year. Ongoing projects must be resubmitted on an annual basis (see Annual Project Update on page 22).

9. CARRYOVER CAPITAL PROJECTS

All other types of projects not cited above which 1) are not completed within the applied fiscal year and 2) have unexpended funds (i.e., fund balance), may be carried into the next fiscal year without resubmitting a project description. However, until completed, such projects must continue to be reported in the Annual Project Update and Annual Expenditure Report (Forms B and C).

10. REIMBURSEMENT

Local Return funds may be used to advance a project which will subsequently be reimbursed by federal, state, or local grant funding, or private funds, if the project itself is eligible under LR Guidelines. **The reimbursement must be returned to the appropriate Proposition A or Proposition C LR fund.**

D. NON-SUBSTITUTION OF FUNDS

1. Proposition A and Proposition C revenues should only be used to maintain and/or improve public transit services. They may not be used to substitute for property tax revenues, which are currently funding existing programs. If the Jurisdiction is unable to segregate property tax from other general fund revenues which cannot be so distinguished, substitution of Proposition A and Proposition C funds for general funds is also prohibited.
2. Jurisdictions which currently receive federal and/or state transit-assistance funds may use Proposition A and Proposition C revenues to replace or supplement any other state, federal, or local transit funds, as long as there is no relation to the property tax (as noted above).
3. Metro Staff reserves the right to bring project proposals involving the substitution of funds before Metro Board.

E. TIMELY USE OF FUNDS

1. PROPOSITION A AND PROPOSITION C FUNDS

Under the Proposition A and Proposition C Ordinances, Jurisdictions have three years to expend LR funds. Funds must be expended within three years of the last day of the fiscal year in which funds were originally allocated. Therefore, by method of calculation, each Jurisdiction has the Fiscal Year of allocation plus three years to expend Proposition A and/or Proposition C funds. For example, a Jurisdiction receiving funds during FY 2004-05 must expend those funds, and any interest or other income earned from Proposition A and Proposition C projects, by June 30, 2008.

Proposition A and Proposition C disbursements, interest income and other income earned from LR projects, such as fare revenues or revenues from advertising which are not expended within the allocated time will be returned to Metro for reallocation to Jurisdictions for discretionary programs of county-wide significance.

2. DETERMINING COMPLIANCE WITH TIMELY USE PROVISION

In applying the timely use provision, Metro will use a "First-In-First-Out" (FIFO) accounting principle, to afford Jurisdictions maximum time to expend funds. For example, City A had a fund balance of \$1,000,000 as of June 30, 2004. In order to avoid lapsing LR funds, City A must expend a total of \$1,000,000 or more from its LR funds during Fiscal Years 2004-05, 2005-06 and 2006-07. This calculation will be done individually for Proposition A and Proposition C funds.

3. EXTENSION OF TIMELY USE PROVISION

Metro will allow Jurisdictions to reserve funds for multi-year capital projects. A specific project must be identified under the Capital Reserve Process. See Capital Reserve Process, page 26.

F. RELATIONSHIP TO TDA ENTRY AND FORMULA DISTRIBUTION

Provision of transit services with LR funds will not qualify Jurisdictions for Transit Development Act (TDA) funding programs. In addition, mileage will not be counted in Metro's subsidy allocation formula for TDA operators.

G. NATIONAL TRANSIT DATABASE (NTD)

Locally funded transit systems are encouraged to report NTD data, either directly to the Federal Transit Administration (FTA), or through Metro's consolidated NTD report. Examples of locally funded transit systems include community based fixed route circulators, community shuttles, Metrolink feeder services and other rail station and neighborhood shuttles (Code 110). Also included are locally funded paratransit, dial-a-ride and demand response services, including taxi voucher and specialized transportation programs (Codes 120, 130).

Benefits of increased NTD reporting include additional Federal Section 5307 capital funds for the LA County region, and improved data collection for regional transportation planning purposes. At this time, NTD reporting is voluntary for locally funded operators. The Proposition A Incentive Guidelines, as adopted by Metro Board, provide a mechanism to reimburse voluntary reporters dollar-for-dollar for additional funds generated to the LA County region, subject to funds availability.

H. REPAYMENT OF FUNDS FOR FIXED ASSETS PURCHASES

If a facility ceases to be used for public transit use as originally stated in the project description, all Proposition A and Proposition C funds expended for the project must be returned to the Proposition A and Proposition C LR accounts.

General guidelines for repayment are as follows:

Land: Repayment of purchase price or appraised value, whichever is greater.

Facilities: 100% repayment of Proposition A and Proposition C LR funds if discontinuation of public transit use occurs between 0-5 years.

75% if discontinuation occurs in more than 5 years but less than 10 years.

50% if discontinuation occurs in more than 10 years but less than 15 years.

25% if discontinuation occurs in more than 15 years.

Repayment must be made no later than five years after the decision is made to cease utilizing the project as a public transit facility. Payback may be made in one lump sum or on an annual equal payment schedule over a five-year period.

Vehicles: Jurisdictions that cease to utilize vehicles for "public transit" purposes before their useful life, will be required to repay the funds into their Proposition A and Proposition C LR accounts in proportion to the useful life remaining. Federal standards for useful life will apply.

Repayment will be made in the same fiscal year as the vehicles ceased to be used for "public transit" purposes.

V. AUDIT SECTION

A financial and compliance audit will be conducted annually as part of Metro’s Consolidated Audit Program to verify adherence to the Proposition A and Proposition C guidelines. Audits will be performed in accordance with auditing standards generally accepted in the United States of America and the Government Auditing Standards, issued by the Comptroller General of the United States. Those standards require that the audit is planned and performed to obtain reasonable assurance about whether the basic financial statements are free of material misstatement. The audit shall include examining, on a test basis, evidence supporting the amounts and disclosures in the basic financial statements. The audit shall also include review of internal control procedures, assessing the accounting principles used, as well as evaluation of the overall basic financial presentation.

It is the jurisdictions’ responsibility to maintain proper accounting records and documentation to facilitate the performance of the audit prescribed in these guidelines. Jurisdictions are required to retain Local Return records for at least three years following the year of allocation and be able to provide trial balances, financial statements, worksheets and other documentation required by the auditor. Jurisdictions are advised that they can be held accountable for excess audit costs arising from poor cooperation and inaccurate accounting records that would cause delays in the completion of the required audits.

A. FINANCIAL AND COMPLIANCE PROVISIONS

The Proposition A and Proposition C Local Return Audits shall include, but not limited to, verification of adherence to the following financial and compliance provisions of this guidelines:

Audit Area	Penalty for Non-Compliance
Verification that jurisdictions which do not use the State Controller’s Uniform System of Accounts and Records has established a Separate Proposition A and Proposition C Local Transit Assistance Account for local return purposes.	Suspension of disbursements.
Verification of revenues received including allocations, project generated revenues, interest income.	Audit exception.
Verification that funds were expended with Metro’s approval and have not been substituted for property tax.	Jurisdiction will be required to reimburse its Local Return account for the amount expended prior to or without approval.
Verification that the funds are expended within three years from the last day of the fiscal year in which funds were originally allocated or received. (see “E” page 30).	Lapsed funds will be returned to Metro for reallocation to jurisdictions for discretionary programs of countywide significance.

<p>Verification that <u>administrative expenditures</u> (project code 480) did not exceed over 20% of the total annual LR expenditures.</p> <p>Verification that projects with greater than 25% change from the approved project budget has been amended by submitting amended Project Description Form (Form A).</p> <p>Verification that the Annual Project Update (Form B) was submitted on or before August 1st following the end of fiscal year.</p> <p>Verification that the Annual Expenditure Report (Form C) was submitted on or before October 15th following the end of fiscal year.</p> <p>Where expenditures include Street Maintenance or Improvement projects (project codes 430, 440 or 450), verification that Pavement Management System (PMS) is in place and being used.</p> <p>Where funds expended are reimbursable by other grants or fund sources, verification that the reimbursement is credited to the Local Return account upon receipt of reimbursement.</p> <p>Where Proposition A funds were given, loaned or exchanged by one jurisdiction to another, verification that the receiving jurisdiction has credited its Local Return Accounts with the funds received.</p> <p>Where funds expended were for Intelligent Transportation Systems (ITS) projects or projects with ITS elements, verification that a Self Certification has been completed and submitted to Metro.</p> <p>Verification that jurisdictions have a LR Assurances and Understandings form on file.</p>	<p>Jurisdictions will be required to reimburse their Local Return account for the amount over the 20% cap.</p> <p>Audit exception.</p> <p>Audit exception.</p> <p>Audit Exception.</p> <p>Any Local Returned funds spent must be returned to the Local Return Funds.</p> <p>Audit exception and reimbursement received must be returned to the Local Return Funds.</p> <p>Audit exception and reimbursement of affected funds to the Proposition A LR account.</p> <p>Audit exception.</p> <p>Audit exception.</p>
--	--

<p>Where a capital reserve has been established, verification that a Capital Reserve Agreement is in effect, a separate account for the capital reserve is established, and current status is reported in the Annual Project Update (Form B).</p>	<p>Audit exception.</p>
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B. AUDIT DELIVERABLES

The auditor shall submit to the Jurisdictions and to Metro a Comprehensive Annual Report of Proposition A and Proposition C Local Return Funds no later than March 31st following the end of fiscal year. The report must contain at the minimum, the following:

- Audited Financial Statements – Balance Sheet, Statement of Revenues and Expenditures and Changes in Fund Balances.
- Compliance Report, Summary of Exceptions, if any, and ensuing recommendations.
- Supplemental Schedules – Capital Reserves, if any; Schedule of Detailed Project Expenditures; and Capital Assets.

C. SUSPENSION OR REVOCATION

Jurisdictions are expected to take corrective action in response to the Local Return financial and compliance audit. Notwithstanding the provisions of these guidelines, Metro reserves the right to suspend or revoke allocation to jurisdictions that may be found to be in gross violation of these guidelines, or repeatedly committing violations, or refusing to take corrective measures.

**PROPOSITION A AND PROPOSITION C LOCAL RETURN PROGRAM
SUMMARY OF PROPOSITION A AND PROPOSITION C USES**

PROJECT TYPE	PROPOSITION A	PROPOSITION C
Streets and Roads Expenditures	<ul style="list-style-type: none"> Allowed exclusively for Bus Lanes and Curb Cuts at corners located or adjacent to Bus Stops 	<ul style="list-style-type: none"> Allowed only on streets that carry regularly scheduled, Fixed-Route Public Transit Services and on streets that carry public Paratransit trips (see conditions outlined in eligibility section of the Guidelines)
Signal Synchronization	<ul style="list-style-type: none"> Allowed if performed to predominantly benefit Transit. Bus Priority must be included as part of the project. The street must have a minimum of five (5) full-sized transit buses in each direction per hour 	<ul style="list-style-type: none"> Allowed on streets that are heavily-used by Public Transit The street must have full-sized transit buses operating on a regularly scheduled fixed-route (no minimum number of buses) Operating costs such as software and hardware maintenance are allowed
Bikeways and Bike Lanes	<ul style="list-style-type: none"> Not allowed 	<ul style="list-style-type: none"> Commuter bikeways Shall be linked to employment sites.
Congestion Management Activities	<ul style="list-style-type: none"> Not allowed 	<p>Most elements allowed, such as:</p> <ul style="list-style-type: none"> Preparation of TDM Ordinances and Deficiency Plans. Land Use Analysis required by CMP Monitoring of Transit Standards by transit operators
Pavement Management System	<ul style="list-style-type: none"> Not allowed 	<p>Some elements allowed, such as:</p> <ul style="list-style-type: none"> One-time development costs of a Pavement Management System. The ongoing costs of maintaining the Pavement Management System (see Guidelines for conditions)
Trading or Exchanging of Funds	<ul style="list-style-type: none"> Allowed if the traded funds are used for Public Transit purposes 	<ul style="list-style-type: none"> Not allowed

ASSURANCES AND UNDERSTANDINGS REGARDING
RECEIPT AND USE OF PROPOSITION A and PROPOSITION C FUNDS

The undersigned, in conjunction with the receipt of funds derived from the one-half cent sales tax imposed by Ordinance No. 16 (Proposition A) and the one-half cent sales tax imposed by the Proposition C Ordinance of the Los Angeles County Metropolitan Transportation Authority (Metro), and as required by Metro's Local Return Program Guidelines, hereby provides the following assurances and understandings.

A. The undersigned hereby assures Metro:

1. That the Proposition A and Proposition C funds will not be substituted for property tax funds which are currently funding existing public transportation programs;
2. That Proposition A and Proposition C funds will be used for public transit purposes as defined in Metro's Local Return Program Guidelines;
3. That the undersigned will submit to Metro a description of the use of funds:
 - a. For service expansion or new service: at least 60 days before encumbrance of funds;
 - b. For other projects: at least 30 days before encumbrance of funds;
 - c. Annually, by August 1st of each year, an update of previously approved projects;
 - d. Annually, by October 15th of each year, an update of the prior year's expenditures;
4. Any proposed use of funds will not duplicate or compete with any existing publicly-funded transit or paratransit service;
5. That Proposition A and Proposition C funds will be expended by the date that is three years from the last day of the fiscal year in which funds were originally allocated;
6. Unless otherwise required by Metro, an audit certified by a Certified Public Accountant, will be conducted by Metro within 180 days of the close of the fiscal year;
7. That the description of the intended use of the funds, as submitted to Metro, is an accurate depiction of the project to be implemented;
8. That a 25 percent change in project scope or financing for those projects defined in the Guidelines will be submitted to Metro at least 60 days before that change in scope is implemented;
9. That all projects proposed for Proposition A and Proposition C funding will meet the legal requirements of the Proposition A and Proposition C Ordinances and Metro's Local Return Program Guidelines criteria.

B. The undersigned further understands and agrees:

1. That Metro will require the undersigned to return any Proposition A and Proposition C funds and may impose interest penalties on any expenditure found to be illegal or improper under the terms of the Proposition A and Proposition C Ordinance or the Metro's Local Return Program Guidelines;
2. That the undersigned will, for projects to be funded in part or in whole with Proposition A and/or Proposition C funds, comply with all applicable federal, state, and local laws and regulations, including without limitation: American With Disabilities Act (ADA), CEQA and NEPA, affirmative action, transit accessibility and public health and safety requirements and fair labor practices;
3. That the undersigned will either utilize the State Controller's Uniform System of Accounts and Records to accommodate uses and disbursements of Proposition A and Proposition C funds or will establish a separate Proposition A and Proposition C Local Transit Assistance accounting system which will allow financial and compliance audits of Proposition A and Proposition C funds transactions and expenditures to be conducted;
4. That any Proposition A and Proposition C funds not expended within the year of receipt of funds plus three years thereafter will be returned to Metro upon request therefrom.

IN WITNESS WHEREOF the undersigned has executed this "Assurances and Understandings Regarding Receipt and Use of Proposition A and Proposition C Funds" this ____ day of _____, 20__ by its duly authorized officer:

CITY OF _____

BY _____

(Title)

DATE _____

LOS ANGELES COUNTY METROPOLITAN
TRANSPORTATION AUTHORITY (METRO)
PAVEMENT MANAGEMENT SYSTEM CERTIFICATION
PROPOSITION C

The City of _____ certifies that it has a Pavement Management System (PMS) in conformance with the criteria stipulated by the Proposition C Local Return Guidelines (identical to the criteria adopted by the Joint City/County/State Cooperation Committee, pursuant to Section 2108.1 of the Streets and Highways Code).

The system was developed by _____ and contains, as a minimum, the following elements:

- * Inventory of arterial and collector routes (including all routes eligible for Proposition C funds), reviewed and updated triennially. The last inventory update was completed _____, 20__.
- * Inventory of existing Class I bikeways, reviewed and updated triennially.
- * Assessment (evaluation) of pavement condition for all routes in the system, updated triennially. The last review of pavement conditions was completed _____, 20__.
- * Identification of all sections of pavement needing rehabilitation or replacement.
- * Determination of budget needs for rehabilitation or replacement of deficient sections of pavement for current triennial period, and for following triennial period.

If PMS was developed in-house, briefly describe it on an attached sheet.

FROM:

AGENCY _____ DATE _____

(Please Print Name)

(Please Print Name)

(Title)

CAPITAL RESERVE AGREEMENT

This Capital Reserve Agreement (this “Agreement”) is entered into as of _____, by and between the Los Angeles County Metropolitan Transportation Authority (“Metro”) and the City of _____ (the “City”).

RECITALS:

A. The City receives Proposition [A] [C] local return funds (the “Local Return Funds”) from Metro.

B. Pursuant to the Proposition A and Proposition C Local Return Guidelines, which are incorporated herein by reference, the City has three years, beginning the last day of the Fiscal Year in which funds were originally allocated, to expend the Local Return Funds. By method of calculation, each jurisdiction has three years plus the Fiscal Year of allocation to expend the Local Return funds. This is period is identified in the Guidelines as Timely Use of Funds.

C. As of Fiscal Year _____, the City desires to commit and accumulate its Local Return Funds beyond the Timely Use of Funds period in order to construct and/or purchase _____ as more particularly described in City’s project description attached hereto as Exhibit A (the “Project”).

D. The Metro Board at its _____ board meeting approved the City’s establishment of a capital reserve fund for the Project.

NOW, THEREFORE, the parties hereby desire to agree to the following terms and conditions:

AGREEMENT

1. The City acknowledges that establishing a capital reserve fund for the Project constitutes a long term financial and planning commitment.
2. The City shall establish a separate interest bearing account or sub-account to be designated as the Capital Reserve Account. Commencing with Fiscal Year _____, the City shall deposit \$ _____ of its Local Return Funds into the Capital Reserve Account. For future Fiscal Years, the City shall deposit the amount specified in its Project Annual Update submitted to Metro for that fiscal year, provided, however, if the City fails to submit its Project Annual Update, the City shall deposit its Local Return Funds in an amount equal to the amount deposited into the Capital Reserve Account for the immediately preceding fiscal year.

3. All interest accruing on the Capital Reserve Account shall remain in such account.
4. The City shall complete the Project by _____.
5. The City shall comply with all terms and conditions for the Capital Reserve Account as provided in the Proposition A and Proposition C Local Return Guidelines, including, without limitation, the following:
 - A. Each fiscal year, submitting the following items:
 - (i) an updated Project Description Form (Form A); and
 - (ii) an Annual Project Update (Form B), including the amount to be reserved and the current project status;
 - B. Every three years commencing with the Commencement Date of this Agreement, Metro will evaluate the Capital Reserve Account, the status of the Project and the projected amount of available funds. Based on this evaluation, Metro may require the City to take certain actions including, without limitation, terminating the Capital Reserve Account.
 - C. If the City uses the Local Return Funds in the Capital Reserve Account for a project different from the Project described above, the City shall return an amount equal to the improperly used funds to the Proposition A or Proposition C Central Account held by Metro. If the City fails to return the amount within 30 days from the date Metro notifies City that it must return the funds, the City hereby authorizes Metro to offset future Local Return allocations to the City in an amount equal to the improperly used funds.
 - D. If the City fails to complete the Project as specified by the date in paragraph 4 above, the Local Return Funds in the Capital Reserve Account may be subject to lapse unless otherwise agreed to in writing by the parties.
 - E. If the Project is a rail project, Metro may decide that the rail corridor is no longer a high priority. Metro can then terminate this Agreement and the City shall:
 - (i) close the Capital Reserve Account and return the outstanding balance of the Capital Reserve Account, including accrued interest (the "Returned Funds"), to the City's local return account; and
 - (ii) reprogram the Returned Funds to be used within three years from the termination date of this Agreement. Any funds remaining after such three-year period shall lapse.
 - F. If the City, independent of Metro action, desires to reprogram all or part of the funds in the Capital Reserve Account, the City must prior to such reprogramming, receive Metro's written approval. The City shall provide Metro with notice of its desire to reprogram the funds in the Capital Reserve Account and indicate the proposed use

of the funds to be reprogrammed and the effect of such reprogramming on the Project. Metro approval may be based on, among other things, whether after exhausting all Local Return funds, additional funds are necessary to meet the City's critical immediate or pending transit needs. If Metro approves reprogramming the funds, this Agreement shall be amended or terminated as appropriate. If Metro does not approve reprogramming the funds, the City must continue the Capital Reserve Account as provided herein or draw the funds down for Metro approved capital related project.

6. This Agreement shall commence on _____. This Agreement shall continue until such time as terminated by either party with a 30 day written notice under the conditions set forth in the Proposition A and Proposition C Local Return Guidelines.

IN WITNESS WHEREOF, the parties have executed this Capital Reserve Agreement by their duly authorized representatives as of the date above.

City of _____

Los Angeles County Metropolitan
Transportation Authority

By: _____

By: _____

Name: _____

Name: _____

Its: _____

Its: _____

Approved as to form:

Approved as to form:

Name: _____

Raymond G. Fortner, Jr.
County Counsel

Its: _____

By: _____
Deputy

SAMPLE FUND EXCHANGE AGREEMENT**(PROPOSITION A LOCAL RETURN ONLY)**

This Fund Exchange Agreement is made and entered into this _____ day of _____, 20__, by and between the City of Surf City, California and the City of Mountain Valley, California with respect to the following facts:

- A. The City of Mountain Valley proposes to provide Dial-A-Ride services to its elderly and individuals with disabilities. Approximately 20% of the City population is unable to use the available fixed route service due to frailty or handicap. No door-to-door public transit services are available in the City of Mountain Valley. Adequate Proposition A Local Return funding for such a service is not available given the limited amount of the City of Mountain Valley's Local Return allocation and the needs of other priority transit projects in the City.
- B. City of Surf City, has uncommitted funding authority for its Fiscal Year 2000-01 allocation of Proposition A Local Return funds which could be made available to the City of Mountain Valley to assist in providing the services discussed in Paragraph A of this Agreement.
- C. City of Mountain Valley is willing to exchange its general funds in the amount indicated in Section 1 below in exchange for City of Surf City's uncommitted Proposition A Local Return funds.
- D. City of Surf City is willing to exchange its uncommitted Proposition A Local Return funding in the amount indicated in Section 1 below to City of Mountain Valley, for the purpose identified in Paragraph A above, for City of Mountain Valley's general funds.

Now, therefore, in consideration of the mutual benefits to be derived by the parties and of the premises herein contained, it is mutually agreed as follows:

1. Exchange. City of Surf City shall transfer \$100,000 of its Fiscal Year 20__-20__ Proposition A Local Return Funds to City of Mountain Valley. In return, City of Mountain Valley shall transfer \$50,000 of its General Funds to City of Surf City.
2. Consideration. City of Surf City shall transfer the Proposition A Local Return funds to City of Mountain Valley in twelve equal installments due the first day of each month (or in one lump sum payment). City of Mountain Valley shall transfer its general funds to City of Surf City in twelve equal installments due the first of each month (or in one lump sum payment).

The first installment shall be due and payable upon approval by the Los Angeles County Metropolitan Transportation Authority ("Metro") of City of Mountain Valley's project description Form (Form A) covering the services discussed in Paragraph A above.

3. Term. This Agreement is effective on the date above written and for such time as is necessary for both parties to complete their mutual obligations under this Agreement.

4. Termination. Termination of this Agreement may be made by either party before the date of approval of the project description covering the funds in question by the Metro so long as written notice of intent to terminate is given to the other party at least five (5) days prior to the termination date.

5. Notices. Notices shall be given pursuant to this agreement by personal service on the party to be notified, or by written notice upon such party deposited in the custody of the United States Postal Service addressed as follows:

a. City Manager
City of Surf City
101 Main Street
Surf City, CA 90000

b. City Manager
City of Mountain Valley
401 Valley Boulevard
Mountain Valley, CA 90000

6. Assurances

A. City of Mountain Valley shall use the assigned Proposition A Local Return funds only for the purpose of providing the services discussed in Paragraph A of this Agreement and within the time limits specified in Metro's Proposition A Local Return Program Guidelines.

B. Concurrently with the execution of this Agreement City of Mountain Valley shall provide Metro with the Standard Assurances and Understandings Regarding Receipt and Use of Proposition A Funds specified in the Guidelines regarding the use of the assigned Proposition A Local Return funds.

7. This Agreement constitutes the entire understanding between the parties, with respect to the subject matter herein. This Agreement shall not be amended nor any provisions or breach hereof waived, except in writing signed by the parties hereto.

IN WITNESS WHEREOF, the parties hereto have caused this Fund Exchange Agreement to be executed by their respective officers, duly authorized, on the day and year above written.

CITY OF _____

CITY OF _____

BY _____

BY _____

ATTEST:

City Clerk
Approved as to Form:

City Clerk
Approved as to Form:

LOS ANGELES COUNTYWIDE
INTELLIGENT TRANSPORTATION SYSTEMS (ITS)

POLICIES AND PROCEDURES

Policy Summary

Federal regulations (23 CFR Parts 655 and 940 Intelligent Transportation System (ITS) Architecture and Standards; Final Rule) now require ITS projects funded with the Highway Trust Fund to conform to the National ITS Architecture and Standards; be guided by a regional architecture with geographic boundaries defined by stakeholder needs; and use systems engineering analysis on a scale commensurate with the project scope. It is Metro's Policy to abide by the Federal ITS regulations and requirements for those agencies seeking federal funding programmed by Metro for projects subject to this rule. For consistency and to maximize benefits, Los Angeles Countywide ITS Policy and Procedures is also applied to projects with state and local funding sources programmed and administered by the Metro.

Procedures Summary

To ensure compliance with the ITS Policy, all ITS project sponsor agencies including Metro internal departments are required to complete the Los Angeles County Regional ITS Architecture Consistency Certification Form (Attachment B) and to self certify that their project's ITS elements in whole or in part are consistent with the Los Angeles County Regional ITS Architecture.

Attached is the RIITS self-certification form. This form must be completed and submitted to Metro for each Local Return funded ITS project or project which includes an ITS element. To learn more about RIITS, please visit www.riits.net. For a complete copy of the Los Angeles Countywide ITS Policy and Procedures, you may go directly to <http://RIITS.net/RegITSDocs.html> and choose "Los Angeles Countywide ITS Policy and Procedures Document."

LOS ANGELES COUNTY REGIONAL ITS ARCHITECTURE CONSISTENCY

SELF-CERTIFICATION FORM

This form should be completed and executed for all ITS projects or projects with ITS elements except routine maintenance and operations, traffic signal controller replacement, purchase of bus or rolling stock, expansion or enhancement of an existing operating system. The form should be sent to Metro Countywide Planning and Development (CP&D) for any planned ITS projects or proposed funding involving Local, State or Federal funds programmed or administered through the Metro at the time of submittal of project application.

1. Name of Sponsoring Agency: _____

2. Contact Name: _____

3. Contact Phone: _____

4. Contact Email: _____

5. Project Description:

6. Identify the ITS elements being implemented and the relevant National Architecture User Services(s), see Attachment A.

7. Outline of the concept of operations for the project:

8. Identify participating agencies roles and responsibilities:

By signing and self-certifying this form, the agency commits itself to follow the ITS requirements listed below during project design and implementation. Please be advised that your project may be subject to further review and documentation by FHWA or FTA during project design and implementation phases:

- Perform a lifecycle analysis for the ITS project elements and incorporate these costs into the Operations and Maintenance plan as part of the system engineering process,
- Maintain and operate the system according to the recommendations of the Operations and Maintenance plan upon project completion,
- Use the systems engineering process and document the system engineering steps, and
- Use the Los Angeles County Regional ITS Architecture interface standards if required and conform to the regional configuration management process.

Signature:

Agency Representative

Date _____

Please return the original Project Self Certification Form to Metro Department of CP&D, Attention, Ms. Carol Inge, Deputy Executive Officer, Los Angeles County Metropolitan Transportation Authority, One Gateway Plaza, MS 99-22-1, Los Angeles, CA 90012-2952

ELIGIBLE RECREATION TRANSIT SERVICE AREA



--- Recreational transit area eligible for full Proposition A & C funding

□ Recreational transit area available for Proposition A & C funding on a proportional share basis

LOCAL RETURN FORMS

Summary:

Project Code: All projects must have Project Codes (see column on right). This code is critical in Form submittal as it is used in the LR database system.

Sequence Number: Sequence Numbers distinguish between the different projects being implemented. Indicate the sequence number of the project that is the order of submittal for the project (i.e., oldest approved to most recent approval).

Form A should be submitted whenever a Jurisdiction is requesting the approval of a new project or if there is a budget or scope change of more than 25 percent in an ongoing transit or paratransit project (as defined in the Proposition A and Proposition C Guidelines).

Form B requires Jurisdictions to give an update of already approved, ongoing and carryover Prop A and Prop C LR projects. Since new projects require additional information, please include all new projects on Form A only. (Note: Jurisdictions are required to call out all administration charges to Direct Administration in order to verify compliance of 20 percent maximum limit).

Form C requires Jurisdictions to report the annual expenditures for both Prop A and Prop C LR for the previous fiscal year. (Note: Jurisdictions are also required to submit an accounting of recreational transit trips, destinations and costs, if applicable).

PROJECT CODES

PROP A AND PROP C LR JOINT CODES:

- 110 Fixed Route Service
- 120 Paratransit Service - General Public Dial-a-Ride
- 130 Paratransit Service - Elderly & Disabled (E&D)
- 140 Recreational Transit Service (incl. special event)
- 150 Bus Stop Improvement (BSI) Program
- 160 Bus Stop Improvement - Capital
- 170 Bus Stop Improvement - Maintenance
- 180 Capital - Vehicle & Misc. Equipment (fare box)
- 190 Capital - Vehicle Modification Program
- 200 Capital - Vehicle Purchase Program
- 210 Transportation Systems Management (TSM)
- 220 Transit Security - On-Board & Bus Stop
- 230 Transit Security - Station/Park-and-Ride Lot
- 240 Fare Subsidy (Taxi)
- 250 Fare Subsidy (User-Side Subsidy)
- 270 Transportation Planning
(Prop A eligible and Prop C eligible)
- 280 Transit Marketing
- 290 Park-and-Ride Lot Program
- 300 Transit Facility Transportation Enhancements
- 310 Transit Centers Program
- 320 Metro Rail Capital
- 350 Right-of-Way Improvements
- 360 Commuter Rail (Operations)
- 370 Commuter Rail (Capital)
- 380 Capital Reserve
- 390 Rail Transit Enhancements
- 480 Direct Administration
- 500 Other (Specify)

Exclusive Uses of Prop A LR Funds:

- 400 Signal Synchronization
- 405 Fund Exchange
- 410 Transportation Demand Management


Exclusive Uses of Prop C LR Funds:

- 400 Signal Synchronization & Traffic Management
- 410 Transportation Demand Management
- 420 Congestion Management Program (CMP)
- 430 Bikeways & Bike Lanes
- 440 Street Repair and Maintenance (e.g., slurry seal)
- 450 Street Improvement Projects (e.g., widenings)
- 460 Street TSM Projects (e.g., signalization)
- 470 Pavement Management Systems (PMS)

Form A - Project Description Form

(This form may be submitted any time during the fiscal year)

--Instructions--

 Metro		LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY Proposition A and Proposition C Local Return Program		
Form A PROJECT DESCRIPTION FORM (Required for all new and amended projects)				
Local Jurisdiction		Fiscal Year		
<input type="text"/>		<input type="text"/>		
Contact Person	Telephone No.	Extension	E-Mail Address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Project Title				
<input type="text"/>				
Project Code:	<input type="text"/>	Category:	<input type="text"/>	
Sequence Number:	<input type="text"/>	Type:	<input type="checkbox"/> Capital <input type="checkbox"/> New <input type="checkbox"/> Operating <input type="checkbox"/> Revised	
		Est Start Date:	<input type="text"/>	
		Est Compl Date:	<input type="text"/>	
Project Description and Justification				
<input type="text"/>				
Project Revenues				
Fund Source(s)	Proposition A Amount	Proposition C Amount	Other Amount	Total
Local Return	<input type="text"/>	<input type="text"/>	<input type="text"/>	-
Fare Revenues	<input type="text"/>	<input type="text"/>	<input type="text"/>	-
Other (Specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>	-
Total Project Revenues	-	-	-	-
Accessibility Features (For Bus Stop Improvement Projects only)				
<input type="checkbox"/> Curb Cut <input type="checkbox"/> Bus Pad <input type="checkbox"/> Installation Sidewalk <input type="checkbox"/> Removal of sidewalk Barrier				
<input type="checkbox"/> For Bikeways and Pedestrian Improvements, Street Repair and Maintenance or Street Improvement projects (project codes 430, 440 or 450), please check to indicate a Pavement Management System (PMS) Self Certification Form (See Appendix III) has been submitted to Metro.				
<input type="checkbox"/> For Intelligent Transportation Systems (ITS) projects, or projects which include an ITS element, please check box to indicate a Self Certification Form (See Appendix VI) has been completed and submitted to Metro.				
<input type="text"/>		<input type="text"/>		
Authorized Signature		Title		
<input type="text"/>		<input type="text"/>		
Date		<input type="text"/>		

Click [here](#) to access form.

Form A - Project Description Form

(This form may be submitted any time during the fiscal year)

--Instructions--

Summary:

Form A should be submitted whenever a Jurisdiction is requesting the approval of a new project or if there is a budget or scope change of more than 25 percent in an ongoing transit or paratransit project (as defined in the Prop A and Prop C Guidelines).

Key Terms:

- **Local Jurisdiction:** Indicate your City or Agency.
- **Fiscal Year:** Indicate the fiscal year (July 1 - June 30th) for which Prop A or Prop C LR funds will be used.
- **Project Description and Justification:** Provide a brief project description (include any necessary details) to help Metro staff determine project scope and eligibility.
- **Project Revenues:** Under the appropriate fund sources, indicate the revenues expected to fund the project.
- **Accessibility Features:** Check box applicable for Bus Stop Improvement Projects only.
- **Street Maintenance, Improvement or bikeway projects:** Check the box to indicate that a Pavement Management System (PMS) is in place and being used (see Appendix III).
- **Intelligent Transportation Systems projects:** Please check the box if this project is or has an ITS project element to indicate that an ITS self-certification (see Appendix VI) for has been submitted to Metro.
- **Authorized Signature:** Form A may be printed, signed and dated by authorized Local Jurisdiction, and sent to Metro by mail or fax, or e-mailed as described in Step 5.

Excel Operations:

Step 1 – Confirm computer is set to run macros

Open Microsoft Excel application

From the menu, select:

- Tools
- Macros
- Security
- Set it at Medium
- Press OK

Close Excel application

Step 2 Open Form A

Visit Metro's Web Site at www.metro.net

- Go to Projects/Programs
- Click on Local Return
- Click on Form A to open

Click yes to open the document containing Macros

Step 3 – Enter Form A Information

Once Form A is opened,

- Select correct agency (click on small arrow to scroll agency names)
- Enter contact name, telephone number, and e-mail address
- Enter project information on Form A

Step 4 – Save document under MY DOCUMENTS

Once information is entered on Form A, save document in My Documents

- Save Document as Form A City of ..

Step 5 – Forward Form A to Metro

Open Outlook (or other e-mail browser)

On e-mail include:

- Contact information including name, title, telephone number, and jurisdiction
- Brief description of the e-mail (transmittal)
- Attach Form A to the e-mail message


Important Changes

- All forms require that the entire value of project be entered, no longer will values be stated in \$ thousands.
- DO NOT alter forms. If for any reason there is a difference in Project Code, Sequence Number, or Project Title, contact Metro to resolve any discrepancies.
- Enter value for every project. If project is finalized, enter COMPLETE. DO NOT enter a dollar value.

Form B – Annual Project Update Form

(This form must be submitted by August 1st of each year)

--Instructions--

 Metro		LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY Proposition A and Proposition C Local Return Program						
		Form B ANNUAL PROJECT UPDATE FORM (Must be submitted by August 1st of each year)						
<input type="button" value="Print Preview"/>		Local Jurisdiction			Fiscal Year			
		Contact Person			Telephone No.	E-Mail Address		
Project Code	Sequence Number	Project Title	Project Status ¹	Funding sources				Total Project Budget
				Proposition A Local Return	Proposition C Local Return	Est. Project Revenue	Funding Sources	
								-
								-
								-
								-
								-
								-
								-
								-
								-
								-
								-
*Project Status: OG=On going operating projects; CO=Carryover capital projects.			Total	-	-	-	-	-

Click [here](#) to access form.

Form B – Annual Project Update Form

(This form must be submitted by August 1st of each year)

--Instructions--

Summary:

Form B requires Jurisdictions to give an update of already approved, ongoing and carryover Prop A and Prop C LR projects. Since new projects require additional information, please include all new projects on Form A only. (Note: Jurisdictions are required to call out all administration charges to Direct Administration in order to verify compliance of 20 percent maximum limit).

Key Terms:

- **Local Jurisdiction:** Indicate your City or Agency.
- **Fiscal Year:** Indicate the fiscal year (July 1 - June 30th) for which Prop A or Prop C LR funds will be used.
- **Project Code:** Enter Project Codes (see column on right). This code is critical in Form submittal as it is used in the LR database system.
- **Sequence Number:** Sequence Numbers distinguish between the different projects being implemented. Indicate the sequence number of the project which is the order of submittal for the project (i.e., oldest approved to most recent approval).
- **Project Title:** Provide Project Title as indicated on the Form A or previous Form B submittal.
- **Project Status:** Check box applicable – Completed, On-going or Carryover.
- **Project Revenues:** Under the appropriate fund sources, indicate the itemized revenues expected to fund the project.
- **Authorized Signature:** Form B may be printed, signed and dated by authorized Local Jurisdiction, and sent to Metro by mail or fax, or e-mailed as described in Step 5.

Excel Operations:

Step 1 – Confirm computer is set to run macros

Open Microsoft Excel application

From the menu, select:

- Tools
- Macros
- Security
- Set it at Medium
- Press OK

Close Excel application

Step 2 Open Form B

Visit Metro's Web Site at www.metro.net

- Go to Projects/Programs
- Click on Local Return
- Click on Form B to open

Click yes to open the document containing Macros

Step 3 – Enter Form B Information

Once Form B is opened,

- Select correct agency (click on small arrow to scroll agency names)
- Enter contact name, telephone number, and e-mail address
- Enter appropriate values for each project

Step 4 – Save document under MY DOCUMENTS

Once the values of each project have been entered, save document into My Documents

- Save Document as Form B City of ..

Step 5 – Forward Form B to Metro

Open Outlook (or other e-mail browser)

On e-mail include:

- Contact information including name, title, telephone number, and Jurisdiction
- Brief description of the e-mail (transmittal)
- Attach Form B to the e-mail message

Important Changes

- All forms require that the entire value of project be entered, no longer will values be stated in \$ thousands.
- DO NOT alter forms. If for any reason there is a difference in Project Code, Sequence Number, or Project Title, contact Metro to resolve any discrepancies.
- DO NOT add or remove project on Form B, please contact Metro regarding any changes.
- Enter value for every project. If project is finalized, enter COMPLETE. DO NOT enter a dollar value.

Form C – Annual Expenditure Report Form

(This form must be submitted by October 15th of each year)

--Instructions--

Summary:

Form C requires Jurisdictions to report the annual expenditures for both Prop A and Prop C LR for the previous fiscal year. (Note: Jurisdictions are also required to submit an accounting of recreational transit trips, destinations and costs, if applicable).

Key Terms:

- **Local Jurisdiction:** Indicate your City or Agency.
- **Fiscal Year:** Indicate the fiscal year (July 1 - June 30th) for which Prop A or Prop C LR funds will be used.
- **Project Title:** Provide Project Title as indicated on the Form A or previous Form B submittal.
- **Project Status:** Check box applicable – Completed, On-going or Carryover.
- **Project Revenues:** Under the appropriate fund sources, indicate the itemized revenues expected to fund the project.
- **Authorized Signature:** Form C may be printed, signed and dated by authorized Local Jurisdiction, and sent to Metro by mail or fax, or e-mailed as described in Step 5.

Excel Operations:

Step 1 – Confirm computer is set to run macros

Open Microsoft Excel application

From the menu, select:

- Tools
- Macros
- Security
- Set it at Medium
- Press OK

Close Excel application

Step 2 Open Form C

Visit Metro's Web Site at www.metro.net

- Go to Projects/Programs
- Click on Local Return
- Click on Form C to open

Click yes to open the document containing Macros

Step 3 – Enter Form C Information

Once Form C is opened,

- Select correct agency (click on small arrow to scroll agency names)
- Enter contact name, telephone number, and e-mail address
- Enter appropriate values for each project

Step 4 – Save document under MY DOCUMENTS

Once the values of each project have been entered, save document into My Documents

- Save Document as Form C City of ..

Step 5 – Forward Form C to Metro

Open Outlook (or other e-mail server)

On e-mail include:

- Contact information such as name, title, telephone number, and Jurisdiction
- Brief description of the e-mail (transmittal)
- Attach Form C on the e-mail message

Important Change Important Changes

- All forms require that the entire value of project be entered, no longer will values be stated in \$ thousands.
- Enter value for every project. If project is finalized, enter COMPLETE. DO NOT enter a dollar value

**GLOSSARY OF TERMS
USED IN LOCAL RETURN GUIDELINES**

Americans with Disabilities Act (ADA), 1990

A civil rights law passed by Congress in 1990 that makes it illegal to discriminate against people with disabilities in employment, services provided by state and local governments, public and private transportation, public accommodations and telecommunications.

Advanced Traveler Information Systems (ATIS)

ATIS technologies provide travelers and transportation professionals with the information they need to make decisions, from daily individual travel decisions to larger scale decisions that affect the entire system, such as those concerning incident management.

Air Quality Management District (AQMD)

Administrative districts organized in California to control air pollution. Generally, AQMDs and their national parallel encompass multiple jurisdictions and closely follow the definition of Consolidated Metropolitan Statistical Areas and Metropolitan Statistical Areas.

Adaptive Traffic Control Systems (ATCS)

ATCS uses sensors to interpret characteristics of traffic approaching a traffic signal, and using mathematical and predictive algorithms, adapts the signal timing accordingly, optimizing its performance.

Advanced Traffic Management Systems (ATMS)

ATMS technologies apply surveillance and control strategies to improve traffic flow on highways and arterials.

Automatic Vehicle Location (AVL)

The installation of devices on a fleet of vehicles (e.g., buses, trucks, or taxis) to enable the fleet manager to determine the level of congestion in the road network. AVL is also used to enable the fleet to function more efficiently by pinpointing the location of vehicles in real time.

Bicyclists Rights

According to CVC21200 Bicyclists have all the rights and responsibilities of vehicle drivers.

Bikeway Definitions

Class I Bikeway - Off road paved bike path

Exclusive bi-directional path designated for bicycles or as multi-use path shared with pedestrians (if pedestrian path is not adjacent).

Class II Bikeway - On-road striped bike lane

Class III Bikeway - On-road bike route (signage only)

Streets designated as preferred routes through high demand corridors, used to provide continuity to other bicycle facilities (usually II bikeways), or provide routes to transit or other destinations where the streets are too narrow for bike lanes. Usually bike routes have some added preferential bike treatments that offers advantages over alternative routes.

Bus turn-out

A branch from or widening of a road that permits buses to stop, without obstructing traffic, while laying over or while passengers board and alight. It is designed to allow easy reentry of the bus into the traffic stream.

California Streets and Highways Code

This is the legal code regulating the roads and highways of the State of California. The code sets forth the administration and funding of the highway system, the relationship of the state government to the county and local governments in regards to streets and roads, administration of tolls collected by the state, and various acts dealing with streets and highways passed by the state legislature.

Capital Reserve

With Metro Board approval and signed Capital Reserve Agreement, funds may be set aside for Capital projects to provide reserve funds for a period of time over the three year timely use provision.

Carry-over Project

A project that was not completed and which takes two or more year to finish. The construction of a transit center or a citywide bus shelter installation project may be multi-year projects.

Congestion Management Program (CMP)

A state mandated program linked to Proposition 111 (1990) that requires each county to prepare a plan to address traffic congestion on regional streets and freeways. Elements of the CMP include designation of a regional highway system with level of service (LOS) standards, a local trip reduction ordinance, capital improvement program, land use impact analysis, and transit performance standards. If LOS standards are not maintained, deficiency plans must be prepared and implemented.

Changeable Message Signs (CMS)

Electronic road and transit station signs used to display information that can be updated, such as warnings of road incidents, hazardous weather conditions, or estimated arrival times of transit vehicles. Used in ATIS and ATMS. Also called Variable Message Signs (VMS).

Councils of Governments (COG)

Regional planning bodies that exist throughout the United States. A typical council is defined to serve an area of several counties, and they address issues such as regional planning, water use, pollution control, and transportation. The Council membership is drawn from the county, city, and other government bodies within its area.

Commuter Rail

Railroad local and regional passenger train operations between a central city, its suburbs and/or another central city. It may be either locomotive-hauled or self-propelled, and is characterized by multi-trip tickets, specific station-to-station fares, railroad employment practices and usually only one or two stations in the central business district. Also known as "suburban rail."

Curb Cut

A small ramp between the sidewalk and curb that facilitates passage by wheelchairs, strollers, etc. between the sidewalk and street intersection.

Commercial Vehicle Operations (CVO)

ITS program to apply advanced technologies to commercial vehicle operations, including commercial vehicle electronic clearance; automated roadside safety inspection; electronic purchase of credentials;

automated mileage and fuel reporting and auditing; safety status monitoring; communication between drivers, dispatchers, and intermodal transportation providers; and immediate notification of incidents and descriptions of hazardous materials involved.

Demand Responsive

Non-fixed-route service utilizing vans or buses with passengers boarding and alighting at pre-arranged times at any location within the system's service area. Also called "Dial-a-Ride."

Dial-a-Ride

A shared-ride public transportation service for senior citizens age 65 and older, people with disabilities and people who meet American Disabilities Act (ADA) eligibility.

Direct Administration

Those fully burdened salaries and overhead, office supplies and equipment directly associated with administering LR operating and capital projects.

Electronic Payment Systems

Systems that collect payments using an electronic transponder. Payment types include fees for transit fares, taxis, parking, and tolls. Electronic payment systems can also gather real-time transit information on travel demand for better planning and scheduling of services.

Farebox revenue

Money, including fares and transfers, zone and park and ride receipts, paid by transit passengers; also known as "passenger revenue."

Financial and Compliance Audit

The review and examination of the jurisdictions' books and records to verify compliance with existing statutes governing the Local Return Funds. Such review and examination include verification of adherence to the generally accepted accounting principles, review of internal control system and evaluation of compliance with the Local Return Guidelines. The Financial and Compliance Audit shall be conducted by an independent auditor and in accordance with the Government Auditing Standards issued by the Comptroller General of the United States.

Fiscal year

A twelve-month period to which the annual budget applies and at the end of which a governmental unit determines its financial position and the results of its operations. This twelve-month period varies from the calendar year. In the California, State Government system, the fiscal year starts July 1 and ends the following June 30. In the Federal system, the fiscal year starts October 1 and ends the following September 30.

Fixed Route

Service provided on a repetitive, fixed-schedule basis along a specific route with vehicles stopping to pick up and deliver passengers to specific locations; each fixed-route trip serves the same origins and destinations, unlike demand responsive and taxicabs.

Flexible Destination

A type of demand-responsive service which takes on passengers according to a fixed route, and drops passengers off at alternative destinations within a defined service area.

Formula Funds

Funds distributed or apportioned to qualifying recipients using formulas which are based on statistics (such as operating performance or route characteristics) and established by law or by funding agency-adopted policies.

Fund Exchange

Funds traded to another Local Jurisdiction or Agency for an agreed amount. Funds returned may be from General, State, Federal funds or other agreed upon method of exchange between the agencies. Eligible under Proposition A only.

Giving

Local Jurisdictions can give Prop C funds to another Jurisdiction for a transit related project as long as Metro approves, and no exchange or gift of any kind is received in return.

Headsign

A destination sign above the front (and sometimes side) window of a bus or train.

Information Exchange Network (IEN)

The Los Angeles County IEN can exchange real-time TCS data from intersections in each of the county's several traffic forums and enables all forums, the county, and partner cities to access the information.

Intelligent Transportation Systems (ITS)

This program is an initiative of the United States Department of Transportation to add information technology to surface transportation infrastructure and vehicles. It aims to manage vehicles, roads, and routes to improve efficiency, safety and reduce vehicle wear, transportation times and fuel costs. ITS Architecture relates to the overarching framework that allows individual ITS services and technologies to work together, share information, and yield synergistic benefits.

Loaning

Local Jurisdictions may arrange a mutually acceptable temporary transfer or loan from one Jurisdiction to another. Refer to Metro's Administrative Process for additional information.

Local Jurisdiction

City or Agency that is the applicant for the project to be funded with Proposition A or Proposition C Local Return (LR).

Maintenance

Maintenance refers to minor work to prevent further deterioration, such as, slurry seal, or pothole repair

Maintenance of Effort

This requirement provides for the continuation of funding commitments by local jurisdictions on roadways used by public transit while supplementing these improvements with Proposition C Local Return funds. Local Return funds cannot be used to replace any pre-existing roadway funding but only to augment what is currently being utilized by local jurisdictions. In the past, local jurisdictions have had to report to the State Controller those funds spent on streets and roads in order to be in compliance with the California Streets and Highways Code.

Metro

The Metropolitan Transportation Authority. Metro staff manages the administration of the program. Metro refers to the administrative staff.

Metro Art

The Metro department responsible for incorporating art enhancements into Metro projects, including rail stations, bus stops, construction sites, streetscapes and other public oriented improvements..

Metro Board

The Metropolitan Transportation Authority has an established member list of Board of Directors and Executives as appointed by the Board. The Metro Board makes decisions on funding allocations, Guidelines, Capital Reserves and possible appeals.

Metro Rail

Rail service operated by the Los Angeles County Metropolitan Transportation Authority (Metro)

Metro Long Range Transportation Plans

In April 2001, the Metro Board adopted the Long Range Transportation Plan. This plan is a 25-year blueprint for transportation planning in Los Angeles County through the year 2025. The Long Range Transportation Plan assesses future population increases projected for the county and what such increases will mean for future mobility needs. The plan recommends what can be done within anticipated revenues, as well as what could be done if additional revenues become available.

Metro Short Range Transportation Plans

The 2003 Short Range Transportation Plan focuses on the phasing of transportation improvements through 2009 that will help put together the pieces of our mobility puzzle. The Plan relies on performance-based modeling to identify the best solution for each mobility challenge. In total, \$19.3 billion is needed to fund this Plan's transportation priorities through 2009. These include the costs of operating the current system and funding new transportation solutions.

National ITS Architecture

A systems framework to guide the planning and deployment of ITS infrastructure. The national ITS architecture is a blueprint for the coordinated development of ITS technologies in the U.S. The architecture defines the functions that must be performed, the subsystems that provide these functions, and the information that must be exchanged to support the defined **User Services**. The National ITS Architecture was released as a final document in June 1996.

National Transit Database (NTD)

A reporting system administered by the Federal Transit Administration (FTA) that uses uniform categories to record mass transportation financial and operating information through a uniform system of accounts on an annual basis.

Paratransit

Auxiliary public transportation available to elderly or disabled passengers or patrons in areas, which are underserved by conventional transit. Paratransit is generally operated using smaller vehicles, with flexible schedules and routes.

Park-and-Ride

An access mode to transit in which patrons drive private vehicles or ride bicycles to a transit station, bus or rail stop or carpool or vanpool waiting area and park their vehicles in the area provided for the

purpose. They then ride the transit system or take the carpool/vanpool to their destinations. (TRB) 2 involve the use of a motorized personal vehicle in conjunction with transit. Park-and-ride facilities include a parking lot or portion of a lot near transit stops, allowing transit users to park their personal vehicles for a short period of time and make convenient transfers to the transit system.

Pavement Condition Index (PCI)

A value for a pavement segment representing its condition. The Pavement Condition Index (PCI) is a numerical rating of the pavement condition that ranges from 0 to 100, with 0 being the worst possible condition and 100 being the best possible condition.

Pavement Management System (PMS)

A systematic process that provides, analyzes, and summarizes pavement information for use in selecting and implementing cost-effective pavement construction, rehabilitation, and maintenance programs and projects. A PMS involves the identification of optimum strategies at various Pavement Condition Index (PCI) levels and maintains pavements at an adequate PCI Threshold (level of serviceability). These include, but are not limited to, systematic procedures for scheduling maintenance and rehabilitation activities based on optimization of benefits and minimization of costs.

Project Code

Project Codes distinguish the type of projects being implemented.

Reconstruction

Activities that extend the serviceable life by at least 10 years, and involve reworking or removal and replacement of all or part of the engineered layers in the pavement structure. Removal and replacement of all asphalt and concrete layers and often the base and sub-base layers, in combination with remediation of the sub-grade and drainage, and possible geometric changes. Due to its high cost, reconstruction is rarely done solely on the basis of pavement condition. Other circumstances such as obsolete geometrics, capacity improvement needs, and/or alignment changes, are often involved in the decision to reconstruct a pavement.

Recreational Transit

City-sponsored trips to recreational or cultural destinations within defined geographic area. Charter buses are frequently used and trips must be advertised to the general public. Service is generally contracted out to a private sector operator.

Rehabilitation

Activities that extend the serviceable life by at least 10 years, and add structural capacity to the pavement.

Reimbursement

LR funds may be advanced for other grant funds as long as the project itself is eligible under LR Guidelines. The grant funds must be reimbursed to the LR fund.

Resurfacing

Activities that extend the serviceable life by at least 10 years and change the surface characteristics of the pavement. Resurfacing generally consists of placing additional asphalt concrete over a structurally sound highway or bridge that needs treatment to extend its useful life.

Revenue Vehicle Miles

The miles a vehicle travels while in revenue service. Vehicle revenue miles exclude travel to and from storage facilities, training operators prior to revenue service, road tests and deadhead travel, as well as school bus and charter services.

Ride matching programs

Programs that provide nearest major intersection-matching services to commuters who wish to establish a car- or van-pool.

Right of Way

Land; a public or private area that allows for passage of people or goods, including, but not limited to, freeways, streets, bicycle paths, alleys, trails and walkways. A public right-of-way is dedicated or deeded to the public entity for use under the control of a public agency.

Regional Integration of Intelligent Transportation Systems (RIITS)

This system supports information exchange between freeway, traffic, transit and emergency service agencies to improve management of the Los Angeles County transportation system.

Ramp Metering Station (RMS)

Traffic-responsive regulation of vehicle entry to a freeway, typically via sensor controlled freeway ramp stoplights.

Sequence Code

Sequence Codes distinguish between the different projects being implemented.

Shuttle

A public or private vehicle that travels back and forth over a particular route, especially a short route or one that provides connections between transportation systems, employment centers, etc.

State Controller

The Controller is the state's chief financial officer and is elected by a vote of the people every four years. The duties of the State Controller are prescribed by the Constitution with additional powers and functions set by statute. The primary function of the State Controller is to provide sound fiscal control over both receipt and disbursement of public funds, to report periodically on the financial operations of both state and local governments and to make certain that money due the state is collected in a fair, equitable and effective manner. The office also enforces collection of delinquent gas, truck and insurance taxes.

Traffic Control Systems (TCS)

Advanced systems that adjust the amount of "green time" for each street and coordinate operation between each signal to maximize traffic flow and minimize delay. Adjustments are based on real-time changes in demand.

Traffic/Transportation/Transit Management Center (TMC)

Traffic/Transportation/Transit Management Center (interchangeable)

Transfer Center

A fixed location where passengers interchange from one route or transit vehicle to another.

Transit revenues

Revenues generated from public transportation (bus, rail or other conveyance for public).

Transportation Demand Management (TDM)

A program designed to maximize the people-moving capability of the transportation system by increasing the number of people in each vehicle or by influencing the time of, or need to, travel. To accomplish these sorts of changes, TDM programs must rely on incentives or disincentives to make the shifts in behavior attractive. The term TDM encompasses both the alternatives to driving alone and the techniques or supporting strategies that encourage the use of these modes.

Transportation Improvement Program (TIP)

A prioritized program of transportation projects to be implemented in appropriate stages over several years (3 to 5 years). The projects are recommended from those in the transportation systems management element and the long-range element of the planning process. This program is required as a condition for a locality to receive federal transit and highway grants.

Transportation Management Associations (TMAs)

An urbanized area with a population more than 200,000 (as determined by the most recent decennial census) or other area when TMA-designation is requested by the Governor and the MPO (or affected local officials), and officially designated by the Federal Highway Administration and the Federal Transit Administration. TMA designation applies to the entire metropolitan planning area(s). (23CFR500).

Transportation Enhancements (TE)

A funding program of the USDOT Federal Highway Administration that offers communities the opportunity to expand transportation choices. Activities such as safe bicycle and pedestrian facilities, scenic routes, beautification, and other investments increase opportunities for recreation, accessibility, and safety for everyone beyond traditional highway programs.

Transportation Systems Management (TSM)

Transportation Systems Management is the cooperative development and implementation of strategies to maximize the safe movement of people and goods by managing an integrated multimodal transportation system. The effective management of the system will enable the traveling public more efficient use of the existing transportation facilities. Elements of TSM include incident management programs, traveler information systems, traffic signal systems upgrades, intermodal freight planning, surveillance control systems, demand management techniques, and commercial vehicle operations.

Traffic Signal Priority (TSP)

It gives preferential treatment to one type of system user over other users and allows signal controllers to service competing needs in the order of relative importance.

User Services

Services available to travelers on an ITS-equipped transportation system, as set forth by ITS America. The 30 services are arranged in 7 categories, as follows: travel and transportation management, travel demand management, public transportation operations, electronic payment, commercial vehicle operations, emergency management, and advanced vehicle control and safety systems.

User-side Subsidies

This refers to funds set aside to offer discounts to public transit users. Such subsidies are approved by local jurisdictions councils or boards and are optional. A city, for example, pays full price for a monthly

bus or rail pass but will sell it to a transit user (city resident) for a lower (subsidized) rate. Each city defines who is eligible for subsidies based on demand and budgetary constraints.

Vehicle Miles Traveled (VMT)

The number of miles traveled within a specific geographic location by vehicles for a period of one year. VMT is calculated either by using two odometer readings or, in the absence of one of the odometer readings, by regression estimate.

REFERENCES

American Public Transportation Association

Website: <http://www.apta.com/research/info/online/glossary.cfm>

California Highway Design Manual Chapter 1000

California Streets and Highways Code

Website: <http://ntl.bts.gov/>

Caltrans-California Department of Transportation

Website: <http://www.dot.ca.gov/>

City and County of Honolulu and the Hawaii Department of Transportation

Website: <http://www.oahutrans2k.com/info/glossary>

Department of Energy

Website: <http://www.energy.gov/>

Federal Transportation Authority glossary

Website: http://www.fta.dot.gov/31_ENG_Printable.htm

Federal Highway Administration (ITS glossary)

Website: http://www.fhwa.dot.gov/planning/glossary/glossary_listing.cfm

Kitsap Transit, Bremerton, Washington.

Website: www.kitsaptransit.org/home/ktjargon.html

State of North Carolina Department of Transportation

Website: <http://www.ncdot.org/transit/transitnet/Glossary/>

US Department of Transportation glossary

Website: <http://www.dot.ca.gov/hq/MassTrans/trterms.htm>

Other website sources

<http://en.wikipedia.org/wiki/infrastructure>

<http://sco.ca.gov>

<http://www.belmont.gov/SubContent.asp?CatId=240000622>

<http://www.dieselnet.com/gl-a.html>

http://www.pvpc.org/html/tier3/transp/trans_study.html

<http://www.tempe.gov/tim/DialARide.htm>

ACKNOWLEDGEMENTS

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Ben Jong, Transportation Development & Implementation, Metro
Randy Lamm, Transportation Development & Implementation, Metro
Robert Machuca, Local Programming, Metro
Al Patashnick, Transportation Development & Implementation, Metro
Susan Richan, Local Programming, Metro
James Rojas, Transportation Development & Implementation, Metro
Armineh Saint, Local Programming, Metro
Carlos Vendiola, Local Programming, Metro
Thomas Soteros-McNamara (cover)