2026

# Community Transit Plan

OAKLAND COUNTY

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# List of Abbreviations

| | |
|---|---|
| ACS | American Community Survey (United States Census Bureau) |
| ADA | Americans with Disabilities Act |
| API | Application Programming Interface |
| CAD/AVL | Computer Automated Dispatch/Automatic Vehicle Location |
| CHSTP | Coordinated Human Services Transportation Plan |
| CTP | Community Transit Plan |
| CSA | Community Service Area |
| CFR | Code of Federal Regulations |
| CMAQ | Congestion Mitigation and Air Quality Program |
| CRM | Customer Relationship Management |
| CRP | Carbon Reduction Program |
| DART (IA) | Des Moines Area Regional Transit Authority |
| DART (MI) | Dial-A-Ride Transit (Niles, Michigan) |
| DDA | Downtown Development Authority |
| EV | Electric Vehicle |
| FHWA | Federal Highway Administration |
| FTA | Federal Transit Administration |
| FY | Fiscal Year |
| GIS | Geographic Information System |
| GPS | Global Positioning System |
| GTFS | General Transit Feed Specification |
| HR | Human Resources |
| LBO | Local Bus Operating Assistance |
| LETS | Livingston Essential Transportation Service |
| LSP | Local Service Provider |
| MaaS | Mobility as a Service |
| MDOT | Michigan Department of Transportation |
| MDOT OPT | Michigan Department of Transportation Office of Passenger Transportation |
| MI | Michigan |
| MM2045 | Michigan Mobility 2045 Plan |
| MTA | Mass Transportation Authority |
| MTF | Michigan Transportation Fund |
| MVTA | Minnesota Valley Transit Authority |
| NOTA | North Oakland Transportation Authority |
| O&M | Operations and Maintenance |
| OCT | Oakland County Transit |
| OCHN | Oakland Community Health Network |
| OLHSA | Oakland Livingston Human Services Agency |
| OPC | OPC Transportation |
| PA 51 | Public Act 51 of 1951 |
| PEX | People's Express |
| PSDS | Paratransit Scheduling and Dispatch Software |
| PTSA | Public Transportation Service Agreement |
| Q# | Quarter #, e.g. Q1 is Quarter 1 |
| RPH | Riders per hour |

| | |
|---|---|
| RTA | Regional Transportation Authority |
| SEMCOG | Southeast Michigan Council of Governments |
| SIP | Service Initiatives Program |
| SMART | Suburban Mobility Authority for Regional Transportation |
| SOP | Standard Operating Procedure |
| TPI | Transit Propensity Index |
| TSM | Transit Service Manager |
| USD | United States Dollars |
| USDOT | United States Department of Transportation |
| UZA | Urbanized Area (United States Census Bureau) |
| VRH | Vehicle Revenue Hours |
| VRM | Vehicle Revenue Miles |
| WOTA | Western Oakland Transportation Authority |

# 1. Introduction

The passage of the 2022 Oakland County Public Transportation Millage was a key moment for Southeast Michigan; a majority of voters in Oakland County decided to invest in improving transit service throughout the County. Since its passage, the millage funding has enabled Oakland County's transit service providers to expand their service and hours in addition to work toward improving access to transit service for all. The Oakland County Community Transit Plan (CTP) seeks to build on this momentum by developing a framework that will guide future growth and improvements to community transit services to improve quality of life for Oakland County's residents.

The CTP is intended solely as a planning and guidance document. It does not create any legal rights, obligations, or guarantees of service. Its recommendations are advisory in nature and are designed to assist Oakland County in the administration of the Oakland County Public Transportation Millage and in informing future transit investment decisions. Implementation of any recommendations is subject to available funding, applicable laws, and approval by the appropriate governing bodies. This document should not be construed as a binding commitment by Oakland County or any affiliated agency.

## 1.1 Oakland County Transit

Following the passage of the 2022 Oakland County Public Transportation Millage, the Oakland County Transit (OCT) division was established under the Oakland County Economic Development Department. OCT works to deliver convenient and reliable public transportation to residents of and visitors to the County through integrated and efficient transit management. OCT's focus is building a linked County transit network that includes options for people of all ages and abilities.

Working to ensure widespread public transportation access across Oakland County, OCT collaborates with transit operators providing service in the County and coordinates with local communities to identify transportation barriers. Through insights gleaned from this engagement, OCT strives to improve community infrastructure through transit-based programs and makes recommendations to the County Board of Commissioners for transit millage fund appropriations to County transit service providers. Overarchingly, OCT is taking steps to expand and diversify Oakland County's public transportation system through better engagement and increased transparency with transit service providers, communities, and the general public.[1]

The intent is that OCT will serve as a financial and facilitative partner to LSPs in implementing the CTP. OCT's role will be to oversee funding, foster communication, ensure accountability, promote LSP collaboration, guide transit policy development, and coordinate resources to advance transit service growth in the CSA. OCT will not act as a provider or evolve into a full-fledged transit authority, instead focusing on supporting and advocating for LSPs to help them maintain alignment with Oakland County and regionwide goals. At points

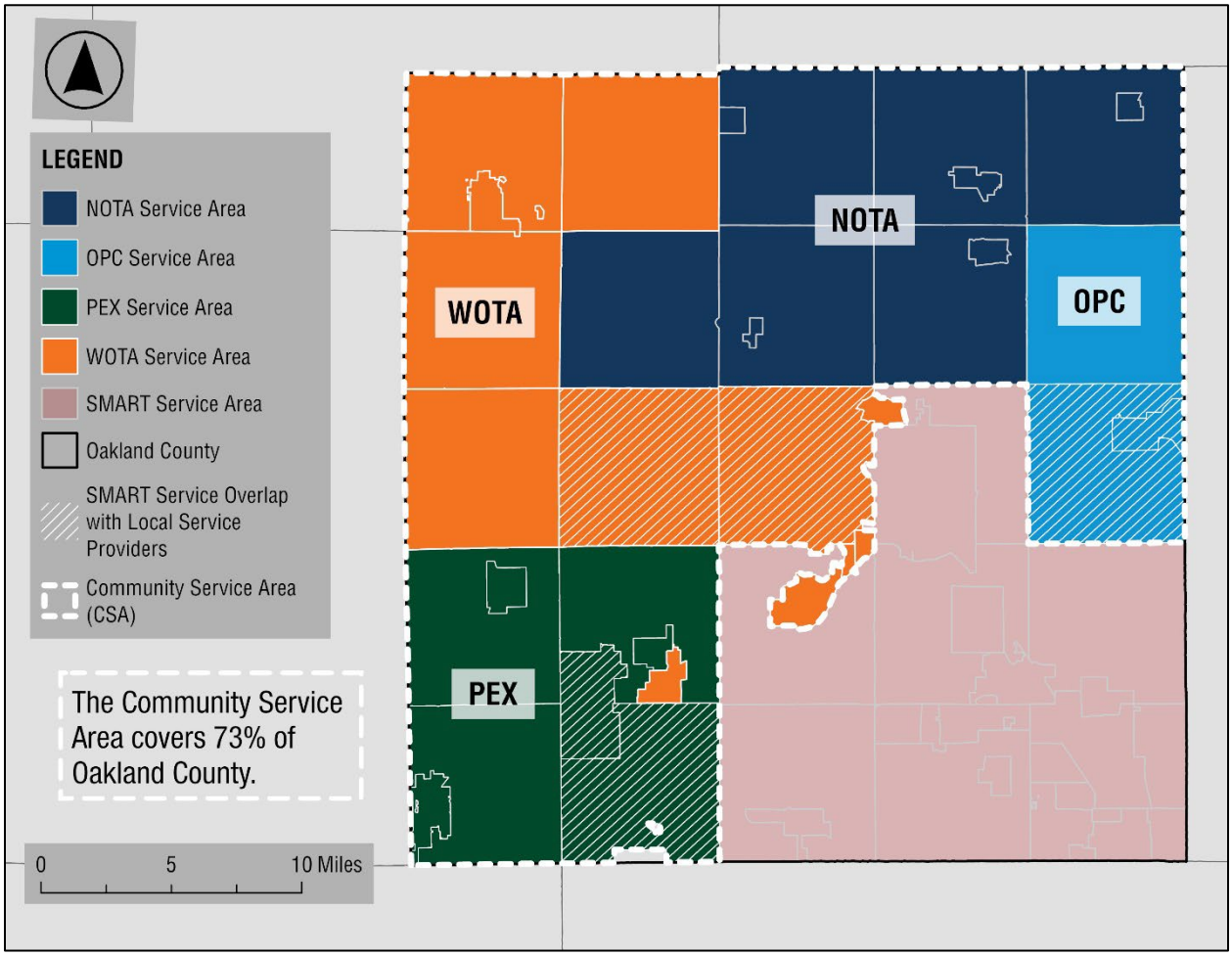
[1] (Oakland County Transit, 2023)

during CTP implementation where external expertise may be necessary, OCT will also coordinate procuring that expertise for LSPs.

## 1.2 Oakland County Community Transit Plan

Building on the momentum of the 2022 Oakland County Public Transportation Millage, OCT is looking ahead to 2026 and beyond by developing the Oakland County CTP. The plan is intended to be a roadmap for enhancing public transportation services across Oakland County's Community Service Area (CSA), shown in Figure 1, which includes cities, villages, and townships served by the County's local service providers: the North Oakland Transportation Authority (NOTA), OPC Transportation (OPC), People's Express (PEX), and Western Oakland Transportation Authority (WOTA).[2]

FIGURE 1: PLAN AREA AND OAKLAND COUNTY TRANSIT SERVICE PROVIDERS



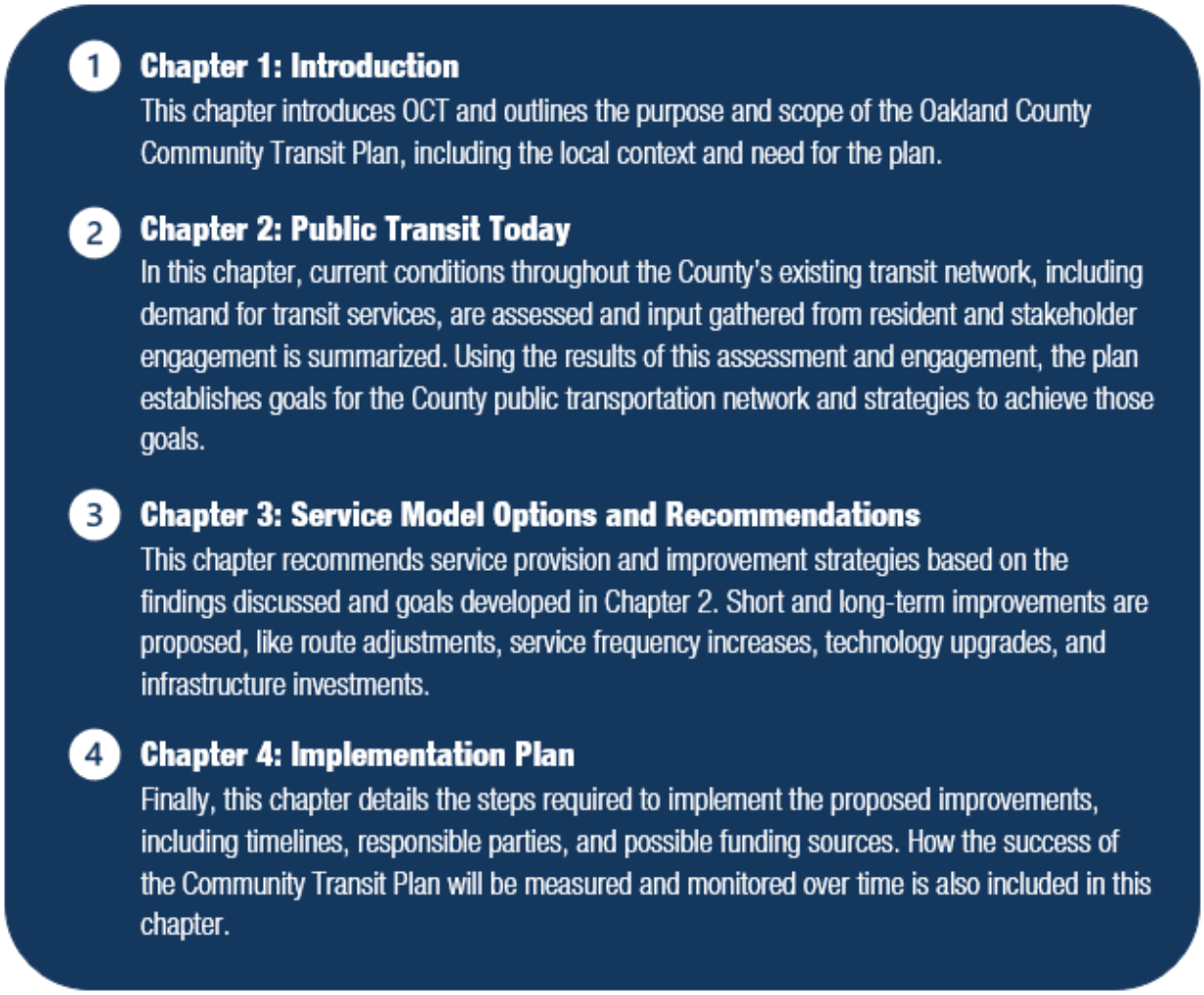

Since 2022, transit services across the County have rapidly expanded to meet increased demand for transit. Ridership has increased over 100% in some areas, especially those served by Oakland County's local service providers. In addition, the Suburban Mobility Authority for Regional Transportation (SMART) has expanded its

[2] (Oakland County Transit, 2023)

services into the CSA, and coordination between all the transit providers has begun to provide transfer trips and countywide services that are no longer constrained by former boundaries between communities. The Community Transit Plan documents existing conditions, reviews current industry practices, and summarizes input gathered from engagement with the public and key stakeholders to develop strategies and recommendations that form a planning framework that will guide future growth and service improvements in the CSA. [3]

The CTP consists of four key chapters, summarized in Figure 2, each focuses on a different aspect of transit development and service enhancement.

FIGURE 2: OAKLAND COUNTY COMMUNITY TRANSIT PLAN OVERVIEW




[3] (Oakland County Transit, 2024)

## 1.3 Service Goals

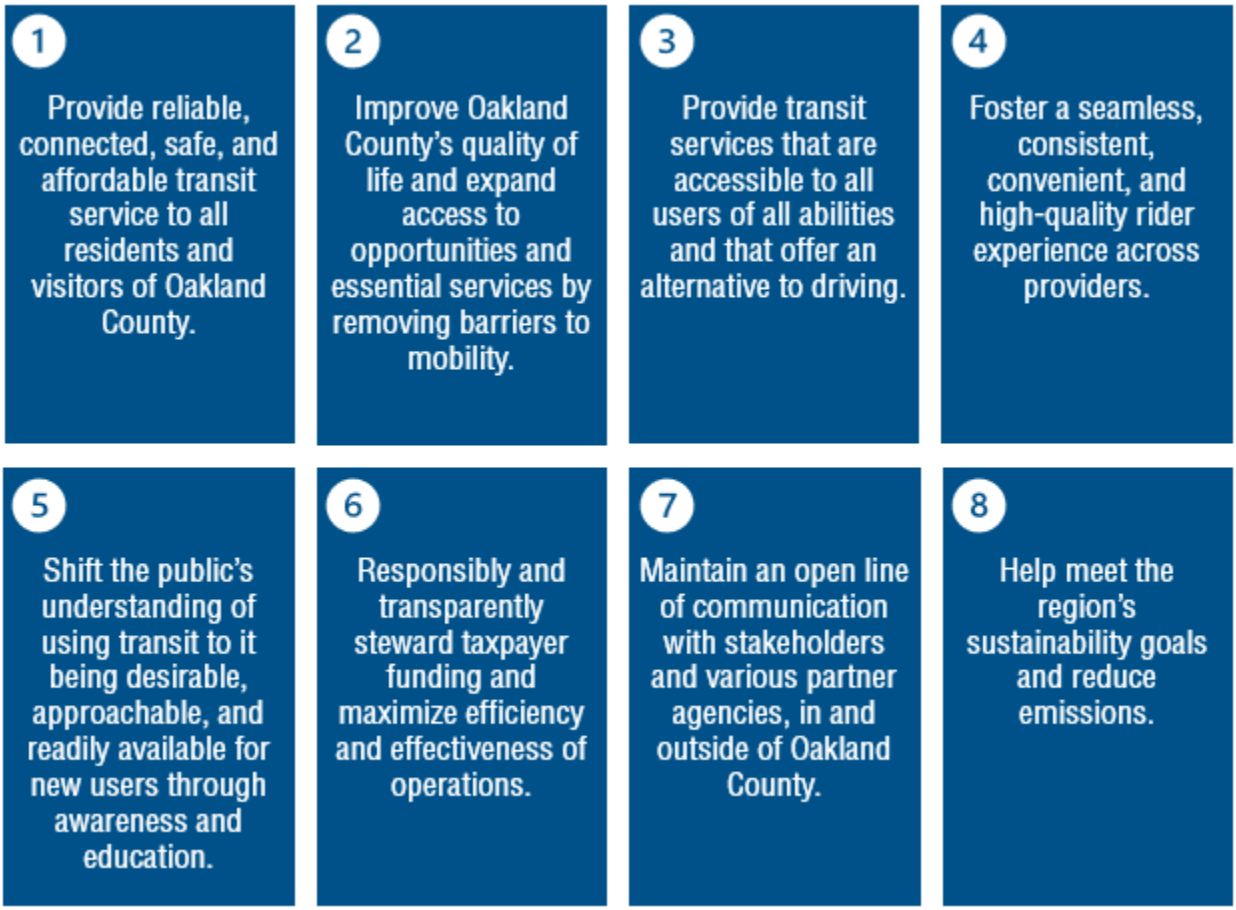
As a part of the CTP, service goals have been developed to guide the recommendations and implementation strategies. These service goals take into consideration existing service, the market analysis and public and stakeholder input.

### 1.3.1 Goal Development Process

Goals for the CTP were developed through a comprehensive evaluation of service needs using various methods. Initial service goals were shaped by input from interviews with Oakland County's local service providers (LSPs) where providers shared their objectives, as well as feedback from public engagement events and survey responses. These goals underwent several iterations, refined collaboratively in conversations with the Project Steering Committee (Steering Committee), which included all LSPs, and through input gathered from focus groups and public meetings. More information regarding the Steering Committee can be found in 2.5 Phase 1 Public and Stakeholder Engagement and 3.4 Phase 2 Public and Stakeholder Engagement. Discussions between the Project Team and Oakland County Transit produced the finalized goals for the CTP.

### 1.3.2 Goals

Oakland County Transit, in collaboration with the Steering Committee and public input, identified eight service goals to guide the Community Transit Plan.



# 2. Public Transit Today

In order to plan for the future, this chapter documents the existing conditions of Oakland County's community transit services, which include the North Oakland Transportation Authority (NOTA), OPC Transportation (OPC), People's Express (PEX) and Western Oakland Transportation Authority (WOTA). Collectively, these entities operate in about 73% of Oakland County by their service area square mileage and serve 606,888 residents. The CTP focuses on these agencies and the areas they serve; the plan area is illustrated in Figure 1. SMART provides transit service to portions of the plan area. SMART is in the process of implementing the *SMARTer Mobility Plan*, which alongside the CTP will set a countywide agenda for public transit.

This chapter documents the existing entities responsible for providing public transit service in Oakland County, synthesizes findings and opportunities from other transportation plans for the County, looks at travel patterns and transit propensity in different areas, and considers public and stakeholder feedback to create a shared vision for how public transit can better service Oakland County. Future chapters will identify recommendations and strategies on how to implement this vision.

## 2.1 Governance and Funding

OCT, a division of Oakland County, collects property tax revenue within the County and contracts with NOTA, OPC, PEX, WOTA, and SMART to provide service. OCT plays a key role in coordinating projects and services, facilitating collaboration between transit service providers, and planning future improvements.

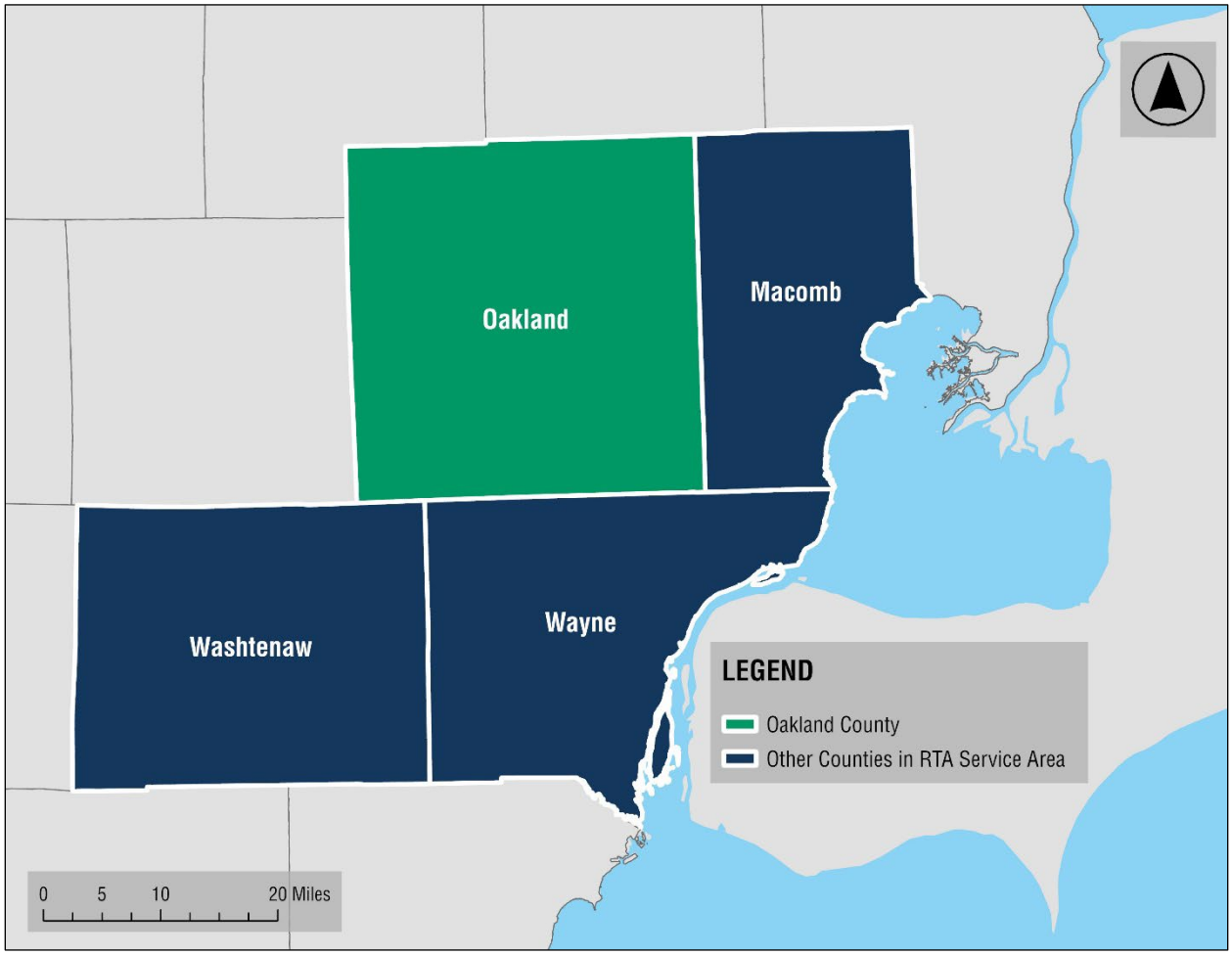
Oakland County is part of the larger Southeast Michigan region, which comprises the Detroit and Ann Arbor Metropolitan areas. A number of other transit agencies and transit service providers operate in the region and work together to coordinate services, funding, and projects.

The Regional Transit Authority of Southeast Michigan (RTA) is responsible for planning, funding, and coordinating services in Oakland, Macomb, Washtenaw, and Wayne counties (Figure 3). RTA is identified by the Federal Transit Administration as the urbanized area designated recipient for the region responsible for allocating federal funding that is apportioned to the region and working collaboratively with transit service providers to align local and regional goals and resources, provide technical support, and to advance regionally significant projects. SMART is the direct recipient of federal funding from the RTA and state funding from the State of Michigan for the counties within its service area, including Oakland County. Subrecipient agencies, meaning those within the service area of a direct recipient, apply for and receive federal and state funding through the direct recipient whose service area they are within. LSPs are subrecipients within the service area of SMART. PEX is the only LSP with a master agreement with MDOT that enables it to apply directly for state funding outside of the RTA process. This agreement functions independently from PEX's work in Oakland County and does not affect how PEX carries out County-specific activities, which will follow Oakland County's established processes and requirements.

LSPs must submit their funding applications to SMART to apply for federal and state funding. For federal funding, SMART then coordinates with the RTA, incorporating subrecipients' funding requests into a broader

regional funding package or plan. For state funding, SMART submits funding applications that include subrecipients' requests directly to various Michigan Department of Transportation (MDOT) grant programs. If federal or state funding is awarded, SMART is responsible for distributing that funding to subrecipients within the SMART service area.

FIGURE 3: RTA SERVICE AREA




Funding for providers typically comes from a combination of federal, state, and local sources in addition to fare revenues, which are managed and allocated by different government entities. This section outlines the primary sources of funding utilized by Oakland County's transit service providers. It is important to note that Oakland County's transit service providers' service areas cover both rural and urban areas. Rural and urban transit service areas differ significantly in terms of population density, travel patterns, and funding eligibility. Some federal and state funding programs require that applicants operate service partially or totally within rural areas or urban areas, as designated by the most recent decennial census. NOTA, OPC, PEX, and WOTA service areas are split across both rural and urban areas, per the 2020 decennial census.[4]

[4] (Federal Transit Administration (FTA), 2023)

Table 1 identifies the 2025 funding sources used by each transit service provider operating in Oakland County.

TABLE 1: FUNDING SOURCES BY OAKLAND COUNTY LOCAL SERVICE PROVIDER

| LSP | Federal Sources | State Sources | Local Sources |
|---|---|---|---|
| NOTA | Section 5310[A], Carbon Reduction Program | Municipal Credits, LBO, Specialized Services Program | Oakland County Transit Millage, Fare Revenues, Local Partnerships |
| OPC | Section 5310[A], Carbon Reduction Program | Municipal Credits, LBO, Specialized Services Program | Oakland County Transit Millage, Fare Revenue, Local Partnerships |
| PEX | | Municipal Credits, LBO | Oakland County Transit Millage, Fare Revenue |
| WOTA | Section 5311, Section 5310[A], Carbon Reduction Program | Municipal Credits, LBO, Specialized Services Program | Oakland County Transit Millage, Fare Revenue, Local Partnerships |

[A] *State provides capital match.*

### 2.1.1 Federal Funding

There are multiple funding programs available through the United States Department of Transportation (USDOT) and its agencies, including the Federal Transit Administration (FTA) and the Federal Highway Administration (FHWA). Some programs are formula funding, meaning that the federal government allocates amounts to different areas based on a set of criteria. Others are discretionary, meaning that agencies apply for them on a competitive basis. Federal funding typically requires a local match that is provided through state or local funds.

As the designated recipient of FTA funds in Southeast Michigan, RTA is responsible for distributing FTA formula funding that is allocated for the Detroit Urbanized Area (UZA) and the Ann Arbor UZA through a number of different grant funding programs. [5]

[5] (Federal Transit Administration (FTA), n.d.)

### Section 5339(c) Low or No Emission Grant Program

- Provides funding to purchase or lease low- or no-emission transit buses and to build or upgrade related facilities and equipment.

### Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities Grants

- Covers operating or capital costs for activities that support transportation for older adults and people with disabilities. It can fund things like managing transportation programs, providing same-day or door-to-door services, and buying new buses or vans.

### Section 5311 Formula for Rural Areas Grants

- Provides operating or capital funding for public transportation in rural areas. It covers costs for expanding services, making agreements to buy services, and connecting smaller and larger transportation providers.

### Section 5304 Statewide Planning Grants

- Provides funding to states and metropolitan planning organizations (MPOs) for transportation planning activities, including the planning and design of public transportation projects and development of transportation plans and programs.

The RTA oversees which agencies apply for federal grants to ensure regional coordination. These grants help fund large projects, planning, and new technologies. One exception is the FTA Section 5311 Formula Grants for Rural Areas program, which is overseen by the Michigan Department of Transportation (MDOT) Office of Passenger Transportation (OPT). This program supports capital, planning, and operating expenses for public transit services in rural areas. In fiscal year (FY) 2024, of Oakland County's four LSPs, only WOTA received FTA Section 5311 funding. Congestion Mitigation and Air Quality (CMAQ) and the Carbon Reduction Program (CRP) are FHWA programs that can be transferred to FTA for public transit projects. The Southeast Michigan Council of Governments (SEMCOG) runs a multiyear call for projects to allocate these funds. Community transit providers can apply for these funds through SMART.

### Section 5310 Projects Awarded (FY 2023-24)

- **NOTA** was awarded $384,000 in capital funding to replace four vehicles and $206,536 in operations funding to help cover day-to-day costs for 20 routes. With this funding, NOTA was able to reduce transit barriers and fill service gaps.
- **OPC** was awarded $576,000 in capital funding to replace five vehicles, three buses and two vans. With this funding, OPC was able to improve mobility options for adults ages 55 and up in addition to people under the age of 55 with disabilities to keep up with increasing demand for service.
- **WOTA** was awarded $96,000 in capital funding to replace one vehicle and $245,613 in operations funding to continue providing demand-response transit service to seniors and people with disabilities in Walled Lake and Highland, Waterford, and White Lake Townships. With this funding, WOTA was able to maintain quality service during a period of expansion following the passage of the Oakland County transit millage in 2022.

### Carbon Reduction Program Projects Awarded (FY 2021-23)

As part of the New Oakland County Electric Non-Emergency Medical Transportation project, NOTA and WOTA were awarded $660,040 total and OPC was awarded $526,880 total to purchase one electric vehicle each and chargers. With this federal and match funding, NOTA, WOTA, and OPC implemented a plan to reduce their carbon production from non-emergency medical transportation provision across Oakland County.

Neither OCT nor LSPs are direct recipients of FTA funding, meaning that they are not able to apply for formula or discretionary grant funding, but are eligible to receive funding as a subrecipient from a direct recipient, such as MDOT, RTA, or SMART.

There are several other federal discretionary grant programs that provide funding to public transit providers like those in the Oakland County CSA:


### 2.1.2 State Funding

The State of Michigan provides funding to support public transit operations, planning, and capital projects through multiple programs managed by MDOT OPT. State public transit funding is distributed to eligible authorities and governmental agencies as defined in Public Act 51 of 1951 (PA 51), which governs transportation funding in Michigan. SMART and the RTA are eligible authorities, or recipients, who receive state public transit funding distributions. Authorities and governmental agencies that are eligible for state public transit funding distributions are defined by Sections 10c and 10e of PA 51.[6] NOTA, OPC, PEX, and WOTA are not eligible recipients of state public transit funding because they do not meet the eligibility criteria defined by Sections 10c and 10e. Once SMART and the RTA receive state public transit funding, they are then responsible for allocating that funding to other public transit authorities in the region, the subrecipients, including Oakland County's local service providers: NOTA, OPC, PEX, and WOTA.

#### Local Bus Operating Assistance (LBO) Program

Eligible authorities and governmental agencies apply annually for funding used in the fiscal year following the application submittal. This application is used to calculate the applicant's operating assistance appropriation. Appropriations range from 50 to 60% of an applicant's operating costs to 26 to 30% of their operating costs, depending on whether the applicant's jurisdiction is urbanized or rural, the population of their jurisdiction, and the size of the annual state appropriation for the LBO program.[7] The eligible agency receiving LBO funding must distribute that funding to smaller agencies in their region. SMART is the eligible agency that distributes LBO funding to Oakland County's local service providers.

[6] (Hamilton, "*Fiscal Brief: The Comprehensive Transportation Fund (CTF) and State Support for Local Public Transportation*", 2023)
[7] (MDOT Office of Passenger Transportation (OPT), "*Annual Application for Funding*", 2024)

## Capital Assistance

Under PA 51, the State of Michigan must provide funding to cover a portion of the required match amount needed to receive federal capital funds from various federal programs, including CMAQ.[8] Statutorily, the state must pay at least two-thirds of the non-federal match required, which is typically 20% of the total capital improvement cost. Federal capital funds disbursed through these programs are typically for capital improvements like bus acquisition or technology upgrades.[9] Eligible authorities and governmental agencies apply annually, submitting a four-year capital budget starting in the application fiscal year.[10]

## Municipal Credits (Act 51) Distribution from Michigan Transportation Fund

Municipal credits are operating assistance funds distributed to cities, villages, and townships by multicounty authorities per Act 51 from the Michigan Transportation Fund (MTF).[11] Multicounty authorities, like SMART in the southeast Michigan region, must return at minimum $2,000,000 of the municipal credit distribution to cities, villages, and townships that provide transportation services. Cities, villages, and townships submit annual applications for the credits, in accordance with procedures established by the multicounty authority. Distributions of the credits to municipalities are primarily based on their population and how they plan to use the funding. Once received, municipalities pass resolutions to pass them along to their respective local service provider.

## Specialized Services Program

The Specialized Services Program provides operating assistance for transportation services that are primarily for seniors and persons with disabilities, specifically for the purchase or lease of service vehicles.[12] One public transit authority or governmental agency per county or multicounty region is the recipient, or coordinating entity, of specialized services funding. The recipient allocates funding from this program to other transit providers in the county or multicounty region they are representing. The coordinating entity must be one of the following, in order of priority: a public transit authority, a governmental agency, an existing Section 5310 agency, or a nonprofit corporation representing specialized services interest. If there is more than one MDOT-approved public transit authority in the county or multicounty region, they must decide amongst themselves who will be the coordinating entity. For the southeast Michigan region, SMART is the coordinating entity of specialized services funding applications.[13]

## Service Initiatives Program

The Service Initiatives Program (SIP) provides discretionary funding for projects that advance and improve mobility by implementing new technology and/or innovative service models, research, training, or planning

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8 (MDOT Office of Passenger Transportation (OPT), "*Annual Application for Funding*", 2024)
9 (Hamilton, "*Fiscal Brief: The Comprehensive Transportation Fund (CTF) and State Support for Local Public Transportation*", 2023)
10 (MDOT Office of Passenger Transportation (OPT), "*Application Instructions for Public Transit Programs*", 2024)
11 (Michigan Department of Transportation (MDOT), "*Act 51*", 2025)
12 (Michigan Department of Transportation (MDOT), "*Michigan Passenger Transportation Programs*", 2025)
13 (MDOT Office of Passenger Transportation (OPT), "*Audit and Accounting Information*", 2024)

and coordination. At times, the SIP may issue calls for proposals that address specific state goals and objectives.[14]

### Metropolitan & Statewide Planning and Nonmetropolitan Transportation Planning Program

The Metropolitan & Statewide Planning and Nonmetropolitan Transportation Planning Program (Section 5304) provides funding for research, training and education, planning and coordination, and other projects that preserve or enhance public transit. Public nonprofit and private for-profit providers can apply for this funding, not just eligible authorities or governmental agencies, but projects receiving federal FTA Section 5304 monies must demonstrate statewide benefits.[15]

## 2.1.3 Local Funding

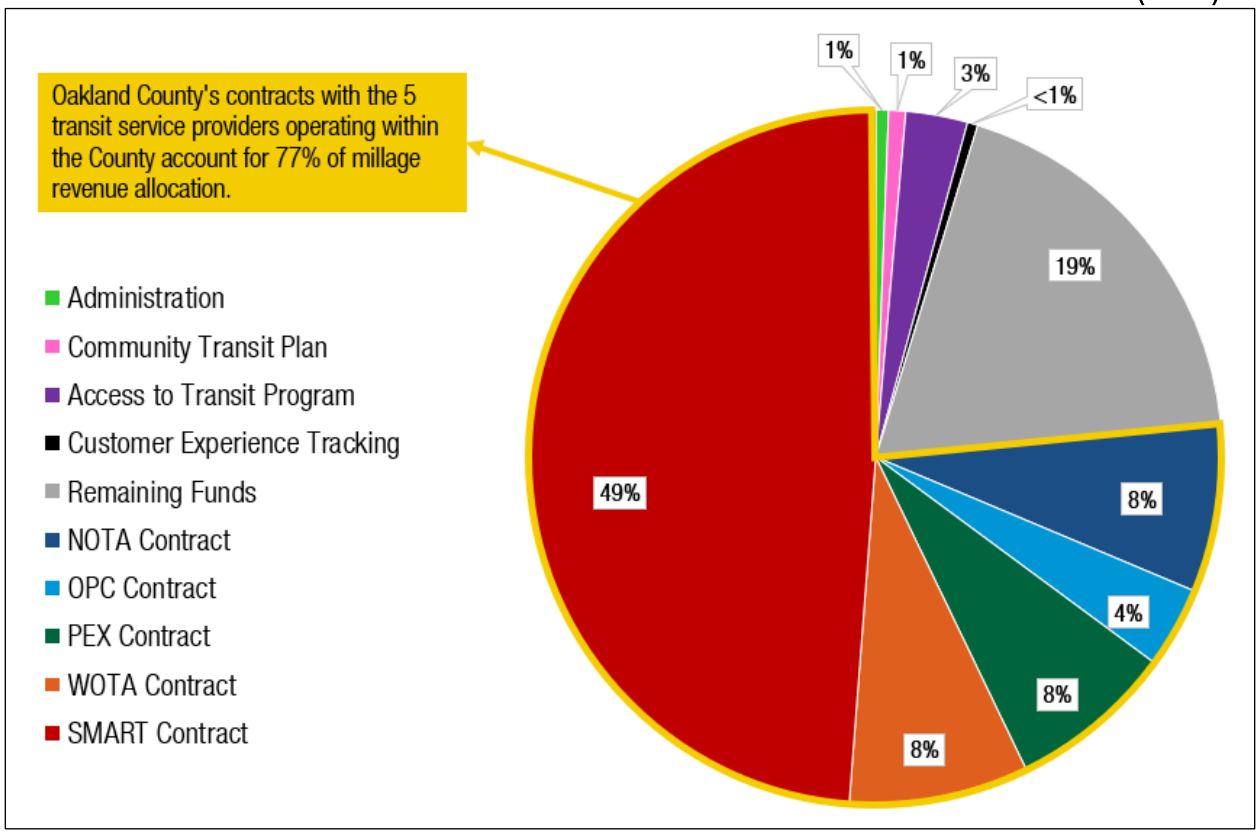
Local funding for public transit primarily comes from the Oakland County Public Transportation Millage. Local funding can also include fare revenue paid by riders.

In November 2022, Oakland County voters approved a 0.95 mill property tax dedicated to public transit. This 10-year countywide millage replaced the previous four-year millage that was used to fund SMART service in certain communities. The countywide millage has allowed Oakland County to eliminate service gaps that created a barrier to mobility for residents in areas that previously opted out of the millage. Increasing the millage period has created stability, allowing long-range planning and improvements. Oakland County Transit oversees the distribution of millage funding to the five major providers that operate service in the County (NOTA, OPC, PEX, WOTA, and SMART). On an annual basis, Oakland County Transit manages a budgeting process to allocate funding based on what is needed to operate existing services, new services or service expansions, and to support capital needs, such as new vehicles, facility improvements, or technology updates.

In 2024, the Oakland County Public Transportation Millage generated $69,314,463 in revenue. A breakdown of how 2024 millage revenue was allocated is shown in Figure 4. The current millage term will end in 2032, at which point the Oakland County Public Transportation Millage will be up for renewal.

[14] (MDOT Office of Passenger Transportation (OPT), "*Annual Application for Funding*", 2024)
[15] (Michigan Department of Transportation (MDOT), "*Federal Passenger Transportation Programs*", 2025)

FIGURE 4: OAKLAND COUNTY PUBLIC TRANSPORTATION MILLAGE REVENUE ALLOCATION BREAKDOWN (2024)




Oakland County Transit retains a portion of the millage to provide targeted funding for projects that enhance transit services and access to them. As an example, in September 2024, Oakland County Transit launched the Access to Transit Program, which seeks to fund infrastructure improvements that allow people to more safely and conveniently use transit services. This can include addressing gaps in the sidewalk and bicycle network, improving crosswalks, adding curb ramps, and better lighting that helps users of all abilities access transit. The grant program was authorized to provide up to $2,000,000 to cities, villages, and townships across Oakland County.

Community Credits are local millage funding that is returned by SMART to municipalities within SMART's former taxing district (before the Oakland County Public Transportation Millage was passed). They may be used for capital or operating purposes. Operating funds must be utilized within two years of their establishment. Funds for SMART-approved transportation-related capital expenses must be utilized within five years from award.

### 2.1.4 Partnerships and Donations

Many local service providers in Oakland County receive some amount of funding from partnerships and donations in addition to federal, state, and local sources. NOTA, OPC, PEX, and WOTA all accept donations, but donations account for a very small portion of all Oakland County's local service providers' revenue.

Donations are used to fund low-income riders' fares, for general operating expenses, and as specified, e.g. for certain trip purposes. Most look for and have been partnering with other community organizations within their jurisdictions.

NOTA has maintained long-standing partnerships with the Oakland Community Health Network (OCHN) in addition to the Downtown Development Authorities (DDA) of Oxford and Lake Orion. OCHN pays NOTA to provide transportation services for OCHN's social service clients. The Oxford and Lake Orion DDAs pay NOTA for the driver time, gas, and maintenance costs associated with operating the fixed route Downtown Trolley Express service between downtown Oxford and Lake Orion on Friday and Saturday evenings.

OPC's Transportation Service partners with the local non-profits and City Governments to provide shuttles for the following: the Rochester Regional Chamber of Commerce Hometown Christmas Parade, the Paint Creek Center for the Arts - Art & Apples Festival, City of Rochester Hills Light the Village Festival, City of Rochester Hills Paddlepalooza, Oakland Township Parks & Recreation Winter Carnival, and City of Rochester Council/DPW Around Town Shuttles. OPC contracts with these organizations for a set amount per vehicle and hour to run fixed routes that are agreed upon prior to the date of service. Shuttles are also provided to support the OPC Social & Activity Centers' special events, including the Annual Senior 50+ Expo and Picnic and Food Truck Rally. OPC provides transportation services to students attending the Dutton Farms special education school from their home to the school and to special school sponsored events. Further, OPC has a long-standing sponsorship with Corewell Hospital Troy/Priority Health.

PEX partners with Novi Adult Education (City of Novi Schools), Team Rehabilitation Physical Therapy Milford (Team Rehab Milford), and Brostrom Physical Therapy. PEX provides transportation services to students attending the Novi Adult Education, transporting them from their homes to classes and back. All of these trips are booked by Novi Adult Education, not through PEX scheduling. PEX provides transportation to Team Rehab Milford clients going to and from their physical therapy appointments. All trips are booked for clients by Team Rehab Milford. PEX is looking to expand this partnership to Team Rehab West Bloomfield. PEX also provides transportation to and from appointments for Brostrom Physical Therapy's South Lyon and Lyon Township clients.

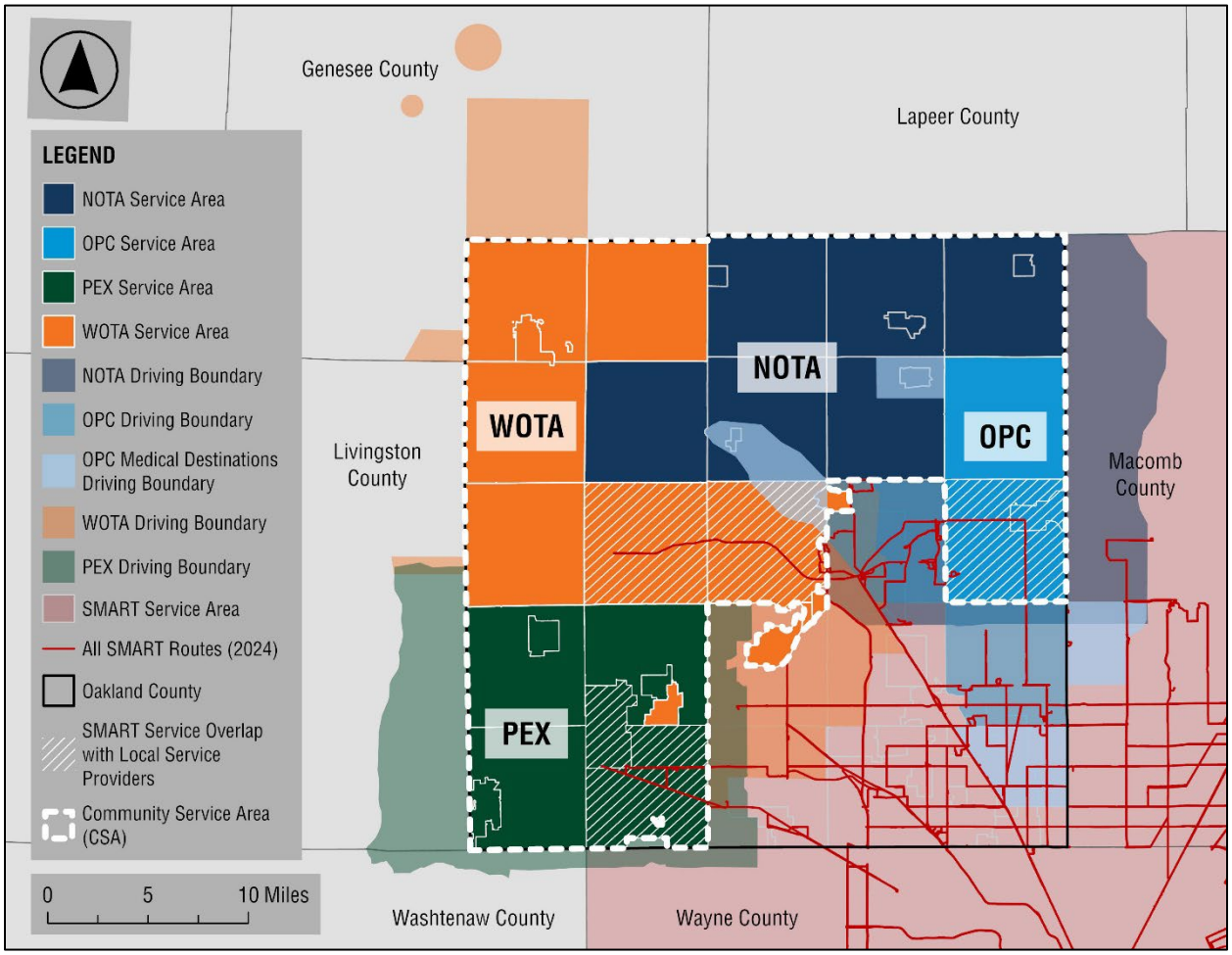
WOTA also partners with OCHN to provide transportation services for OCHN clients. WOTA additionally partners with community organizations via sponsorships. Additional organizations partnering with WOTA include: Huron Valley Schools' and Waterford Community Schools' Adult Transition Programs, Alternative to Incarceration, Team Rehab, Freedom Works, Open Door, EasterSeals MORC, Waterford Parks and Recreation, City of Pontiac Holiday Extravaganza, Hospitality House, Encore, Lakes Area Chamber of Commerce, North Oakland Regional Chamber of Commerce, Highland White Lake Business Association, and all senior centers within the WOTA service area. WOTA also partners with the Village of Holly, providing transportation to special events in the Village. Organizations looking to sponsor WOTA receive advertising in exchange for their sponsorship. Sponsor logos are displayed on the back of WOTA vehicles. WOTA is not a nonprofit organization, but it does receive and manage donations through its nonprofit arm: Ride with Pride.

## 2.2 Transit Service Providers

All of the five transit service providers operate in the CSA, shown in **Figure 5.** Three of these transit entities operate exclusively in the CSA: NOTA, OPC, and WOTA. Two of them, PEX and SMART, also operate in other parts of the southeast Michigan region. Oakland County's local service providers NOTA, OPC, PEX, and WOTA are the focus of the CTP. Transit service provider profiles in this section are representative of a snapshot in time during a period of change for the providers. Provider data cited in this section is likely to change.

Transit service is largely demand-response, meaning that riders call ahead to schedule a ride and a vehicle picks them up at their starting point and drops them off at their destination. Demand-response service is operated across the CSA by all the providers, each of which has its own service area. There is some fixed route service in denser parts of the CSA. These services operate on pre-defined schedules and pick up and drop off rides at designated bus stops. NOTA operates a limited trolley service on weekend evenings, and SMART has expanded bus service into the CSA since the passage of the 2022 millage.

FIGURE 5: TRANSIT SERVICES ACROSS OAKLAND COUNTY




Collectively, the operations of the five transit service providers currently serving Oakland County cover all communities within the County. Five communities do not have formal service agreements with any of Oakland

County's transit service providers: Brandon Township, Novi Township, Ortonville, the portion of Northville within Oakland County, and the portion of Fenton in Oakland County. While not formally included in NOTA's, PEX's, or WOTA's agreements with Oakland County, NOTA provides transportation to the residents of Brandon Township and Ortonville, PEX provides transportation to residents of Novi Township and Northville, and WOTA provides transportation to residents of Fenton. In addition, the Mass Transportation Authority (MTA) serving Flint and the rest of Genesee County can transport residents of Fenton.

As of January 2025, all transit service providers' services are open to the general public. **Table 2** includes local service providers' general service metrics. All four agencies operate seven days a week with varying hours. NOTA, OPC, PEX, and WOTA offer seniors ages 55 and over, low-income individuals, and persons with disabilities a reduced fare. In partnership with Oakland County Veterans Services and OCT, all County transit service providers offer free rides to veterans.

TABLE 2: LOCAL SERVICE PROVIDER GENERAL SERVICE METRICS

| | NOTA | OPC | PEX | WOTA | Total [B] |
|---|---|---|---|---|---|
| **SERVICE AREA** [A] | | | | | |
| Population [C] | 142,690 | 109,124 | 190,275 | 164,799 | **606,888** |
| Square Miles | 217 | 73 | 141 | 227 | **658** |
| Population Density [D] | 658 | 1,495 | 1,350 | 726 | **922** |
| **RIDERSHIP** [A] | | | | | |
| Annual | [E] 97,042 | 52,839 | 55,990 | 79,685 | **285,654** |
| Revenue Vehicles [F] | 67 | 36 | 51 | 58 | **161** |
| Rides/Hour [G] | 0.93 | 1.24 | 1.02 | 1.15 | **1.05** |
| **OPERATIONS** [A] | | | | | |
| Vehicle Miles | 1,510,106 | 428,987 | 838,239 | 1,065,495 | **3,842,827** |
| Vehicle Hours | 104,858 | 42,598 | 55,158 | 69,516 | **272,130** |
| **STAFF** | | | | | |
| Drivers [H] | 101 | 37 | 82 | 69 | **281** |
| **2025 BUDGET (millions)** [I] | | | | | |
| Total Income | $10.9 | $3.8 | $8.0 | $8.3 | **$31.0** |
| Operating Expenses [J] | $8.4 | $3.2 | $6.1 | $7.0 | **$24.7** |
| Capital Expenses | $2.5 | $0.6 | $1.8 | $1.2 | **$6.1** |
| Fare Revenues | $0.22 | $0.09 | $0.19 | $0.13 | **$0.63** |

[A] *Unless otherwise noted, values are 2024 totals.*

[B] *Grand total or average across four local service providers.*

[C] *U.S. Census Bureau Table B01003 2023 ACS 5-Year estimates.*

[D] *Persons per square mile; includes land and water area.*

[E] *Does not include 2024 total Trolley rides (4,228). Total Demand Response Passengers/Vehicle Hours.*

[F] *Vehicle counts updated as of December 2025.*

[G] *Total Demand Response Passengers/Vehicle Hours.*

[H] *Includes full-time and part-time employees as of June 2025.*

[I] *Provided in millions of 2024 U.S Dollars, rounded.*

[J] *Includes salaries and benefits, building costs, and program costs.*

TABLE 3: LOCAL SERVICE PROVIDER RIDERSHIP DEMOGRAPHICS

| Demographic Group | NOTA [A] | OPC [A] | PEX [A] | WOTA [A] |
|---|---|---|---|---|
| General Public | 6% | 25% | 11% | 15% |
| Elderly | 38% | 37% | 59% | 37% |
| Disability | 38% | 14% | 13% | 20% |
| Elderly with Disability | 18% | 24% | 17% | 28% |

[A] *Based on ridership reported in LSP quarterly reports for the third quarter of 2025.*

Table 4 summarizes rider eligibility, fares, ride scheduling windows, and hours of service for NOTA, OPC, PEX, and WOTA.

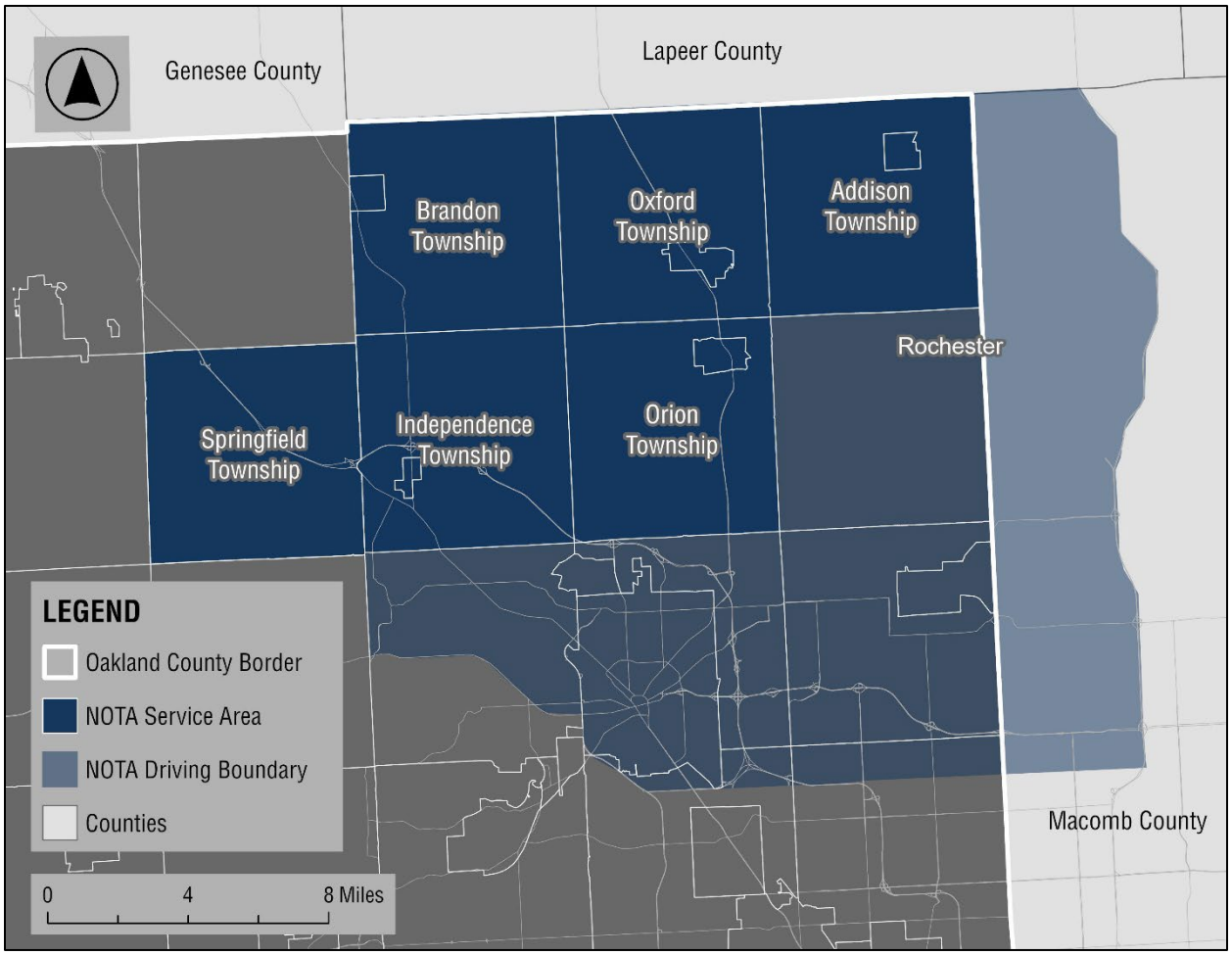
TABLE 4: LOCAL SERVICE PROVIDER DEMAND RESPONSE SERVICE SUMMARY

| Service Information | NOTA | OPC | PEX | WOTA |
|---|---|---|---|---|
| Rider Eligibility | General public (ages 14 and up).<br><br>Veterans, persons with disabilities, low-income individuals, and adults age 55 and up eligible for reduced fare. | General public (ages 14 and up).<br><br>Veterans, persons with disabilities, low-income individuals, and adults age 55 and up eligible for reduced fare. | General public (ages 14 and up).<br><br>Veterans, persons with disabilities, low-income individuals, and adults age 55 and up eligible for reduced fare. | General public (ages 18 and up).<br><br>Veterans, persons with disabilities, low-income individuals, and adults age 55 and up eligible for reduced fare. |
| Fare | **$4.00 one-way** for General Public<br><br>**$2.00 one-way** for Reduced-fare riders<br><br>**Veterans ride free** | **$4.00 one-way** for General Public<br><br>**$2.00 one-way** for Reduced-fare riders<br><br>**Veterans ride free** | **$4.00 one-way** for General Public<br><br>**$2.00 one-way** for Reduced-fare riders<br><br>**Veterans ride free** | **$4.00 one-way** for General Public<br><br>**$2.00 one-way** for Reduced-fare riders<br><br>**Veterans ride free** |
| Scheduling Window | 3 days in advance | 3 days in advance | 3 days in advance | 2 days in advance [A] |
| Hours of Service | **Monday - Friday**<br>6:00 AM - 9:00 PM<br><br>**Saturday**<br>6:00 AM - 4:00 PM<br><br>**Sunday**<br>7:30 AM - 3:30 PM | **Monday - Friday**<br>6:00 AM - 9:00 PM<br><br>**Saturday**<br>8:00 AM - 4:00 PM<br><br>**Sunday**<br>7:30 AM - 3:30 PM | **Monday - Friday**<br>5:00 AM - 9:00 PM<br><br>**Saturday**<br>5:00 AM - 5:00 PM<br><br>**Sunday**<br>7:30 AM – 5:00 PM | **Monday – Friday**<br>6:00 AM - 10:00 PM<br><br>**Saturday**<br>8:00 AM - 4:00 PM<br><br>**Sunday**<br>7:30 AM - 3:30 PM |

[A] *Trips can only be scheduled Monday through Friday.*

## 2.2.1 North Oakland Transportation Authority (NOTA)

FIGURE 6: NOTA SERVICE AREA AND DRIVING BOUNDARY




NOTA provides demand response transit service to residents of Addison, Brandon, Independence, Orion, Oxford, and Springfield townships, and the Villages of Lake Orion, Leonard, Ortonville, and Oxford, and the City of the Village of Clarkston. NOTA's service area and driving boundary are illustrated in Figure 6. The agency also operates a trolley between downtown Lake Orion and downtown Oxford.

### Organization

NOTA was established in 2001 through an intergovernmental services agreement between Orion, Oxford, and Addison townships. Until the passage of the 2022 millage, NOTA provided demand-response service to eligible residents of those areas who were seniors, people with disabilities, or people with low-incomes. After the passage of the millage, NOTA's service area expanded to 217 square miles, including Brandon, Independence, and Springfield townships in addition to the City of the Village of Clarkston. From 2023 to 2024, NOTA saw a 97% increase in ridership. Since June 2024, NOTA has been providing rides to the general public.

In addition to NOTA's services, Brandon Township opted to continue providing its own paratransit service for Brandon Township residents who are persons with disabilities or adults ages 55 and up live within the Brandon Township School District. The service is funded by municipal credits distributed through Act 51 and operates out of the Edna Burton Senior Center Monday through Friday from 8:00 AM to 4:00 PM.

NOTA's twelve-member board consists of two members from Addison Township, Orion Township, and Oxford Township, and one member from the Villages of Lake Orion, Oxford and Leonard and three non-governmental voting positions currently held by Training & Treatment Innovation, Easterseals MORC and the Village of Oxford. Board members are appointed by their respective townships or organizations and open board meetings are held monthly.

As of June 2025, NOTA has 125 total employees, 81% of which are drivers. Out of NOTA's total employees, 49 are full-time, and 69% of those full-time employees are drivers. As of 2024, NOTA offers employees benefits and competitive pay in line with or better than what employers in the same industry or area offering similar roles. Due to increased demand, NOTA has hired 12 additional dispatchers to keep up with increased service demands since the passage of the millage. In 2025, NOTA hired a full-time trainer and a full-time safety officer to maintain quality of service as they continue to grow.

NOTA's FY 2025 budget was $10,874,654. A breakdown of NOTA projected FY 2025 operating and capital expenses is shown in Table 5.

TABLE 5: NOTA FISCAL YEAR 2025 EXPENSES BREAKDOWN

| | |
|---|---|
| Operating Expenses | 77% |
| Capital Expenses | 23% |


In 2024, NOTA served employment hubs including: Meijer Oxford, Meijer Lake Orion, Meijer Auburn Hills, Kroger Lake Orion, Amazon, Jabil, FedEx, Hoff Engineering, Home Goods, and Goodwill. 52 drivers, 8 dispatchers, and 1 part-time accountant were added to NOTA's staff.

## Services

NOTA provides demand-response transit service to residents of its service area. NOTA's service area includes Addison, Orion, Oxford, Brandon, Independence, and Springfield townships, in addition to the Villages of Leonard, Lake Orion, Oxford, and Clarkston. NOTA also travels into Macomb County, should residents of their service area need to access destinations there.

Rides should be scheduled a minimum of three days in advance and are available Monday through Friday 6:00 AM to 9:00 PM. Service is also available Saturday 6:00 AM to 4:00 PM and Sunday 7:30 AM to 3:30 PM. Riders must register with NOTA to use services. Veterans, persons with disabilities, low-income individuals, and those age 55 years or older are eligible for a discounted fare. Fares can be paid with exact change at the time of service, or in advance via cash or check. Additionally, NOTA operates the Downtown Trolley Express (Trolley), a fixed route service between Downtown Lake Orion and Downtown Oxford. The Oxford DDA and Lake Orion DDA have contracted NOTA since January 2022 to run the Trolley, paying NOTA for driver time, gas, and maintenance of the trolley. The trolley runs on Friday evenings from 5:00 PM to 9:00 PM and on Saturday evenings from 4:00 PM to 10:00 PM. NOTA provides public real-time vehicle tracking using global positioning systems (GPS).

Among NOTA riders, 38% are persons with disabilities, 38% are age 55 years or older, and 18% are both 55 years or older and persons with disabilities. In 2024, NOTA traveled a total of 1,510,106 vehicle miles and 104,858 vehicle hours. From Spring through Fall 2025: 95% of NOTA riders had an excellent or very good ride experience, 94% thought scheduling their trip was extremely easy or very easy, and 96% thought their driver's behavior was excellent or very good.

## Fleet, Facilities, and Technology

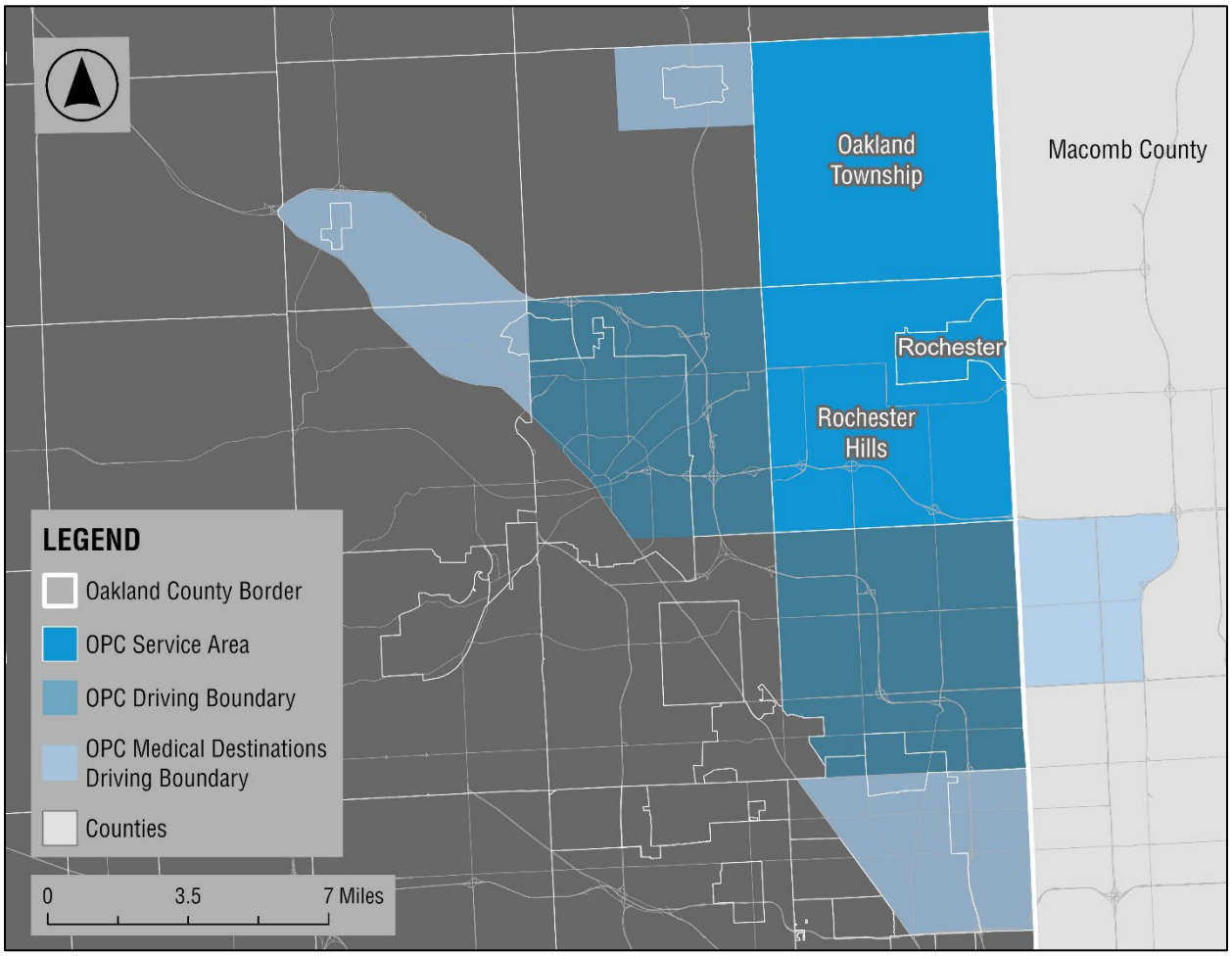
A total of 67 vehicles are part of NOTA's fleet as of 2025. One of these vehicles is non-revenue, and of the 66 that are revenue vehicles, 99% include lifts. Only two vehicles out of the total fleet use diesel fuel; the rest use gasoline. NOTA currently brings vehicles to local mechanics for maintenance. NOTA currently uses QRyde for scheduling and dispatching but has experienced challenges with the software. NOTA has a combined administration and operations facility with directly adjacent fleet parking at 675 South Glaspie Street in Oxford. NOTA is considering renovating the portion of this facility that is currently empty so that they can use it for in-house maintenance. NOTA parks ten vehicles at Independence Township Park to reduce deadhead miles and hours incurred due to NOTA's main facility no longer being central within their service area.

## Planned Improvements

- NOTA is a partner with OCT and SMART in procuring a new dispatch software for transit providers throughout the region in 2026-2027.
- NOTA would like to integrate dispatch and scheduling software with payroll and scheduling driver shifts, maintenance and asset management tools and software, online or app-based fare collection, and new financial management programs to improve operations.
- In 2025, NOTA installed in-vehicle tablets with CAD/AVL software and put out a request for proposals to install vehicle interior security cameras in all revenue vehicles. CAD/AVL software helps track and manage where vehicles are in real-time. It allows dispatchers to find the best routes, save time, and improve customer service by letting riders track their buses or shuttles. It also helps reduce costs and make better decisions with data on how the service is running.
- For cost savings, NOTA is also considering adding on-site daily maintenance capabilities so that they are able to service some of their vehicles at their facility.

## 2.2.2 OPC Transportation (OPC)

FIGURE 7: OPC SERVICE AREA AND DRIVING BOUNDARY




OPC Transportation (OPC) is a division of the OPC Social & Activity Center, which is dedicated to providing a wide variety of supportive senior services and programs to adults 55 years and older. OPC provides demand-response transit service to the residents within their service area, illustrated in **Figure 7**, which includes Rochester Hills, Rochester, and Oakland Township.

### Organization

OPC's transit service was formally established in 1983 through an interlocal agreement between Rochester Hills, Rochester, and Oakland Township, following the enactment of an operational millage supporting the service. This agreement also includes provisions for service to Oakland University, Corewell Hospital, and additional medical facilities in Troy, Auburn Hills, Lake Orion, Sterling Heights, and Pontiac. OPC provides door-to-door, shared-ride transit service to residents of their service area who are 55 years and older, veterans, or under 55 with developmental disabilities. From 2023 to 2024, OPC saw a 22% increase in ridership. In 2025, OPC began providing transit services to the general public.

OPC's eight-member board consists of elected officials and senior representatives from each jurisdiction in their service area. Two elected officials and two senior representatives represent Rochester Hills, while Rochester and Oakland Township are each represented by a pair of one elected official and one senior representative. Board members are elected or appointed by their respective communities, and open board meetings are held six times a year.

As of June 2025, OPC Transportation has 45 direct employees, 88% of whom are drivers. Nine are full-time, and 44% of those full-time employees are drivers. Most OPC drivers are part-time as most are retired seniors. OPC Transportation also has 13 indirect employees, five full-time and eight part-time, that support and guide OPC Transportation and other divisions of the OPC Social & Activity Center. These indirect employees manage OPC Transportation's administrative, financial, and marketing functions. OPC continues to hire dispatchers and drivers to support the increase in ridership since the passage of the millage.

OPC's FY 2025 transportation budget was $3,800,925. A breakdown of OPC projected FY 2025 operating and capital expenses is shown in Table 6.

TABLE 6: OPC FISCAL YEAR 2025 EXPENSES BREAKDOWN

| | |
|---|---|
| Operating Expenses | 84% |
| Capital Expenses | 16% |


In 2024, OPC served employment hubs including: Meijer Rochester Hills, Kroger Rochester Hills, Kroger Rochester, and OPC Rochester. 6 drivers and 1 dispatcher were added to OPC's staff.

## Services

OPC provides demand-response transit service to qualified residents of its service area, which includes Rochester Hills, Rochester, and Oakland Township. Residents 55 years and older or under 55 with developmental disabilities qualify for OPC transit services. OPC's driving area includes Oakland University, Corewell Hospital, and additional medical facilities located in Troy, Sterling Heights, Auburn Hills, Lake Orion and Pontiac. Rides should be scheduled a minimum of three days in advance and are available Monday through Friday 6:00 AM to 9:00 PM. Local limited service is available on Saturday from 8:00 AM to 4:00 PM, and Sunday from 7:30 AM to 3:30 PM as of September of 2024. Riders must be registered with OPC to use OPC services. Fares can be paid with exact change at the time of service, or in advance using cash, check, or credit card. Veterans ride for free with OPC.

As of the first quarter of 2025, among OPC riders, 14% are persons with disabilities, 37% are age 55 years or older, and 24% are both 55 years or older and persons with disabilities. In 2024, OPC traveled 428,987 vehicle miles and 42,598 vehicle hours.

## Fleet, Facilities, and Technology

A total of 36 revenue vehicles are part of OPC's fleet as of 2025, 94% of which are equipped with lifts. Four revenue vehicles use diesel fuel; the rest use gasoline. Vehicles are fueled at the Rochester Department of Public Works. Recently purchased vehicles are dealer serviced for warranty repairs and maintenance. A bus wash is located in the garage at the OPC Social & Activity Center building.

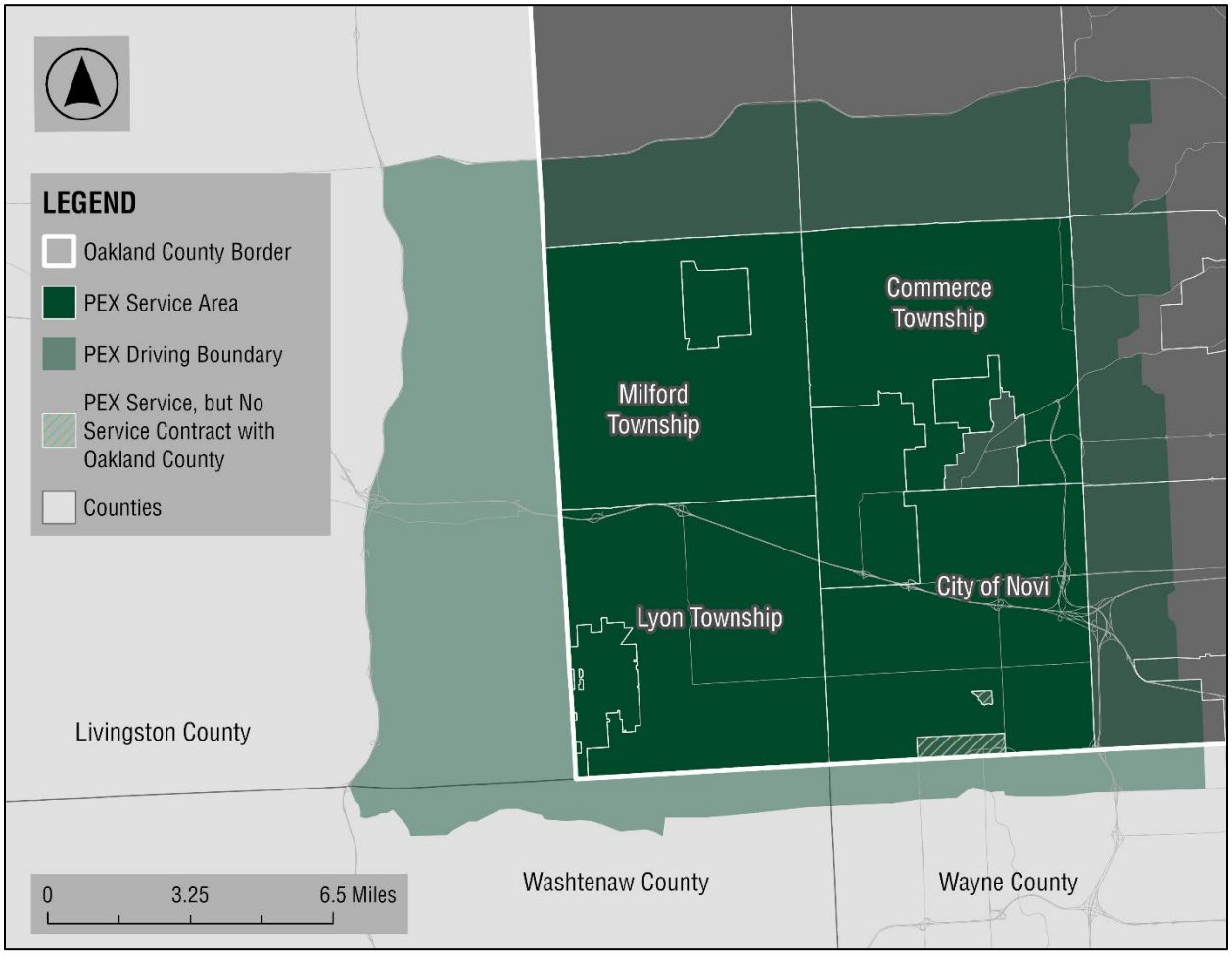
Following the passage of the millage, OPC Transportation outgrew its space at the OPC Social & Activity Center due to the increase in staff needed to support growing demand for service. In September 2024, OPC relocated its transportation administration and operations to a new facility at 328 South Street, Rochester. The building, featuring additional office space for dispatch and management and a garage, was renovated for fleet parking and small vehicle maintenance.

## Planned Improvements

- OPC plans to expand Saturday service hours.
- OPC retired revenue vehicles that use diesel fuel by early 2026.
- OPC is a partner with OCT and SMART in procuring a new dispatch software for transit providers throughout the region in 2026-2027.
- In-vehicle tablets with CAD/AVL software, fare collection, and communication capabilities are a priority in addition to vehicle interior security cameras to improve operational efficiency and safety.

## 2.2.3 People's Express (PEX)

FIGURE 8: PEX OAKLAND COUNTY SERVICE AREA AND DRIVING BOUNDARY




People's Express provides demand-response transit service in Livingston, Oakland, Washtenaw, and Wayne Counties. In Oakland County, People's Express provides service to the residents of Commerce, Lyon, and Milford townships, the residents of the Cities of Novi, South Lyon, and Wixom, and the residents of the Villages of Milford and Wolverine Lake. PEX's Oakland County service area is illustrated in Figure 8. Novi Township, located within PEX's driving boundary, has declined engagement with Oakland County Transit regarding transit services at this time. Also located partially within PEX's driving boundary, the City of Northville spans both Oakland and Wayne Counties and has its own municipal transportation service.[16]

### Organization

Previously a specialized service program part of Northfield Human Services, PEX was established as a stand-alone nonprofit agency in 2007. PEX provides transit services in four counties: Livingston, Washtenaw,

[16] (Northville Parks and Recreation, n.d.)

Wayne, and Oakland. In Livingston and Washtenaw counties PEX serves Green Oak and Northfield townships in addition to Saline. In Wayne County, PEX provides 30% of the Detroit Department of Transportation's paratransit services.[17] Until the passage of the 2022 millage, PEX provided demand-response service to residents of Commerce Township, Lyon Township, Milford Township, Milford, South Lyon, Wolverine Lake, and Wixom under separate contracts with each community, and travel was limited to trips within each community. After the passage of the millage, while still prioritizing senior, veteran, disabled, and low-income residents, PEX expanded its driving boundary and hours of operation for all the Oakland County communities it served pre-millage and enabled residents of any PEX community to travel to any of the others. From 2023 to 2024, PEX saw a 129% increase in ridership. In July 2024, PEX added the City of Novi to its service area.

PEX is governed by a seven-member board consisting of local volunteers. Sitting board members search for and appoint new board members if there is a vacancy. Board meetings are held monthly.

As of June 2025, PEX has 132 total employees, 62% of which are drivers. Out of PEX's total employees, 88 are full-time, and 60% of those full-time employees are drivers. To bridge the gap caused by dispatch software, vehicle technology issues, and recent increases in ridership following the passage of the millage, PEX is considering hiring several different types of administrative and managerial staff so that their organization can scale to meet the new level of demand in Oakland County.

PEX's FY 2025 budget was $8,024,680. A breakdown of PEX projected FY 2025 operating and capital expenses is shown in Table 7.

TABLE 7: PEX FISCAL YEAR 2025 EXPENSES BREAKDOWN

| | |
|---|---|
| Operating Expenses | 77% |
| Capital Expenses | 23% |


In 2024, PEX served employment hubs including: Suburban Collection Showplace of Novi, Kroger South Lyon, and Fox Run Senior Living Community Novi. 24 drivers, 6 dispatchers, and 1 each of the following were added to PEX's staff: HR Coordinator, HR Assistant, Oakland Coordinator, MDOT Coordinator, and a Social Media/Marketing Coordinator.

[17] (People's Express, n.d.)

## Services

In Oakland County, PEX provides demand-response transit service to residents of its service area, which includes Commerce, Lyon, and Milford townships, the Cities of Novi, South Lyon, and Wixom, and the Villages of Milford and Wolverine Lake. Riders are picked up within PEX's service area and can travel to destinations outside the service area that are within PEX's driving boundary. Rides should be scheduled a minimum of three business days in advance and are available Monday through Friday from 5:00 AM to 9:00 PM, Saturday 5:00 AM to 5:00 PM, and Sunday 8:00 AM to 5:00 PM. Same-day service is something that PEX would like to be able to offer in the future. Currently, fares must be paid using cash at the time of service. PEX would like to offer methods of advance fare payment in the near future.

As of the first quarter of 2025, among PEX riders, 13% are persons with disabilities, 59% are age 55 years or older, and 17% are both 55 years or older and persons with disabilities. In 2024, PEX traveled a total of 838,239 vehicle miles and 55,158 vehicle hours. From Spring through Fall 2025: 95% of PEX riders had an excellent or very good ride experience, 92% thought scheduling their trip was extremely easy or very easy, and 98% thought their driver's behavior was excellent or very good.

## Fleet, Facilities, and Technology

PEX's Oakland County fleet includes a total of 51 revenue vehicles as of 2025, all of which are equipped with lifts and use gasoline fuel. PEX's primary facility is 175 Barker Road, Whitmore Lake. As PEX provides services in multiple other counties, PEX has fleet parking facilities at their primary facility in Whitmore Lake and the Novi Civic Center. PEX partners with Oakland Fuels to fuel vehicles on-site at PEX's Whitmore Lake location. Vehicles parked at the Novi location are fueled at the City of Novi Department of Public Works. Vehicles needing maintenance or repairs other than oil changes are taken to independent local mechanics in South Lyon and other local locations. Oil changes are done on-site at PEX's facilities by the Ford Motor Company each Saturday.

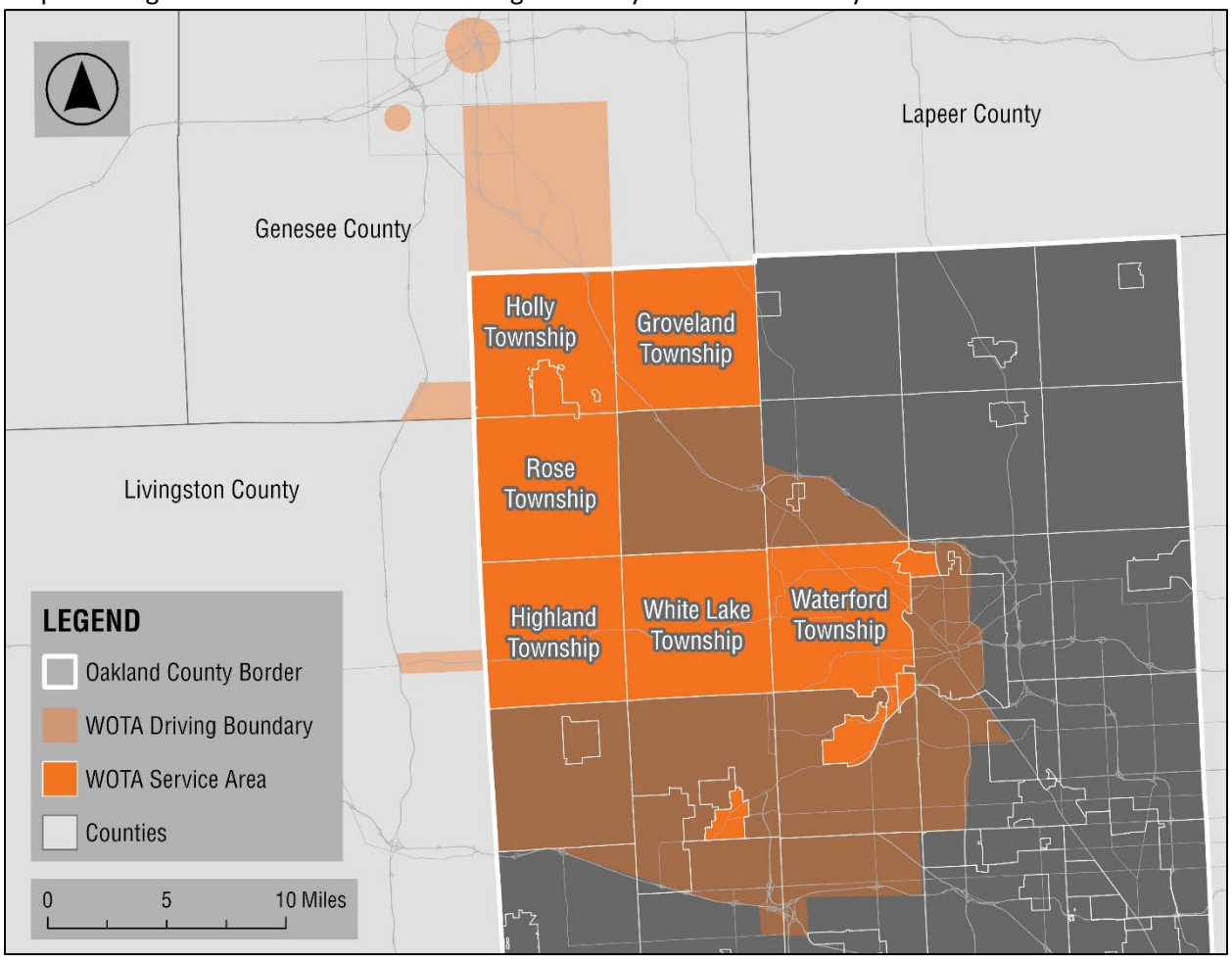
## Planned Improvements

- PEX is a partner with OCT and SMART in procuring a new dispatch software for transit providers throughout the region in 2026-2027.
- Additionally, PEX is interested in acquiring asset management software with integrated maintenance scheduling, and GIS mapping software to improve daily operations.
- PEX would also like to explore trip scheduling software for riders that connects all transit service providers operating in Oakland County through GTFS data.
- Due to increased service demand, PEX quickly outgrew their primary facility in Whitmore Lake following the passage of the millage in 2022. Currently, the facility is not large enough for all PEX staff and will soon not be able to house all of PEX's Oakland County fleet, as both are rapidly growing. People's Express has moved their admin staff to a leased space down the road from its primary facility (11930 Whitmore Lake Rd Ste L, Whitmore Lake).
- In Oakland County, PEX would like to identify one location to regularly fuel, wash, and do light maintenance work on their vehicles.

## 2.2.4 Western Oakland Transportation Authority (WOTA)

FIGURE 9: WOTA SERVICE AREA AND DRIVING BOUNDARY

Map showing WOTA service area and driving boundary in Oakland County.




WOTA provides demand-response transit service to the residents of Groveland, Highland, Holly, Rose, Waterford, and White Lake townships, the residents of the Cities of Keego Harbor, Lake Angelus, Orchard Lake, Sylvan Lake, and Walled Lake, and the residents of the Village of Holly. WOTA's service area and driving boundary are illustrated in Figure 9.

### Organization

WOTA was established in January 2020 through an interlocal agreement between Highland, Waterford, and White Lake townships in addition to the City of Walled Lake. Until the passage of the 2022 millage, WOTA provided demand-response service to those who qualified based on residency in these townships or City and senior, veteran, disability, or low-income status. After the passage of the millage, WOTA's service area expanded to include Groveland, Holly, and Rose townships, the Cities of Keego Harbor, Lake Angelus, Orchard Lake, and Sylvan Lake, and the Village of Holly. From 2023 to 2024, WOTA saw a 60% increase in ridership.

As a governmental agency, WOTA's seven-member board consists of representatives from various communities in the WOTA service area including; Highland Township, White Lake Township, Waterford Township, and the City of Walled Lake, and one ADA advisor and one Senior advisor. In 2024, WOTA's board added an additional member to represent the interests of Holly, Rose, and Groveland townships in addition to the Village of Holly. Open board meetings are held monthly.

As of June 2025, WOTA has 86 total employees, 80% of which are drivers. Out of WOTA's total employees, 35 are full-time, and 69% of those full-time employees are drivers. As of 2025, WOTA's staff includes an in-house accountant, a fully state-certified superintendent of fleet and facility maintenance, a maintenance technician, an operations manager, a logistics manager, a training manager, a human resources manager, and a grassroots marketing professional, all added due to increased demand following the passage of the 2022 millage. WOTA's superintendent of fleet and facility maintenance is also a member of the MDOT Value Engineering and Alternative Technology committee, which helps determine future state contract vehicles and their maintenance requirements.

WOTA's FY 2025 budget was $8,269,430. A breakdown of WOTA projected FY 2025 operating and capital expenses is shown in Table 8.

TABLE 8: WOTA FISCAL YEAR 2025 EXPENSES BREAKDOWN

| | |
|---|---|
| Operating Expenses | 86% |
| Capital Expenses | 14% |


In 2024, WOTA served employment hubs including: various Meijer locations, various Kroger locations, Fox Run Senior Living Community Novi, Culver's Waterford, and Huron Valley Council for the Arts Highland. 25 drivers, 4 dispatchers, and 1 finance manager were added to WOTA's staff.

## Services

WOTA provides demand-response transit service to residents of its service area, which includes Groveland, Highland, Holly, Rose, Waterford, and White Lake Townships, the Cities of Keego Harbor, Lake Angelus, Orchard Lake, Sylvan Lake, and Walled Lake, and the Village of Holly. WOTA serves residents in the small portion of Fenton located within Oakland County. While WOTA does not pick up riders from areas of Fenton outside Oakland County, WOTA riders can travel to destinations in Fenton located in Livingston County.

Riders are picked up within WOTA's service area and can travel to destinations outside the service area that fall within WOTA's driving boundary. A portion of Livingston County and several destinations in Genesee County, including portions of Flint and Grand Blanc, are included in WOTA's driving boundary. Rides should be

scheduled a minimum of two days in advance Monday through Friday and are available Monday through Friday from 6:00 AM to 10:00 PM, Saturday 8:00 AM to 4:00 PM, and Sunday 7:30 AM to 3:30 PM. Riders must register with WOTA to use services. Veterans, persons with disabilities, low-income individuals, and those age 55 years or older are eligible for a discounted fare. Fares can be paid with exact change at the time of service, or in advance via cash or check. A convenient rider card is available for purchase with ten pre-paid rides and one free ride for $20.

As of the first quarter of 2025, among WOTA riders, 20% are persons with disabilities, 37% are age 55 years or older, 28% are both 55 years or older and persons with disabilities. In 2024, WOTA traveled a total of 1,065,495 vehicle miles and 69,516 vehicle hours. From Spring through Fall 2025: 96% of WOTA riders had an excellent or very good ride experience, 93% thought scheduling their trip was extremely easy or very easy, and 98% thought their driver's behavior was excellent or very good.

## Fleet, Facilities, and Technology

WOTA's fleet includes a total of 58 revenue vehicles as of 2025, 98% of which are equipped with lifts. WOTA's primary facility is 250 West Livingston Road, Highland. All WOTA vehicles use gasoline fuel and are fueled at any gas station available using WEX cards. Preventative vehicle maintenance can be performed on-site by WOTA's in-house mechanic, but vehicles must be taken to the dealership for repairs due to their warranties. WOTA currently parks their vehicles in five different locations.

## Planned Improvements

- WOTA is a partner with OCT and SMART in procuring a new dispatch software for transit providers throughout the region in 2026-2027.
- WOTA has outgrown their current facility in Highland, which is not large enough to meet growing service demands. It lacks adequate space for administrative staff, potable water, and a working septic system. Further, WOTA's current facility offers very limited employee and vehicle parking, as WOTA shares the campus with Highland Township. During the warmer months, WOTA must frequently move a significant portion of their vehicles offsite for several days due to Township events hosted at the site. WOTA has secured a Section 5304 grant to assist with site selection and planning for a facility. Interim steps may need to be taken to temporarily move dispatch, training, and office staff to a location to accommodate growing service demand prior to a new primary WOTA facility being identified.

### 2.2.5 Suburban Mobility Authority for Regional Transportation (SMART)

SMART operates fixed route and demand response services in Oakland, Macomb, and Wayne counties. Demand-response services include Americans with Disabilities Act (ADA) complementary paratransit service, Connector, and SMART Flex. ADA paratransit service is for people who are unable to ride fixed route services due to a disability. Connector service provides transportation for riders more than 1/3 mile from a bus route, for trips up to 10 miles. SMART Flex, is an on-demand microtransit service that operates within specific zones.

Table 9 provides 2023 fixed route service provision metrics for SMART and FY 2025 budget values.

TABLE 9: SMART FIXED ROUTE SERVICE AND FY 2025 BUDGET BREAKDOWN

| | |
|---|---|
| Service Area Size [A] | 1603 |
| Vehicle Revenue Hours [B] | 553,093 |
| Vehicle Revenue Miles [B] | 9,710,578 |
| Ridership [B] | 4,489,616 |
| Rides/Hour [C] | 8.11 |
| Total Revenue | $171.1 |
| Operating Expenses [A] | $121.2 |
| Capital Expenses [A] | $41.2 |
| Other Expenses [A] | $52.2 |

[A] *Service area size provided in square miles, budget values provided in millions of 2025 USD.*

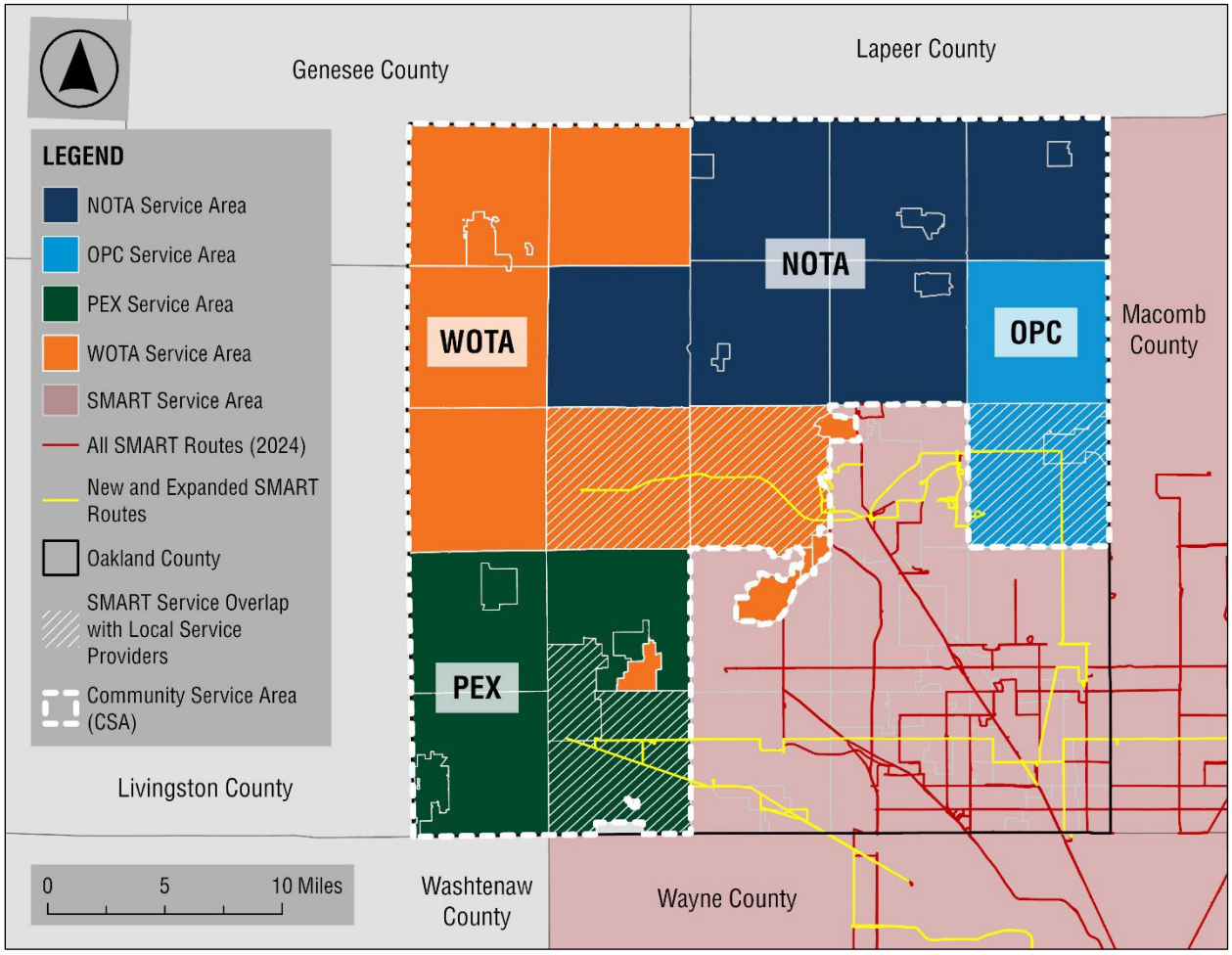
[B] *Source: National Transit Database (2023)*

[C] *Ridership/Vehicle Hours.*

Additionally, SMART and local service providers collaborate to coordinate trips between SMART's and LSPs' service areas. Eligible individuals can utilize SMART's ADA service, enhancing overall paratransit transit service in the region. Additionally, those who are able to use the fixed route system can be taken to a SMART bus stop by LSPs. In this way, SMART and LSPs complement one another, working together to provide riders with a seamless transportation experience.

In the CSA, SMART operates six bus routes as well as complimentary ADA paratransit service for people who are unable to ride fixed route services due to a disability.

FIGURE 10: SMART ROUTES ACROSS OAKLAND COUNTY




*Source: SMART (September 2024)*

These services were expanded into the CSA after the passage of the 2022 Oakland County Public Transportation Millage:

- Routes 305, 740, and 805
  Extended in September 2023 to expand service to Novi and Wixom from Farmington Hills.[18, 19, 20]
- Route 492
  New, added in April 2024, expanding service to Rochester and Rochester Hills.
- Route 790
  Modified and extended in April 2024, expanding service within Pontiac and Auburn Hills.[21]

[18] (Suburban Mobility Authority for Regional Transportation, 2023)
[19] (Suburban Mobility Authority for Regional Transportation, 2023)
[20] (Suburban Mobility Authority for Regional Transportation, 2023)
[21] (Transportation Riders United, 2023)

- Route 759
  New, added in June 2024, expanding service to Auburn Hills, Pontiac, Waterford, and White Lake.[22]

Table 10 illustrates the recent performance of SMART routes that were expanded into the CSA after the passage of the 2022 Oakland County Public Transportation Millage using passengers per route mile data. Passengers per route mile is a metric used to assess the efficiency or effectiveness of transit service by providing an average number of passengers served for every mile that the vehicle, in this case a bus, travels along a given route. A higher passengers per route mile number indicates more efficient service provision, and lower passengers per route mile numbers indicate less efficient service provision.

TABLE 10: SMART OAKLAND COUNTY FIXED ROUTE EXPANSION PERFORMANCE

| Fixed Route Expansion | Weekday Passengers per Route Mile [A] | Saturday Passengers per Route Mile [A] | Sunday Passengers per Route Mile [A] |
|---|---|---|---|
| 305 Grand River [B] | 0.77 | 0.71 | 0.75 |
| 740 Twelve Mile Crosstown [B] | 0.19 | 0.12 | N/A |
| 805 Grand River Park and Ride [B] | 0.14 | N/A | N/A |
| 759 Highland Road | 0.47 | 0.33 | N/A |
| 492 Rochester Road | 0.34 | 0.38 | N/A |
| **Oakland County Median** | **1.06** | **0.96** | **1.74** |

[A] *July through September 2024.*

[B] *Data for Routes 305, 740, and 805 is only for the Novi/Wixom segment of those routes.*

[22] (Suburban Mobility Authority for Regional Transportation, 2024)

### 2.2.6 Transit Service Provider Key Takeaways and Challenges

Following the addition of the Oakland County Public Transporation Millage funding, local service providers are experiencing a steep increase in demand for services and a resulting need for more organizational support. The following three focus areas summarize key LSP takeaways and challenges identified through a review of existing LSP conditions.

#### Facilities

- **Many local service providers have recently expanded or need to expand their facilities.**
- Local service providers need more space for current and future staff in addition to revenue vehicle parking and maintenance.
- Two local service providers have expanded or rennovated their facilities and two are exploring upgrading their facilities.
- Some local service providers are interested in the idea of a communal public works facility for the local transit service providers that could be used to address space needs and to streamline collaboration between providers.

#### Collaboration

- **Many local service providers feel that better structure for collaboration between them is key moving forward.**
- Many local service providers support collaborating on trip scheduling policies and software.
- Many local service providers want to learn more about federal and state grant programs to diversify their funding sources.
- Most local service providers want to see more transparency surrounding applications for and disbursements of federal and state funding.

#### Technology

- **All local service providers have outgrown their current technology or are using outdated technology.**
- All local service providers would like to update their dispatch software to one that works better for demand-response service and for coordinating trips between providers. SMART is in the process of procuring a regional transit dispatch software and CAD/AVL tablets for this purpose.
- As riders become increasingly tech-savvy, some providers are interested in developing fare payment and scheduling apps for their riders. The app should allow riders to see options for, schedule, and pay for trips spanning multiple providers through a single app.
- Some local service providers are also in-need of hardware like interior vehicle security cameras or CAD/AVL tablets for route display.

## 2.3 Plan Review

Oakland County's local service providers operate alongside transit agencies in the county and the region, making coordination and collaboration essential. Other government entities that play a role in helping people move within and outside of Oakland County also have plans that will guide future projects, services, and investments in the county. These plans were reviewed to better understand other initiatives in the region and how Oakland County Transit can work with its peer agencies to build stronger partnerships. Figure 11 identifies major themes across these plans. More detailed plan reviews are included in APPENDIX B: Plan Review.

FIGURE 11: RELATED PLANS KEY THEMES


Three categories of major themes were common across all related plans reviewed: technology, regionalism, and accessibility. Relative to technology, there is an interest in integrating operations across providers using various forms of technology to better coordinate services. Upgrading fleets to electric vehicles and providing more multimodal transportation options that connect with transit services is also part of current regional goals. Finally, designing transit service that continues to improve quality of life and serves an aging population is a major regional priority in the coming years. Building on the existing services provided by the four LSPs, which already enhance quality of life for residents in west and north Oakland County, future transit planning will prioritize continued improvements to technology, regionalism and accessibility.

## 2.4 Market Analysis

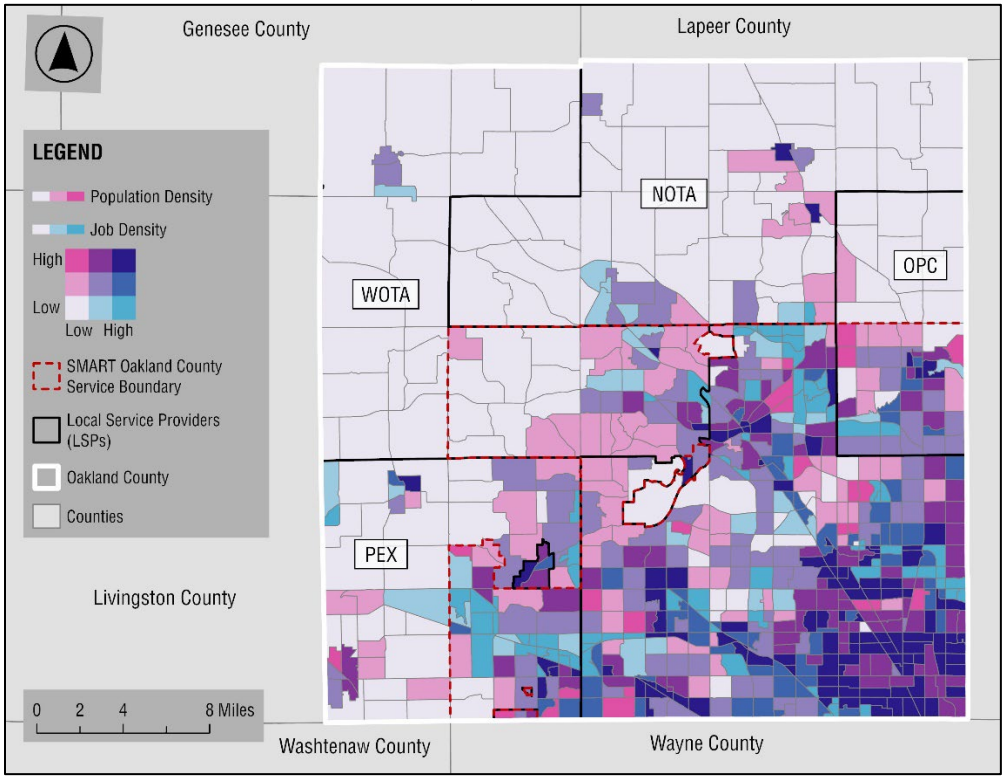
This market analysis identifies areas that may have demand for and are able to support additional transit service. It also highlights overall travel patterns and major activity centers. Essentially, it's a way of looking at where Oakland County residents currently live and work and how this is forecasted to shift in the future. The market analysis considers current and future land use in addition to existing and future population and employment data.[23] The land use and demographic review is further supported by analysis of transit demand and existing travel patterns to provide an assessment of Oakland County's transit market potential with an emphasis on community transit provider service areas.

### 2.4.1 Population and Employment

Population and employment densities are often significant indicators of potential transit markets, especially for fixed route bus services. Greater densities can support more transit service as more people and jobs lead to higher travel activity often with travel in similar directions. The County is home to over 1,270,000 people and 726,000 jobs, with almost 50% of the population and 75% of jobs in the southeast portion of the County where SMART operates transit service.[24]

Figure 12 displays both population and employment densities for Oakland County. There are also several areas in local service providers' service areas that have high density concentrations, including: the Village of Milford, Waterford Township, and the cities of Novi, Rochester, Rochester Hills, South Lyon, and Wixom.

FIGURE 12: POPULATION AND EMPLOYMENT DENSITY, OAKLAND COUNTY




[23] (Oakland County, 2024), (SEMCOG, 2024), (United States Census Bureau American Community Survey (ACS), 2018-2022)
[24] (United States Census Bureau American Community Survey (ACS), 2022)

## 2.4.2 Population and Job Growth

Population and job growth forecasts for 2050 were reviewed for the County. By 2050, Oakland County's total population is projected to grow by almost 10%, or over 116,000 people, and total jobs are projected to grow by almost 24%, or over 220,000 jobs.[25] Significant population and job growth is anticipated within SMART's Oakland County service area in the southeast but is also dispersed throughout the County, illustrated in

Figure 13. By local service provider, population growth is projected to be highest in NOTA's service area in Independence Township, OPC's service area in Oakland Township and Rochester Hills, PEX's service area in Milford and Lyon townships in addition to the City of Novi, and WOTA's service area in White Lake Township. Areas along the outer edges of the County also show high projected population. Job growth is more concentrated to targeted locations including Auburn Hills, Independence Township, and the City of Novi.

FIGURE 13: OAKLAND COUNTY TOTAL POPULATION AND JOBS DENSITY BY 2050


[25] (SEMCOG 2050 Regional Forecast, Transportation Analysis Zones, 2020, 2050)

### Southeast Michigan's Aging Population

Another key component of the region's population forecast is a steep increase in the number of people ages 65 and older. Michigan is currently home to 1,877,562 seniors. Statewide projections indicate that 2.7 million seniors will live in Michigan by 2030.[26] This is in line with a national trend of population aging that the U.S. has been experiencing since the 1970s due to a number of factors, primarily declining fertility rates coupled with increasing life expectancy. In Michigan, population aging has been exacerbated by the out-migration of younger adults.[27]

Southeast Michigan population projections specific to Oakland County and the CSA indicate a significant increase in the density of older adults by 2050. In Oakland County, the 65 to 84 age group is expected to increase by 22.5% and the 85 and older age group is expected to increase by 138.7%. Projections for CSA show higher projected increases in the population of both age groups. Within the CSA, the 65 to 84 age group is expected to increase by 28.3% and the 85 and older age group is expected to increase by 163.1%.[28] LSPs will need to expand their capacity to meet growing demand from the region's aging population.

## 2.4.3 Land Use

Across Oakland County, current land uses generally align with development and density patterns (see Figure 14). The eastern and southeastern portions of the County have higher densities of mixed-uses. Northern and western parts of the County have lower concentrations of mixed-uses, including less dense single-family housing, fewer commercial areas, and more recreation/conservation and agricultural land. Commercial uses are generally located along major roadways with the highest concentrations in the southeast, where multi-family housing is more abundant.

Oakland County's future land use, a compilation of each community's future land use plan, indicates that the most change is anticipated in the northern portions of the County (see Figure 15). While recreation/conservation land is largely maintained, its anticipated that much of the agricultural land in these areas will be developed as mostly single-family housing. Concentrations of commercial uses in the northern portion of the County are anticipated to increase along with additional infill of mixed-uses. Current and future land uses in the CSA are largely low density in character, generally unfavorable to fixed route transit service outside of major corridors where there are more mixed uses and commercial areas.

[26] (Regional Transit Authority (RTA), 2024)
[27] (Leach & Butler, 2024)
[28] (Southeast Michigan Council of Governments (SEMCOG), 2023)

FIGURE 14: OAKLAND COUNTY CURRENT LAND USE

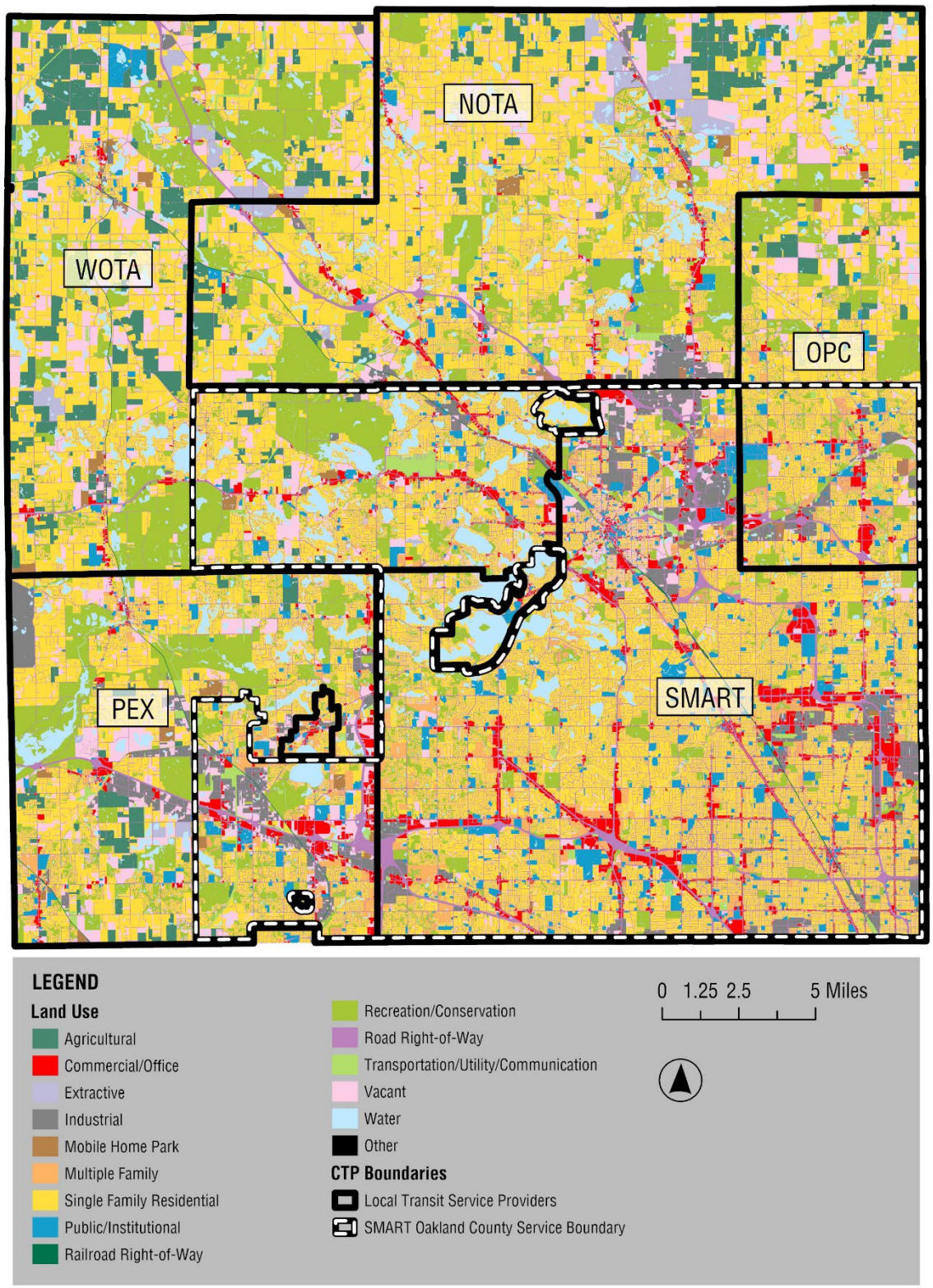
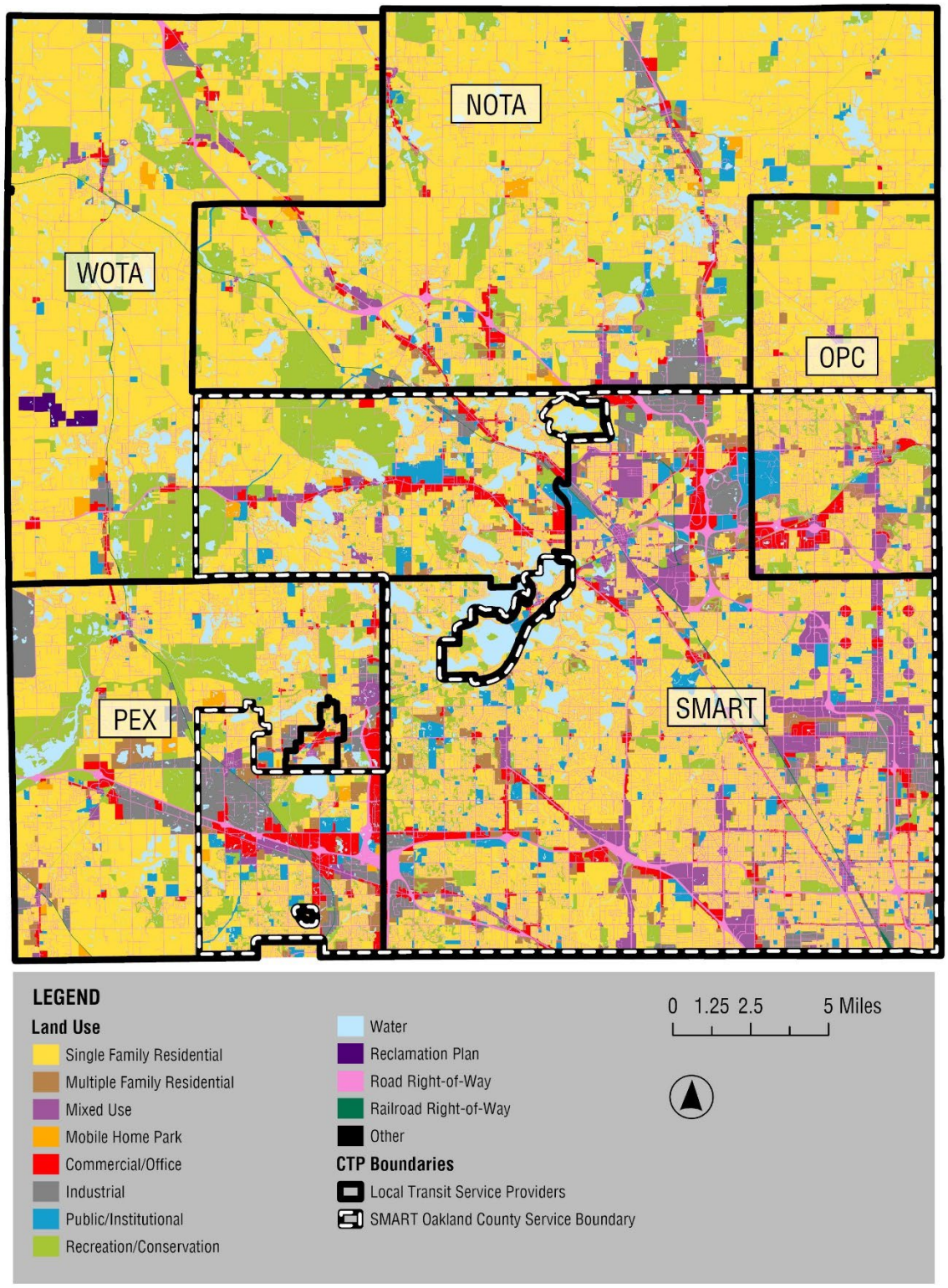


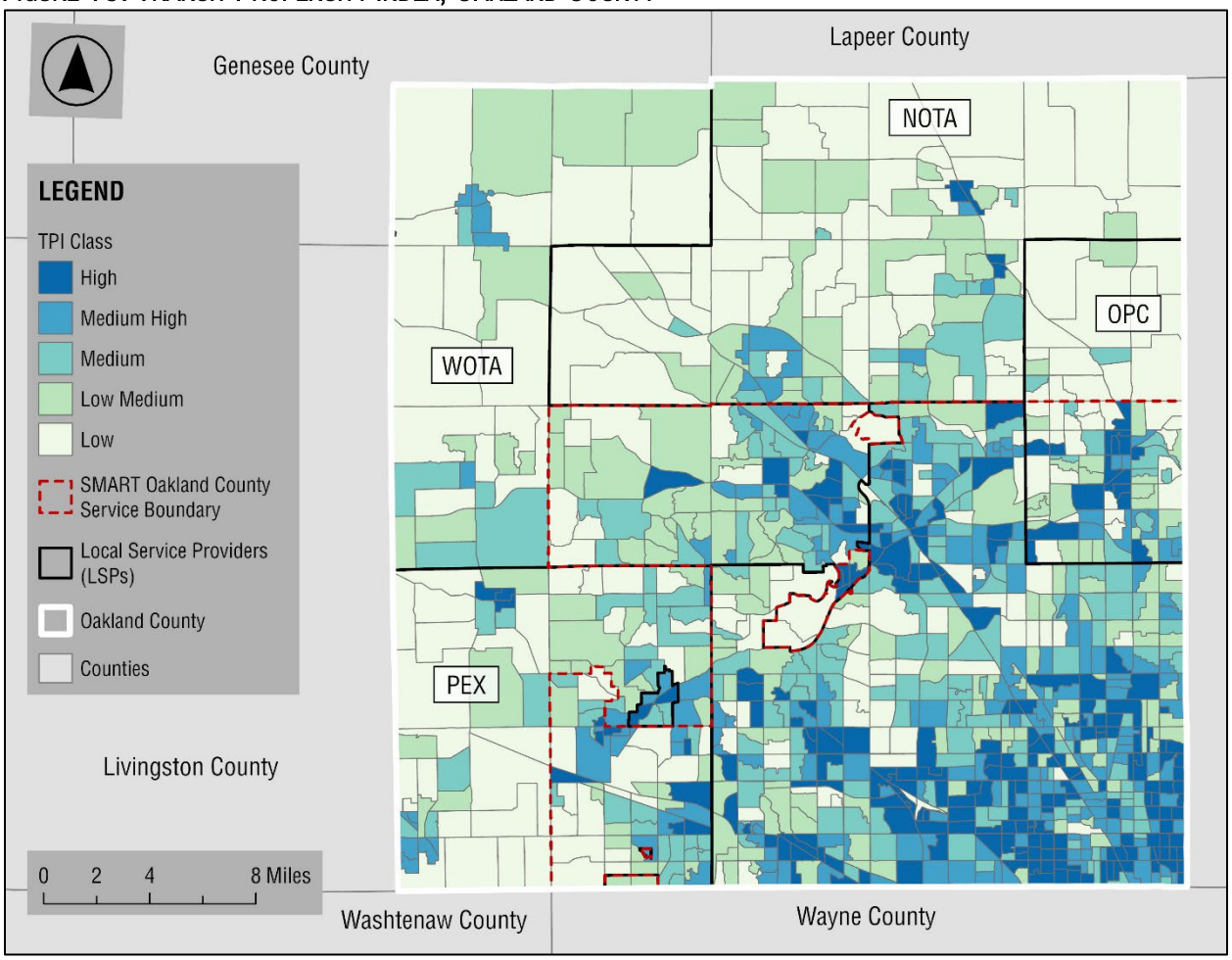
FIGURE 15: OAKLAND COUNTY FUTURE LAND USE



### 2.4.4 Transit Propensity Index

There are many demographic characteristics, such as population and employment densities, which can be attributed to supporting public transit services and generating ridership. To better understand transit demand in Oakland County, a tailored Transit Propensity Index (TPI) was developed to further identify specific areas where people might have a higher likelihood of needing and using transit service. The TPI is calculated based on a variety of origin and destination-based demographic, socioeconomic, and travel pattern activity (using cell phone data) metrics in associated block groups to describe where people live, work, and travel. The index used for the market analysis conducted to inform the CTP was created to address metrics more relevant to Oakland County and its LSPs with a goal of identifying transit demand potential for fixed route and demand-response services. A map displaying the TPI results from "low" to "high" is displayed in Figure 16. Block groups in the top two categories, defined as Medium-High and High, describe areas that have the highest demand for transit service in Oakland County.

FIGURE 16: TRANSIT PROPENSITY INDEX, OAKLAND COUNTY



### 2.4.5 TPI Findings and Transit Opportunities

There are many areas of high transit demand in the southeast portions of the County. However, there are also several locations in the CSA that may support additional transit services. Areas with clusters of block groups with higher identified transit demand can indicate an opportunity to support fixed route service. Areas of disaggregated or singular block groups also can support transit service but may be better served by demand-response services.

Figure 17 identifies higher transit demand areas with existing fixed route service provided by SMART.

Figure 18 displays additional opportunities for increased demand-response or fixed route service. Adjacent to the SMART service area, there are several clusters of higher transit demand that may be opportunities for new or extended fixed route services. These clusters include Rochester and Rochester Hills, Wixom and the City of Novi, and Clarkston. Additionally, within the CSA there are several clusters with stronger demand for transit that may benefit from additional demand-response service for the general population. These clusters include the Village of Holly, City of Novi, the Village of Oxford, City of South Lyon, Lake Orion, and parts of Orion and Highland Townships.

FIGURE 17: EXISTING FIXED ROUTE SERVICE IN AREAS WITH MEDIUM-HIGH OR HIGH TPI

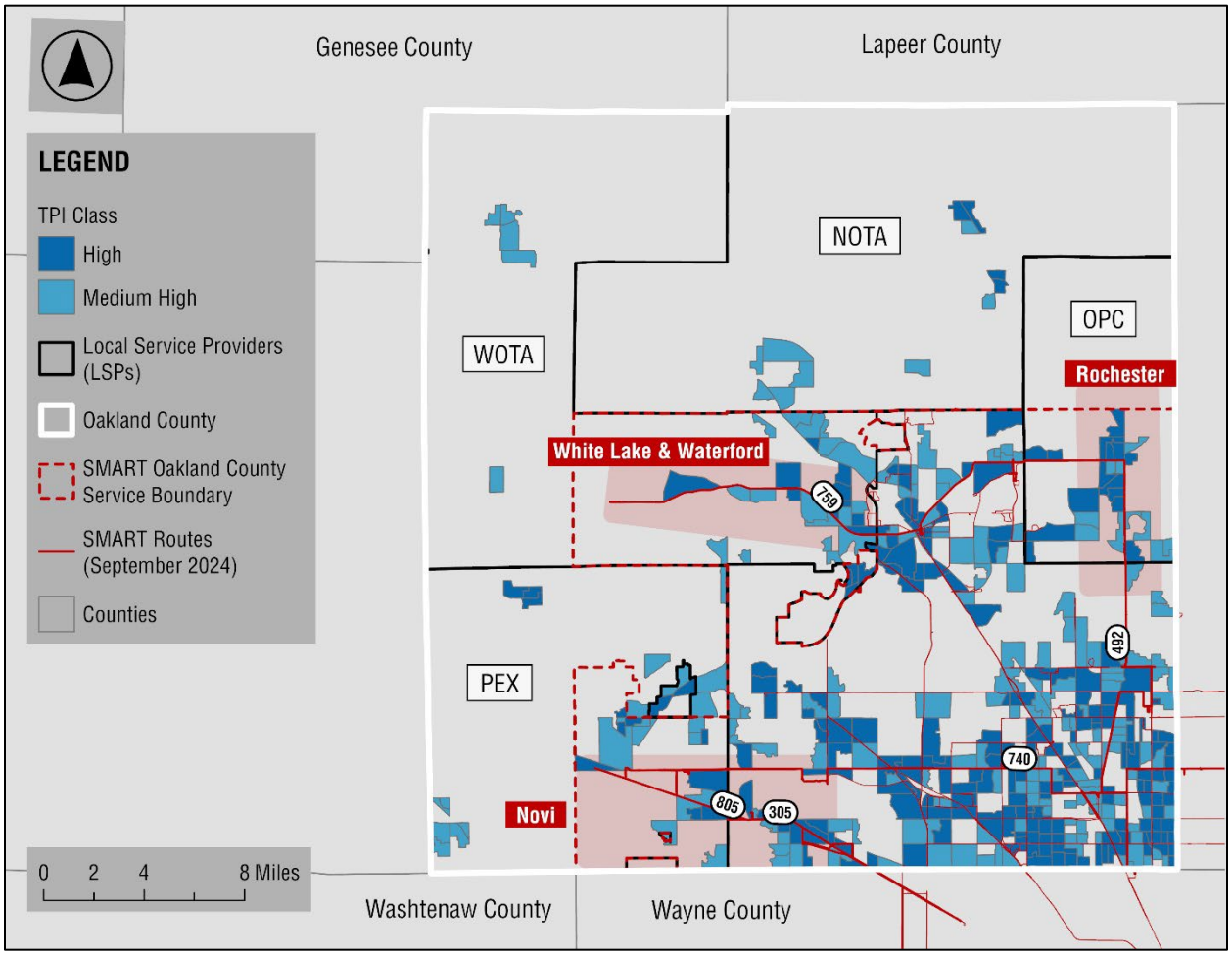
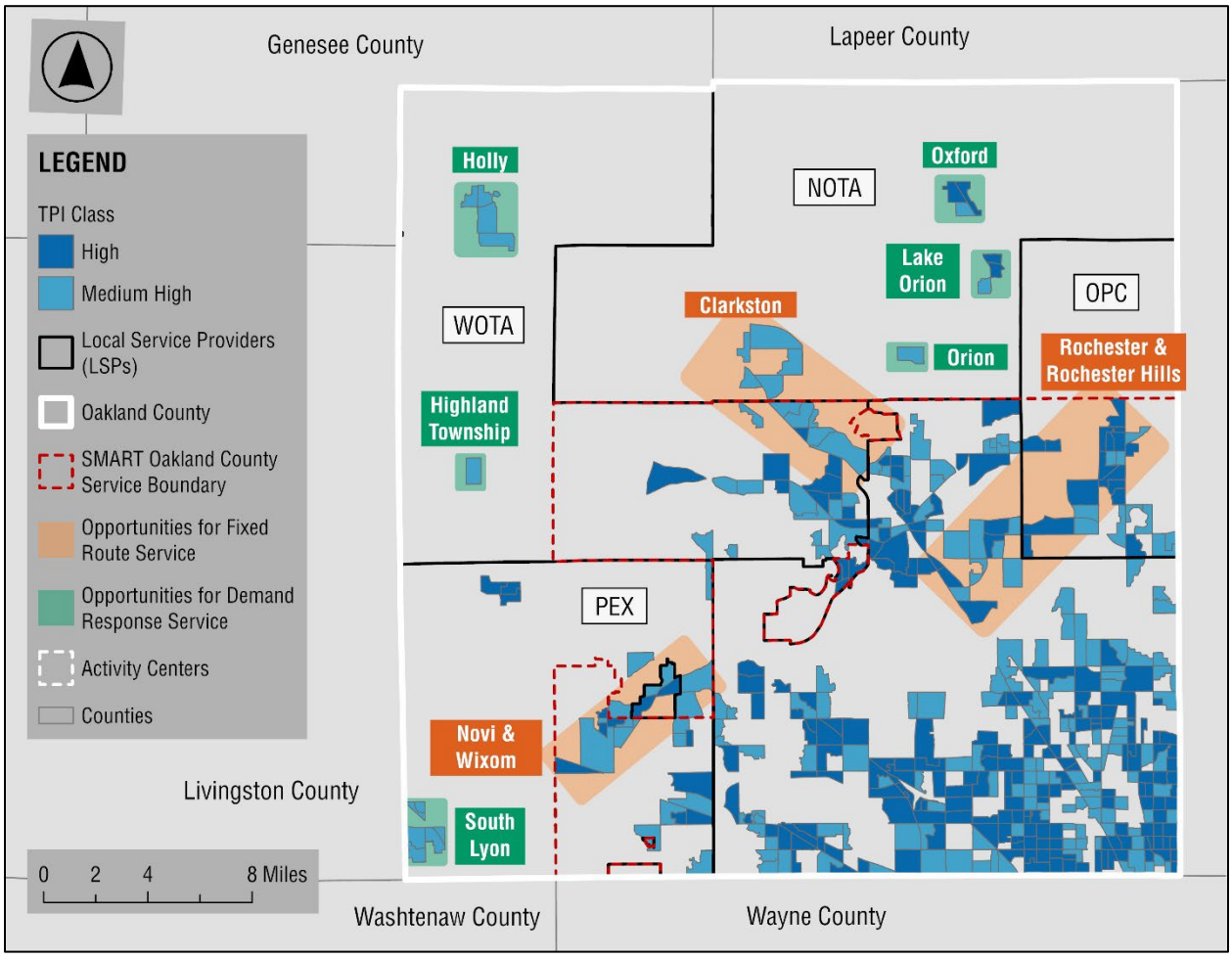


FIGURE 18: POTENTIAL SERVICE IMPROVEMENTS IN AREAS WITH MEDIUM-HIGH OR HIGH TPI




## 2.4.6 Oakland County Travel Patterns

To better understand general travel patterns in Oakland County and between LSPs' service areas, an origin-destination analysis was conducted using Replica trip data. Replica is a company that models specific travel patterns across the country using location-based service data (e.g., cell phone data) that represents overall travel pattern activity between Census block groups. Each Replica trip has a defined origin and destination block group. The number of "total trips" can be calculated for each block group, which helps identify major travel patterns between different locations across the County. Data used includes origins and destinations for those traveling to, from, and within Oakland County on a typical weekday in Fall 2023.

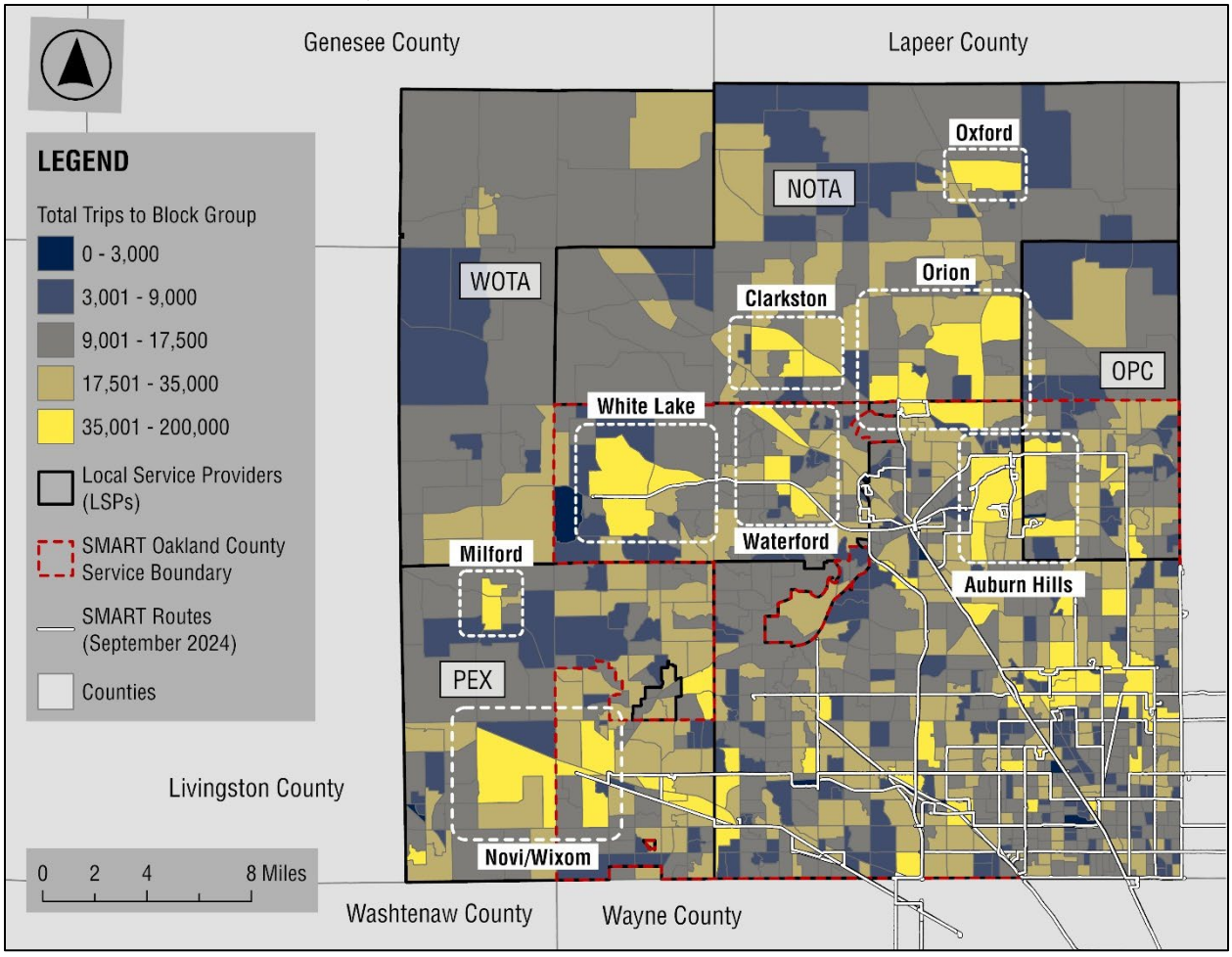
It is important to note that the Replica data presented in this section represents all trips that start and/or end in Oakland County. These trips are not limited to trips associated with the CSA or completed using LSP services.

## Oakland County Activity Centers

Activity centers[29] in the County were identified and are shown in Figure 19. Some of the highest trip activity can be seen in areas scattered throughout the southeastern portion of the county and in Auburn Hills, White Lake, Waterford Township, the Village of Milford, Oxford Township, the City of Novi, Wixom, Clarkston, and Orion Township.

The highlighted areas in Figure 19 indicate activity centers with potential to explore more transit service as they have higher volumes of trips to and from them. Some of the activity centers highlighted currently have existing SMART service, namely Waterford and White Lake townships, Auburn Hills, the City of Novi, and Wixom.

FIGURE 19. TOTAL TRIP ACTIVITY, OAKLAND COUNTY




[29] Activity centers are block groups that generate a high number of trips.

## Major Travel Patterns Crossing Local Service Provider Boundaries

To build upon the identification of activity centers, major travel patterns between LSPs' service areas were identified to better understand how people move throughout Oakland County. Most major travel patterns between block groups are to adjacent areas.

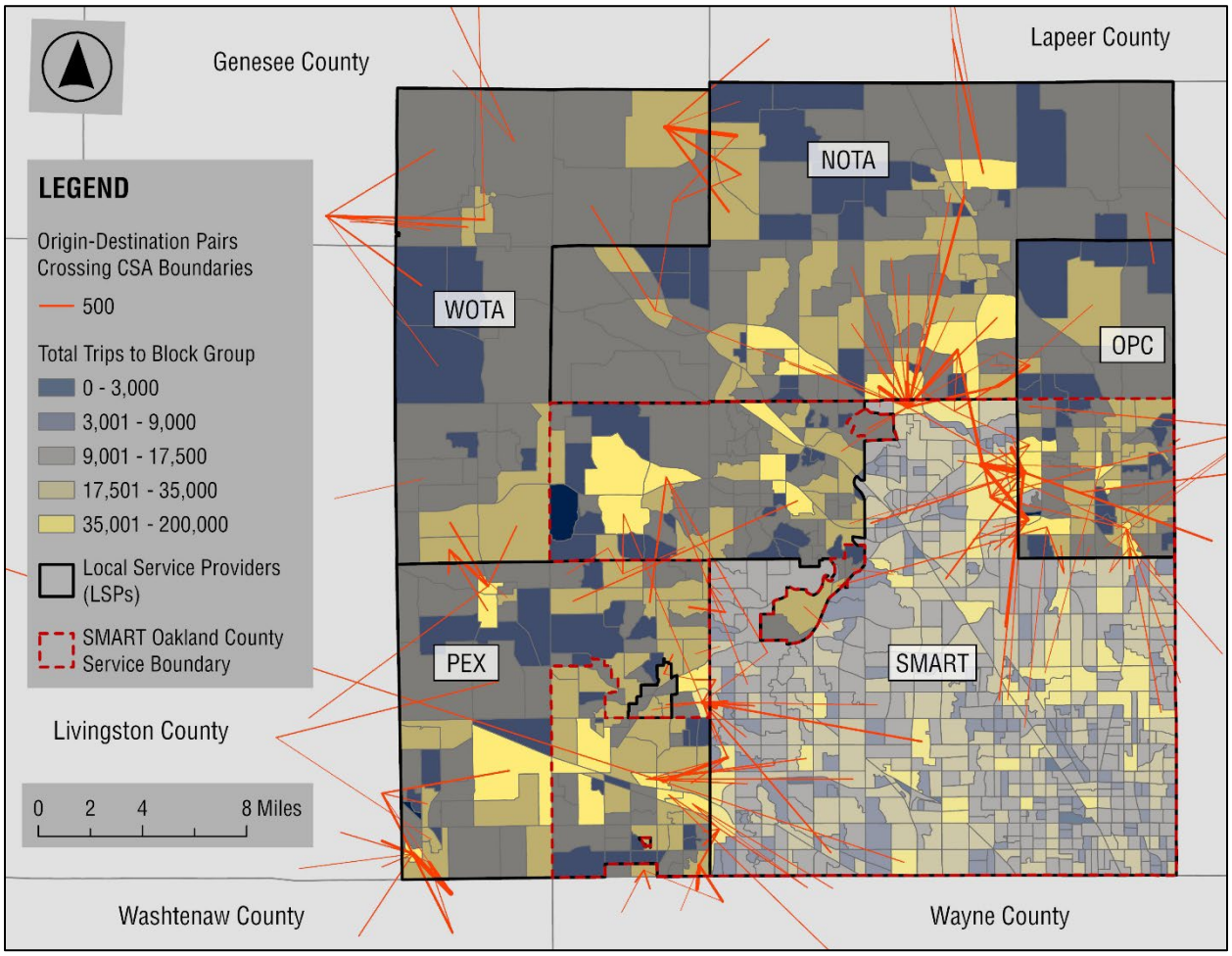
To focus on other travel patterns of significance, a tailored analysis of travel patterns crossing LSPs' service area boundaries was explored. Trips originating from each LSP's service area were compiled; the top 10% for each are displayed in Figure 20.[30] Most of these trip patterns display connections to adjacent areas across provider service area borders and/or show patterns to city/town centers or commercial areas. Table 11 summarizes the top five major travel patterns and other notable patterns observed.

TABLE 11: OAKLAND COUNTY MAJOR AND NOTABLE TRAVEL PATTERNS

| Top Five Major Travel Patterns | Other Notable Travel Patterns |
|---|---|
| Ortonville between WOTA and NOTA service areas | Fenton to Holly |
| Great Lakes Crossing Outlets to NOTA service area | Leonard/Addison to Romeo |
| Auburn Hills crossing OPC and SMART service areas | Southfield to Novi |
| Novi to Farmington Hills/SMART service area | Novi to Livonia |
| South Lyon to Salem | Waterford to Lake Sherwood |
| | Oxford to Metamora |
| | Rochester Hills to Sterling Heights/Shelby Township |
| | Holly to Grand Blanc |

[30] Trips crossing local service provider boundaries include trips with either an origin (begin) or destination (end) in a community transit provider service area.

FIGURE 20. TOP 10% OF TRAVEL PATTERNS CROSSING CSA BOUNDARY




Overall travel patterns between each LSP and SMART's Oakland County service area were reviewed to better understand connections between these areas. For each service area, internal trips are most significant and account for the majority of trips taken. This indicates strong travel patterns within each existing service area with SMART (1,930,000 trips) and PEX (398,000 trips) notably higher than the other LSPs. Each LSP has a strong connection with the SMART service area with PEX, OPC, and WOTA (185,000 to 195,000 trips) with slightly more trips than NOTA (135,000 trips). Amongst connections between the CTP service areas, WOTA has the most trip connections with the strongest patterns to PEX (105,000 trips) and NOTA (85,000 trips). These patterns reflect overall travel behavior in the region, not solely trips completed through LSP services.

Connections between LSP service areas that are separated by another service area have the least amount of travel between them.[31] With strong connections between several adjacent LSP service areas, there may be opportunities to capture a selection of trips with transit services that cross boundaries and serve major activity

[31] For example, connections between PEX and OPC (4,600 trips) or PEX and NOTA (6,800 trips) are notably less than other service area connections.

centers. These trips may be able to be taken with additional transit services and/or further coordination between providers.

### Travel Pattern Activity by Local Service Provider

The following details travel activity and major travel patterns that occur in each LSP service area using Replica trip data. This is representative of overall travel occurring in service areas. It can be useful for understanding how people are traveling in these areas and support planning for future or additional transit services in each LSP service area.

Additionally, each LSP provided data on provided transit trips between April and July of 2024 for analysis to better understand how existing riders are utilizing their services. Information provided included trip date, purpose, time, and pickup and drop off location. Brief summaries and findings of this analysis by LSP are provided in APPENDIX A: Local Service Provider Trip Analysis.

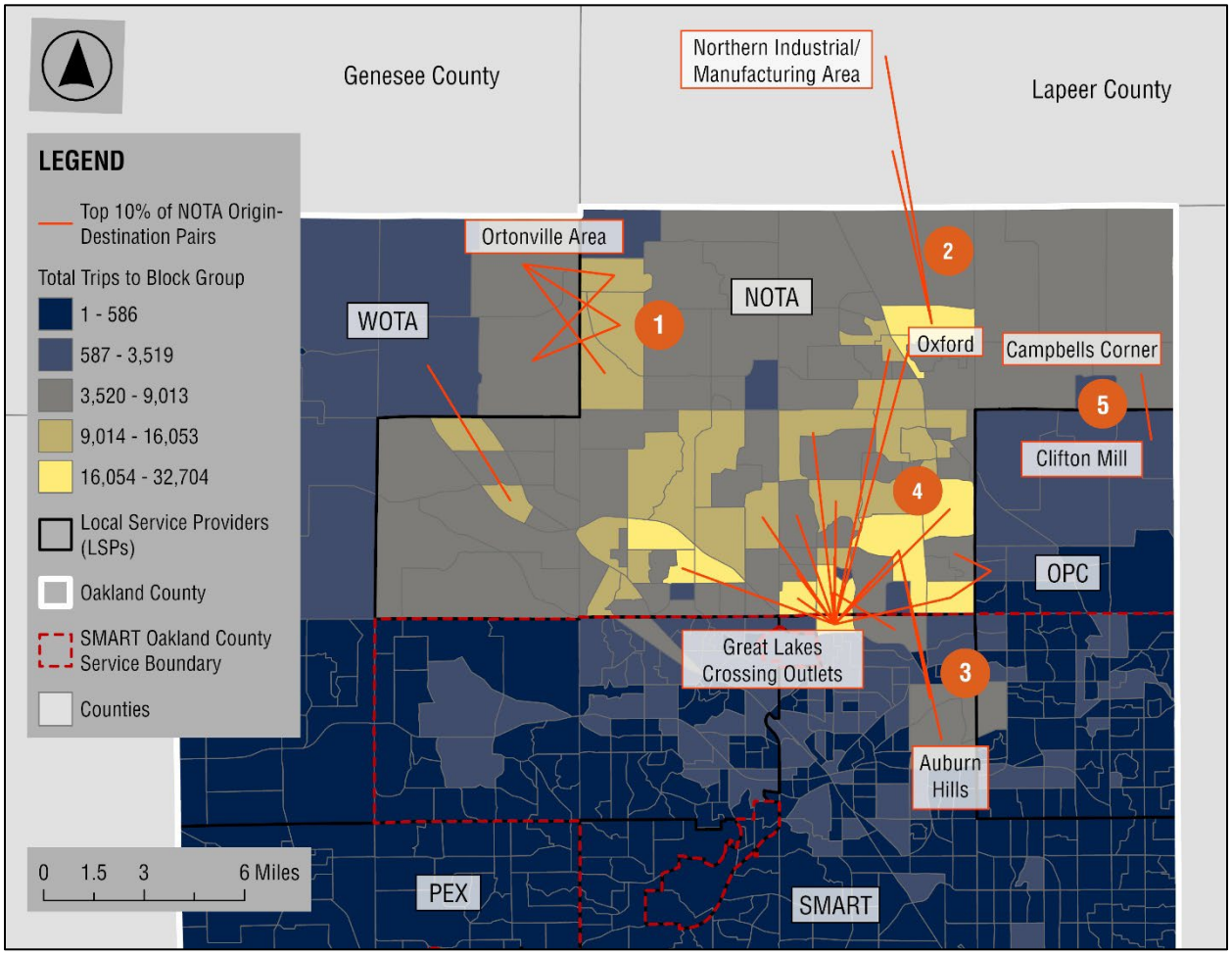
## NOTA Travel Patterns

Most of the internal trips in NOTA's service area connect activity centers and the nearest/largest residential areas, illustrated in Figure 21. Major activity centers include Great Lakes Crossing Outlets, Oxford, Lake Orion Schools, and Independence Township. Major travel patterns traveling outside of the service area include:

1. Areas around Ortonville
2. Oxford and northern Industrial/Manufacturing area
3. Auburn Hills and GM Orion Assembly Plant
4. Great Lakes Crossing Outlets and Oxford
5. Campbells Corner and Clifton Mill

There are also less significant but existing connections[32] between Lansing and the GM Orion Plant, and Downtown Flint and Ortonville.

FIGURE 21: TOP 10% OF TRAVEL PATTERNS AND TOTAL TRIPS BY BLOCK GROUP IN NOTA SERVICE AREA



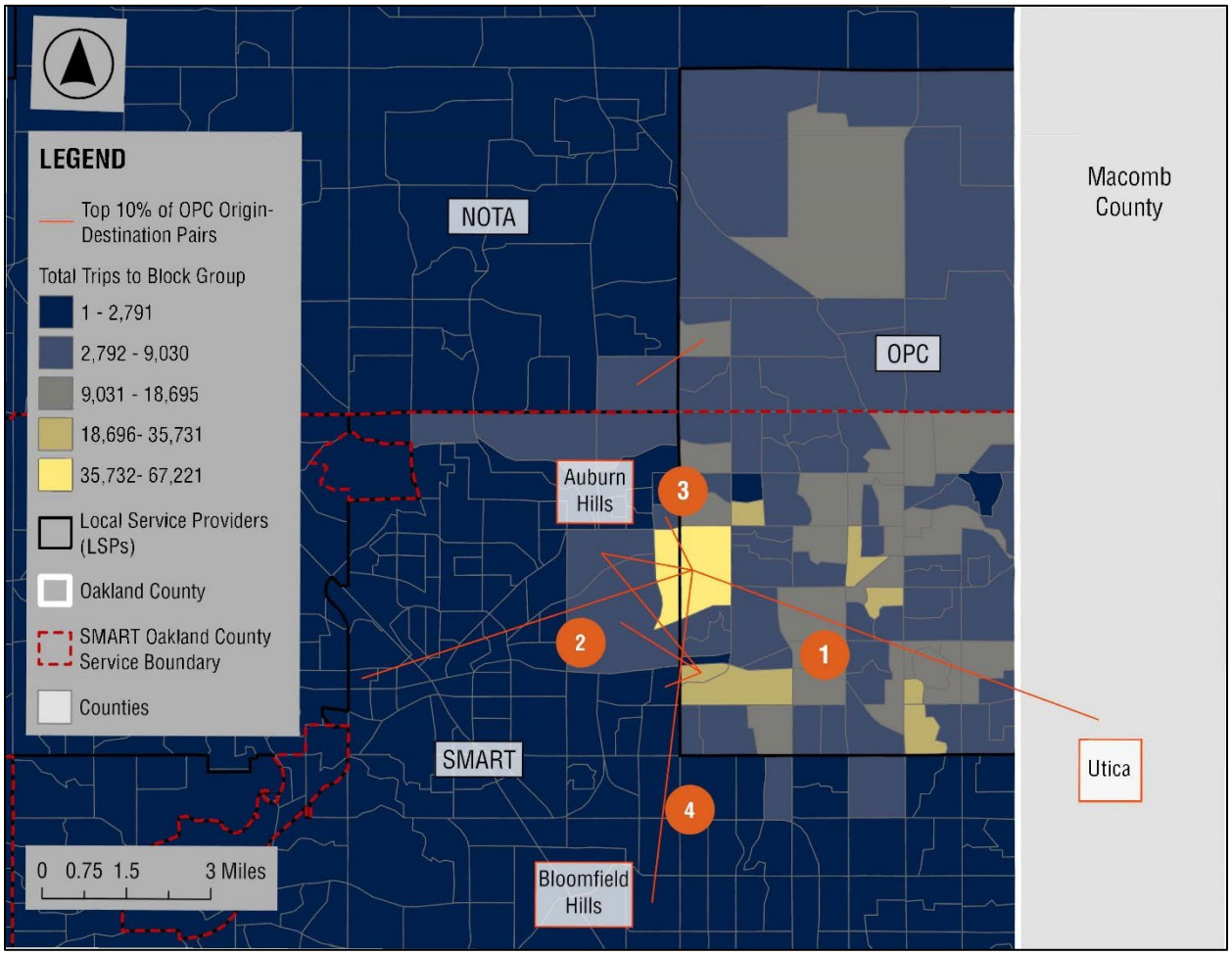

[32] Less than 50 trips per day.

## OPC Travel Patterns

A majority of internal trips in OPC's service area connect activity centers to larger residential areas, illustrated in Figure 22. Major activity centers include Auburn Hills and Oakland University Meadowbrook. Major travel patterns traveling outside of the service area include:

1. Auburn Hills and Utica
2. Auburn Hills, adjacent block groups
3. Stellantis North America Headquarters and Marketplace Circle
4. Auburn Hills and Bloomfield Hills

FIGURE 22: TOP 10% OF TRAVEL PATTERNS AND TOTAL TRIPS BY BLOCK GROUP IN OPC SERVICE AREA

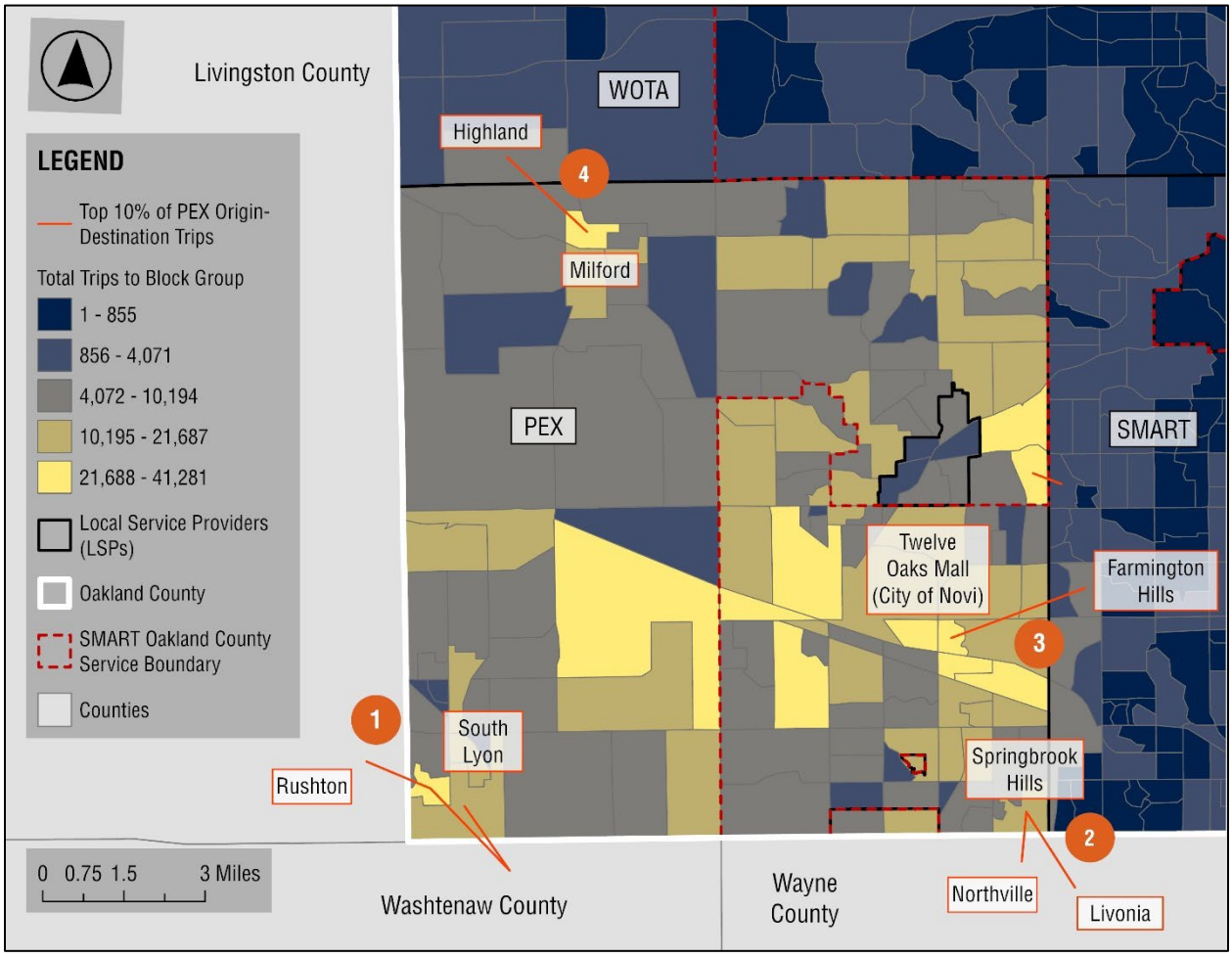


## PEX Travel Patterns

Most of the internal trip activity in PEX's service area was between major activity centers and adjacent residential areas, illustrated in **Figure 23**. Major activity centers include South Lyon, Bloomfield Avenue Shoppes, Leon Town Center, New Hudson, and Downtown Milford. Major travel patterns traveling outside of the service area include:

1. South Lyon to Rushton
2. Springbrook Hills to Northville Retail Center / Schoolcraft College / Livonia
3. Twelve Oaks Mall to Farmington Hills
4. Milford to Highland

FIGURE 23: TOP 10% OF TRAVEL PATTERNS AND TOTAL TRIPS BY BLOCK GROUP IN PEX SERVICE AREA

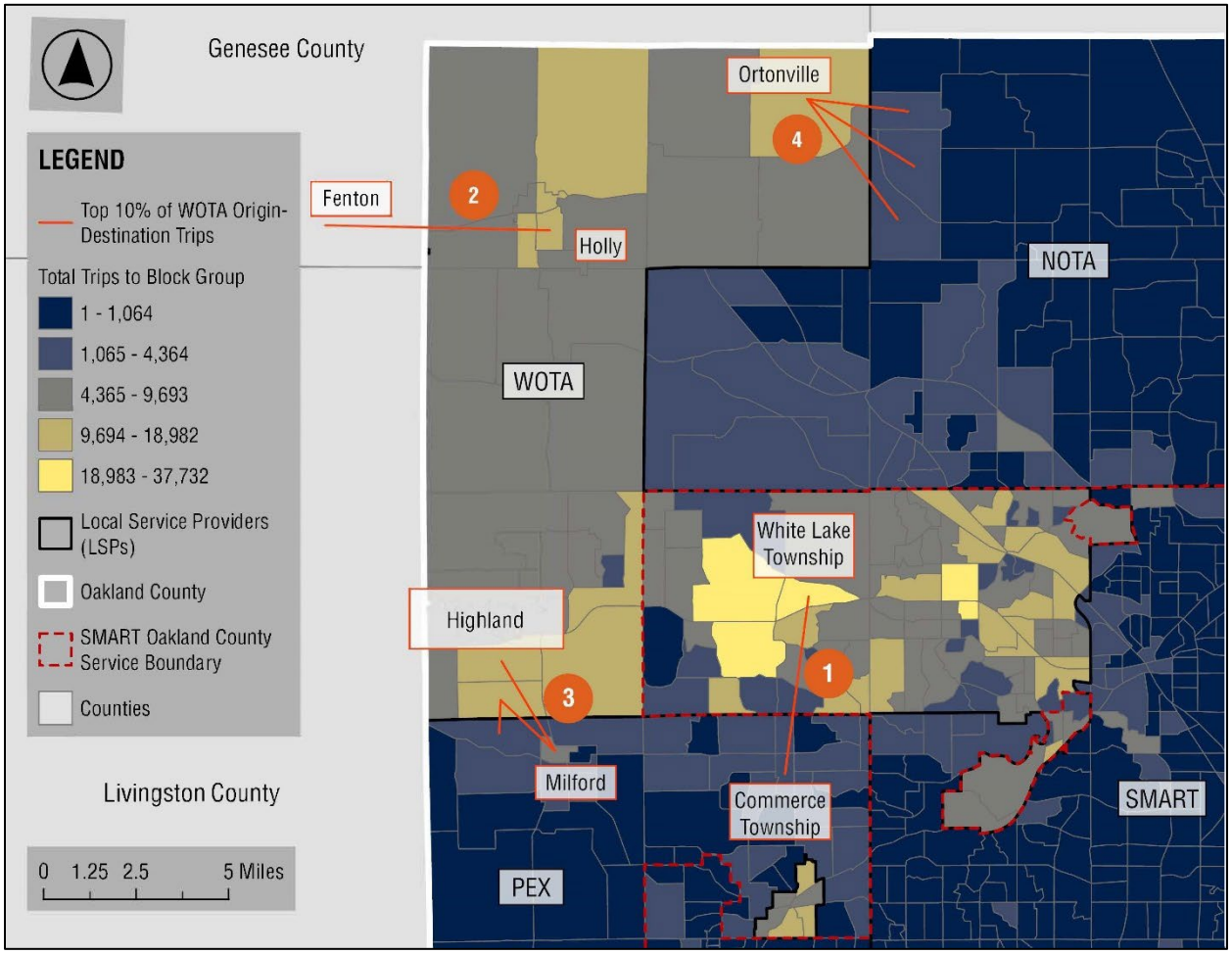


## WOTA Travel Patterns

Many of the internal trips in WOTA's service area connect activity centers to major residential areas, illustrated in Figure 24. Major activity centers include White Lake and Oakland County International Airport. Major travel patterns traveling outside of the service area include:

1. White Lake and Commerce
2. Fenton (shopping center, multi-family residential) and Holly
3. Milford and Highland
4. Ortonville, large adjacent block groups

FIGURE 24: TOP 10% OF TRAVEL PATTERNS AND TOTAL TRIPS BY BLOCK GROUP IN WOTA SERVICE AREA



## 2.5 Phase 1 Public and Stakeholder Engagement

In developing the Oakland County CTP, the Project Team consulted with the public and key stakeholders to develop strategies and recommendations that form a planning framework that will guide future growth and service improvements for transit in Oakland County. The Public and Stakeholder Engagement was intended to include a broad group of representatives, communities and stakeholders during the development of the Community Transit Plan. To engage the public, OCT used a variety of strategies including a survey, six focus groups, two Steering Committee meetings, five pop-up events and two virtual public meetings, participating in a total of 15 public engagement events during the first phase of the project.

The Project Steering Committee (Steering Committee) is a group of key regional stakeholders that met four times during the development of the CTP to provide feedback on the planning process, including twice during Phase 1 of CTP public and stakeholder engagement (Phase 1). This Committee included representatives from SMART, NOTA, WOTA, OPC, PEX, RTA, Southeast Michigan Council of Governments (SEMCOG), MDOT, Oakland County Transit, and Oakland County Planning and Economic Development.

The Project Team held four stakeholder engagement meetings during Phase 1. Stakeholder groups included Oakland County departments (Planning, Parks & Recreation, Economic Development, Sustainability, Veteran Services, Workforce Development, Strategic Partnerships), nonprofits (Centro Multicultural La Familia, On My Own of Michigan, Blueprint to End Homelessness), employers and universities (Lawrence Technological University, Oakland University, Henry Ford Health System, Health Careers Alliance, Oakland Community College), and Oakland County Township supervisors.

During Phase 1, two virtual public meetings were held on November 14, 2024, at 12:00 p.m. and 5:30 p.m., drawing 56 and 22 attendees respectively, to introduce the Oakland County Community Transit Plan, review existing conditions, and gather feedback on draft service goals. Discussions focused on improving accessibility, affordability, connectivity, and user experience, with attendees emphasizing priorities like free rides for veterans, enhanced communication, and reliable service frequency. Major feedback from attendees is discussed in 2.5.1 Key Takeaways and Findings.

### 2.5.1 Key Takeaways and Findings


Overall, there was strong advocacy for improved transit accessibility, communication, and fixed route services to address community needs comprehensively for Oakland County Transit. Important themes from participants feedback included:

- Needed improvements to fixed route connections between Oakland and neighboring counties.

Event participants noted that connections to Macomb, Wayne, Genesee, and Livingston would be particularly valuable for their needs.

- Better coordination between providers to facilitate smooth travel across service areas.
  Making connections between local service providers is currently inefficient due to the lack of a unified scheduling and dispatch systems for both LSP users and operators and better means of coordination between providers would both help make trips seamless and make more trips possible.
- Accessibility issues, such as inadequate bus stop infrastructure, lack of shelters, and challenges for individuals with disabilities.
  Individuals with differing mobility needs cited the need for better transit facilities and connecting infrastructure within local service provider service areas, which is more applicable to fixed route service.
- More transparency in service planning and transit millage allocation.
  Residents of Brandon Township and Ortonville expressed frustration over perceived neglect in service planning despite paying transit millage, emphasizing the need for fixed routes, and expanded coverage.
- Need for better communication regarding available transit services and rider education.
  Many event participants reported the need for transit service awareness campaigns, so that the public has a better understanding of what their service options are and how to use them.

### 2.5.2 Survey

A transit survey was conducted by OCT in coordination with local service providers to reach both riders and non-riders to assess the effectiveness, usage, and awareness of the services offered by all transit service providers operating across Oakland County. Respondents were asked different questions based on whether they were LSP riders or non-riders to gain a better understanding of which transit services available in Oakland County are used, how, and why in addition to the reasons why individuals may not use LSP services.

The survey garnered over 950 responses, gathering input from current riders and from non-riders regarding their experiences and familiarity with Oakland County's transit service providers. While the survey has primarily been conducted online, paper surveys were made available to local service providers in October 2024 to ensure accessibility and promote it further with the local transit agency riders. Survey links and QR codes were shared on social media and printed on flyers that transit service agencies have distributed throughout the County. Additionally, efforts have been made to solicit survey responses at public events.

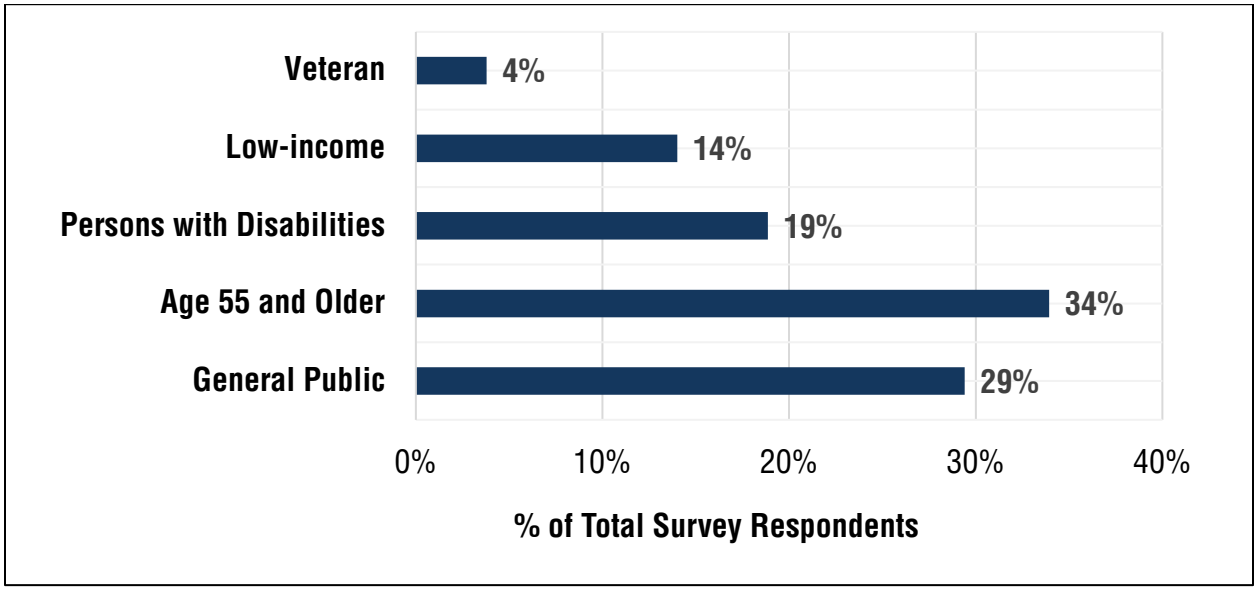
**Current riders** made up 39% of survey respondents.

**Non-riders** made up 61% of survey respondents.

The proportion of survey respondents in each rider demographic group is shown in

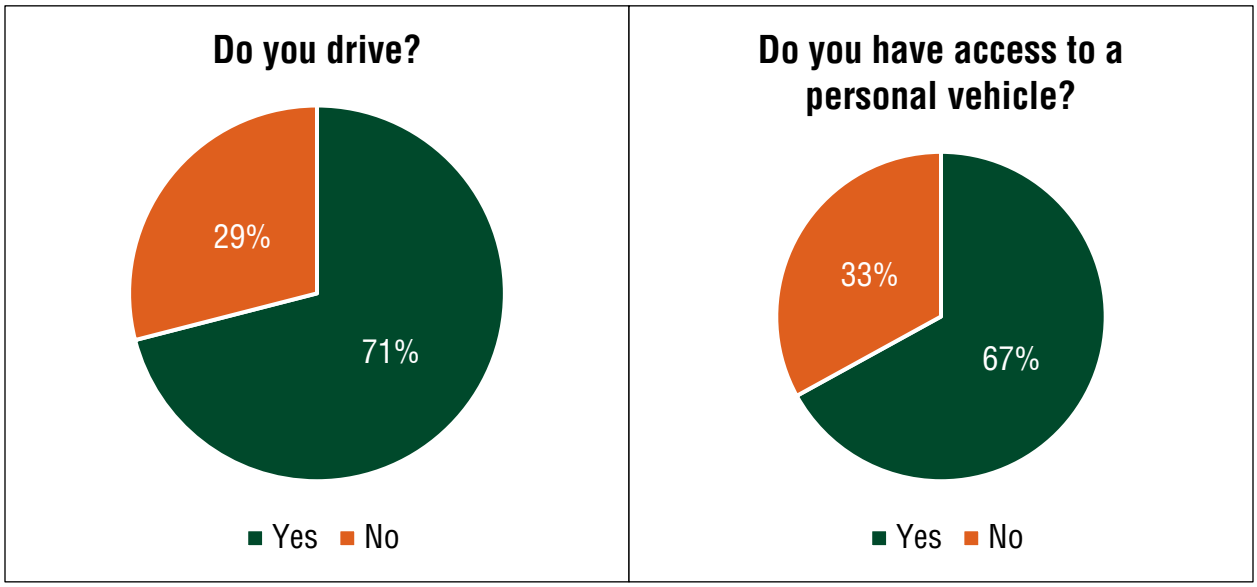
Figure 25. Most survey respondents are members of the general public or age 55 and older.

FIGURE 25: SURVEY RESPONDENTS BY RIDER DEMOGRAPHIC GROUP



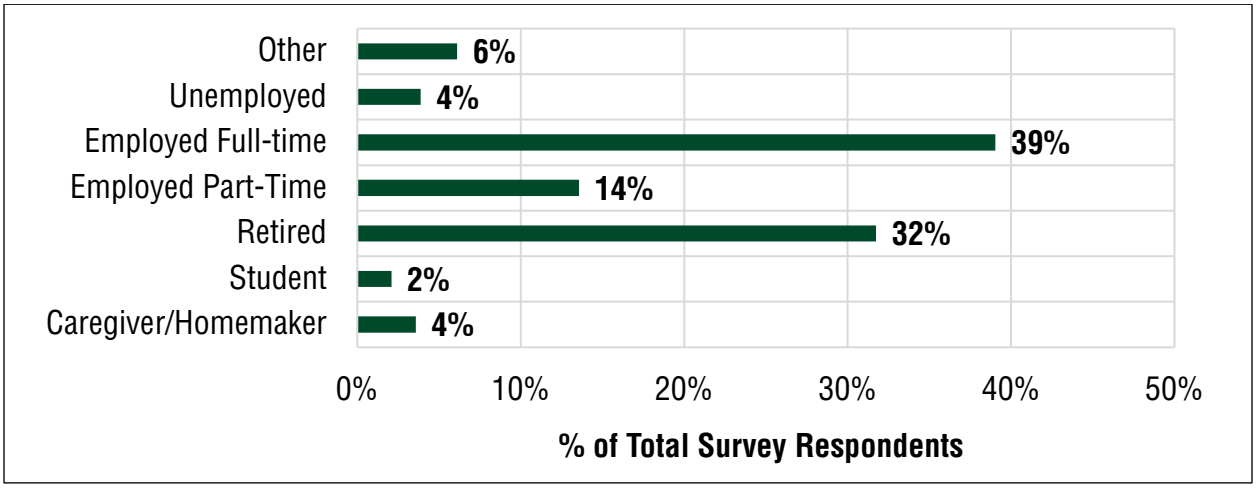

Out of all survey respondents, riders and non-riders, most do drive and have access to a personal vehicle, illustrated in Figure 26.

FIGURE 26: ALL SURVEY RESPONDENTS DRIVER STATUS AND PERSONAL VEHICLE ACCESS




Most are employed full-time or are retired, 39% and 32% respectively. Very few were students, caregivers/homemakers, or unemployed. Those who marked their employment status as "other" provided write-in responses indicating they are self-employed, unemployed due to disability, or fall under multiple employment status categories provided, e.g. student and employed full-time. Survey respondents' employment status is summarized in Figure 27.

FIGURE 27: SURVEY RESPONDENT EMPLOYMENT STATUS

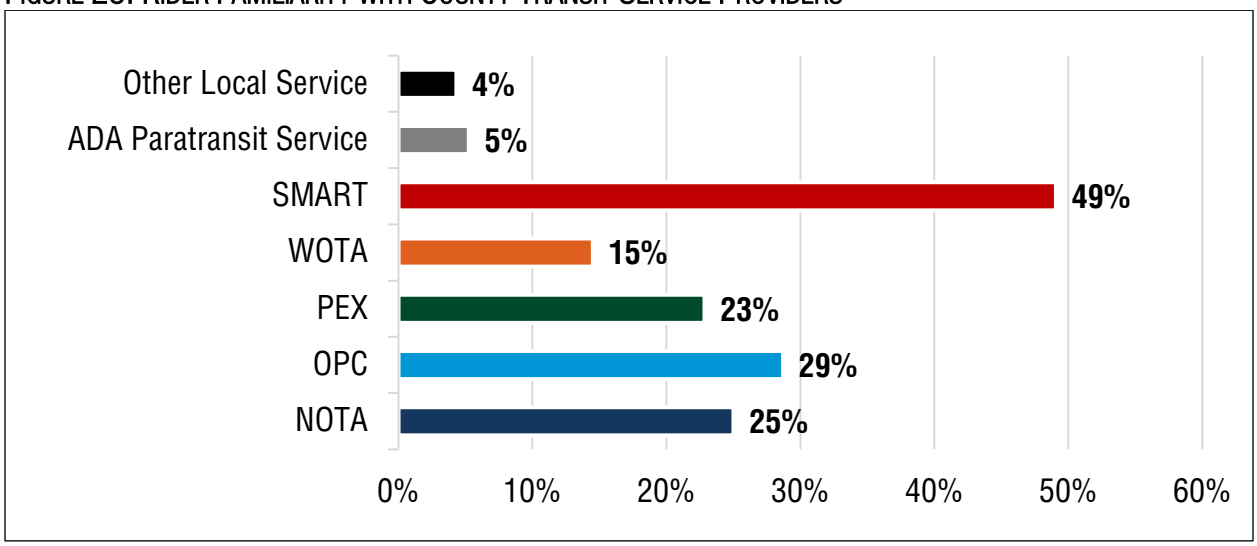



Almost all survey respondents stated they have access to a smart phone, and a large majority of survey respondents stated that they had relatively easy internet access and use the internet to make purchases. From this sample, most current and prospective transit users have the resources to access an app and the internet for trip options, trip scheduling, and fare payment. Further, most current riders who responded to the survey are interested in online/mobile booking services and find mobile apps preferrable for fare payment.


## Current Riders

Out of survey respondents who are current riders, SMART Flex, Connector and regular fixed route bus service is the most familiar transit service, as illustrated by Figure 28. This aligns with SMART's service area being the largest of all transit service providers operating in Oakland County. SMART also offers the most service of all transit service providers within Oakland County. Relative to Oakland County's LSPs, OPC is most familiar to riders, following by NOTA, PEX, and WOTA. OPC has been in operation the longest, followed by NOTA, PEX, and WOTA.

FIGURE 28: RIDER FAMILIARITY WITH COUNTY TRANSIT SERVICE PROVIDERS

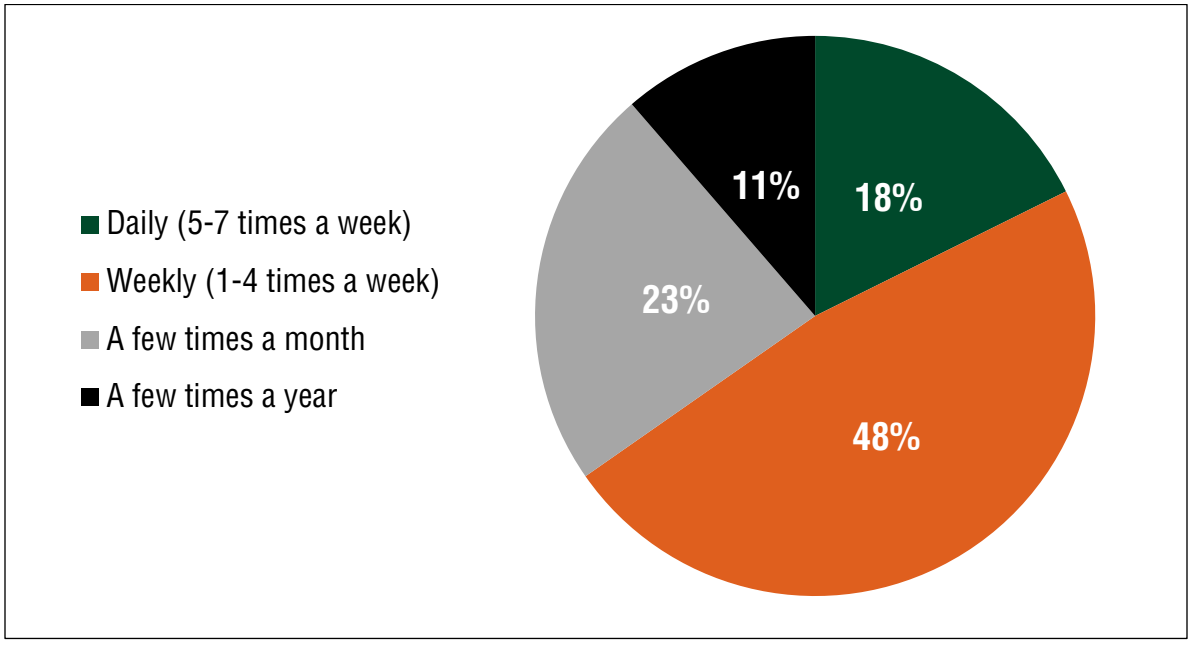



### Most riders are satisfied with LSPs:

- 65%, do not feel that they have any unmet transit needs.
- 66% find booking rides easy and 87% feel that they can book rides for their preferred date and time.
- Over 75% wait less than 10 minutes beyond their scheduled pickup time for their ride.
- Over 75% feel that LSPs' service hours are adequate for their needs.

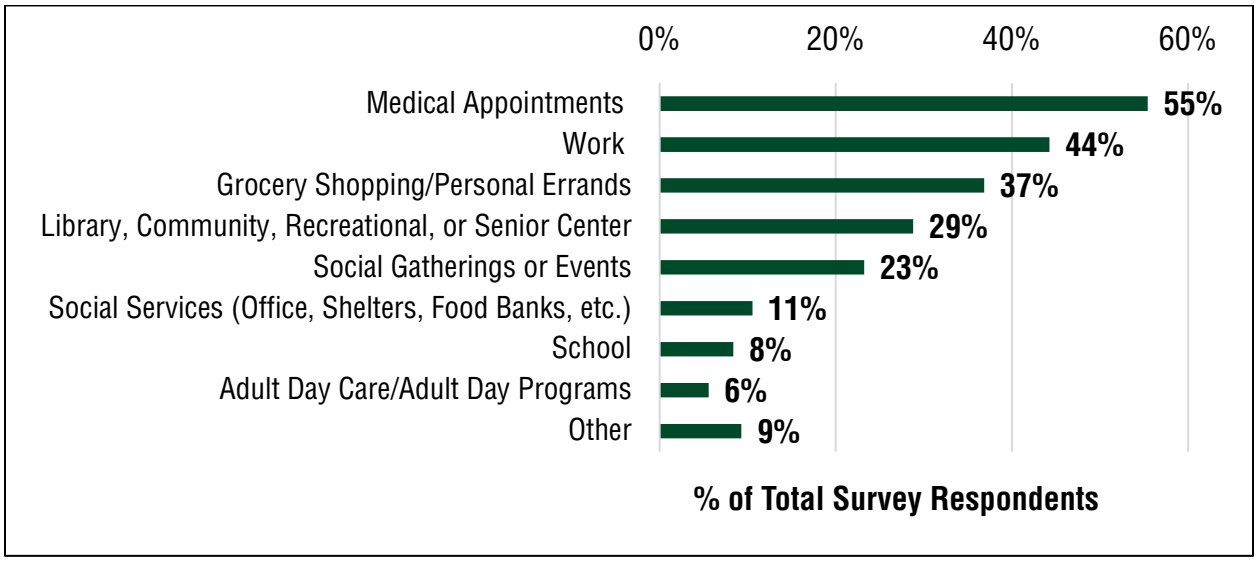
The biggest trip booking difficulty cited by current users is the number of days in advance that trips must be booked. An app allowing riders to view trip options, schedule, and pay fares could help alleviate this difficulty.

FIGURE 29: RIDER FREQUENCY OF TRANSIT SERVICE USE



Two-thirds of all riders who responded to the survey, 66%, use transit services available in Oakland County daily or weekly, as illustrated in **Figure 29**. Most of these riders use transit services weekly to get to medical appointments, work, run errands, travel to their local library, community, recreational, or senior center, or attend social gatherings and events (see **Figure 30**). Other reasons survey respondents choose to use local transit services include traveling to locations where they can exercise, volunteering, visiting friends, or attending religious services.

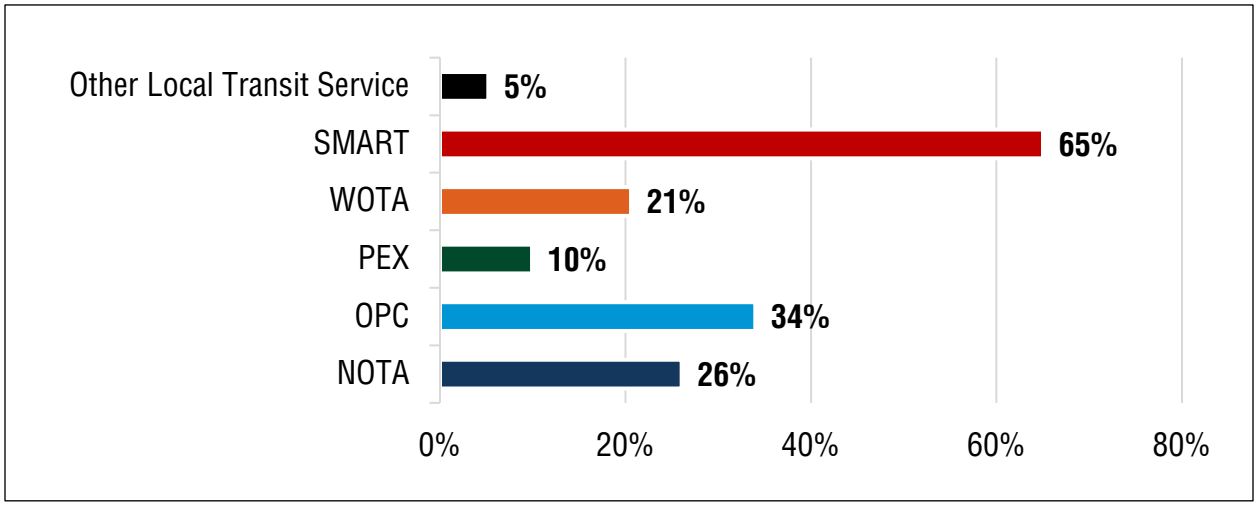
FIGURE 30: RIDER'S REASONS FOR LOCAL SERVICE PROVIDER USE




## Non-Riders

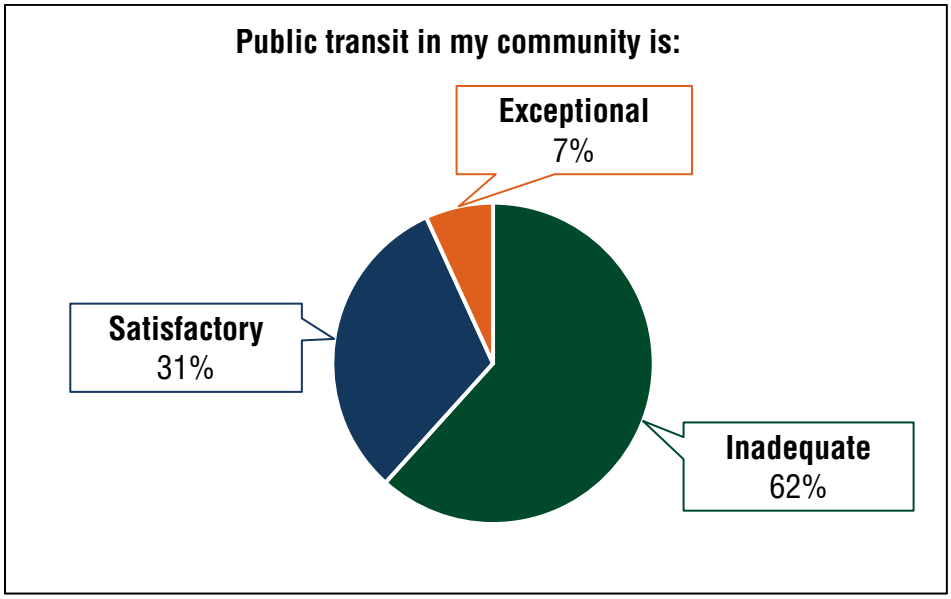
Like current riders, non-riders are most familiar with SMART out of all the transit services offered throughout Oakland County, as illustrated in **Figure 31**. Much like riders, OPC is the most familiar County LSP to non-riders, followed by NOTA, WOTA, and PEX. Interestingly, 78% of non-riders report no unmet transit needs.

FIGURE 31: NON-RIDER FAMILIARITY WITH COUNTY TRANSIT SERVICE PROVIDERS



Though most non-riders feel transit service in their community is inadequate (see Figure 32), a good number are glad that the Oakland County Public Transportation Millage passed, see a need for transit services across the County or know someone personally who has been positively impacted by transit services offered across the County. Most non-riders do not use currently available transit services in Oakland County because those services do not go where non-riders need to travel, as shown in Figure 33. Many non-riders are also unaware of their transit service options and how to use them. Smaller portions of non-riders feel that currently available transit services in Oakland County do not have adequate service hours or are not accessible for their needs.

FIGURE 32: NON-RIDER LEVEL OF SATISFACTION WITH THEIR TRANSIT SERVICE OPTIONS




Non-rider concerns about the CTP center primarily on the Oakland County Transportation Millage. Many non-riders are not sure about the necessity of the Community Transit Plan, citing public spending efficiency and concerns due to the empty bus stops or empty and out-of-service buses they see while they are traveling around the local area. Others expressed that local community taxes continue to be collected in addition to the millage, and several feel that communities should still be able to opt out. Overall, non-riders want greater transparency between OCT, local service providers, and the public.

FIGURE 33: NON-RIDER REASONS FOR NOT USING TRANSIT SERVICES

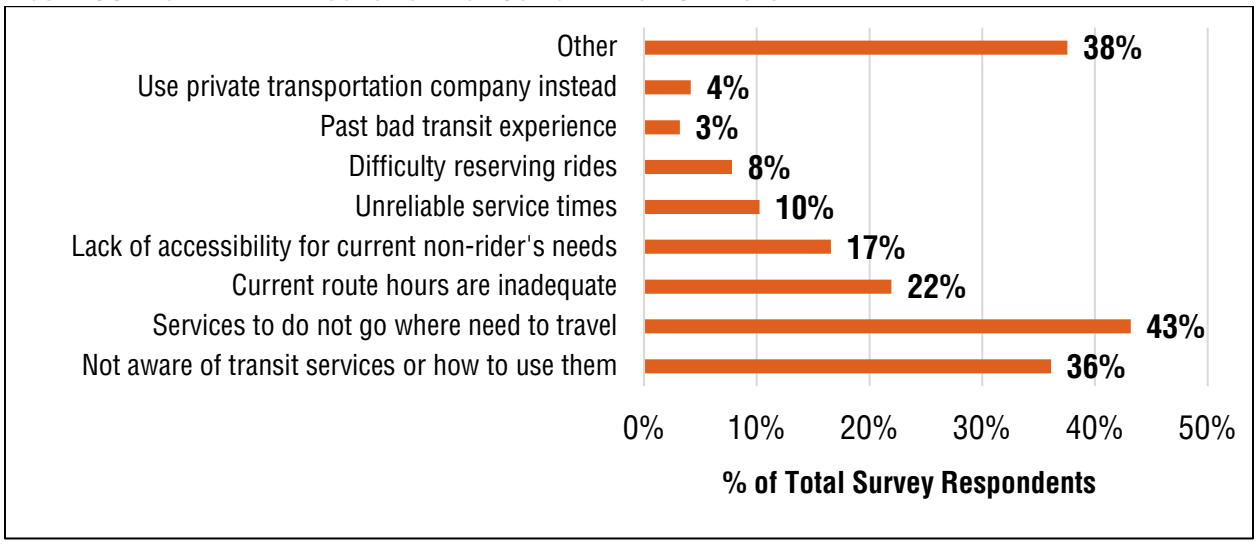



FIGURE 34: NON-RIDER TRANSIT CONCERNS

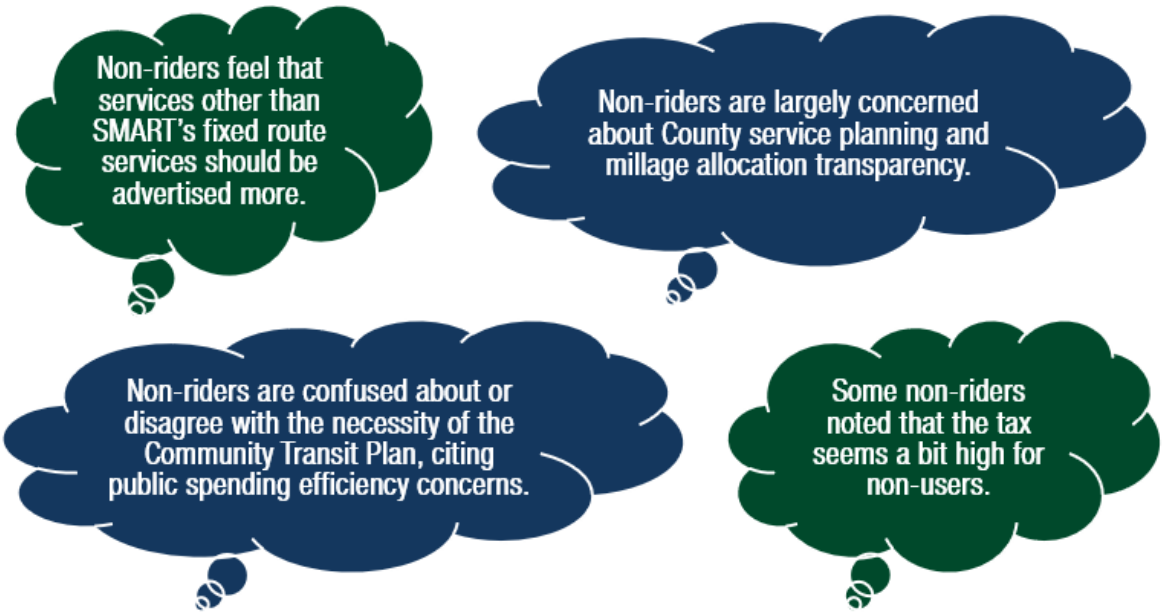
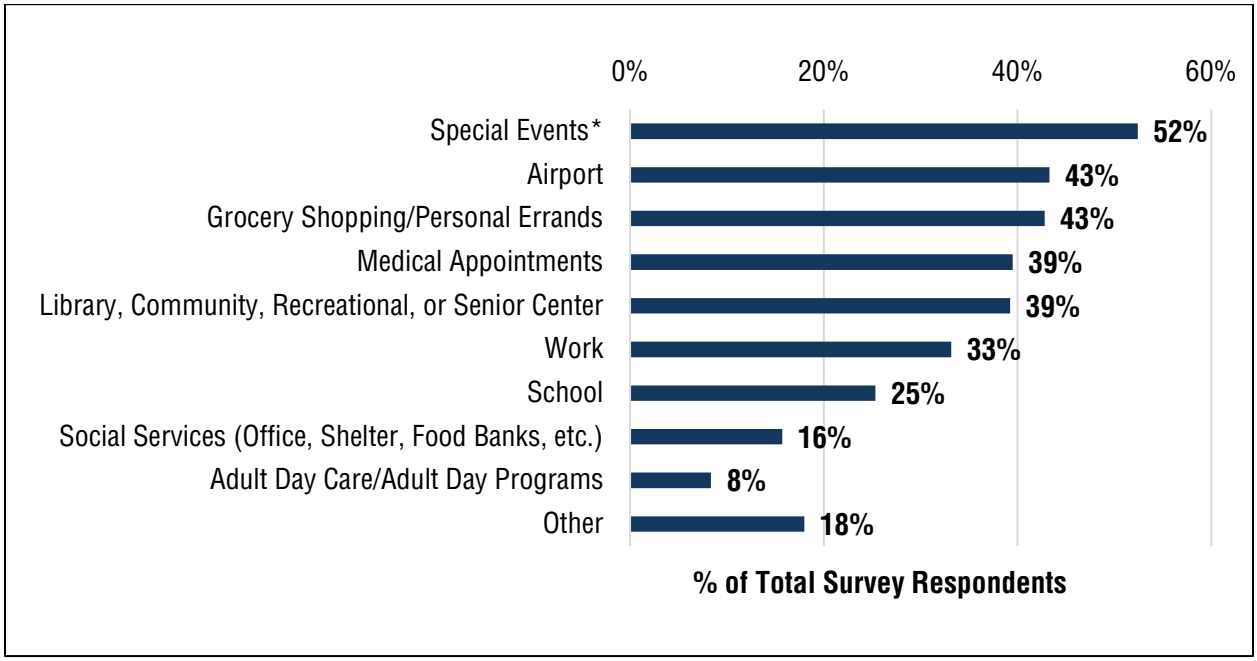


FIGURE 35: NON-RIDERS' DESIRED USES OF TRANSIT SERVICES




**Concerts, sporting events, festivals, etc.*

Non-riders would like to use transit mostly for special events, getting to the airport, appointments or personal errands, excursions to community buildings, or grocery shopping/personal errands, as illustrated by Figure 35. There are also a good number of non-riders who would like to use transit services to get to work or school.

For the 22% of non-riders who did have unmet transit needs, the most frequent comments provided explaining why their needs are not met were:

- Services do not go to specific locations where non-riders work, have medical appointments, or shop.
- Night and weekend service hours are not adequate.

A large portion of non-riders reported that the major reason they do not use transit services available in Oakland County is a preference for using their personal vehicle. Many noted that they feel they do not need to use transit services because they are able to drive and have access to a personal vehicle.

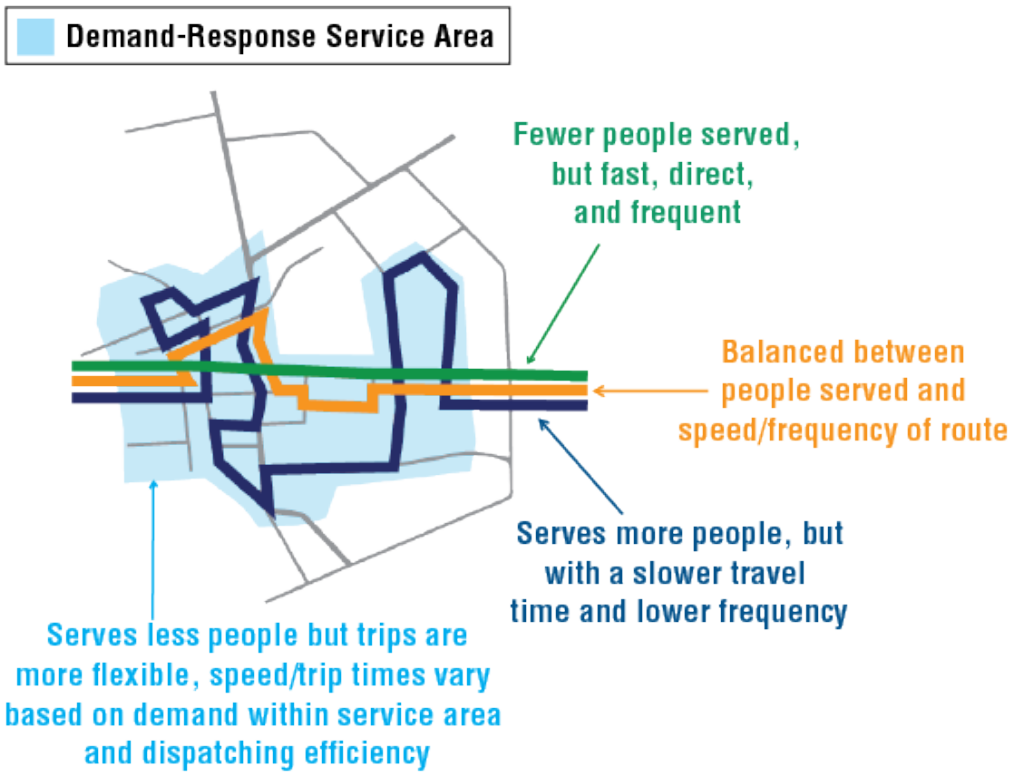
# 3. Service Model Options and Recommendations

With an understanding of the current conditions of Oakland County's transit service providers and demand for transit across the County, we can develop transit service model options and recommendations through effective transit service planning. This chapter discusses the different components of a transit service model and potential outcomes of various service model options.

## 3.1 What is Transit Service Planning?

Transit, like all transportation, is utilized to reach a destination. When people spend less time traveling, they have more time for other activities. Transit service is a public good: something that everyone can use. Transit service must balance the transportation needs of many different groups of people. Transit service planning is the process of balancing those needs. It involves determining the what, where, how, and when for transit services in a particular community: what type(s) of transit service to provide, where to provide those services, how much service to provide, and when to provide service. All transit networks must undergo the transit service planning process at regular intervals, so that targeted improvements that bolster rider experience and efficiency can be made.

FIGURE 36: ROUTING TRADE-OFFS



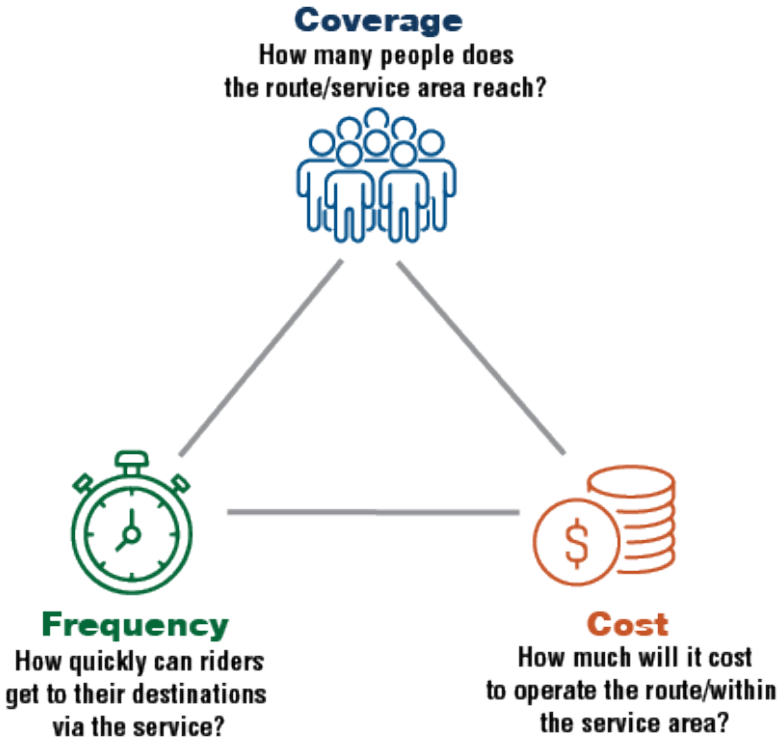

The first major phase of transit service planning is deciding on a transit service model. The service model is an outline of what types of transit services will be provided, where they should go, and how they will operate within a community. Deciding what types of transit service will meet the transportation needs of people living,

working, and visiting in a community is typically the first step in building a service model. After selecting types of transit service appropriate for community needs, where those services will go, how much service is needed, and when service should be available must be determined. There are two main components to planning these elements of how transit services will function in a particular area: routing/setting service area boundaries and operations planning.

Routing centers on deciding where transit services will stop and the path they will take to get to those stops. The path that transit services take must balance the number of people served with the frequency and speed of service. In areas without route-based services, service area boundaries set limits on where transit service will stop in addition to where and how far they will take riders. Figure 36 illustrates routing trade-offs.

Operations planning is about figuring out the logistics of and policies governing transit service. Geographic boundaries delineating the extent of where transit service will be provided, how many vehicles are needed, when and how often should they run, what fare structure and payment should be, and who is eligible to use transit service are all critical considerations within operations planning. When reviewing these considerations, decision-makers must balance tradeoffs between coverage, frequency, and cost of transit service with community context and needs. Figure 37 illustrates these operating tradeoffs.

FIGURE 37: OPERATING TRADEOFFS



## 3.2 Service Model Options

In this section, different service model options for the Oakland County transit network will be identified relative to existing conditions and service goals identified in the previous chapter. First, different transit service operation types and service policies considered for Oakland County will be reviewed in addition to case studies of transit agencies serving rural and suburban communities outside of major cities within the Midwest. A review of Southeast Michigan transit agency service plans is also included to ensure Oakland County transit services are in alignment with other transit initiatives in the region. Finally, four service model options selected for Oakland County will be introduced, and the service operation types and associated policies they each include will be explained.

### 3.2.1 Transit Service Operation Types

In this section, various transit service operation types being considered for Oakland County's new transit service model are reviewed. Descriptions of the different service operation types covered identify best practices, ideal markets, and key metrics such as coverage, frequency, connectivity, convenience, and cost. These key metrics are defined as used in this section in Table 12. The specific service operation types being reviewed are listed and briefly described in Table 13.

TABLE 12: KEY METRICS FOR TRANSIT SERVICE OPERATION TYPES

| Key Metric | Definition |
|---|---|
| Coverage and Frequency | How much of the community would be served and how often services would be available via the service operation type. |
| Connectivity | How well the service operation type links with other regional and local transit services, so riders can reach a wider variety of destinations through smooth transfers. |
| Convenience | How easy and practical the service operation type is for people to use, including factors like travel time, wait times, transfers, and how well service fits riders' daily needs. |
| Cost | How efficiently the service operation type uses resources, monetary or other. |

Understanding these factors helps us evaluate the opportunities and constraints associated with each operation type. Evaluating the ease of transferring between routes and modes of transportation helps create a seamless network, while considering factors that make services user-friendly ensures a positive rider experience. Analyzing the financial implications of each operation type ensures sustainability. By weighing the

potential benefits and challenges, we aim to develop a transit service model that is efficient, accessible for all, and responsive to the diverse needs of the community.

TABLE 13: SUMMARY OF TRANSIT SERVICE OPERATION TYPE OPTIONS

| Service | Description |
|---|---|
| Fixed Route | Traditional bus service ideal for consistent use and travel patterns. |
| Flex Route | Hybrid of fixed route service, allowing for deviations from a route to pickup and drop-off passengers within a specified distance from the fixed route. |
| Ride-share | Pickup and drop-off with shared ride/vanpool service. |
| Fixed Zone Demand Response | Demand response service operating within specified zones offering pickup and drop-off at a fixed fare. |
| Distance-Based Demand Response | Demand response service offering pickup and drop-off with fares based on distance traveled. |

### Fixed Route

Fixed routes have designated stop locations along a set route. Stops are marked with bus stop signs and can offer other infrastructure like seating, bus shelters, and other additional amenities for waiting passengers. More rural systems sometimes include flag stops, which allow transit service to pick-up or drop-off along a route by request. Traveling the same set route, transit service will only stop at a flag stop to pick-up passengers that "flag" the service down at that particular stop location.

FIGURE 38: PRIMARY TYPES OF FIXED ROUTE SERVICE


There are two primary types of fixed route service: local and express. Local service makes stops on local streets, following a regular schedule. Express service, either regular throughout the day or only during peak hours, makes stops only at major destinations usually on arterial and sometimes on local streets.

FIGURE 39: IDEAL MARKETS FOR FIXED ROUTE SERVICE


Illustrated by **Figure 39**, the ideal market for fixed route transit service includes areas with overall high to medium built density and population density, fixed destinations that many potential transit riders need to go to and from regularly, and hubs of housing and employment. Corridors capable of supporting fixed route service should typically have minimum population and employment densities of five to ten per acre.

**Table 14** summarizes key considerations that should be reviewed prior to implementing fixed route transit service in a specific area.

TABLE 14: FIXED ROUTE SERVICE CONSIDERATIONS

| Coverage and Frequency | Convenience |
|---|---|
| • Fixed route service can be tailored to serve more streets (coverage) or have more frequent service on fewer streets (frequency). | • Operates on a fixed schedule that is easier to understand.<br>• Routes with high frequency allow for more flexible travel. |
| **Connectivity** | **Cost** |
| • Multiple routes can utilize the same stop, making trips more seamless.<br>• Routes can connect to other modes and activity centers.<br>• Schedule coordination with other routes for timed transfers. | • Operating costs are relatively fixed and do not typically vary with increased demand.<br>• May include additional bus stop infrastructure and maintenance costs<br>• Requires complementary ADA paratransit service (3/4 mile buffer of route). |

**Table 15** delineates the opportunities that come with fixed route transit service versus its constraints.

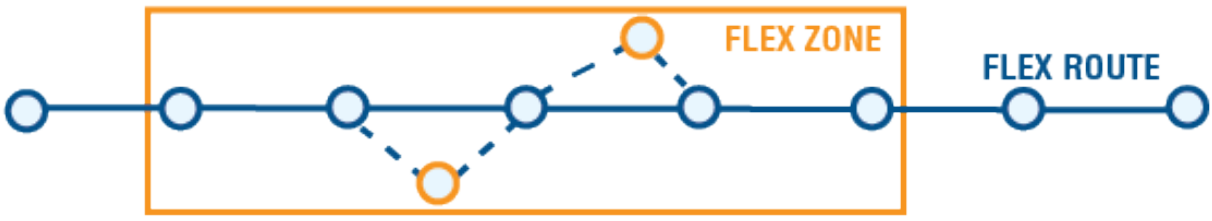
TABLE 15: FIXED ROUTE SERVICE OPPORTUNITIES VS. CONSTRAINTS

| Opportunities | Constraints |
|---|---|
| • Allows for more visibility of transit service and is easier to understand<br>• Can be tailored to address different periods of ridership or types of use (peak hour commuters, early morning workers, students etc.)<br>• Allows for higher frequency service supportive of more spontaneous use<br>• **Flag stops:** less infrastructure required, lower costs<br>• **Designated stops:** allow for greater opportunities for transfers and connectivity | • Less viable for low ridership and low-density areas<br>• No route deviation<br>• **Flag stops:** stops could be missed, fewer amenities (seating, bus shelters)<br>• **Designated stops:** not suitable for all densities, less amenable to irregular travel, origins, and/or destinations |

### Flex Route

Flex routes serve all fixed stop locations along a route, like fixed routes, but they also serve supplemental requested stops within a flex zone. These supplemental stops are typically requested in advance. **Figure 40** illustrates a flex zone with supplemental stops along a flex route. Flex routes operate on local streets with the same standard transit service infrastructure as fixed routes at all fixed stop locations—supplemental stops, given that they are by-request, may not have transit service infrastructure.

FIGURE 40: FLEX ZONE WITHIN FLEX ROUTE




Illustrated by **Figure 41**, the ideal market for flex route transit service includes areas with overall medium to low building and population density, lots of potential riders that regularly need to get to varied destinations, and popular destinations that require deviating from general, more linear routes. Corridors capable of supporting flex routes should typically have minimum population and employment densities of three to five people per acre.

FIGURE 41: IDEAL MARKETS FOR FLEX ROUTE SERVICE


Table 16 summarizes key considerations that should be reviewed prior to implementing flex route transit service in a specific area.

TABLE 16: FLEX ROUTE SERVICE CONSIDERATIONS

| Coverage and Frequency | Convenience |
|---|---|
| • Vehicles can deviate from routes, extending coverage.<br>• Deviations result in longer travel time, and routes likely run less often. | • Riders may need to request deviations in advance.<br>• Deviations allow flexibility in pick-up/drop-off locations. |
| **Connectivity** | **Cost** |
| • Flex route service can connect riders to fixed routes or high-capacity corridors. | • As the route is not fixed, operating costs can vary day to day and may limit service. |

Table 17 delineates the opportunities that come with flex route transit service versus its constraints.

TABLE 17: FLEX ROUTE SERVICE OPPORTUNITIES VS. CONSTRAINTS

| Opportunities | Constraints |
|---|---|
| • Route deviation within a specified radius of marked stops extends service areas.<br>• Marked stops provide a base market for consistent ridership.<br>• Service makes sense to provide in areas that do not meet the ridership threshold for fixed route service. | • Travel times are less predictable due to route deviations, which can impact service reliability.<br>• Route deviations may induce higher and/or varied operating costs. |

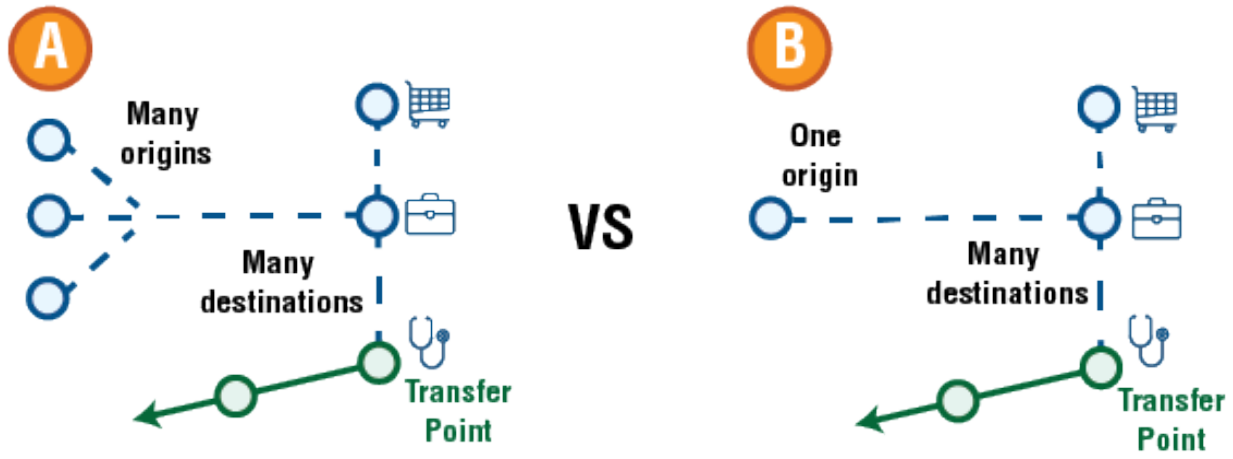
### Ride-share

Ride-share services (also known as carpooling, vanpooling or subscription bus services) involve multiple riders picked up at one or multiple locations sharing a ride to shared or individual destinations instead of using private means of transportation. Shared destinations may be transfer points to fixed or flex route services, shared places of employment, activity centers, or shopping centers, illustrated in Figure 42. Ride-share programs are typically operated in an agency provided vehicle, typically with a capacity of eight or fewer. The route ride-share services follow is set according to where riders board and alight. Ride-share services are often arranged through a transit agency or transportation vendor and match riders with available drivers heading in the same direction.

As illustrated in Figure 42, ride-share services vary significantly to serve specific trips. Trips may be from many origins to many destinations, one origin to many destinations, or one origin to one destination, based on the needs of the riders:

- Example A: Riders are picked up at predetermined park-and-ride locations and distributed to businesses within a central business district.
- Example B: Riders assemble at an origin location (park-and-ride, activity center, etc.) and are distributed to destinations within a college campus.

FIGURE 42: RIDE-SHARE TRIP EXAMPLES




Illustrated by Figure 43, ideal markets for ride-share transit service generally include places where riders' needs do not align with what more traditional fixed or flex route services can offer. This includes places where riders regularly need to travel from areas with low built and population density to one shared destination or nearby areas with high built and population density. Additional places that are ideal for ride-share service are areas where riders' transportation needs do not follow peak periods and/or standard patterns, meaning riders need to travel early in the morning or late at night and the majority of riders do not need to travel at the same time or in the same direction.

FIGURE 43: IDEAL MARKETS FOR RIDE-SHARE SERVICE


Table 18 summarizes key considerations that should be reviewed before implementing ride-share services in a specific area.

TABLE 18: RIDE-SHARE SERVICE CONSIDERATIONS

| Coverage and Frequency | Convenience |
|---|---|
| • Ride-share is a coverage tool, used to fill transit gaps in areas underserved by more traditional transit options. | • Pick up riders where and when they request, but service is less direct as multiple riders will need to be picked up and dropped off.<br>• Service can be planned to connect to other transit on a fixed schedule. |
| **Connectivity** | **Cost** |
| • Service can connect to other transit and modes of transportation.<br>• Service can extend the reach of a transit service area.<br>• Better serves riders with more specific travel needs. | • Cost is reduced compared to other demand response services due to rides being shared between multiple riders but may be more expensive than fixed and flex routes.<br>• Costs for each user can be reduced with more shared rides, but must be balanced with average trip time. |

Table 19 delineates the opportunities that come with flex route transit service versus its constraints.

TABLE 19: RIDE-SHARE SERVICE OPPORTUNITIES VS. CONSTRAINTS

| Opportunities | Constraints |
|---|---|
| • If pickup or drop off location is a shared place of employment, users may benefit from additional cost savings via an employer commuter benefit program. | • Trips are less direct and therefore may not be as convenient for users. |

### Demand Response

Demand response transit services, encompassing microtransit and often paratransit services, are similar to ride-share services in that they involve multiple riders sharing a ride to one shared or multiple individual destinations. The major difference is that demand response riders must make a reservation in advance to travel via demand response services. LSPs in the CTP study area all currently primarily operate this type of transit service, with a majority of service for paratransit trips. Advance reservations for rides can be made by contacting a dispatcher or on an app. In recent years, the use of an app to reserve rides in advance has become more common but varies by area and provider. An app can offer a variety of additional features including allowing riders to quickly review service options (i.e., where and when trips can be made), schedule trips within a short notice, pay fare, coordinate transfers, and more. How far in advance riders must make a reservation depends largely on the volume of resources that the demand response service has at its disposal. In this way, demand response transit services are often better for meeting community transportation needs, like providing rides to seniors or persons with disabilities for essential services and errands, whereas ride-share services thrive in areas where transportation needs stem primarily from consumer demand for flexibility and speed.

Demand response services either pick-up and drop-off riders curb-to-curb or intersection-to-intersection. Curb-to-curb service means that passengers are picked up and dropped off directly at the curb of their specified locations, providing a high level of convenience and accessibility. In contrast, intersection-to-intersection service involves picking up and dropping off passengers at designated intersections, which may require them to walk a short distance to their destination. Intersection-to-intersection demand response service is traditionally less costly to operate and can accommodate more passengers per hour as compared to curb-to-curb demand response service. However, intersection-to-intersection service requires users to walk to/from the nearest intersection or node at the origin and destination of their trip and typically does not meet the standards required to provide paratransit service.

There are two primary types of demand response transit services: fixed-zone demand response services and distance-based demand response services. Additionally, some agencies operate a hybrid of these demand response types, similar to SMART's Flex service, to better meet the needs of their operations and rider demand. The differences between fixed-zone demand response services and distance-based demand response services are explained in the following sections.

### *Fixed-Zone Demand Response Service*

Fixed-zone demand response services pick-up and drop-off riders within a set area, or specified service zone as shown in Figure 44, for a flat rate. Specified service zones are often also referred to as service areas. No matter how far riders travel within the specified service zone, their ride still costs the same flat rate. When making an advance reservation to use fixed-zone demand response transit services, riders note pick up and drop off points within a specified service zone. Ideally, riders' regular destinations overlap with transfer points to fixed or flex route services operating within the fixed-zone demand response service's specified service zone.

Fixed-zone demand response trips are typically scheduled in advance by calling dispatch or making a reservation online. On-demand or same day requests may be available, subject to vehicle availability.

FIGURE 44: SPECIFIED SERVICE ZONE FOR FIXED-ZONE DEMAND RESPONSE SERVICE


Illustrated by Figure 45, ideal markets for fixed-zone demand response services are areas with low built and population density that have many riders whose trips cannot be served by fixed and flex route services due to riders' need to travel during non-peak periods and/or following non-standard travel patterns. Areas capable of these types of demand response zones should typically have minimum population and employment densities of three to five per acre.

FIGURE 45: IDEAL MARKETS FOR FIXED-ZONE DEMAND RESPONSE SERVICE


Table 20 summarizes key considerations that should be reviewed before implementing ride-share services in a specific area.

TABLE 20: FIXED-ZONE DEMAND RESPONSE SERVICE CONSIDERATIONS

| Coverage and Frequency | Convenience |
|---|---|
| • Demand response service is a coverage tool.<br>• Fixed zone demand response models cover a pre-determined service area. | • Pick up riders where (within the specific zone) and when they request.<br>• Reservations typically required.<br>• Service can be planned to connect to other transit on a fixed schedule. |
| **Connectivity** | **Cost** |
| • Service can connect to other transit and transportation modes.<br>• Service can extend the reach of a transit service area.<br>• Service can serve riders with a specific need. | • Demand response is typically more expensive than on-demand because there are fewer shared rides due to advanced trip scheduling. |

Table 21 delineates the opportunities that come with flex route transit service versus its constraints.

TABLE 21: FIXED-ZONE DEMAND RESPONSE SERVICE OPPORTUNITIES VS. CONSTRAINTS

| Opportunities | Constraints |
|---|---|
| • Extends service coverage and can link users to fixed or flex route service.<br>• More cost effective in low density areas, areas with low demand, and/or low ridership periods than fixed or flex route service.<br>• Useful for gauging demand for potential future fixed or flex route service.<br>• More directly responsive to community needs or human service programs via more efficient routing. | • Additional costs associated with staffing needs (dispatcher) or use of an app.<br>• Reservations are typically required in advance or can be limited based on demand/vehicle availability.<br>• Service is limited to a specific zone and can become expensive to serve large zones. |

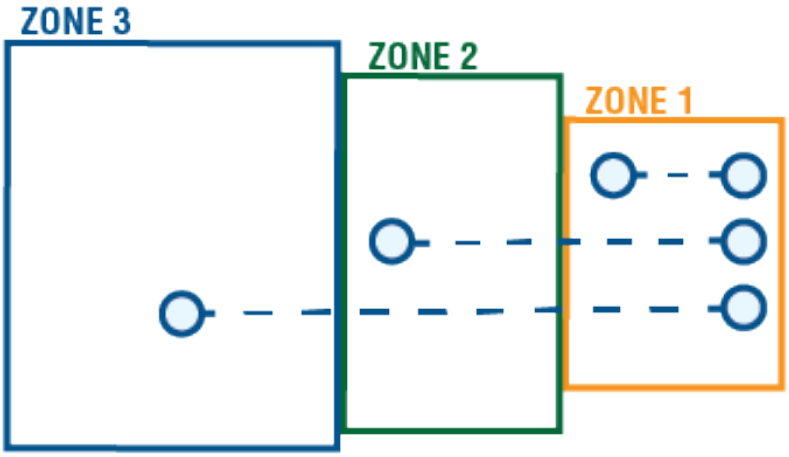
### *Distance-Based Demand Response Service*

Distance-based demand response services pick up and drop off riders at requested locations, but with fares determined by the distance traveled unlike fixed-zone demand response services that operate within a defined service area for a flat rate. Fares for distance-based demand response services vary based on the length of the trip, as shown in Figure 46. Riders can schedule trips in advance by specifying their pick-up and drop-off locations, and the fare is adjusted accordingly. These services often provide greater flexibility for trips that extend beyond specified service areas, allowing riders to travel farther than fixed-zone demand response

services. Ideally, distance-based demand response services connect seamlessly with other existing transit services, enabling smooth transfers to fixed route or flex route services.

Distance-based demand response trips are typically scheduled in advance by calling dispatch or making a reservation online. On-demand or same day requests may be available, subject to vehicle availability.

FIGURE 46: MULTIPLE ZONES—DISTANCE-BASED DEMAND RESPONSE SERVICE




Like fixed-zone demand response services, ideal markets for distance-based demand response service include areas with low built and population density that have many riders who trips cannot be served by fixed and flex route services due to riders' need to travel during non-peak periods and/or following non-standard travel patterns, illustrated by Figure 47. Areas capable of these types of demand response zones should typically have minimum population and employment densities of three to five per acre.

FIGURE 47: IDEAL MARKETS FOR DISTANCE-BASED DEMAND RESPONSE SERVICE


Table 22 summarizes key considerations that should be reviewed before implementing ride-share services in a specific area.

TABLE 22: DISTANCE-BASED DEMAND RESPONSE SERVICE CONSIDERATIONS

| Coverage and Frequency | Convenience |
|---|---|
| • Demand response service is a coverage tool.<br>• Distance-based on demand models cover a much wider service area than fixed zone demand response. | • Pick up riders where and when they request it.<br>• Reservations typically required. |
| **Connectivity** | **Cost** |
| • Service can connect to other transit.<br>• Service can significantly extend a transit service area.<br>• Service can serve riders with a specific need. | • Cost rises as distance increases or crosses zone boundary. |

**Table 23** delineates the opportunities that come with flex route transit service versus its constraints.

TABLE 23: DISTANCE-BASED DEMAND RESPONSE SERVICE OPPORTUNITIES VS. CONSTRAINTS

| Opportunities | Constraints |
|---|---|
| • Users can travel farther distances than with fixed-zone demand response service.<br>• Users can access destinations not served by any other transit service.<br>• Service is more personalized to the needs of each individual user. | • Distance-based cost may not be affordable to as many users as fixed cost service options.<br>• Reservations are typically required in advance or can be limited based on demand/vehicle availability.<br>• Operating costs increase with distance traveled. |

### 3.2.2 Transit Provider Service Policies

Transit service policies are guidelines and regulations that shape the operation of public transit systems. They are crucial in transit service planning because they help ensure that transit service of a particular operation type can be delivered in an efficient, universally accessible, and sustainable manner that meet the needs of the community. Given that Oakland County is evaluating which transit service operation types to include in its transit service model moving forward, service policies associated with the delivery of those transit service operation types must be evaluated as well. In this section, best practices for and considerations relative to service policies that were critical in the evaluation of Oakland County's service model options will be explained and discussed, including policies related to: service boundaries, connectivity, rider eligibility, scheduling, and dispatch.

#### Service Boundaries & Connectivity

Considering service boundaries and connectivity jointly ensures that transit networks are both comprehensive and efficient. This approach optimizes service planning and resource allocation, making the transit system easier to access and navigate. Service boundaries that do not prioritize connectivity between transit and other modes of transportation lead to inefficiencies and inconvenience for riders.

Service boundaries define the geographic areas within which transit service providers operate. These areas are often referred to as "service areas." These boundaries are essential for planning routes, allocating resources, and ensuring service coverage meets community needs. Connectivity in transit service planning refers to the ease and efficiency with which passengers can transfer between different routes and service operation types. Good connectivity is crucial to creating a seamless and accessible transit network.

At times, transit service providers' operations are defined by multiple boundaries within which service policies may differ. For example, Oakland County's LSPs have service area boundaries and driving boundaries. Figure 6 through Figure 10 show NOTA, OPC, PEX, WOTA, and SMART's service and driving boundaries within the CTP study area. Driving boundaries define additional areas that a transit service provider will pick up riders within their service area boundaries and drop them off at any destinations within their driving area boundaries. Another example are distance-based demand response services, for which fares depend on which service boundaries, or zones, trip start and end within, as illustrated in Figure 46.

## Key Considerations: Service Boundaries & Connectivity

- Understand where frequent travel patterns are occurring and where high-use activity centers are within those patterns to inform service boundaries that will facilitate service that is as direct as possible.
- If frequent travel patterns cross existing service provider boundaries, consider aggregating providers or developing policies to support seamless transfers.
- Prioritize connections to other transit service operation types and transportation modes.
- Coordinate schedules to facilitate seamless transfers between transportation modes.
- Utilize tools such as AVL/CAD, dispatch, and customer-facing apps (e.g., trip planner apps) to support effective and direct transfers.

### Rider Eligibility

Rider eligibility refers to the criteria that determine who can use transit services. Generally, all transit services should be accessible to the general public, including visitors and others who may be using transit for the first time. However, specialized transit services have more limited rider eligibility, as these services are designed to meet specific mobility needs. These criteria are essential to ensuring that specialized transit services are accessible to those who need them most, such as older adults or persons with disabilities. Paratransit services are an example of where rider eligibility matters. These services are designed to accommodate individuals whose disabilities prevent them from using regular fixed route transit systems. Rider eligibility is crucial here because it ensures that these specialized service operation types are reserved for those who genuinely need them, promoting equitable access and efficient resource allocation.

## Key Considerations: Rider Eligibility

- Develop an understanding of transit propensity, latent demand, service area demographics, and riders with the greatest need to determine rider eligibility for various service operation types.
- Identify groups of riders that may be unable to utilize other transportation modes.

### Trip Scheduling

Trip scheduling involves determining the timing and frequency of transit services. It ensures that transit services are reliable and efficient in how they align with travel patterns and transit service providers' operational capabilities. LSPs within Oakland County typically require advanced scheduling with a dispatcher for demand response service, and on-board fare payment for all service. Many agencies have implemented customer friendly trip reservations and automated/online fare payment.

There are three primary types of scheduling considered in transit service planning:

- Continuous Service scheduling is applied to transit services operating at a consistent frequency throughout the day, like fixed and flex route services. Continuous service schedules help make services operating at a consistent frequency predictable and reliable for riders.
- Select Trip scheduling involves planning a specific number of trips in advance that need to be made at designated times. Dispatchers are used to field and/or manage requests for trips, which can be placed in-person, via phone call, online, or via an app. This type of scheduling can be applied to flex route services that only make a certain number of trips deviating from their base fixed route during peak periods, like during rush hour due to commuters needing to be dropped off at a wider variety of destinations. Demand response services may also use select trip scheduling, as service provision is tailored to individual appointments and travel requirements.
- Demand Response Booking allows passengers to request transit services as needed, typically through dispatchers or via a mobile app or online platform. Riders note pick-up and drop-off points in addition to specific departure or arrival times around which trips are scheduled. Demand response booking offers added travel flexibility and convenience for riders, adapting to real-time travel patterns and demand.

| Key Considerations: Continuous Service Scheduling | Key Considerations: Select Trip Scheduling | Key Considerations: Demand Response Booking |
|---|---|---|
| • Users benefit from predictable and reliable service scheduling.<br>• Improves accessibility for those making non-traditional trips (such as split shift or third shift workers).<br>• Lower utilization during off-peak periods. Transit operating on a continuous service schedule may make trips without customers due to this. | • Targets specific trips, optimizing transit resource allocation.<br>• Limited accessibility for those making non-traditional trips (such as split shift or third shift workers).<br>• Focuses on specific times, meaning passengers may face uncertainty or inconvenience if their travel plans don't align with select trips. | • Demand response booking is cost effective in areas with low built and population density, low transit demand, and/or regular periods of low ridership, but is overall more expensive than select trip scheduling.<br>• Useful for gauging demand for potential future fixed or flex route service<br>• There may be additional costs associated with dispatch staffing needs or use of a mobile app or online form.<br>• Vehicle availability limits how many trips can be scheduled at what times. |

### Dispatch

Dispatch refers to the coordination and management of transit vehicles and drivers to ensure timely and efficient service delivery. It involves real-time decision-making to address operational needs, such as route adjustments and responding to service disruptions. Computer-aided dispatch (CAD) software manages and coordinates transit vehicles and drivers in real-time, enhancing operational responsiveness to dispatch needs. CAD systems help streamline scheduling, monitor vehicle locations, and address service disruptions promptly. Dispatching needs are greater for services that are not on continuous services schedules, as service needs vary regularly if not daily.

**Key Considerations: Dispatch**

- Ensure dispatch systems are compatible with other existing fleet and facility systems to streamline operations. When they are uniform across transit service providers operating within a particular region, dispatch systems are most efficient and create more seamless user experiences for riders.
- Efficient dispatch systems limit "deadhead," which refers to the revenue loss that occurs when transit service vehicles must operate without riders on-board. This typically occurs due to a need to reposition the vehicle for its next scheduled trip. Dispatch systems that are uniform across providers and integrated with other existing fleet and facility systems limit revenue lost to deadhead.
- Choose CAD software that can scale and adapt to changing needs as the transit agency grows.

## 3.2.3 Case Studies

Case studies of selected transit agencies' service operation types, service policies, and overall service models were also used to analyze various service model options considered by OCT. These agencies were selected based on their geographic location (shown in Figure 48) in addition to services offered and the communities they serve (summarized in Table 24).

- Location
  Case studies focused on transit agencies operating in the Midwest, providing a regional perspective on transit operations and challenges.

- Communities Served
  Transit agencies that provide service to rural and suburban communities outside of major cities, particularly agencies that offer non-traditional transit services, were chosen over agencies that provide service within major cities.

Agencies providing service to rural and suburban communities outside of major cities within the Midwest, particularly those offering non-traditional transit services, were the focus. SMART, currently operating within the study area, was chosen as a case study due to the potential benefit of aligning Oakland County's service model with SMART's to optimize customer experience.

FIGURE 48: LOCATION OF CASE STUDY TRANSIT AGENCIES

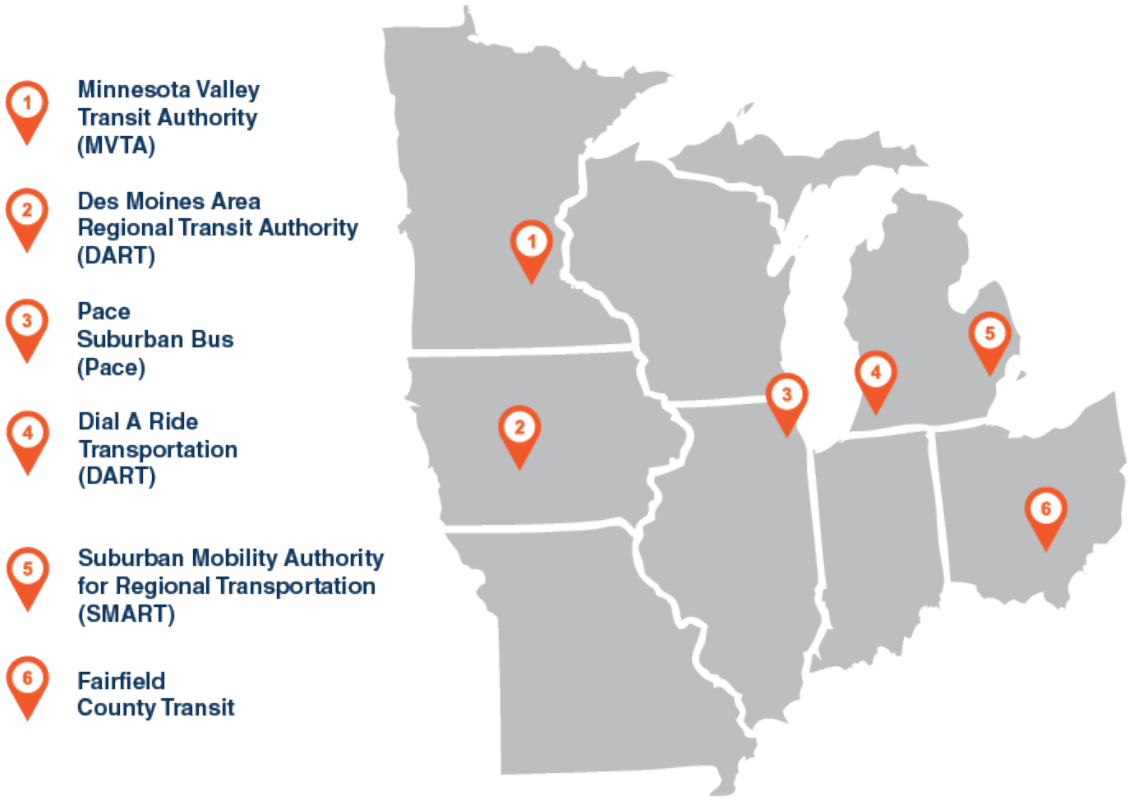



TABLE 24: SELECTED CASE STUDY TRANSIT AGENCIES

| Transit Agency | | Transit Services Offered | | | | |
|---|---|---|---|---|---|---|
| Name | Location | Fixed Route | Flex Route | Ride Share | Fixed-Zone | Distance-Based |
| SMART | Oakland, Macomb, and Wayne Counties, MI | ✓ | | | ✓ | ✓ |
| MVTA | Minneapolis – Saint Paul Metro, MN | ✓ | ✓* | ✓ | | |
| Pace Suburban Bus | Chicago Metro, IL | ✓ | | ✓ | ✓ | |
| DART (IA) | Des Moines Metro | ✓ | ✓* | ✓ | ✓ | |
| Fairfield County Transit | Fairfield County, OH | | ✓ | | | ✓ |
| DART (MI) | Niles, MI | | ✓ | | | ✓ |

**Recently discontinued*

Selected transit agencies' implementation of the transit service operation types and service policies considered by Oakland County was analyzed as part of these case studies. Case study findings are summarized by transit service operation type in APPENDIX C: Transit Service Case Studies—Summary Tables. Fixed route service findings are in Table C- 1, flex route service findings are in Table C- 2, ride-share service findings are in Table C- 3, fixed-zone demand response service findings are in Table C- 4, and distance-based demand response service findings are in Table C- 5. Not all case study transit agencies offer each of the transit service operation types considered by Oakland County.

## Case Study Key Takeaways

Insights, or key takeaways gleaned from various case studies to inform our service model options are summarized in Table 25. By examining successful transit systems and innovative approaches from transit agencies operating in areas similar to Oakland County's transit service providers, additional contextually best practices and industry standards for various service operation types and policies applicable to the County's transit service planning efforts were identified as key takeaways. These key takeaways are further guidance relative to developing a more efficient, equitable, and responsive transit service model tailored to Oakland County's needs.

TABLE 25: SUMMARY OF CASE STUDY KEY TAKEAWAYS

| Service Operation Type or Service Policy | Key Takeaways |
|---|---|
| Fixed Route Service | • Typically placed along major corridors with consistent demand and density.<br>• Service boundaries stretch farther, usually including multiple counties. |
| Flex Route Service | • Can be implemented as an intermediate step when transitioning from demand response transit service to fixed route services or vice versa.<br>• Observed trend of larger transit agencies (e.g., MVTA, DART-IA) moving away from deviated fixed route service and instead offering demand response service that connects to fixed routes. |
| Ride-share Service | • Ideal for areas where many riders share the same trip origin or trip destination |
| Demand Response Service | • Operating costs and wait times increase as ridership increases.<br>• Cost parameters or incentives can help tailor demand for service in addition to trip length. |
| Dispatch | • CAD systems can and should be tailored to assign trips, communicate changes in real-time, and streamline communication between dispatchers, operators, and riders for multiple service types. |

### 3.2.4 Coordination with Regional Service Plans

Effective coordination with other transit service providers and organizations is crucial for the success of Oakland County's Community Transit Plan. This subsection identifies service plans and programs currently being developed by regional transit agencies whose operations overlap with the CTP study area: the *SMARTer Mobility Program* study (SMART) and the *Mobility 4 All Plan* (RTA). More detailed descriptions of the *SMARTer Mobility Program* and the *Mobility 4 All Plan* can be found in APPENDIX B: Plan Review. Service model options selected for the County were aligned with these service plans and programs. By aligning transit service initiatives in the CTP study area with these overlapping transit service initiatives, Oakland County can enhance the efficiency and reach of its transit network.

#### SMARTer Mobility Program Study (SMART)

The *SMARTer Mobility Program* is SMART's ongoing planning effort that was launched in early 2022 and is anticipated to conclude in December of 2025. The study will culminate in a comprehensive plan intended to drive decision-making for SMART's services in Macomb, Oakland, and Wayne counties. The study includes existing conditions analysis, origin and destination surveys, passenger surveys, a financial plan and funding evaluation, performance measures and service standards evaluation, transit demand and market analysis, and three rounds of community engagement.

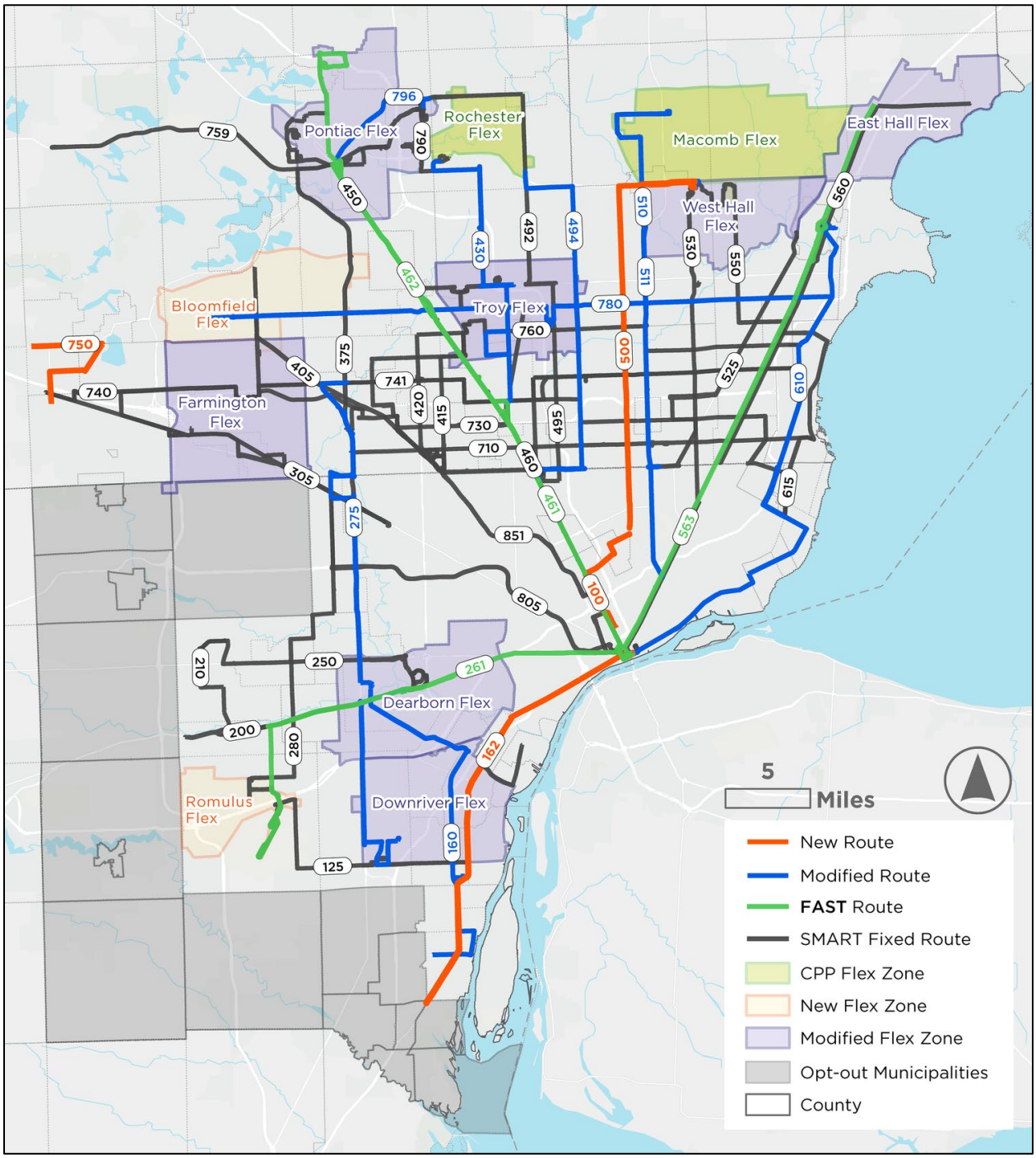
The *SMARTer Mobility Program* currently recommends the following service modifications within the service areas of Oakland County's LSPs:

- Route 462: Improvement to 20-minute headways during weekday peak hours (6a-8p)
- Route 430: Extended to Hampton Village Centre
- Route 796: Reduced to terminate at Oakland University Main Campus
- Route 494: Extended to Rochester Hills Meijer
- Route 740: Splits the existing Route 740 into two routes at Royal Oak Transit Center
- Route 750: New Service to connect Wixom to the SMART system
- Modified Pontiac Flex Zone
- New Rochester Flex Zone
- New Bloomfield Flex Zone

The final service model recommendations of the Oakland County Community Transit Plan will be fully compatible with the *SMARTer Mobility Program* study's recommended network.

Figure 49 displays the *SMARTer Mobility Program* study recommended network as of March 2025.

FIGURE 49: SMARTER MOBILITY PROGRAM RECOMMENDED NETWORK




*SOURCE: SMART (2025)*

## SMART Paratransit Scheduling and Dispatching Software Procurement

SMART is actively pursuing a vendor to provide paratransit scheduling and dispatching software (PSDS) that could be shared with all transit providers in the region. SMART anticipates implementation and provider training in 2026.

Regional implementation of a PSDS software would allow for more advanced trip scheduling, fare integration, seamless transfers, regionally coordinated trips and scheduling optimization. A regional PSDS procurement would significantly reduce manual processes currently performed by dispatchers at each LSP. The SMART procurement is anticipated to have the following:

### User Experience Improvements

- Online trip scheduling
- Trip scheduling in advance or in real-time
- Fare integration
- Paratransit, on-demand and other service types in one module for all providers who adopt the software
- Seamless transfers through regionally coordinated trips

### Service Provider Improvements

- In-vehicle tablets with CAD/AVL for all revenue vehicles
- Fare integration
- Operator training and regionwide SOPs
- Regionally coordinated trips
- Support a shared network allowing for coverage during conflicts (breakdowns, crashes, limited vehicle availability, etc.)
- Scalable to allow additional vehicles and providers
- Paratransit, on-demand and other service types in one module
- Scheduling optimization

The PSDS procurement would significantly improve trip coordination and communication between providers across the region. Adoption of this software by Oakland County LSPs would mitigate cancelled trips and inefficient transfers that occur with the existing configuration.

SMART has implemented short term solutions (such as on-board tablets) and is currently working towards procuring a long-term solution. The final service model recommendations of the Oakland County Community Transit Plan will be fully compatible with the SMART PSDS procurement.

## Mobility 4 All Plan (RTA)

RTA is currently working on the *Mobility 4 All Plan*, which is an update to the RTA's previous coordinated human services transportation plan (CHSTP) *OnHand: Expanding Transportation Access Across Southeast Michigan Plan*. To develop this plan, RTA is collaborating with transit service providers in its four-county region, which includes Oakland County (see Figure 3). Similarly to the previous CHSTP, the plan will focus on outlining a vision, goals, and strategies for improving transportation access across the region, with a focus on

persons with disabilities, older adults, and individuals with limited incomes. This plan will identify needs and guide how FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program funding can help meet those needs. Section 5310 funding is an important source of funding for Oakland County's local service providers. See Section 2.1.1 Federal Funding and Table 1 for more information on Section 5310 funding and which LSPs utilize it, respectively.

Development of the *Mobility 4 All Plan* is required to obtain federal funding through FTA's Section 5310 program, which supports Enhanced Mobility of Seniors and Individuals with Disabilities. The final service model recommendations of the Oakland County Community Transit Plan will be fully compatible with the *Mobility 4 All Plan* and retain all services currently funded, and services anticipated to be funded through the Section 5310 program. It is anticipated to be complete in fall 2025.

### *WOTA Section 5310-Funded Flex Routes*

WOTA submitted an application to establish two new flex routes in FY 2025-26 through the Section 5310 Program. The proposed flex routes would serve the following areas:

- Proposed Flex Route 1
  The first route will connect riders from SMART's Route 759 fixed route service to key destinations, including DMC Huron Valley Hospital, Huron Valley Schools' alternative/adult education complex, the White Lake Library and new Township facility, as well as White Lake businesses.

- Proposed Flex Route 2
  The second route, developed in collaboration with Livingston Essential Transportation Service (LETS), will operate along the M-59 corridor connecting Highland Township businesses, access to the Highland Township Library, local food banks and destinations along the first deviated fixed route. This deviated fixed route will provide residents of both Oakland County and Livingston County with access to critical services and resources not currently available. Through these coordinated efforts, WOTA riders will be able to transfer seamlessly to a barrier-free vehicle, improving accessibility and eliminating the need for pre-scheduled appointments.

The final service model recommendations of the Oakland County Community Transit Plan will be fully compatible with WOTA's proposed Section 5310 flex routes if funded.

### 3.2.5 Selected Service Model Options

Potential service model options selected for Oakland County's transit network are introduced and explained in this section. These options were selected based on analysis of existing and forecasted conditions across Oakland County and feedback derived from initial public and stakeholder engagement efforts, all discussed in Chapter 2: Public Transit Today. The four selected service model options include Oakland County's existing service model and three potential future service model packages. A service model package generally represents various high-level service components, including different transit service operation types, associated service policies, retained existing service configurations and new service configurations. Service configuration refers to the physical structure of a particular transit service, meaning its specific arrangement, including routes or zones depending on the transit service operation type.

The service model packages selected for Oakland County differ primarily based on whether and how LSPs are structured. Package 1 retains the four existing LSPs with some modifications, Package 2 integrates the existing LSPs into two LSPs, and Package 3 integrates the existing LSPs into one LSP. SMART and its existing service configuration within the CTP study area is included as part of Packages 1, 2, and 3, with no recommended changes to their operations. Related to operations, the service model options also include some variations in potential demand response type services and scheduling/dispatch components. The three potential future service model packages also include a general expansion of fixed and/or flex routes in Oakland County.

A summary comparison of service model options relative to fixed and flex route, paratransit, and demand response services in addition to rider eligibility, scheduling, and dispatch policies is provided in Table 26. The specific LSP structure and subsequent service areas are defined in this chapter, and will be addressed further in Chapter 4: Implementation Plan.

TABLE 26: SUMMARY OF SELECTED SERVICE MODEL OPTIONS

| | Existing Service Model | Package 1 | Package 2 | Package 3 |
|---|---|---|---|---|
| Transit Service Providers [A] | • Existing Four LSPs<br>• SMART | • Existing Four LSPs<br>• SMART | • Two LSPs (integrates existing)<br>• SMART | • One LSP (integrates existing)<br>• SMART |
| Paratransit Service | • Door-to-Door service | • Door-to-Door service | • Door-to-Door service | • Door-to-Door service |
| Fixed and Flex Route Services [A, B] | • Primarily Fixed Routes provided by SMART | • Potential additional Fixed Routes and Flex Routes (Local and Express) operated by LSPs and/or SMART<br>• WOTA 5310 Flex Routes<br>• SMARTer Mobility Program Recommended Network | • Potential additional Fixed Routes and Flex Routes (Local and Express) operated by LSPs and/or SMART<br>• WOTA 5310 Flex Routes<br>• SMARTer Mobility Program Recommended Network | • Potential additional Fixed Routes and Flex Routes (Local and Express) operated by LSPs and/or SMART<br>• WOTA 5310 Flex Routes<br>• SMARTer Mobility Program Recommended Network |
| Demand Response Service [A] | • Curb-to-Curb Service within fixed zones<br>• Operated by LSPs | • Intersection-to-Intersection Service within fixed zones, possibly larger than zones for Curb-to-Curb Service<br>• Operated by LSPs | • Curb-to-Curb Service within fixed zones<br>• Operated by LSPs | • Distance-Based Curb-to-Curb Service<br>• Operated by LSPs |
| Rider Eligibility | • **Paratransit Service:** Adults Age 55 and Up, Persons with Disabilities, Low-Income Individuals, and Veterans<br>• **All Other Service:** General Public | • **Paratransit Service:** Adults Age 55 and Up, Persons with Disabilities, Low-Income Individuals, and Veterans<br>• **All Other Service:** General Public | • **Paratransit Service:** Adults Age 55 and Up, Persons with Disabilities, Low-Income Individuals, and Veterans<br>• **All Other Service:** General Public | • **Paratransit Service:** Adults Age 55 and Up, Persons with Disabilities, Low-Income Individuals, and Veterans<br>• **All Other Service:** General Public |
| Scheduling | • **Paratransit:** scheduled in advance<br>• **Demand Response:** scheduled in advance | • **Paratransit:** scheduled in advance<br>• **Demand Response:** scheduled in advance or in real-time | • **Paratransit:** scheduled in advance<br>• **Demand Response:** scheduled in advance | • **Paratransit:** scheduled in advance<br>• **Demand Response:** scheduled in advance or in real-time |
| Dispatch [A] | • Dispatch, Vehicle Storage and Maintenance within each LSP service area<br>• Localized CAD | • Unified scheduling, dispatch, and user software (e.g., SMART procurement)<br>• Dispatch, Vehicle Storage and Maintenance within each LSP service area<br>• Regional CAD | • Dispatch, Vehicle Storage and Maintenance within each LSP service area<br>• Localized CAD | • Unified scheduling, dispatch, and user software (e.g., SMART procurement)<br>• Dispatch, Vehicle Storage and Maintenance within each LSP service area<br>• Regional CAD |

[A] *LSP = Local Service Provider, as distinct from regional providers like SMART and RTA.*

[B] "Additional fixed routes" refers to adding fixed routes to the existing set serving the CTP study area.

## Existing Service Model (Four Local Service Providers)

Oakland County's existing service model was evaluated alongside the three new service model packages developed for the County to both establish a baseline for the study area and determine how well current transit operations meet the LSP service goals and align with stakeholder feedback. The existing service model currently includes four LSPs—NOTA, WOTA, PEX and OPC—in addition to SMART. A high-level summary of Oakland County's existing service operation types and policies is provided in this section. More detailed information about both can be found in Chapter 2: Public Transit Today.

### *Fixed and Flex Route Services*

Currently, NOTA is the only LSP that operates partial fixed route services within Oakland County. NOTA currently operates the Downtown Trolley Express, a fixed route service between Downtown Lake Orion and Downtown Oxford offered on Friday and Saturday evenings. For more details regarding the Downtown Trolley Express, see Section 2.2.1 North Oakland Transportation Authority (NOTA).

After the passage of the 2022 Oakland County Public Transportation Millage, SMART added or expanded existing fixed routes into the CTP study area, including the following:

- Route 305: Grand River
- Route 740: Twelve Mile Crosstown
- Route 805: Grand River Park and Ride
- Route 492: Rochester Road
- Route 790: Pontiac Crosstown
- Route 759: Highland Road

SMART's fixed routes primarily operate in the southeastern Oakland County and provide transit connections to each local service provider, as shown in Figure 10 and discussed in Section 2.2.5 Suburban Mobility Authority for Regional Transportation (SMART).

### *Demand Response & Paratransit Services*

As of January 2025, existing demand response fixed-zone and distance-based curb-to-curb (or door-to-door for paratransit) transit services offered by LSPs are available to the general public, with priority given to those with paratransit eligibility, typically adults ages 55 and older, persons with disabilities, low-income individuals, and veterans. Rides through these services are available via advance reservation only.

### *Policies: Rider Eligibility, Trip Scheduling, and Dispatch*

Rider eligibility varies slightly across Oakland County's transit service providers. As of January 2025, LSPs' services are available to the general public, with priority for rides given to adults ages 55 and older, persons with disabilities, low-income individuals, and veterans. SMART's fixed route services within the CTP study area are open to the general public and visitors.

The County's existing service model requires that users call dispatch during LSPs' operating hours to schedule trips. Hours of operation and required advanced scheduling windows vary by LSP. Though hours of

operation vary, all of Oakland County's LSPs currently operate seven days a week with reservation windows ranging from three days (NOTA, OPC, PEX) to two days (WOTA) in advance. Information on rider eligibility, fares, service hours, and scheduling for each LSP is summarized in Table 4. Dispatch, vehicle storage, maintenance and other overhead functions are currently administrated at the level of each transit service provider, local or otherwise, rather than on a countywide basis. See the *Fleet, Facilities, and Technology* sections in Section 2.2 Transit Service Providers for more information on LSPs' existing dispatch, vehicle storage, maintenance, and other overhead functions.

## Package 1: Four Local Service Providers (Modified)

Package 1 represents a system with a similar LSP configuration to Oakland County's existing service model. The key difference is that Package 1 includes general expansion of fixed and/or flex routes, revisions to demand response policies, and the addition of a unified scheduling, dispatch, and user software.

### *Fixed and Flex Route Services*

Package 1 assumes retainage of fixed routes currently operated by NOTA and SMART, and the inclusion of planned SMART services via the SMARTer Mobility Program's Recommended Network, as well as proposed flex route services operated by WOTA (see WOTA Section 5310-Funded Flex Routes).

Additional opportunities for fixed route service were also identified for the following areas:

- Rochester and Rochester Hills
- Clarkston
- Novi and Wixom

These new routes could be operated by either LSPs or by SMART. Contracted operation of these services through SMART could be beneficial as SMART currently maintains similar vehicles, has vehicle storage sites, and has a process in place for hiring, training and maintaining fixed route operators.

### *Paratransit Services*

Within Package 1, paratransit service would consist of door-to-door service within each LSP's service area, similarly to Oakland County's existing service model.

### *Demand Response Services*

Package 1 includes operation of a fixed-zone intersection-to-intersection demand response service instead of curb-to-curb.

Additional opportunities for enhanced demand response service (e.g., microtransit, on-demand, etc.) were identified for the following areas:

- Village of Milford
- Village of Holly
- City of Novi
- Village of Oxford
- City of South Lyon

- Lake Orion
- Portion of Orion Township

Demand response service would be operated by LSPs in Package 1.

### *Policies: Rider Eligibility, Trip Scheduling, and Dispatch*

Paratransit service (door-to-door demand response service) would be available only to adults ages 55 and older, persons with disabilities, low-income individuals, and veterans. All other services, such as fixed route and demand response services would be open to the general public.

Package 1 would require scheduling at least 24 hours in advance for paratransit services, while demand response services may be scheduled in advance or requested in real-time, as applicable. Vehicle availability would dictate whether trips requested in real-time are accommodated within a reasonable amount of time, or if trips are cancelled.

Package 1 assumes the implementation of the unified scheduling, dispatch, and user software, allowing users to schedule trips by calling dispatch, filling in an online form, or requesting a trip through an app. In this package, CAD would be a regional tool that is initially routed to LSP dispatchers and secondarily to available dispatchers within the region. Unified software would be acquired at the regional level, through SMART procurement described in the SMART Paratransit Scheduling and Dispatching Software Procurement Section. Though software would be uniform across all transit service providers, dispatch, vehicle storage, and maintenance functions for each service would be retained within by the LSP offering that service.

## Package 2: Two Local Service Providers

Package 2 represents a system with select restructuring of LSPs. The existing LSP structure would be modified from four to two providers in this package, retaining SMART's existing service configuration.

### *Fixed Route Services*

Package 2 assumes retainage of fixed routes currently operated by NOTA and SMART, and the inclusion of planned SMART services via the SMARTer Mobility Program's Recommended Network, as well as proposed flex route services operated by WOTA (see WOTA Section 5310-Funded Flex Routes). Proposed flex route services operated by WOTA would be operated by LSPs.

#### Additional opportunities for fixed route services were also identified for the following areas:

- Rochester and Rochester Hills
- Clarkston
- Novi and Wixom

These new routes could be operated by either LSPs or by SMART. Contracted operation of these services through SMART could be beneficial as SMART currently maintains similar vehicles, has vehicle storage sites, and has a process in place for hiring, training and maintaining fixed route operators.

### *Paratransit Services*

Within Package 2, paratransit service would consist of door-to-door service within each LSP's service area, similarly to Oakland County's existing service model.

### *Demand Response Services*

Package 2 includes operation of fixed-zone curb-to-curb demand response service. Additional opportunities for enhanced demand response service (e.g., microtransit, on-demand, etc.) were identified for the following areas:

- Village of Milford
- Village of Holly
- City of Novi
- Village of Oxford
- City of South Lyon
- Lake Orion
- Portion of Orion Township

Demand response service would be operated by LSPs in Package 2.

### *Policies: Rider Eligibility, Trip Scheduling, and Dispatch*

Paratransit service (door-to-door demand response service) would be available only to adults ages 55 and older, persons with disabilities, low-income individuals, and veterans. All other services, such as fixed route and demand response services would be open to the general public.

Package 2 would require scheduling at least 48 hours in advance for paratransit services and demand response services. This package assumes that unified scheduling, dispatch, and user software is not implemented. Dispatch, vehicle storage, maintenance and other overhead functions for each service would be retained within by the LSP offering that service.

## Package 3: One Local Service Provider

Package 3 represents a system where all LSPs are restructured. Package 3 would retain the existing SMART service configuration within Oakland County but would only include one integrated LSP to provide other countywide services. The specific organizational framework of a countywide LSP is yet to be determined; however, it may be based on potential regionally focused operating divisions to ensure local transit needs and demand are continually met.

### *Fixed Route Services*

Package 3 assumes retainage of fixed routes currently operated by NOTA and SMART, and the inclusion of planned SMART services via the SMARTer Mobility Program's Recommended Network, as well as proposed flex route services operated by WOTA (see WOTA Section 5310-Funded Flex Routes). Proposed flex route services operated by WOTA would be operated by the single LSP in this package.

Additional opportunities for fixed route services were also identified for the following areas:

- Rochester and Rochester Hills
- Clarkston
- Novi and Wixom

These new routes could be operated by either LSPs or by SMART. Contracted operation of these services through SMART could be beneficial as SMART currently maintains similar vehicles, has vehicle storage sites, and has a process in place for hiring, training and maintaining fixed route operators.

### *Paratransit Services*

Within Package 3, paratransit service would consist of door-to-door service within each LSP's service area, similarly to Oakland County's existing service model.

### *Demand Response Services*

Package 3 includes operation of a distance-based curb-to-curb demand response across the County. Specifics on this service are yet to be determined; however, it is likely that service parameters may include a mix of zone boundaries, service delivery options, and/or a pricing structure similar to SMART Flex. Demand response service would be operated by LSPs in Package 3.

### *Policies: Rider Eligibility, Trip Scheduling, and Dispatch*

Paratransit service (door-to-door demand response service) would be available only to adults ages 55 and older, persons with disabilities, low-income individuals, and veterans. All other services, such as fixed route and demand response services would be open to the general public.

Package 3 would require scheduling at least 24 hours in advance for paratransit services, while demand response services may be scheduled in advance or requested in real-time, as applicable. Vehicle availability would dictate whether trips requested in real-time are accommodated within a reasonable amount of time, or if trips are cancelled.

Like Package 1, Package 3 assumes the implementation of the unified scheduling, dispatch, and user software, allowing users to schedule trips by calling dispatch, filling in an online form, or requesting a trip through an app. In this package, CAD would be a regional tool that is initially routed to LSP dispatchers and secondarily to available dispatchers within the region. Unified software would be acquired at the regional level, through SMART procurement described in the SMART Paratransit Scheduling and Dispatching Software Procurement Section. Though software would be uniform across all transit service providers, dispatch, vehicle storage, and maintenance functions for each service would be retained within by the LSP offering that service.

## 3.3 Service Model Evaluation

The four service model options selected were qualitatively evaluated to determine which general option may be the best fit for future transit service in Oakland County. Methodology used to evaluate the four service model options is discussed in this section, followed by evaluation results.

### 3.3.1 Service Model Evaluation Methodology

Evaluations of each service model option were based on how well they met the service goals set by OCT, described in Section 1.3 Service Goals. The eight service goals set by OCT were broken down into evaluation criteria as shown in Table 27. Each service model option was assigned a low, medium, or high score representing how well they met each of these criteria.

TABLE 27: SERVICE GOAL EVALUATION CRITERIA

| Service Goal | Criteria |
|---|---|
| 1 | • Reliable and affordable transit service<br>• Connected and safe transit service |
| 2 | • Removes mobility barriers<br>• Improves first mile/last mile accessibility |
| 3 | • Provides more transit coverage to users |
| 4 | • Improves user experience<br>(e.g. seamless transfers and fare payment, real-time arrival information, etc.) |
| 5 | • Service is consistent and convenient |
| 6 | • Ease of use (new user familiarity)<br>• Scalability |
| 7 | • Connectivity to SMART<br>• Connectivity to adjacent counties |
| 8 | • Potential to reduce vehicle miles traveled and emissions |

### 3.3.2 Service Model Evaluation Results

Evaluation results relative to service goal evaluation criteria are discussed by service model package. Low, medium, and high service goal evaluation criteria scores for each service model option are summarized in Table 28. Reasoning behind these scores is provided by service model package in APPENDIX D: Service Model Options—Service Goal Criteria Evaluation Results. It is important to note that these evaluations consider the CSA as a whole and are not reflective of any single LSP's contributions. They represent how Oakland County communities can best be served through a well-operating, connected system overall.

TABLE 28: SERVICE MODEL OPTIONS—SERVICE GOAL EVALUATION CRITERIA RESULTS

| Service Goal Evaluation Criteria | | Existing Service Model Result | Package 1 Result | Package 2 Result | RECOMMENDED Package 3 Result |
|---|---|---|---|---|---|
| Goal 1 | Reliable and affordable transit service | Medium | Medium | Medium | **Medium** |
| | Connected and safe transit service | Medium | High | Medium | **High** |
| Goal 2 | Removes mobility barriers | Low | Medium | Medium | **High** |
| | Improves first mile/last mile accessibility | Medium | Medium | Medium | **Medium** |
| Goal 3 | Provides more transit coverage to users | Medium | Medium | Medium | **High** |
| Goal 4 | Improves user experience (e.g. seamless transfers, fare payment, real-time arrival information, etc.) | Medium | High | Medium | **High** |
| | Service is consistent and convenient | Medium | Medium | Medium | **High** |
| Goal 5 | Ease of use (new user familiarity) | Low | Medium | Low | **High** |
| Goal 6 | Operational affordability and sustainability | Medium | Medium | Medium | **High** |
| | Scalability | Low | Low | Medium | **High** |
| Goal 7 | Connectivity to SMART | Low | Medium | Low | **High** |
| | Connectivity to adjacent counties | Medium | Medium | Medium | **High** |
| Goal 8 | Potential to reduce vehicle miles traveled and emissions | Low | Medium | Medium | **Medium** |

## 3.4 Phase 2 Public and Stakeholder Engagement

A secondary phase of public and stakeholder engagement was pursued to generate feedback needed on service model options during this service planning process. This section will outline the stakeholders involved in the service planning process, the timing of public and stakeholder meetings, and the structure of those meetings along with the feedback received. Additionally, analysis of results from a survey run during this second phase of public and stakeholder engagement will be reviewed.

The Steering Committee, composed of key regional stakeholders including SMART, NOTA, WOTA, OPC, PEX, RTA, SEMCOG, MDOT, Oakland County Transit, and Planning and Economic Development, met once during Phase 2 CTP public and stakeholder engagement (Phase 2). During the Phase 2 meeting, the committee reviewed and provided input on draft service model options and recommendations to guide future transit improvements.

Two virtual public meetings were held on June 24, 2025, at 12:00 PM and 5:30 PM to reintroduce the Oakland County Community Transit Plan and gather feedback on draft service model recommendations. These sessions included an overview of proposed service options and a discussion of how they address community priorities such as improved reliability, seamless connections, and expanded access beyond seniors and people with disabilities.

During the second phase of engagement, the Project Team held multiple stakeholder meetings and attended community events to gather input on draft service model recommendations. Four focus group meetings were conducted: Employers and Universities on April 29, 2025 (including Oakland County, Workforce Intelligence Network, Henry Ford Health Services, and Lawrence Technological University), Oakland County Departments on April 30, 2025 (Planning, Parks and Recreation, Economic Development, Sustainability, Veteran Services, Workforce Development, and Strategic Partnerships), Nonprofits on April 30, 2025 (Centro Multicultural La Familia and Lighthouse), and Oakland County All Township Supervisors on May 19, 2025. Additionally, the team attended Senior Center meetings in May and June 2025 at Oxford and South Lyon Senior Centers. Feedback from these discussions is included in the remainder of this section.

### 3.4.1 Key Takeaways and Findings


During the second phase of engagement, public and stakeholder commentary centered on universal access to transit services, making transit trips more seamless, and modernizing rider tools. Important new themes identified from participants feedback included:

- Training for bus drivers on how to facilitate access for those with disabilities and alert riders of limitations with assistance.

Event participants emphasized the importance of equipping bus drivers with an understanding of how to operate vehicle accessibility features, communicate clearly about available assistance, and recognize when additional support may be needed to ensure that all riders feel safe, respected, and informed throughout their journey.

- Desire for a more seamless transit system.
  Riders want fewer transfers or better-coordinated ones to make trips faster and more convenient.
- Expand services to so that all people can access across the county.
  While current services often prioritize seniors and individuals with disabilities, participants voiced a strong desire for broadening the rider eligibility requirements and geographic reach of CSA transit services.
- Allowing real-time trip scheduling and online trip payments.
  Many participants highlighted the need for more modern rider tools to improve convenience, reduce uncertainty, and make the CSA transit system more accessible.

### 3.4.2 Phase 2 Survey

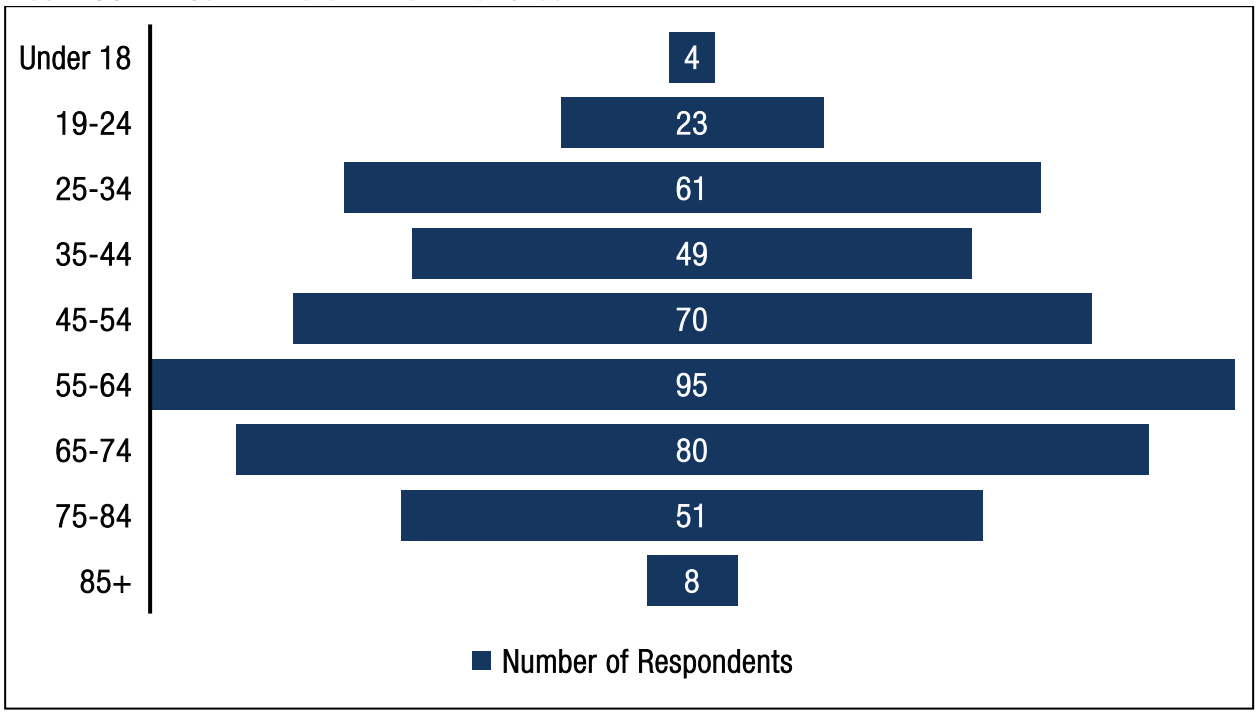
A second survey was distributed through Qualtrics in coordination with LSPs to reach their active riders, garnering a total of 535 responses. The second survey focused on getting feedback on future transit options in Oakland County and if respondents may or may not use certain services. It was virtually distributed from May 2025 through the first week of August 2025 using links and QR codes shared on social media and by County partners and agencies with their networks. Additionally, survey responses were solicited during public events and stakeholder meetings.

Current users of LSP or SMART services made up 75% of survey respondents.

Non-users of LSP or SMART services made up 25% of survey respondents.

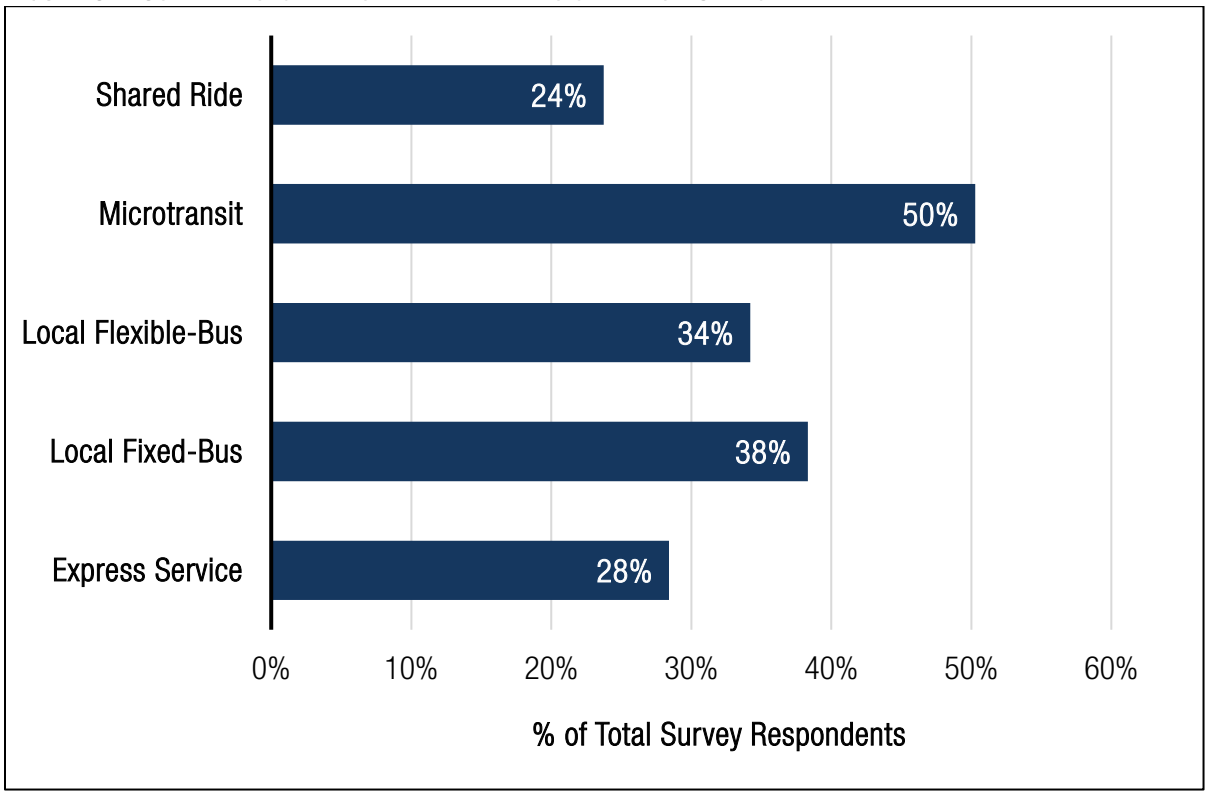
The majority of survey respondents were 45 to 74 years old, as shown in Figure 50. However, there were a significant number between 25 and 34 years old.

FIGURE 50: ALL SURVEY RESPONDENTS BY AGE GROUP



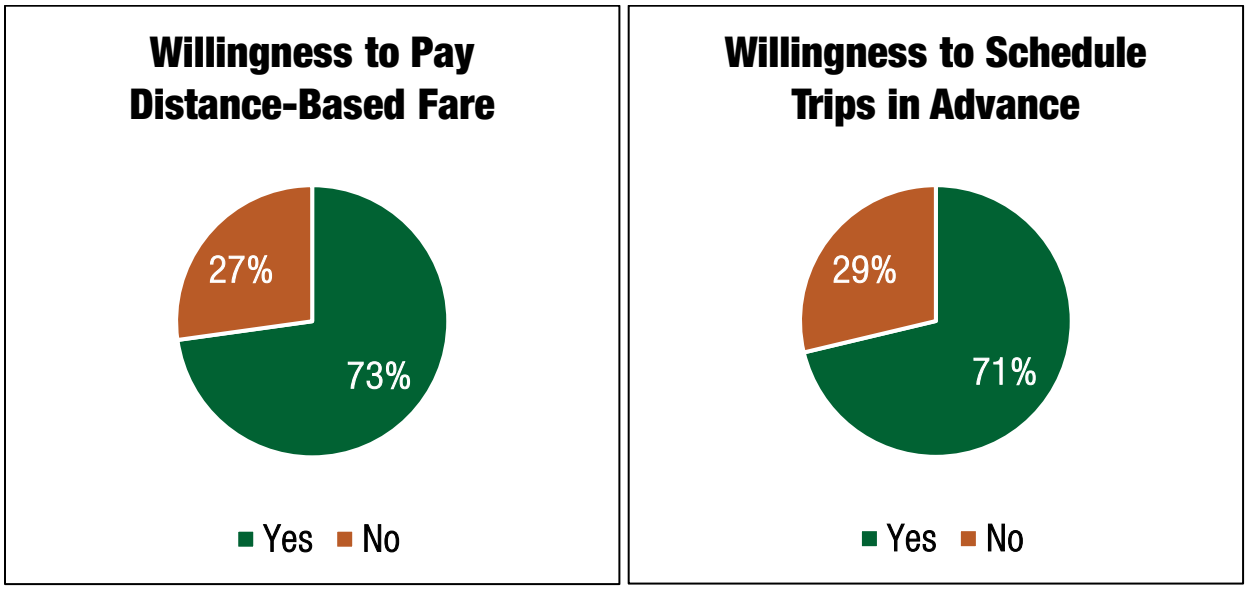

As shown in **Figure 51**, most survey respondents' preferred form of transit service is microtransit, which is a service where riders can book rides that start and end within specific areas. This service doesn't follow a fixed route or schedule. Microtransit service may be able to be requested on demand or could require advanced reservations. Local fixed-bus and local flexible-bus services were also popular across survey respondents as preferred transit service types. Local fixed-bus service refers to regular bus service that follows a specific route with set stops and schedules, while local flexible-bus service operates similarly to a regular bus service but can change its route to pick up or drop off passengers. Shared ride services, which pick up and/or drop off a group of people from a designated area to a common location, and express services, commuter-based service that provides select trips to major employment centers during morning and afternoon commutes, were not highly preferred types of transit service by survey respondents.

FIGURE 51: SURVEY RESPONDENTS PREFERRED TYPES OF TRANSIT SERVICE




Nearly three-quarters of survey respondents are willing to pay distance-based fares (see **Distance-Based Demand Response Service**), as illustrated by **Figure 52.** Around seventy percent of survey respondents are willing to schedule trips in advance, meaning several days ahead or at least 24 hours ahead of their trip.

FIGURE 52: SURVEY RESPONDENTS WILLINGNESS TO PAY DISTANCE-BASED FARES AND SCHEDULE TRIPS IN ADVANCE



Open comments revealed that many residents feel disconnected from CSA transit services due to unclear information and a lack of guidance on how to navigate the system. Residents noted that the geographic distribution of services within the CSA and their limited evening and weekend service hours are leaving some communities underserved. Respondents also expressed a desire for more integrated and expansive transit options that connect the CSA with neighboring metropolitan areas and improve regional mobility.

FIGURE 53: COMMON COMMENTS FROM SURVEY RESPONDENTS

## 3.5 Final Service Model Recommendations

The preliminary service model recommendation was modified based on input from stakeholder engagement efforts to develop the final service model recommendation.

Implementation of the service model recommendation is anticipated to occur gradually to allow for further coordination between OCT and SMART. Additionally, gradual implementation will ensure that services provided by SMART and LSPs are not disrupted by abrupt changes and are in alignment with the future Oakland County Public Transportation Millage (2032). A phased approach to implementation should be applied to slowly introduce staff and users to service changes and establish appropriate policies and organizational structures that may allow for consolidation and optimization of service.

The service model detailed in the following section describes the recommended service model Oakland County Transit should consider for future implementation.

### 3.5.1 Service Provider Configuration

The final service model recommendation would retain the existing SMART service configuration within Oakland County but would unify and restructure LSPs into a single provider in the long term. The specific organizational framework of a countywide LSP is yet to be determined; however, it may be based on potential regionally focused operating divisions to ensure local transit needs and demand are continually met. Unification and consolidation of LSPs will also help to streamline and simplify funding, including potentially mitigating experienced issues obtaining specific project/service funding.

Unification of the four existing LSPs would not happen immediately but would be accomplished in several consecutive implementation phases over the course of years. Chapter 4: Implementation Plan provides short-, mid-, and long-term implementation strategies that would be applied to slowly transition LSP operations and policies to those included within the final service model recommendation. Implementation strategies for consolidation and unification of the four existing LSPs are covered in more depth in Chapter 4: Implementation Plan.

### 3.5.2 Fixed Route Service

The final service model recommendation is to retain fixed routes currently operated by NOTA and SMART, and the inclusion of planned SMART services via the *SMARTer Mobility Program* study's Recommended Network shown in Figure 49, as well as proposed flex route service operated by WOTA (see WOTA Section 5310-Funded Flex Routes).

#### Additional opportunities for fixed route could be explored in the following areas:

- Rochester and Rochester Hills
- Clarkston
- Novi and Wixom

These new routes could be operated by either LSPs or by SMART. Oakland County may benefit from having LSPs operate fixed route services if they have operators and vehicles available.

### 3.5.3 Paratransit Service

Paratransit service would consist of a door-to-door service across the County with specific rider eligibility requirements operated by the LSP. Additional limitations and/or service parameters may also be considered including where paratransit service is offered outside of required complementary ADA service areas and trip distances.

### 3.5.4 Demand Response Service

The final service model demand response recommendation is to provide curb-to-curb fixed-zone demand response service. Specifics on this service are yet to be determined; however, it is likely that service parameters may include a mix of zone boundaries, service delivery options, and/or a pricing structure similar to SMART Flex.

Opportunities for additional supplemental demand response service could be explored in the following areas:

- Village of Milford
- Village of Holly
- City of Novi
- Village of Oxford
- City of South Lyon
- Lake Orion
- Portion of Orion Township

Additional supplemental demand response service would be operated by LSPs in the final service model recommendation.

### 3.5.5 Rider Eligibility

The final service model rider eligibility recommendation is to offer all fixed route and demand response services to the general public. Paratransit service will continue to be available only to eligible riders including adults ages 55 and older, persons with disabilities, low-income individuals, and veterans.

### 3.5.6 Trip Scheduling

The final service model scheduling recommendation is to require advanced scheduling (at least 24 hours in advance) for paratransit service and offer demand response services scheduled in advance or potentially requested in real-time, as applicable to select services. Vehicle availability dictates whether trips requested in real-time can be accommodated within a reasonable amount of time, or if trips are cancelled.

The final service model recommendation includes the implementation of a unified scheduling, dispatch, and user software, allowing users to schedule trips by calling dispatch, filling in an online form, or requesting a trip through an app. Depending on project timeline and development of this procurement, Oakland County may be able to implement this policy ahead of any LSP integration.

### 3.5.7 Dispatch

The final service model recommendation would implement a unified scheduling, dispatch, and user software, and would combine dispatch, vehicle storage, and maintenance functions within the single LSP. CAD would be a regional tool that is initially routed to the LSP dispatchers and secondarily to available dispatchers within the region.

### 3.5.8 Implementation

Implementation of the selected service model will occur in three phases: the short-term (zero to four years), mid-term (four to seven years), and long-term (seven-plus years, i.e., 2032 and beyond). Additional details on implementation are included in Chapter 4: Implementation Plan.

# 4. Implementation Plan

With a recommended transit service model identified, the next step in the CTP planning process is making it a reality through phased implementation. This chapter outlines a performance-based implementation plan designed to bring the future service model recommendation for Oakland County to life. The plan will be executed over three phases: short-term, mid-term, and long-term. For each phase, the plan outlines targeted recommendations and strategies to achieve those recommendations aimed at advancing the County's transit vision and mission, as defined in the CTP. These strategies are carefully aligned with the service goals established at the start of the CTP planning process, structuring efficient use of public funds through their focus on avoiding resource duplication, reducing procurement costs, enhancing rider experience and ensuring equitable distribution of resources across the County. This will set the stage for OCT and LSPs to deliver a more connected, efficient, and accessible transit future to County residents and visitors.

Provider plans for each LSP outlining CTP implementation strategies and activities across the short-, mid-, and long-term implementation phases can be found in APPENDIX G: Provider Implementation Plans.

## 4.1 Future Oakland County Transit Service

This section shares the vision and mission behind the future of transit service in the community service area (CSA) of Oakland County, reconnecting with the themes introduced earlier in the CTP. The phased implementation of the recommended service model for the County reflects the regional vision, mission, and associated service goals that shaped the CTP planning process and will be discussed in the following sections.

Building on this vision, OCT will serve as a financial and facilitative partner in implementing the CTP. OCT's role will be to oversee funding, foster communication, ensure accountability, promote LSP collaboration, guide transit policy development, and coordinate resources to advance transit service growth in the CSA. OCT will not act as a provider or evolve into a full-fledged transit authority, instead focusing on supporting and advocating for LSPs to help them maintain alignment with county and regionwide goals. At points during CTP implementation where external expertise may be necessary, OCT will also coordinate procuring that expertise for LSPs.

### 4.1.1 Vision, Mission, and Service Goals

OCT is committed to building an accessible, sustainable, and efficient transit system. The future service model recommendation for Oakland County and its phased implementation plan are designed to directly support the eight service goals set for OCT during the CTP planning process (see Section 1.3.2 Goals). These goals envision a transit future that sustainably improves quality of life for County residents and visitors through transparent management and service that is reliable, connected, safe, and affordable for all.

Regional connectivity is a key goal of the CTP planning process and outcome of CTP implementation. The CSA, representing the combined service areas of the four existing Oakland County LSPs, exists adjacent to

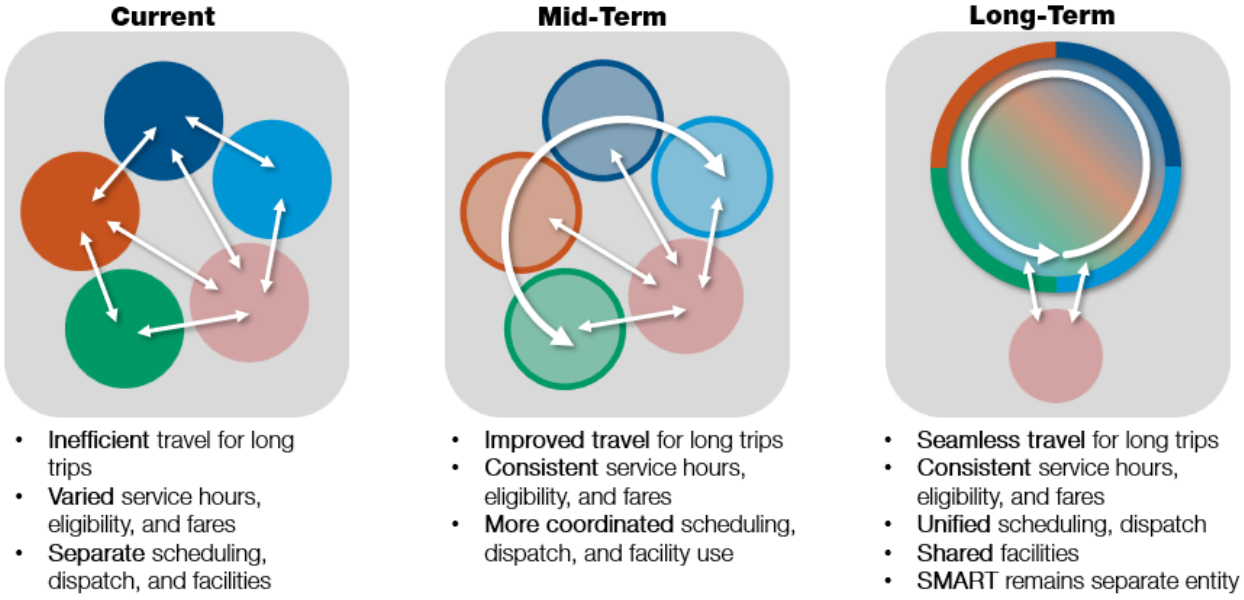
and in some part overlaps with the regional service network created by southeast Michigan's public transit authorities. One of the regional public transit services that the CSA is highly interconnected with is SMART. LSPs' driving boundaries extend into the SMART service area and SMART fixed routes reach into the CSA, as shown in Figure 5. Apart from connecting to SMART services, some LSP riders frequently travel into counties adjacent to Oakland County, WOTA riders travel into Livingston County and Genesee County, PEX riders travel to destinations in Livingston, Washtenaw, and Wayne counties, and OPC and NOTA riders travel into Macomb County.

The gradual, phased approach to CTP implementation supports operational efficiency, service consistency, and a simplified rider experience without disorienting riders through abrupt service transitions. Expanding fixed and flex route services, offering countywide paratransit and demand response services, and adopting modern technology as part of future service model recommendation implementation will remove mobility barriers for Oakland County residents and visitors and build a resilient, regionally connected transit system that meets their evolving needs. The implementation strategy reflects OCT and the LSP commitment to long-term County transit system resilience and improving residents and visitors access to transit not only in Oakland County, but across the southeastern Michigan region.

### 4.1.2 Future Service Model Recommendation Implementation Overview

The future service model recommendation for the County is to integrate the existing LSPs into one LSP due to the potential for this service model to reduce costs, improve operational efficiency, and provide a more seamless rider experience to riders in Oakland County. Implementation of the future service model recommendation involves first aligning, then coordinating, and finally potentially integrating the existing LSPs operating in the CSA to a single LSP. SMART services operated in the CSA would additionally be maintained, but the single integrated LSP would not be contracted by or managed under SMART or OCT. The operational and rider experience benefits of integrating the existing four LSPs into one LSP are illustrated in Figure 54. Integration would be a gradual process slowly merging LSPs' administrative and operational functions, and contingent on the renewal of the Oakland County Public Transportation Millage during the November 2032 Oakland County general election.

FIGURE 54: GRADUAL INTEGRATION TO A SINGLE LOCAL SERVICE PROVIDER

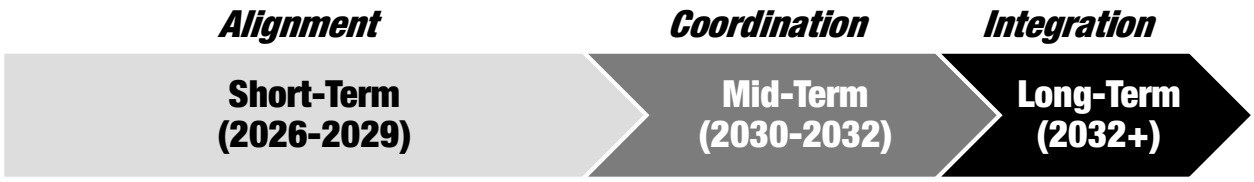



Creating better alignment and fostering improved coordination between LSPs during CTP implementation will include standardizing their service expansion, asset management, and service policies and procedures, collaboratively procuring operational resources, and defining administrative structures for LSP collaboration. These strategies will help LSPs solidify and adopt a shared brand identity to reflect unity with one another. Following this alignment and coordination of transit service across LSPs, the operational efficiency and cost-savings benefits of continued coordination between the four existing LSPs versus pursuing full organizational integration to a single LSP should be evaluated.

## 4.2 Performance-Based Implementation Plan

Implementation of the future service model recommendation is structured in three sequential phases—short-term, mid-term, and long-term. Short-term implementation will occur from 2026 to 2029, mid-term implementation will occur from 2030-2032, and long-term implementation will occur beyond 2032, as shown in Figure 55. Each implementation phase includes recommendations and actionable strategies to achieve those recommendations, both of which are designed to build upon the progress and outcomes of the previous implementation phase. It is important to note that the CTP is flexible. If certain recommendations in the short-term alignment phase are delayed or not implemented, related actions planned for the mid-term coordination and long-term integration phases may also be impacted or require adjustment.

FIGURE 55: OAKLAND COUNTY COMMUNITY TRANSIT PLAN IMPLEMENTATION TIMELINE




LSP fleet expansion and replacement estimates in addition to financial projections are provided in 2027 for the short-term implementation phase rather than the start year of 2026. It is anticipated that the CTP will be completed in 2026, but that work on the first several short-term implementation recommendations may not come to fruition until 2027.

Short-term implementation will focus primarily on policy alignment across the four LSPs, in addition to initial service and potential to expand service through pilot programs. Further coordination of LSP services without altering LSPs' service areas will occur during mid-term implementation, through opportunities to improve efficiency by softening LSPs' service boundaries. Full operational and administrative integration of the existing LSPs to a single LSP may occur during long-term implementation, if that is the most cost-effective, operationally efficient option. Full integration is additionally contingent on the renewal of the Oakland County Public Transportation Millage in 2032.

Table 29 summarizes implementation recommendations by phase and future service model component.

TABLE 29: IMPLEMENTATION RECOMMENDATIONS BY PHASE AND SERVICE MODEL COMPONENT

| Phase | Service Component | Service Subcomponent | Recommendation [A] |
|---|---|---|---|
| **Short-Term (2026 – 2029): Alignment** | Service Operation | LSP Configuration | Align operating policies and standard procedures. |
| | | Service Expansion | Launch coordinated or joint pilot programs to improve or expand services in areas with high transit demand, as identified in the market analysis. |
| | | Fleet Needs | Procure vehicles needed to support LSP pilot programs and growing transit demand. |
| | Facilities, Technology, and Maintenance | LSP Facilities | Assess LSP facility assets and address LSP facility needs at regular intervals. |
| | | Technology | Unify LSP scheduling, dispatch, and user software systems and procure lacking LSP tech. |
| | | Maintenance | Align LSP fleet and facility maintenance policies and procedures. |
| | Service Policies | Administration | Standardize rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements across all LSPs. |
| | | Funding | Identify new LSP O&M and capital funding sources. |
| **Mid-Term (2030 – 2032): Coordination** | Service Operation | LSP Configuration | Initiate how LSPs should integrate their operations. |
| | | Service Expansion | Continue running and evaluating successful LSP pilot programs. |
| | | Fleet Needs | Continue procuring vehicles through MDOT OPT to meet future LSP fleet needs. |
| | Facilities, Technology, and Maintenance | LSP Facilities | Assess whether establishing shared LSP facilities would improve efficiency and help meet growing demand for services. |
| | | Technology | Reevaluate LSP scheduling, dispatch, and user software effectiveness as needed. |
| | | Maintenance | Procure contracts collectively for LSP fleet and facility maintenance. |
| | Service Policies | Administration | Continue to collaboratively adapt LSPs' unified service policies and procedures as needed. |
| | | Funding | Review the Millage to assure balance between needs and resources to cover rising O&M costs and then determine if the Millage rate should be increased. |

| Phase | Service Component | Service Subcomponent | Recommendation [A] |
|---|---|---|---|
| Long-Term (2032+): Integration | Service Operation | LSP Configuration | Integrate the existing LSPs in alignment with the recommendations of the LSP organizational development plan completed during the mid-term. |
| | | Service Expansion | Identify successful pilot programs and transition them to permanent services. |
| | | Fleet Needs | Continue to follow fleet policies and procedures developed from 2026 to 2032. |
| | Facilities, Technology, and Maintenance | LSP Facilities | Establish shared facilities as recommended by the mid-term facility integration assessment. |
| | | Technology | Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed. |
| | | Maintenance | Continue to standardize and optimize fleet and facility maintenance practices and ensure assets remain in a state of good repair. |
| | Service Policies | Administration | Continue to follow administrative policies and procedures developed from 2026 to 2032. |
| | | Funding | Take steps to renew the Millage and ensure continued service delivery within the CSA. |

[A] *O&M = Operations and Maintenance, Millage = Oakland County Public Transportation Millage*

### 4.2.1 Short-Term Implementation (2026 – 2029): Alignment

Short-term recommendations for the first four years of Oakland County CTP implementation, 2026 to 2029, focus on alignment between LSPs and OCT. The short-term will center on building momentum and laying the groundwork for future integration opportunities. This phase is designed to deliver scalable strategies that prepare the County's existing transit system for more ambitious changes ahead. Table 30 summarizes short-term implementation strategies by future service model components and their subcomponents.

TABLE 30: SHORT-TERM IMPLEMENTATION RECOMMENDATIONS BY SERVICE COMPONENT

| Service Component | Service Subcomponent | Short-Term Recommendations |
|---|---|---|
| Service Operation | LSP Configuration | Align operating policies and standard procedures. |
| | Service Expansion | Launch coordinated or joint pilot programs to improve or expand services in areas with high transit demand, as identified in the market analysis. |
| | Fleet Needs | Procure vehicles needed to support LSP pilot programs and growing transit demand. |
| Facilities, Technology, and Maintenance | LSP Facilities | Assess LSP facility assets and address LSP facility needs at regular intervals. |
| | Technology | Unify LSP scheduling, dispatch, and user software systems and procure lacking LSP tech. |
| | Maintenance | Align LSP fleet and facility maintenance policies and procedures. |
| Service Policies | Administration | Standardize rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements across all LSPs. |
| | Funding | Identify new LSP O&M and capital funding sources. |

Short-term implementation focuses on improvements to the administrative efficiency of existing services, potential service expansion through new pilot programs, and beginning to bolster shared tools, County policy frameworks, and performance standards that help LSPs work together towards integration more seamlessly. Progress on these initial steps will be measured using benchmarks tied to OCT's service goals and regularly reported performance metrics.

## Service Operation

Initial opportunities to reconfigure, improve, and expand existing LSP transit services across Oakland County will be explored in the short-term. Efficiency adjustments to LSPs' policies and procedures, a framework for expanding transit services through pilot programs, and anticipated short-term fleet expansion needs, are all part of short-term service operation strategies.

### *Local Service Provider Configuration*

In the short-term, efforts towards merging LSPs into a single LSP will be preparatory, providing the groundwork for more integration in the mid- and long-term. From 2026 to 2029, the four LSPs currently serving Oakland County will remain and their service boundaries are not intended to be altered, and they will maintain servicing trips originating from their respective service areas. However, LSPs should align their operating policies and procedures through standardization led by OCT in preparation for further integration in later implementation phases.

**Short-Term Recommendation**

Align operating policies and standardize procedures.

| Short-Term Strategies | |
|---|---|
| 1 | Update policies and procedures governing service operation seeking consistency across all LSPs. |
| 2 | OCT and each LSP should each designate an existing staff position to act as a liaison for coordination purposes. |
| 3 | LSPs should consider developing a coordinated communication and branding strategy to strengthen alignment and present a unified identity. This effort could be guided by a joint committee of designated liaisons from each LSP. |
| 4 | OCT should continue consistent, regular engagement with LSPs' riders to ensure that service changes feel manageable. OCT and each LSP should each designate an existing staff position to monitor rider engagement. |
| 5 | OCT should consider hiring another staff member in the role of CTP Implementation Coordinator to manage the process of putting the CTP into action. |

Currently each LSP runs its transit services independently, using different systems, staff, and procedures. The short-term goal is to align operations. This helps reduce duplicate resources and improves efficiency, lowering

costs over time. For example, each LSP operates their own separate customer service team, with their own communication systems and customer relationship management (CRM) software. Instead, through operational alignment across LSPs, all customer inquiries related to LSP services could be routed through a centralized customer service team. Using one communication system and CRM software lowers costs and improves response times.

Aligning operations may bring significant changes to how LSPs deliver services. To keep riders informed and satisfied, changes should be clearly communicated. A unified rebranding campaign presenting a cohesive identity across LSPs will help reinforce the transition to a coordinated countywide system and make change more manageable for riders. This could entail revamping branding on LSPs' vehicles, websites, and communications to clarify that all LSPs are now operating in formal cooperation with one another.

OCT's marketing and communications resources should be resourced to launch the coordinated communication and branding campaign with the goal of more proactively communicate service developments with riders and educating the public on available services. During the first two years of CTP implementation, OCT marketing and communications staff should develop a five-year public and stakeholder engagement plan to ensure clear and consistent communication with the public. Through rider engagement surveys, OCT should continue monitoring LSP riders' response to service operation changes during the remainder of their contract with Qualtrics.

To ensure the successful rollout of the CTP, OCT will need to dedicate staff capacity to oversee implementation activities and maintain alignment across departments. Hiring a CTP Implementation Coordinator would provide focused leadership on scheduling, stakeholder coordination, and progress tracking, reducing the risk of delays and ensuring that strategic objectives are met efficiently.

### *Service Expansion*

As Oakland County prepares for population, employment, and transit demand growth over the next several decades, starting to explore additional and improved services in areas where these factors are high will be a critical first step in implementing the CTP. In the short-term, LSPs should consider launching pilot programs to assess the value of new or improved services in these areas. The decision to launch these initiatives should be grounded in a thorough assessment of financial realities to prevent conflicts with other critical priorities, including the growing demands for service and facility investments.

**Short-Term Recommendation**

Launch coordinated or joint pilot programs to improve or expand services in areas with high transit demand, as identified in the market analysis.

| Short-Term Strategies | |
|---|---|
| 1 | OCT should coordinate planning processes with LSPs for microtransit and fixed or flex route pilot programs. |
| 2 | To measure the success of pilot programs, LSPs should follow set quarterly service benchmarks for both microtransit and fixed or flex route pilots, see Table 32. |
| 3 | LSPs should each explore launching one initial three-year pilot program chosen from areas with high transit potential identified in the market analysis conducted as part of this planning process. |

Short-term service expansion strategies are aimed at proactively responding to areas in Oakland County's CSA with projected population, employment, and transit demand growth identified by the market analysis portion of the CTP development process. Analysis of areas expected to experience growth is discussed in Section 2.4.5 TPI Findings and Transit Opportunities. By exploring launching pilot programs in areas identified as having high transit potential, LSPs will be better positioned to explore and refine service expansions before they are urgently needed. OCT's role in managing and evaluating these pilots ensures a structured, data-driven approach that supports coordinated decisions about future transit investments.

### Pilot programs are exploratory and may not transition to permanent service unless performance benchmarks are met.

In 2026, OCT should create a system to monitor and facilitate LSP pilot programs in the CSA, including a standardized application and evaluation processes. Application processes should include data-driven analysis steps that LSPs must go through to determine if a pilot program could be a beneficial use of public funds.

### For both microtransit and fixed or flex route pilot program applications, this should include:

1. **Purpose**
   *What is the goal of the pilot program? What service gap will it bridge?*
   Clearly articulating the purpose of the pilot program will ensure that it aligns with the service goals established for the CSA and broader regional transit service goals.

### 2. Proof of Demand

*Does the data show there is a clear need for the proposed new or improved service?*

Demonstrating a clear need for a pilot program by analyzing transit demand in the pilot's service area helps justify the use of public funding and improves the chances of success. Transit demand should be modeled and assessed using a combination of population and employment density thresholds[33] and travel pattern data to highlight high transit potential areas with unmet demand and service gaps.

- Microtransit Pilot Programs
  Zones capable of supporting microtransit pilot programs should typically have population and employment densities of three to five per acre.
- Fixed or Flex Route Pilot Programs
  Corridors capable of supporting flex route pilot programs should typically have minimum population and employment densities of three to five per acre. Corridors capable of supporting fixed route pilot programs should typically have minimum population and employment densities of five to ten per acre.

How travel patterns align with density thresholds also factors into identifying areas with enough demand to support transit. Certain facilities, like medical offices, shopping centers, or schools, might support a certain volume of trips at particular points of the day or week. A detailed narrative explaining how a pilot program could benefit individuals traveling to specific areas or facilities should be supported, at a minimum, by an analysis of density thresholds, demonstrating how aligning service with these travel patterns can benefit the broader public. Trip request and/or trip denials may also be considered as a demonstration of demand.

### 3. Service Plan

*How will the proposed service operate?*

Outlining the operational details of a proposed pilot program within a service plan ensures that it is logistically feasible, financially sustainable, and ready for implementation once approved. Service plans for pilot programs should include where, how often, and how long the new or improved service will be operated and identify targets for ridership. They should also determine the number of additional vehicles and operators they will require along with how much funding will be needed to operate the pilot program for up to three years.

While pilot program applications for both demand response and fixed or flex route services will both include these three components, proof of demand and service plan requirements should differ slightly based on the proposed service type. Demand response services should identify high-potential zones/areas, while fixed or flex route services should focus on corridors. With an understanding of LSPs' administrative tools, OCT should define data sources and analysis methods for proof of demand. For example, OCT may provide LSP's access to OCT's Geographic Information System (GIS) software so they can analyze their travel patterns from

[33] Density thresholds refer to the people and jobs per acre recommended to support various types of service.

scheduling and dispatch records. OCT may also define which U.S. Census Bureau American Community Survey tables could be used for showing demographic demand in pilot program applications. Key differences in service plan requirements are summarized in Table 31.

TABLE 31: KEY SERVICE PLAN DIFFERENCES – DEMAND RESPONSE VS. FIXED OR FLEX ROUTE SERVICE PILOTS

| Demand Response Pilot Programs | Fixed or Flex Route Pilot Programs |
|---|---|
| • Requires defining a service zone.<br>• Demand analysis should identify zones with high unmet transit need.<br>• May require additional dispatchers to support additional trip booking and coordination.<br>• No fixed frequency, trips are scheduled on demand.<br>• Vehicle needs are based on on-time performance, trip volume, and peak demand.<br>• Typically requires scheduling software and mobile tools.<br>• Typically may evaluate based on wait times, trip denials, and cost/riders per trip or hour. | • Requires defining a route and designating stops.<br>• Demand analysis should identify corridors with consistent travel patterns.<br>• May require additional operators given frequency of service.<br>• Operates on a published schedule with minimal dispatching.<br>• Operates at a set frequency, for example every 60 minutes.<br>• Vehicle needs are based on route length, headways, and round-trip time.<br>• Typically may evaluate based on ridership, on-time performance, and cost/riders per trip or hour. |

Potential microtransit and fixed or flex route pilot programs for LSPs to choose from are listed in this section and discussed in greater detail in Section 3.5.2 Fixed Route Service and Section 3.5.4 Microtransit. A specific pilot program from this list has been recommended for each LSP in their provider implementation plan (see APPENDIX G: Provider Implementation Plans). It is generally recommended that LSPs look to pilot flex route programs rather than fixed route in the short-term due to existing densities throughout the CSA.

| Microtransit Opportunities |
|---|
| Village of Milford |
| Village of Holly |
| City of Novi |
| Village of Oxford |
| City of South Lyon |
| Lake Orion |
| Portion of Orion Township |

| Fixed or Flex Route Service Opportunities |
|---|
| Rochester and Rochester Hills |
| Clarkston |
| Novi and Wixom |

Sample initial service plans for a flex route pilot program and an microtransit pilot program are provided in APPENDIX E: Sample Pilot Program Service Plans. LSPs will need a scheduling, dispatch, and user software that can book same day trips or in real-time to support efficient operations and minimize the need for significant increases in dispatch staff. Discussed in Short-Term Technology, SMART's PSDS procurement, occurring during short-term implementation, includes requirements for these capabilities slated to be procured through their process.

Although initial pilot programs are anticipated to be supported in the short-term, not all pilot programs (or expansion of initial programs) may be funded as permanent services through the Oakland County Public Transportation Millage funding. LSPs should also consider additional funding sources and seek competitive and formula grant funding (see Table 39) to support future pilot program growth and other operating considerations beyond the short-term.

Suggested benchmarks for assessing the performance of microtransit and fixed or flex route pilot programs are included in Table 32. These benchmarks should be calculated quarterly for all pilot programs and submitted to OCT as part of LSPs' quarterly reports.

TABLE 32: SUGGESTED SHORT-TERM QUARTERLY BENCHMARKS FOR PILOT PROGRAMS

| Performance Measure | Calculation [B] | Suggested Short-Term Benchmark [A] |
|---|---|---|
| **Microtransit Pilot Programs** | | |
| Riders per Hour | $\frac{Total\ Ridership}{VRH}$ | 1 - 2 |
| Operating Cost per Rider | $\frac{Total\ O\&M\ Expenses}{VRH}$ | Less than $60 |
| Average Trip Denials per week | $\frac{Total\ Trip\ Denials}{Weeks\ Operated}$ | 0 – 2 per LSP |
| **Fixed or Flex Route Pilot Programs** | | |
| Riders per Hour | $\frac{Total\ Ridership}{VRH}$ | 2 – 3 |
| Operating Cost per Rider | $\frac{Total\ O\&M\ Expenses}{VRH}$ | Less than $60 |

[A] *All monetary values provided in 2025 U.S. Dollars (USD).*

[B] *Time period for calculations is one quarter.*

Riders per hour (RPH) and operating cost per rider (OCR) provide benchmarks for operational efficiency for both types of pilot programs. VRH, part of both the RPH and OCR calculation, refers to vehicle revenue hours. For microtransit pilot programs, the average number of trip denials per week provides a benchmark for rider satisfaction and also can be a metric of unmet demand.

Rider engagement methods, included as a short-term alignment strategy under the Short-Term Local Service Provider Configuration, should be used as a performance benchmark. At a minimum, annual rider surveys should be conducted during the pilot programs in the short-term. OCT can leverage their existing contract with Qualtrics, extending through 2027, to accomplish at minimum annual rider surveys soliciting feedback on LSP services.

### *Fleet Needs*

As service demands grow and pilot programs expand, ensuring that each LSP has the right number and type of revenue vehicles will be critical to maintaining reliable, high-quality transit service in the CSA. Standardizing LSPs' approach to assessing and addressing fleet needs will help LSPs avoid duplication, reduce procurement costs, and ensure equitable distribution of resources across the County.

## Short-Term Recommendation

Procure vehicles needed to support LSP pilot programs and growing transit demand.

| Short-Term Strategies | |
|---|---|
| 1 | OCT and LSPs should collaborate to establish a mutually agreed upon standard process by which vehicle needs can be estimated during PTSA contracting. |
| 2 | Include requirements in PTSAs for LSPs to procure revenue vehicles through MDOT OPT. |
| 3 | LSPs should begin to transition the majority of their fleets to be comprised of a more consistent vehicle type for demand response service (e.g., transit passenger vans, such as Ford Transit vans) to optimize maintenance, training, and operational interchangeability across their fleets. |
| 4 | LSPs should take an inventory of their assets necessary to support operations, e.g. spare parts, technology, or tablets. |

In the short-term, LSPs should procure the revenue vehicles necessary to support efficient delivery of existing, new, and improved services through MDOT OPT to reduce costs and make it easier to align their fleet management practices.

During the 2027 PTSA contracting process, include a stipulation requiring that LSPs procure vehicles through MDOT OPT. For NOTA and OPC this will include becoming MDOT-authorized public transit providers. As of February 2025, PEX and WOTA have been approved. NOTA and OPC will need to be authorized by MDOT prior to LSPs procuring through MDOT OPT. Typically, agencies apply for this during the annual state and federal transit fund grant application process. MDOT will accept applications for funding or vehicle purchases if an agency's approval is pending or already granted.

As MDOT does not have a standardized formula for determining vehicle procurement needs, OCT and LSPs should set a mutually agreed upon standard process for annually estimating vehicle needs and justifying those estimates based on service operation type: demand response or microtransit, and fixed or flex route. This process should be applied to vehicle needs estimates submitted to OCT as part of annual PTSA contracting. The sample processes in this section are provided as a starting point. To proactively manage fleet needs, estimates should account for ridership expected over the next three to five years, as it may take several years to receive vehicles procured through MDOT OPT. Standard processes for estimating vehicles needs and procuring revenue vehicles through MDOT OPT will align LSPs' capital investments as service grows.

The following is a sample process OCT could set for estimating demand response and fixed or flex route vehicle needs:

1. **Estimating Fleet Size Needed for Demand Response Services (including Microtransit)**
   Vehicle needs for demand response services, encompassing microtransit and often paratransit services, depend on projected trip volume, average trip duration, service hours, and desired performance metrics such as wait time and trip denial rate. A simplified formula to estimate demand response or microtransit fleet size is:

   $$\textbf{Fleet Size Needed} = \frac{Total\ Daily\ Passenger\ Trips\ x\ Average\ Trip\ Time}{(Service\ Span)\ x\ (Average\ Number\ of\ Passenger\ Trips\ per\ Hour)} * Spare\ Ratio$$

   The spare ratio, typically ten to twenty percent, accounts for maintenance and downtime. For pilot programs, since total daily trips are unknown, best practice is to assume approximately one vehicle for every two and a half square miles served.

2. **Estimating Fleet Size Needed for Fixed or Flex Route Services**
   Fixed or flex route vehicle needs depend on route length, desired frequency (headway), and round-trip travel time (including recovery/layover needs). A simplified formula to estimate the number of vehicles needed per fixed or flex route is:

   $$\textbf{Vehicles per Route} = \frac{Round\ Trip\ Time + Layover}{Headway}$$

   Summing fleet needs across all routes and multiplying the sum by a fifteen to twenty percent spare ratio gives the estimated fleet size needed.

3. **Estimating Vehicle Needs**

   $$\textbf{Vehicle Needs} = Estimated\ Fleet\ Size\ Needed - Current\ Fleet\ Size$$

   Vehicle needs for demand response, microtransit, or fixed or flex route operations are simply the estimated fleet size needed less the current fleet size.

As it may not be possible to completely fund all vehicle purchases through the Oakland County Public Transportation Millage funding, LSPs should consider seeking competitive and formula grant funding to support vehicle procurement (see Table 39). LSPs should also consult the MDOT OPT procurement guidelines regarding funding requirements.

LSPs can assess how well they are addressing their fleet needs by calculating average fleet age by revenue vehicle type and comparing it to half the useful life of their revenue vehicles. This benchmark for fleet management is provided in Table 33.

TABLE 33: SHORT-TERM QUARTERLY FLEET MANAGEMENT BENCHMARK

| Performance Measure | Calculation | Suggested Short-Term Benchmark |
|---|---|---|
| Average Revenue Fleet Age [A] | $\frac{Total\ Age\ of\ All\ Revenue\ Vehicles\ of\ Type\ X}{Number\ of\ Total\ Revenue\ Vehicles\ of\ Type\ X}$ | Half Useful Life of Vehicle [A] |

[A] *By vehicle type, as defined by FTA Circular 5010.1D (Federal Transit Administration, 2012).*

The minimum useful life of revenue vehicles is determined by years of service or total vehicle revenue miles, whichever comes first. LSPs should use Federal Transit Administration (FTA) Circular 5010.1D as a reference for more information about the standard useful life of revenue vehicles by type, or updated guidance on this topic released by the FTA.[34, 35]

Minimum useful life for each type of revenue vehicle is assumed to be as follows [36]:

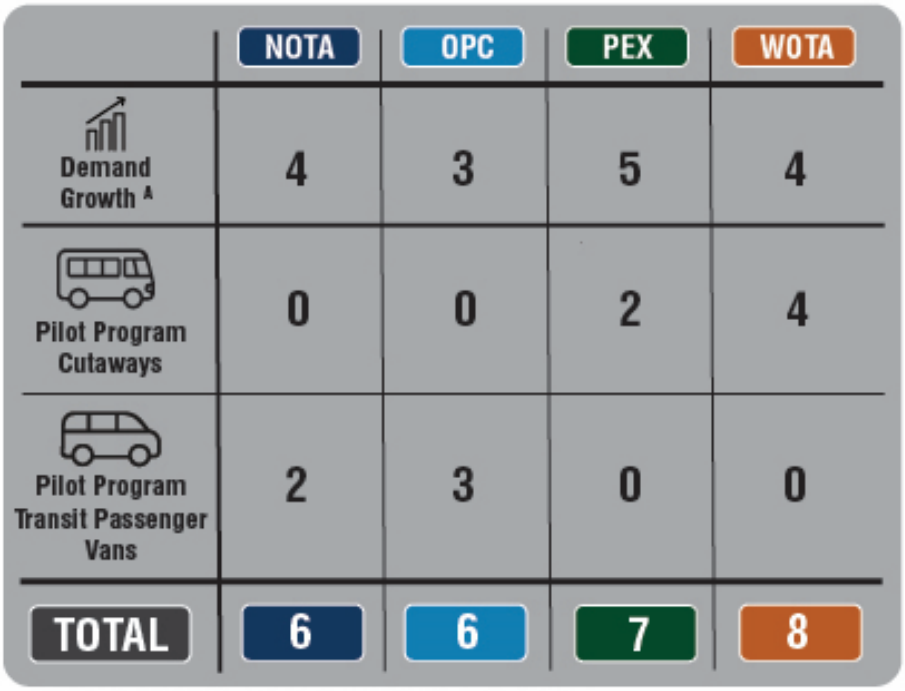
- BUSES: VEHICLE SIZE DEPENDENT
  - Large Size, Heavy-Duty Transit Buses: 12 Years or 500,000 VRM
    Approximately 35'–40' in length, including over the road buses and articulated buses.
  - Small Size, Heavy-Duty Transit Buses: 10 Years or 350,000 VRM
    Approximately 30' in length.
  - Medium Size, Medium-Duty Transit Buses: 7 Years or 200,000 VRM
    Approximately 25'–35' in length.
  - Medium Size, Light-Duty Transit Buses: 5 Years or 200,000 VRM
    Approximately 25'–35' in length.
- LIGHT-DUTY VEHICLES: 4 YEARS OR 100,000 VRM
  Other light-duty vehicles used as equipment and in transport of passengers (revenue service) such as regular and specialized vans, sedans, and light-duty buses including all bus models exempt from testing in the current 49 CFR part 665.

Demand in the CSA for demand response service is anticipated to continue to grow as the need for paratransit and service to the general public increases. To support demand response growth and recommended pilot programs in the short-term, OCT will need to support LSP fleet expansion by helping manage LSPs' applications for procurement of additional revenue vehicles through MDOT OPT. The total estimated number of vehicles LSPs will require for expansion in the short-term are shown in **Figure 56.** Transit demand and the

[34] (Federal Transit Administration (FTA), 2012)
[35] OCT's current PTSAs use a 5-year depreciation schedule, differing from federal guidelines to simplify contracting.
[36] Simulated trolleys, with rubber tires and internal combustion engine (often termed "trolley-replica buses"), should adhere to guidance for buses.

fleet planning process may vary year to year and vehicle needs should be revisited annually as part of the PTSA process.

FIGURE 56: SHORT-TERM ESTIMATED FLEET NEEDS[37]



| | NOTA | OPC | PEX | WOTA |
|---|---|---|---|---|
| Demand Growth [A] | 4 | 3 | 5 | 4 |
| Pilot Program Cutaways | 0 | 0 | 2 | 4 |
| Pilot Program Transit Passenger Vans | 2 | 3 | 0 | 0 |
| TOTAL | 6 | 6 | 7 | 8 |

[A] Includes 20% spare ratio assumption, transit passenger vans only.

In addition to fleet expansion (i.e., vehicles for pilot programs or demand growth), LSPs will need to be active in replacing vehicles to maintain their fleet as they reach their useful life. LSPs' fleets include several different revenue vehicle types: cutaways, minivans, and transit passenger vans. Many of those revenue vehicles are nearing the end of their useful life and will need to be retired and replaced to continue to meet demand. For the high-level fleet estimates developed for CTP implementation, it is assumed that LSPs will replace revenue vehicles once they are six years old for all vehicle types except for cutaways. Most of the existing fleet has a four- or five-year useful life criteria; however, to be conservative and maximize the potential for LSPs to receive discretionary grant funding, the six-year target was assumed as a reasonable expectation for LSPs to consider supporting future fleet planning.[38] Additionally, cutaway vehicles will be replaced once they are eight years old.

For procurement of additional and replacement vehicles, it is recommended that LSPs focus a majority of their procurements on transit passenger vans, e.g. Ford Transit vans, to increase the efficiency and consistency of their fleets during CTP implementation. LSPs may continue to procure other vehicle types to support specific services (e.g., cutaways for fixed or flex routes); however, this should be considered on a case-by-case basis.

[37] Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.
[38] LSP CTP implementation fleet needs estimates developed following the FTA's Section 5310 grant funding program's useful life criteria.

[39] Working towards fleets with more consistent vehicle types helps to optimize daily operations, vehicle maintenance, and operator training. LSPs should leverage improving dispatch and trip scheduling technology to provide more efficient service (i.e., more passengers per hour) whenever possible. See **Fleet Needs Estimates** in **APPENDIX F: LSP Financial Outlook Analysis** Summary for more information on LSP revenue vehicle replacement programming and specific fleet compositions by LSP.

## Facilities, Technology, and Maintenance

To support the implementation of OCT's future service model, targeted investments in facilities, technology, and maintenance infrastructure are essential. This section includes strategies to address projected LSP facility needs, fleet and facility maintenance policies, and the technological tools necessary to support coordinated future LSP service delivery. Short-term recommendations and their associated strategies focus on identifying and addressing immediate needs while setting the groundwork for LSPs to share resources when their operations are further integrated.

### *Local Service Provider Facilities*

Assessing the condition and capacity of LSP facilities, such as vehicle storage facilities, maintenance garages, and administrative office, will play a critical role in supporting reliable service delivery as LSP services begin to expand. Establishing a coordinated approach to prioritizing and planning for facility needs will avoid the duplication of investments and support long-term operational efficiency.

**Short-Term Recommendation**

Assess LSP facility assets and address LSP facility needs at regular intervals.

| Short-Term Strategies | |
|---|---|
| 1 | OCT should lead LSPs to conduct an inventory of their facility assets and a condition assessment of those assets. |
| 2 | OCT should lead LSPs in conducting regular facility condition assessments to document facility needs every three years. |
| 3 | OCT should develop a process for LSPs to prioritize and address immediate facility needs. |

[39] For fleet planning purposes in this plan, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans). Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life; however, expansion of cutaways was also included as related to potential needs associated with pilot programs.

To begin addressing facility needs, OCT should lead a coordinated effort to create a complete inventory and condition assessment of each LSP's facilities, including vehicle storage, maintenance garages, and administrative spaces, to understand current capacity, identify gaps, and explore opportunities for shared use. Following this initial assessment, facility condition assessments should be conducted every three years to track changes over time and inform capital planning. OCT should consult the FTA's *Transit Asset Management Template for Small Providers* for guidance on how to structure this process.[40] The National Rural Transit Assistance Program's Transit Manager's Toolkit and the FTA *Facility Condition Assessment Guidebook* provide additional resources on facility asset management.[41, 42]

As pilot programs and demand grow, some LSPs will need larger administrative offices and more secure vehicle storage. In the short-term, LSPs should meet facility needs through procuring short-term leases to provide flexibility during future service integration and optimize capital investments. LSPs should consult APTA's Architectural and Engineering Design for a Transit Operating and Maintenance Facility report (APTA BTS-BMF-RP-001-11) as a guide while determining their facility space needs. Relative to funding, LSPs should leverage MDOT and FTA funds for significant operational investments like facility leases.

LSPs should consult the most updated *Project Management and Construction Guidelines* resource provided by the FTA to ensure they are following federal procurement guidelines and their facility plans undergo all necessary reviews so that LSP facility projects are eligible for federal funds.[43] Based on existing conditions, see **Chapter 2: Transit Service Today**, WOTA and PEX will need to acquire leases for administrative offices and vehicle storage facilities to meet increasing demand in the short-term; however, it may not be possible to completely fund facility planning efforts through the Oakland County Public Transportation Millage funding. LSPs should also seek competitive and formula grant funding to support facility planning efforts (see **Table 39**) whenever possible.

### *Technology*

Using the same software and jointly procuring other needed technology will help LSPs align their service operations in the short-term, support management of their expanded services and fleets, and make their transition to integrated service operation easier.

**Short-Term Recommendation**

**Unify LSP scheduling, dispatch, and user software systems and procure lacking LSP tech.**

[40] (Federal Transit Administration, 2020)
[41] (National Rural Transit Assitance Program, 2024)
[42] (Federal Transit Administration, 2017)
[43] (Federal Transit Administration, 2025)

| Short-Term Strategies | |
|---|---|
| 1 | LSPs should all procure the same scheduling and dispatch software, preferably through SMART's PSDS procurement to improve regional connectivity. |
| 2 | LSPs should procure in-vehicle GPS-enabled devices compatible with procured scheduling and dispatch software through OCT material procurement processes. |
| 3 | LSPs should procure in-vehicle security cameras for all revenue vehicles in their fleets that do not currently have them. |
| 4 | OCT should clarify how visitors are able to access LSP transit services in the CSA by providing information on the OCT website. |
| 5 | OCT should lead LSPs in joining RTA's pilot of a mobility wallet application integrating fare payment mechanisms across Southeast Michigan transit providers. |

LSPs are all currently in need of new scheduling and dispatch software. OCT should coordinate LSP's inclusion on the SMART PSDS procurement. SMART's PSDS procurement and launch is expected to occur in 2026 -2027. Before the software is released to LSPs, SMART will provide training on the software and help LSPs prepare vehicles. If regional dispatch software procurement is delayed beyond 2027, Oakland County will pursue an interim scheduling solution to maintain service continuity. It is recommended that all LSPs procure the same software as SMART and other regional providers in future implementation phases.

Some LSPs lack in-vehicle GPS devices and/or security cameras in their revenue vehicles. Both of these are essential pieces of technology for operators and administrators. GPS-enabled devices, such as in-vehicle tablets, allow operators to view scheduling and dispatch information in real-time and allow administrators to more effectively manage fleet assets. In-vehicle security cameras are an important component of operator safety and liability protection. Procuring in-vehicle GPS-enabled devices and security cameras jointly is more cost efficient and will help LSPs streamline operations as they begin to integrate in the future. It may not be possible to completely fund technology procurement through the Oakland County Public Transportation Millage funding. LSPs should seek competitive and formula grant funding to support technology procurement (see Table 39).

Visitors to Oakland County currently lack dedicated resources to help them navigate LSP transit services within the CSA. To address this, OCT should add a visitor-focused frequently asked questions section to its website, covering key information such as where, when, and how LSP services are available.

To further improve accessibility of LSP services for both residents and visitors, OCT should lead LSPs in exploring a mobility wallet pilot. Using a mobility wallet would enable seamless fare payment and transfers between regional transit services for LSP riders, making it easier for riders to travel farther and more

efficiently. The RTA is currently running their Mobility Wallet pilot program, a joint initiative funded by MDOT and the Michigan Economic Development Corporation's Office of Future Mobility and Electrification.[44] The pilot aims to integrate transit payment systems for transit users across southeast Michigan.[45] Through the application developed for the Mobility Wallet pilot program, users can easily pay fares for the following transit services: Detroit Department of Transportation, SMART, QLINE, People Mover, MoGo, and more. OCT should coordinate LSP participation in further rounds of MDOT-funded mobility wallet pilot programs if they occur.

### *Maintenance*

Establishing consistent maintenance policies and procedures across all LSPs will help ensure that vehicles are safe, reliable, and available to meet growing service demands. Standardization in this area will also support more efficient fleet management, reduce downtime, and simplify training and oversight. As LSPs align their operations and move toward greater integration, unified maintenance practices will be essential for maintaining consistent service quality and while optimizing costs.

**Short-Term Recommendation**

Align LSP fleet and facility maintenance policies and procedures.

| Short-Term Strategies | |
|---|---|
| 1 | OCT should partner with LSPs to review and update their preventive and corrective maintenance standards for their vehicles and facilities, utilizing guidelines from FTA, MDOT, RTA, and SMART. |
| 2 | LSPs should work with OCT to develop fleet and facility preventative maintenance plans. |
| 3 | LSPs should align their current preventative and corrective maintenance practices. |

OCT should work with LSPs to review their current maintenance practices for both facilities and fleet vehicles. They should review FTA, MDOT, RTA, and SMART maintenance policies to develop standard LSP preventative and corrective maintenance guidelines to promote safety, reliability, and cost-efficiency. MDOT OPT's *Preventative Maintenance Manual* and *Vehicle Maintenance Records Review Preparation Guide* offer vehicle maintenance policy guidance. A Facilities and Equipment maintenance checklist tailored to transit agencies like LSPs who are recipients of Section 5310 and 5311 funding can be requested through MDOT. Following a review of current maintenance practices, each LSP should create and execute maintenance plans that follow these standards or, if different, the manufacturer's recommendations. These plans should include clear

[44] (Regional Transportation Authority (RTA), 2025)
[45] (Michigan Department of Transportation, 2025)

documentation of procedures and compliance tracking mechanisms for regular inspections and preventative repairs.

In the short-term, LSPs should continue to use their current preventative maintenance capabilities, including existing staff, facilities, contracts, and partnerships. They should develop or maintain their capability to complete light preventative maintenance activities in-house, like oil changes and tire replacements. Concurrently, LSPs should review their corrective maintenance contracts to identify service gaps and find ways to streamline repairs. OCT should help LSPs determine which corrective maintenance services to jointly procure once their current contracts are up to optimize their corrective maintenance costs. To assess whether aligned preventative and corrective maintenance practices are improving vehicle operation and on-road safety performance, the benchmarks in Table 34 can be used. These benchmarks should be calculated quarterly as part of LSPs' quarterly reports submitted to OCT.

TABLE 34: SHORT-TERM QUARTERLY MAINTENANCE BENCHMARKS

| Performance Measure | Calculation [B] | Suggested Short-Term Benchmark |
|---|---|---|
| Mean Miles between Failures [A] | $\left(\frac{Total\ Failures}{Total\ VRM}\right)$ | 5,000 to 7,500 Miles [C] |

[A] *Measure the miles between mechanical failures that require the vehicle to be removed from service for safety reasons.*

[B] *VRM = Vehicle Revenue Miles.*

[C] *May vary by vehicle type and maintenance requirements.*

## Service Policies

Creating consistent service policies is an important first step in aligning LSP transit operations across the CSA. In the short-term, consistent service policies will improve' alignment by establishing operational standards across the existing LSPs. These efforts will both improve rider experience and streamline service delivery, laying the groundwork for eventual integration of the existing LSPs into a single countywide LSP. By setting and requiring the adoption of standard policies early in the CTP implementation process, OCT can ensure a smoother transition to the future service model recommendation.

### *Administration*

As transit services in the CSA evolve, consistent administrative policies across LSPs will be essential to delivering a seamless rider experience and supporting future operational integration.

**Short-Term Recommendation**

Standardize rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements across all LSPs.

| Short-Term Strategies | |
|---|---|
| 1 | During OCT's contracting process for 2027 public transportation service agreements (PTSAs), OCT should hold a joint meeting with a representative from each LSP to ensure alignment across LSPs' administrative policies. |
| 2 | These jointly established administrative policies should be explicitly included in the 2027 PTSAs. |
| 3 | OCT should annually convene LSPs during PTSA contracting to review and reaffirm unilateral administrative policies, which should be included in each year's PTSAs. |

***Funding***

Service expansion will increase operations and maintenance costs in addition to capital costs, making identifying sustainable funding sources in the short-term essential. Close collaboration between OCT and LSPs will ensure LSPs' additional funding needs are proactively addressed through new and existing opportunities further strengthen LSPs' ability to compete for and manage funding sources.

**Short-Term Recommendation**

Identify new LSP O&M and capital funding sources.

| Short-Term Strategies | |
|---|---|
| 1 | During OCT's annual review of LSP operating and capital budgets, OCT should meet jointly with a representative from each LSP to identify additional funding needs and sustainable sources of funding to cover them. |
| 2 | OCT should collaborate with LSPs to help them identify and apply for grants, following the application and award steps required by agencies like MDOT, RTA, or FTA. |
| 3 | Each LSP should designate an existing staff member to manage grant applications collaboratively with OCT. |
| 4 | OCT should host a grants planning workshop for LSPs to clarify the roles of the State of Michigan, SMART, and RTA in LSP grant applications and outline which grants LSPs can apply for. |

OCT, SMART, and LSPs should work together to actively identify and pursue sustainable funding opportunities, building flexible strategies that allow the region to secure resources when new opportunities arise. Gaps in funding for capital improvements, like new revenue vehicles, programmatic funding for service pilots, or in-vehicle GPS-enabled devices, may be addressed by reallocating remaining funds (see Figure 4) from the Oakland County Public Transportation Millage or by LSPs exploring and applying for formula and competitive grants.

OCT should establish the administrative structure for LSPs to explore and apply for additional formula and competitive grants to bridge funding needs. This will help ensure that LSPs can respond quickly and effectively to funding opportunities. Each LSP should designate an existing staff member to manage their grant applications and coordinate any application resource needs with OCT and SMART when necessary. This structure will strengthen the region's ability to compete for external funding, improve grant compliance, and ensure that financial planning keeps pace with service expansion. Potential federal and state grant funding sources for implementation activities that will occur throughout CTP implementation are identified in Table 39.

See Section 2.1 Governance and Funding for more information about grant programs and MDOT, FTA, and RTA roles in the disbursement of grant funding to local public transit providers in southeast Michigan. Grant funding program requirements are likely to change over time, as such federal and state grant funding information in the CTP is not an authoritative reference for funding available or activities eligible for various grant funding program monies.

### 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination

Mid-term strategies will be applied during years four through seven of CTP implementation, 2030 – 2032 and focus on further LSP integration. This phase builds directly on short-term implementation progress as Oakland County moves closer to full realization of the future service model recommendation. Mid-term implementation focuses on expanding successful pilot programs, adjusting or ending those that aren't working, and continuing to standardize service and planning tools across LSPs. It also includes creating a fleet and facility plan to prepare for LSP integration in the long-term phase. Table 35 summarizes mid-term implementation strategies by future service model component.

TABLE 35: MID-TERM IMPLEMENTATION RECOMMENDATIONS BY SERVICE COMPONENT

| Service Component | Service Subcomponents | Mid-Term Recommendations |
|---|---|---|
| Service Operation | LSP Configuration | Initiate how LSPs should integrate their operations. |
| | Service Expansion | Continue running and evaluating successful LSP pilot programs. |
| | Fleet Needs | Continue procuring vehicles through MDOT OPT to meet future LSP fleet needs. |

| Service Component | Service Subcomponents | Mid-Term Recommendations |
|---|---|---|
| Facilities, Technology, and Maintenance | LSP Facilities | Assess whether establishing shared LSP facilities would improve efficiency and help meet growing demand for services. |
| | Technology | Reevaluate LSP scheduling, dispatch, and user software effectiveness as needed. |
| | Maintenance | Procure contracts collectively for LSP fleet and facility maintenance. |
| Service Policies | Administration | Continue to collaboratively adapt LSPs' unified service policies and procedures as needed. |
| | Funding | Review the Millage to assure balance between needs and resources to cover rising O&M costs and then determine if the Millage rate should be increased. |

As in the short-term, mid-term implementation progress will be monitored using indicators tied to OCT's service goals and regularly reported performance metrics.

## Service Operation

Building on short-term operational alignment, mid-term service operation recommendations focus on strengthening forms of internal coordination and coordinated service delivery among LSPs to enhance their operational efficiency and responsiveness. During this phase, LSPs should standardize how they coordinate services with one another and accommodate trips outside their service areas while continuing to evaluate and refine successful pilot programs initiated in the short-term.

### *Local Service Provider Configuration*

In an effort to ensure eventual LSP integration is strategic and sustainable, assessing LSPs' organizational structure options and operational efficiency will be necessary during the mid-term implementation phase. By proactively planning integration, OCT can facilitate the creation of a more cohesive and efficient service network that better meets CSA transit needs.

**Mid-Term Recommendation**

Initiate how LSPs should integrate their operations.

| Mid-Term Strategies | |
|---|---|
| 1 | OCT should facilitate the creation of an organizational development plan that evaluates the options for LSP integration and structure. |
| 2 | OCT should facilitate a review of LSPs' organizational charts to identify staffing redundancies across LSPs prior to integration. |

Given existing and forecasted conditions, there are three options for LSP operational integration that differ based on the type of lead agency. OCT and LSPs should collaboratively assess each of these options and choose one of them to implement during the long-term CTP implementation phase:

1. Single Lead Agency - Restructure the existing LSPs under a single lead agency with operating divisions. In this case, a lead agency would assume management of CSA transit operations and maintenance activities, serving as a primary liaison with OCT. This lead agency would also manage CSA transit planning and asset management activities or outsource them to consultants. The existing LSPs would likely become operating divisions under the lead agency.
2. New Independent Authority - Create a new entity to manage operations independent of the existing LSPs. Existing LSPs would likely become operating divisions under this new authority.
3. Private Vendor - Contracting with a private vendor to manage operations and maintenance activities. In this case existing LSPs would likely become operating divisions under this contracted private vendor.

The term Transit Service Manager (TSM) will serve as a placeholder to identify whichever of the three proposed operational integration models is ultimately chosen by LSPs and OCT during the long-term implementation phase. This designation does not imply that either SMART or OCT will assume the role of TSM; rather, the responsibility will rest with the entity or structure agreed upon through the collaborative process.

During the mid-term, OCT should hire a consultant to generate an organizational development plan that evaluates these three options for full integration of LSP operations. Part of the development of this plan should include a strategic review of LSPs' organizational charts for staffing redundancies as a structure of operating divisions is analyzed. At the point of full LSP integration, there may be redundancies across administrative, financial, HR, and training staff. Redundancies in these staff will be dependent on service expansion and the outcome of a mid-term benefit-cost analysis, which will assess whether integrating LSP facilities is recommended (see Mid-Term Local Service Provider Facilities).

While staffing changes are expected, maintaining core operational positions is critical. Operators and frontline staff remain essential to delivering a positive rider experience and ensuring continuity of service. Preserving these roles will be necessary not only to sustain current service levels but also to support anticipated growth and service improvements.

If the Oakland County Public Transportation Millage funding is not enough to cover the cost of hiring a consultant team for this planning activity, LSPs should seek competitive and formula grant funding to support the identification of the most beneficial LSP integration option (see Table 39).

***Service Expansion***

Mid-term service expansion strategies will continue to focus on building a pilot program framework and LSP pilot programs launched during the short-term.

**Mid-Term Recommendation**

Continue running and evaluating successful LSP pilot programs.

| Mid-Term Strategies | |
|---|---|
| 1 | LSPs should continue to run and evaluate pilot programs launched in the short-term. |
| 2 | OCT should work with LSPs to develop a standard process to convert successful pilot programs to permanent LSP services. |
| 3 | OCT should collaboratively review the CTP market analysis with LSPs and compare it to LSPs' 2026 to 2029 ridership trends and service provision growth. |

Mid-term benchmarks measuring the performance of LSP pilot programs are summarized in Table 36. Mid-term operating cost per rider metrics for both microtransit and fixed or flex route service pilot programs remain the same as the short-term; however, LSPs should aim for increased rider per hour metrics for both and lower average trip denials per week for microtransit pilots.

TABLE 36: MID-TERM QUARTERLY BENCHMARKS FOR PILOT PROGRAMS

| Evaluation Metric | Calculation [A] | Suggested Mid-Term Goal [B] |
|---|---|---|
| **Microtransit Pilot Programs** | | |
| Riders per Hour | $\frac{Total\ Ridership}{VRH}$ | More than 2 |
| Operating Cost per Rider | $\frac{Total\ O\&M\ Expenses}{VRH}$ | Less than $70 |
| Average Trip Denials per week | $\frac{Total\ Trip\ Denials}{Weeks\ Operated}$ | 0 – 1 per LSP |
| **Fixed or Flex Route Pilot Programs** | | |
| Riders per hour | $\frac{Total\ Ridership}{VRH}$ | More than 4 |
| Operating Cost per Rider | $\frac{Total\ O\&M\ Expenses}{VRH}$ | Less than $52 |

[A] *Time period for calculations is one quarter, e.g. January through March.*

[B] *All monetary values provided in 2025 USD.*

If pilot programs meet mid-term benchmarks listed in Table 36Table , then LSPs should consider transitioning the pilots programs to permanent LSP services. Prior to transitioning a pilot program, OCT and the operating LSP should conduct an onboard or other type of rider survey regarding the utility of the service to validate the public perception of the pilot program. Further, it will need to be determined if the LSP will have enough funding to continue operating the pilot program in the long-term. If the pilot program is positively received by the public and future funding is available, it should be transitioned to a permanent service. Following, the LSP's marketing materials and rider resources should be updated to include the new permanent service.

Additionally, OCT should collaborate with LSPs to review the CTP's market analysis of the CSA and compare it with up-to-date ridership and LSP service growth data. This may help further determine the need for new pilot programs, the reduction or expansion of existing services, and other updates to existing service policies.

### *Fleet Needs*

As transit demand continues to grow in the mid-term, LSPs should focus on streamlining and scaling fleet procurement to support long-term operational goals. This coordinated approach will help ensure LSP fleet management is cost efficient, sustainable, and compliant with County vehicle standards.

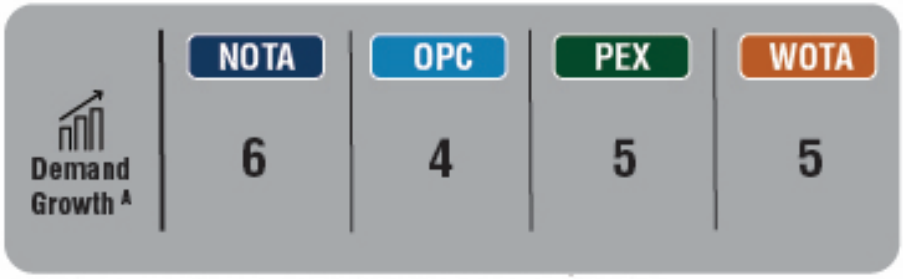
**Mid-Term Recommendation**

Continue procuring vehicles through MDOT OPT to meet future LSP fleet needs.

| Mid-Term Strategies | |
|---|---|
| 1 | LSPs should continue estimating their vehicle needs using OCT's standard process and procuring vehicles through MDOT OPT. |
| 2 | OCT should ensure that a portion of the vehicles procured for each LSP are low-emissions vehicles. |
| 3 | LSPs should use previous inventory of their assets to collaboratively identify future needs for assets supporting operations, like spare parts, technology, or tablets when appropriate (or cost effective and efficient). |

The total estimated number of vehicles LSPs will need in 2030 to support CSA transit demand growth is shown in **Figure 57.** Pilot program vehicle needs are already accounted for through procurements in the short-term and no additional vehicle needs are assumed. Additional needs for these programs should be monitored and revisited each year. Similar to the outlined short-term procurement process, specific vehicle replacements should be considered in the mid-term to maintain service and standardize the fleet. See **Fleet Needs Estimates** in **APPENDIX F: LSP Financial Outlook Analysis Summary** for more information on LSP revenue vehicle replacement programming and specific fleet compositions by LSP.

FIGURE 57: MID-TERM ESTIMATED FLEET EXPANSION NEEDS [46]




OCT should ensure that a portion of each LSP's vehicle acquisitions through MDOT OPT include low-emissions vehicles. Allocating capital funding for vehicle purchase or replacement to low-emissions vehicles is in line with service goal eight, which commits OCT and LSPs to helping reduce emissions and meet regional sustainability goals. At least 10% of the vehicles procured for each LSP during the mid-term should be low-emissions vehicles.

Transitioning LSP fleets to include more low emissions vehicles is in line with both State of Michigan and Oakland County policies. The State of Michigan *MI Healthy Climate Plan* (2022) emphasizes vehicle fleet electrification as a pivotal strategy for reducing emissions in the transportation sector, which it cites as

[46] Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

responsible for a third of all annual emissions in Michigan. It also encourages State collaboration with local public institutions for procurement of low- and zero-emissions vehicles, which LSPs will be well-positioned to do as participants MDOT OPT revenue vehicle procurement processes.[47] The *Oakland County Sustainability Plan* (2021) targets achieving net zero carbon emissions by 2050. Fleet electrification is a core strategy for achieving this target.[48] Oakland County's *Zero Emissions Roadmap for Oakland County* (2024) is a recent strategic planning document that provides more detail on how to achieve the *Oakland County Sustainability Plan* goals.[49] The targets and directives included in these Oakland County policies are reflective of SEMCOG's *Southeast Michigan Priority Climate Action Plan* (2024).[50] LSPs should consult the State of Michigan's Community EV Toolkit for funding and planning resources for meeting these State, Oakland County, and SEMCOG emissions targets.[51]

## Facilities, Technology, and Maintenance

After identifying and addressing immediate facility, technology, and maintenance infrastructure needs in the short-term, LSPs should move to evaluating opportunities for shared resource management.

### *Local Service Provider Facilities*

With initial facility inventories and condition assessments completed and a regular cadence for them set, OCT should lead LSPs in evaluating whether establishing shared facilities moving forward could reduce costs and better support coordinated service delivery.

**Mid-Term Recommendation**

**Assess whether establishing shared LSP facilities would improve efficiency and help meet growing demand for services.**

**Mid-Term Strategies**

| | |
|---|---|
| 1 | OCT should lead LSPs in conducting a benefit-cost analysis focused on determining if existing and future shared facilities will optimize their service provision. |

This facility analysis should primarily evaluate geographic service coverage, including facility inventory and county travel patterns, projected fleet growth, service impact (i.e., limit impacts to existing riders), and cost savings. OCT may facilitate this effort or hire a consultant to perform this analysis. This analysis may include scenario planning and cost modeling that use spatial analysis, GIS mapping, and fleet simulation tools to

[47] (Department of Environment, Great Lakes, and Energy, 2025)
[48] (Oakland County, 2025)
[49] (Holland & Brambley, 2024)
[50] (Southeast Michigan Council of Governments, 2025)
[51] (Southeast Michigan Counil of Governments, 2025)

estimate vehicle needs under different integration scenarios. Additionally, cost-benefit analysis frameworks can help estimate potential savings while accounting for service quality and rider experience. These assessments support informed decision-making by balancing operational efficiency with customer impact.

If the Oakland County Public Transportation Millage funding is not enough to cover the cost of hiring a consultant team for this planning activity, LSPs should seek competitive and formula grant funding to support the development of an analysis of LSP facility integration (see Table 39).

***Technology***

In the mid-term, technology strategies will shift focus from initial alignment to evaluation and refinement. Following the adoption of unified scheduling, dispatch, and user software across LSPs during short-term implementation, LSPs should assess whether these systems continue to meet their operational needs as services expand and their service delivery is further coordinated.

**Mid-Term Recommendation**

Reevaluate LSP scheduling, dispatch, and user software effectiveness as-needed.

| Mid-Term Strategies | |
|---|---|
| 1 | OCT should lead LSPs in evaluating whether the scheduling, dispatch, and user software procured through SMART is working well relative to their needs. |
| 2 | If the scheduling, dispatch, and user software procured by SMART is not working effectively for LSPs, OCT should coordinate with SMART and LSPs to identify issues and take corrective actions. |
| 3 | OCT should standardize how LSP operational metrics are calculated and determine whether any digital reporting tools or data exports are available through the new unified scheduling and dispatch software. |
| 4 | LSPs with support from OCT should evaluate whether the integration between the scheduling, dispatch, and user software procured through SMART and LSP fare payment systems is operating as intended. |

OCT should leverage the capabilities of the unified scheduling and dispatch software adopted in the short-term phase and identify whether there are any digital tools or export formats within the software to help standardize and streamline LSP reporting. For example, OCT could use Application Programming Interface (API)-driven refreshes, where the scheduling or dispatch system automatically pushes data to analytics

platforms, or cloud-based integrations that keep data synced in near real-time for dashboards and reports. This approach will ensure accurate, comparable data across all LSPs and support informed decision-making during CTP implementation.

### *Maintenance*

During mid-term implementation, opportunities to share fleet and facility maintenance resources will be explored. Determining how maintenance services can be shared across LSPs is another means of reducing costs, LSPs' administrative responsibilities, and ensuring consistent service quality across the CSA.

**Mid-Term Recommendation**

Procure contracts collectively for LSP fleet and facility maintenance.

**Mid-Term Strategies**

| | |
|---|---|
| 1 | OCT should lead LSPs in determining whether procuring joint agreements for all or most contracted maintenance activities will help optimize LSPs' operations. |

Standardization of maintenance practices will be the foundation for mid-term improvements for how LSPs handle fleet and facility maintenance. With an understanding of preventative and corrective maintenance standards most beneficial to the useful life of LSP assets, current needs, and the duration of current maintenance service contracts, joint services that work for all LSPs can be procured. By coordinating procurement and managing maintenance contracts collectively, LSPs can focus more on asset management and service quality.

LSPs should work with OCT to explore whether there are eligible vendors that can support in-house preventative maintenance and other functions that cannot be performed on-site. For LSPs who have limited in-house maintenance functions, joint contracting for light preventative vehicle maintenance can help avoid redundancies in maintenance staff ahead of potential LSP integration during the long-term implementation phase.

LSPs should also collaborate with SMART, through OCT, to determine eligible vendors for specialized and/or heavy preventative vehicle maintenance activities and corrective vehicle maintenance. To ensure cost-effective and efficient operations, OCT should review how well maintenance provider locations match up with LSP assets when deciding if joint contracts for these services are appropriate.

Based on this analysis, LSPs may choose to:

- Adopt another LSP's maintenance provider, or
- Continue with their current maintenance provider, or
- Adopt a new maintenance provider.

## Service Policies

The focus of mid-term service policy recommendations is refining and reinforcing the policy alignment established during short-term implementation. This iterative approach will help maintain consistency while allowing for flexibility and innovation across the system.

### *Administration*

In the mid-term, administrative efforts should shift from administrative policy and procedure alignment to refinement. Structured collaboration among LSPs relative to updating unified administrative policies and procedures as needed will continue as a formal process.

**Mid-Term Recommendation**

Continue to collaboratively adapt LSPs' unified service policies and procedures as-needed.

| Mid-Term Strategies | |
|---|---|
| 1 | OCT should convene LSPs during PTSA contracting to review and reaffirm administrative policies. |
| 2 | During 2030 PTSA contracting review, language should be added to PTSAs requiring LSPs to update their service policies as a group to support better service coordination. |

### *Funding*

As service expansion continues, ensuring LSPs' long-term financial sustainability will become increasingly important. OCT should begin assessing whether the current primary funding source, the Oakland County Public Transportation Millage, is sufficient to support ongoing service growth and determine if adjustments may be needed.

**Mid-Term Recommendation**

Review the Millage to assure balance between needs and resources to cover rising O&M costs and following determine if the Millage rate should be increased.

| Mid-Term Strategies | |
|---|---|
| 1 | OCT should conduct a property tax revenue forecast for Oakland County to determine if the Oakland County Public Transportation Millage should be increased. |
| 2 | OCT should conduct a forecast of LSPs' operations and maintenance costs and capital costs, to determine if they will outpace projected property tax revenue. |

OCT should conduct or hire a consultant to develop a detailed financial forecast to assess the future capacity of the existing Oakland County Public Transportation Millage to continue to support LSPs' operations and maintenance costs. Both projected property tax revenue from the Oakland County Public Transportation Millage and LSPs' projected operations, maintenance, and capital costs should be forecasted for ten to fifteen years to determine if adjustments may be required to the future millage. This proactive approach allows OCT and LSPs to plan ahead, avoid funding shortfalls, and maintain service continuity as the system grows.

### 4.2.3 Long-Term Implementation (2032+): Integration

Strategies to be applied during the long-term phase of the CTP implementation, occurring in 2032 and beyond, will focus on fully realizing the future service model recommendation for Oakland County. Contingent on the renewal of the Oakland County Public Transportation Millage in 2032 and the results of the mid-term analysis, long-term implementation will support the formal unification of LSPs into a single, countywide transit entity (i.e., TSM) as outlined in previous phases. During this phase, existing LSPs' administrative and operational functions will be integrated in the specific manner identified as most beneficial to supporting local needs based on the analysis conducted in the mid-term.

Building on short-term operational alignment and mid-term service operation recommendations, the long-term focus shifts to improving internal coordination and joint service delivery among LSPs to boost efficiency and responsiveness. In this phase, LSPs should continue to refine their shared standard operational processes while continuing to evaluate successful pilot programs initiated in the short-term. Table 37 summarizes long-term implementation strategies by future service model component.

TABLE 37: LONG-TERM IMPLEMENTATION RECOMMENDATIONS BY SERVICE COMPONENT

| Service Component | Service Subcomponents | Long-Term Recommendations |
|---|---|---|
| **Service Operation** | LSP Configuration | Integrate the existing LSPs in alignment with the recommendations of the LSP organizational development plan completed during the mid-term. |
| | Service Expansion | Identify successful pilot programs and transition them to permanent services. |
| | Fleet Needs | Continue to follow fleet policies and procedures developed in short- and mid-term phases. |
| **Facilities, Technology, and Maintenance** | LSP Facilities | Establish shared facilities as recommended by the mid-term facility integration assessment. |
| | Technology | Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed. |
| | Maintenance | Continue to standardize and optimize fleet and facility maintenance practices and ensure assets remain in a state of good repair. |
| **Service Policies** | Administration | Continue to follow administrative policies and procedures developed in short- and mid-term phases. |
| | Funding | Take steps to renew the Millage and ensure continued service delivery within the CSA. |

As in the mid-term, long-term implementation progress will be monitored using indicators tied to OCT's service goals and regularly reported performance metrics.

## Service Operation

Long-term service operation recommendations focus on fully realizing the benefits of coordination and standardization efforts during earlier implementation phases. If the LSP organizational development plan completed in the mid-term demonstrates that full integration is more efficient and cost-effective, the four existing LSPs should consolidate under the TSM to streamline operations within the CSA. This phase should also focus on transitioning successful short- and mid-term pilot programs into permanent services and maintaining adherence to fleet management policies and procedures to ensure consistent, reliable, and efficient service delivery across the CSA.

### *Local Service Provider Configuration*

LSPs' possible integration represents a pivotal decision-making point in the evolution of Oakland County's transit system, with the potential to establish seamless service delivery across the CSA.

**Long-Term Recommendation**

Integrate the existing LSPs in alignment with the recommendations of the LSP organizational development plan completed during the mid-term.

**Long-Term Strategies**

| | |
|---|---|
| 1 | OCT should include the LSP integration recommendation from the mid-term organizational development plan in the renewal proposal for the Oakland County Public Transportation Millage. |

***Service Expansion***

Pilot programs identified as successful should be formally adopted as permanent service offerings within the CSA transit network. This marks the culmination of the development of a multi-year data-driven approach for the exploration of new and improved transit services, ensuring service additions are sustainable and responsive to rider needs.

**Long-Term Recommendation**

Identify successful pilot programs and transition them to permanent services.

**Long-Term Strategies**

| | |
|---|---|
| 1 | Using the standard process developed by OCT in the mid-term, successful services explored through pilot programs should become permanent services. |

Depending on available funding, new pilot programs may also be introduced in the CSA using the standard processes refined in the short- and mid-term, following renewal of the Oakland County Public Transportation Millage.

***Fleet Needs***

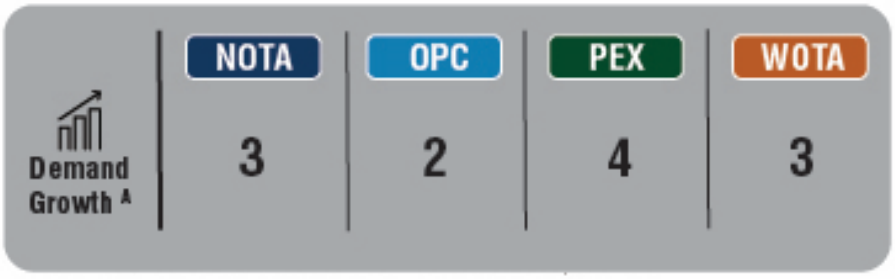
Long-term fleet management should focus on maintaining and refining the standard practices established during earlier implementation phases. Continuing to follow fleet policies and procedures developed previously will ensure consistency across fleets and cost optimization in vehicle procurement, sustaining a stable and scalable transit system capable of adapting as service demand in the CSA grows.

**Long-Term Recommendation**

Continue to follow fleet policies and procedures developed from 2026 to 2032.

The total estimated number of additional vehicles LSPs will need in 2032 to support CSA transit demand growth is shown in Figure 58. Pilot program vehicle needs are already accounted for through procurements in the short and mid-terms and no additional vehicle needs are assumed. Additional needs for these programs should be monitored and revisited each year. Similar to the outlined short-term procurement process, specific vehicle replacements should be considered in the long-term to maintain service and standardize the fleet. See Fleet Needs Estimates in APPENDIX F: LSP Financial Outlook Analysis Summary for more information on LSP revenue vehicle replacement programming and specific fleet compositions by LSP.

FIGURE 58: LONG-TERM ESTIMATED FLEET EXPANSION NEEDS[52]




## Facilities, Technology, and Maintenance

Long-term fleet, facilities, and maintenance strategies focus on optimizing the infrastructure systems established in earlier implementation phases to support a fully integrated transit network within the CSA. Where mid-term facilities, technology, and maintenance evaluations indicated operational benefits, the TSM should move forward with integration. Continued reassessment of operational infrastructure and maintenance practices will also ensure that CSA transit services remain responsive to evolving service demand.

### *Local Service Provider Facilities*

The TSM should integrate facilities where recommended by mid-term assessments. In these cases, integration refers to coordinated LSP operations, shared LSP facility resources, and aligned LSP infrastructure planning.

[52] Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

**Long-Term Recommendation**

Establish shared facilities as recommended by the mid-term facility integration assessment.

## Long-Term Strategies

| | |
|---|---|
| 1 | The TSM should implement the mid-term facility integration assessment recommendations. |

OCT should coordinate planning and funding TSM operational integration into shared or centralized facilities where unification is determined to improve service delivery and reduce costs. OCT's leadership will help ensure that facility transitions address needs equitably, minimizing service disruptions and aligning facility investments with the broader goals of system integration. This does not involve consolidating all LSP facilities into a single physical site. Instead, this would involve each LSP having access to all existing LSPs' facility resources. A singular shared facility for all LSPs' operational and administrative activities that is centrally located within Oakland County will likely not be recommended by the mid-term assessment. This would likely introduce inefficiency to LSP service provision due to the deadhead it may incur, as LSPs' trips are spread all across Oakland County.

### *Technology*

During long-term implementation, maintaining consistent technology systems by continuing to follow the policies and procedures developed in earlier phases should be the focus. These standardized practices and technology systems will support the data-sharing and cross-provider compatibility needed for continued coordinated service delivery or fully integrated services. Continuing to monitor how well procured technology is working, primarily scheduling, dispatch, and user software, will help minimize service disruptions during changes to the CSA transit network and maximize rider experience quality.

**Long-Term Recommendation**

Continue to reevaluate scheduling, dispatch, and user software effectiveness as-needed.

### *Maintenance*

The CTP's long-term maintenance strategy focuses on developing a unified, proactive approach to asset replacement based on preventative and corrective maintenance alignment and coordination established in earlier implementation phases. This ensures that fleet and facility assets are continually able to meet demand for transit services in the CSA and deliver high-quality transit service to riders.

**Long-Term Recommendation**

Continue to standardize and optimize fleet and facility maintenance practices and ensure assets remain in a state of good repair.

## Long-Term Strategies

| | |
|---|---|
| 1 | The TSM should develop long-range fleet and facility replacement plans. |

Fleet and facility replacement plans should be reviewed and updated as-needed concurrently to ensure operational alignment between these two critical asset groups. A five to ten-year planning horizon is recommended for both, enabling effective fleet planning and closely monitoring facility needs. Fleet and facility replacement plans should establish replacement schedules based on the useful life of assets, and forecast fleet and facility needs based on projected growth in demand for transit services. Following the development of replacement plans, vehicle replacement schedules should be consulted prior to procuring vehicles through MDOT OPT. Facility replacement schedules should be consulted during regular facility condition assessments implemented in the short-term. OCT should work closely with the TSM or consider contracting consultants with fleet and facility replacement planning expertise to develop these replacement plans.

### Service Policies

As operational practices mature, attention must shift toward securing long-term transit system stability. OCT can ensure the continued success of service improvements primarily by securing the renewal of the Oakland County Public Transportation Millage, which will help bolster support for transit and maintain uninterrupted service delivery.

#### *Administration*

Administrative efforts will focus on maintaining the consistency and cohesion established in earlier implementation phases. Continuing to follow the unified policies and procedures developed during short- and mid-term implementation will ensure a stable, coordinated service environment that supports seamless operations and prepares the system for future growth and innovation.

**Long-Term Recommendation**

Continue to follow administrative policies and procedures developed from 2026 to 2032.

***Funding***

In the long-term, sustaining transit system growth and preventing service disruptions will depend on securing continued public investment in CSA transit services. The focus will be on maintaining eligibility and accessing federal and state funding and renewing the Oakland County Public Transportation Millage. This will include OCT preparing a ballot proposal for the Oakland County Public Transportation Millage prior to November 2032 and supporting additional marketing campaigns.

**Long-Term Recommendation**

Take steps to renew the Millage and ensure continued service delivery within the CSA.

| Long-Term Strategies | |
|---|---|
| 1 | OCT should develop a ballot proposal for the renewal of the Oakland County Public Transportation Millage to be included on the November 2032 general election ballot. |
| 2 | OCT should collaborate with the TSM to initiate an Oakland County Public Transportation Millage education campaign running from January 2032 to November 2032. |
| 3 | If the Millage is not renewed in November 2032, OCT will need to prepare a termination plan for TSM-run services. |

OCT should collaborate with the TSM to launch a comprehensive Oakland County Public Transportation Millage public education campaign beginning in 2030. This campaign should inform residents about the benefits of the Oakland County Public Transportation Millage and highlight service and mobility improvements made possible by the Millage to build widespread public support for its renewal. OCT may also consider hiring a public engagement consultant to conduct this education campaign if additional support is needed.

If the millage is not renewed in November 2032, OCT will need to prepare a termination plan for TSM-run services as they exist in the CSA. This termination plan would roll back existing services, calculating how much service could be funded through other County means until the next opportunity to pass a County public transportation millage.

The termination plan may include the following key steps:

- Coordination between OCT and LSPs regarding how to phase out County support.
- Identifying the reduction in LSP services due to the loss of millage funding, including both level of service and rider eligibility decreases.
- Alerting the public on how LSP services will be reduced.

- Assessing LSP fleet and facility assets and identifying which are necessary to provide the level of service that can be funded without the millage.
    - Assets that are not needed should be liquidated, following any state and federal requirements stemming from the funding source used to procure those assets.

## 4.3 CTP Implementation: Financial Outlook (2026 – 2032)

A high-level analysis of LSP revenue, baseline expenses, and added expenses from CTP implementation activities was conducted to develop an understanding of LSP financial outlook from 2026 to 2032. This analysis was conducted for three milestone years during CTP implementation, 2027, 2030, and 2032, offering a snapshot of projected income and expenditures as implementation progresses through the short-, mid-, and long-term phases. It is intended to be used as a high-level guide for OCT to consider supporting future financial planning efforts but should be revisited annually as it is not a comprehensive financial analysis.

Table 38 summarizes projected revenue, baseline expenses, and additional expenses by LSP. More information about the methodology used to conduct this analysis can be found in APPENDIX F: LSP Financial Outlook Analysis Summary. These estimates reflect the full scope of strategies and recommendations outlined in Section 4.2 4.2 Performance-Based Implementation Plan. The financial estimates account for revenue increases from CSA demand growth, rising operational costs tied to service expansion and pilot programs, as well as capital investments in fleet, facilities, technology, and administration needed to implement CTP recommendations for LSPs.

As the CTP recommendations are implemented, additional investment may be necessary, primarily due to capital needs related to revenue vehicle replacement. These may exist as the LSP revenue projections do not include federal (except for existing 5310 fleets, which are to be replaced by SMART from FTA funds) and state discretionary grant funding opportunities. Additionally, LSP capital reserves that account for vehicle depreciation is assumed to assist with offsetting future vehicle costs (refer to APPENDIX F: LSP Financial Outlook Analysis Summary for additional details). Remaining funding needs can likely be covered under the existing millage and/or mitigated through support from various discretionary grant programs.

LSPs may choose not to replace all vehicles that meet their useful life for replacement in 2027, 2030 and 2032. OCT will coordinate with LSPs to meet these needs and the CTP is implemented. As LSPs don't factor in competitive state or federal grants when planning their budgets, using programs like Section 5310 to buy replacement vehicles would significantly reduce their financial burden. These grants typically cover the vehicle cost, 80% through federal funding and 20% from state match funding as MDOT funds allow from the Comprehensive Transportation fund. Following, LSPs should only need to secure a small portion of the vehicle cost through local match funding, if any, easing their short-, mid-, and long-term investment needs. If MDOT's budget does not permit match funding, revenue from service contracts, such as the LSP PTSAs, may be used as a local match. Alternatively, funds from other federal programs may also be used, excluding those from the U.S. Department of Transportation, except for the Federal Lands Transportation Program and the Tribal Transportation Program under Sections 202 and 203 of Title 23 U.S.C.

The 2027, 2030, and 2032 fleet needs costs provided in **Table 38** should serve as funding benchmarks for LSPs in their grant management. Once vehicles are ordered, they often take 18 to 24 months (or longer) to be built and delivered, so it's important to begin applying for funding well in advance of when vehicles must be procured. Also, grant funding typically is disbursed for future fiscal years, so applying in advance ensures the funds will be available and allocated when they are needed.

There are many potential federal and state grant funding sources for implementation activities that will require capital funding, including expanding and maintaining revenue vehicle fleets in a state of good repair. These and other federal and state grant funding sources are identified in **Table 39**.[53] The federal and state funding landscape may change over the course of CTP implementation. Refer to **Section 2.1 Governance and Funding** for more information about state and federal grant programs and funding disbursement.

[53] This is not an authoritative reference for grant funding programs available or activities eligible for various grant funding program funds. Additional grant opportunities should be monitored each year.

TABLE 38: FINANCIAL OUTLOOK BY LSP, 2026-2032 (MILLIONS OF 2025 U.S. DOLLARS)

| | 2027 (Short-Term) | | | | 2030 (Mid-Term) | | | | 2032 (Long-Term) | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | NOTA | OPC | PEX | WOTA | NOTA | OPC | PEX | WOTA | NOTA | OPC | PEX | WOTA |
| **TOTAL Revenue** [A] | $ 10.8 | $ 5.5 | $ 10.6 | $ 9.7 | $ 13.8 | $ 5.1 | $ 10.7 | $ 11.6 | $ 14.1 | $ 5.5 | $ 11.9 | $ 11.1 |
| Baseline O&M | $ 7.9 | $ 3.2 | $ 5.3 | $ 6.6 | $ 9.2 | $ 3.8 | $ 6.2 | $ 7.8 | $ 10.1 | $ 4.1 | $ 6.8 | $ 8.4 |
| Baseline Capital | $ 1.3 | $ 0.3 | $ 1.3 | $ 0.9 | $ 1.4 | $ 0.3 | $ 1.4 | $ 0.9 | $ 1.5 | $ 0.4 | $ 1.5 | $ 1.0 |
| **TOTAL Baseline Expenses** | $ 9.2 | $ 3.5 | $ 6.6 | $ 7.5 | $ 10.6 | $ 4.1 | $ 7.6 | $ 8.7 | $ 11.6 | $ 4.5 | $ 8.3 | $ 9.4 |
| Pilot Programs [B] | $ 0.4 | $ 0.8 | $ 0.4 | $ 0.8 | $ 0.4 | $ 0.9 | $ 0.4 | $ 0.9 | $ 0.5 | $ 0.9 | $ 0.5 | $ 0.9 |
| **TOTAL Added O&M Expenses** | $ 0.4 | $ 0.8 | $ 0.4 | $ 0.8 | $ 0.4 | $ 0.9 | $ 0.4 | $ 0.9 | $ 0.5 | $ 0.9 | $ 0.5 | $ 0.9 |
| Fleet Needs [C] | $ 0.61 | $ 1.1 | $ 3.2 | $ 1.0 | $ 2.7 | $ - | $ 1.5 | $ 1.5 | $ - | $ - | $ 0.57 | $ - |
| LSP Facilities | $ - | $ - | $ 0.32 | $ 0.32 | $ - | $ - | $ 0.35 | $ 0.35 | $ - | $ - | $ 0.37 | $ 0.37 |
| Technology | $ 0.027 | $ 0.027 | $ 0.027 | $ 0.027 | $ 0.029 | $ 0.029 | $ 0.029 | $ 0.029 | $ 0.031 | $ 0.031 | $ 0.031 | $ 0.031 |
| Administration | $ 0.074 | $ 0.074 | $ 0.074 | $ 0.074 | $ 0.081 | $ 0.081 | $ 0.081 | $ 0.081 | $ 0.086 | $ 0.086 | $ 0.086 | $ 0.086 |
| **TOTAL Added Capital Expenses** | $ 0.71 | $ 1.2 | $ 3.6 | $ 1.4 | $ 2.8 | $ 0.11 | $ 2.0 | $ 2.0 | $ 0.12 | $ 0.12 | $ 1.1 | $ 0.5 |
| **GRAND TOTAL Added Expenses** | $ 1.1 | $ 2.0 | $ 4.0 | $ 2.2 | $ 3.2 | $ 1.0 | $ 2.4 | $ 2.9 | $ 0.62 | $ 1.0 | $ 1.6 | $ 1.4 |
| **GRAND TOTAL Expenses** [D] | $ 10.3 | $ 5.5 | $ 10.6 | $ 9.7 | $ 13.8 | $ 5.1 | $ 10.0 | $ 11.6 | $ 12.2 | $ 5.5 | $ 9.9 | $ 10.8 |

[A] *Includes Michigan Local Bus Operating Assistance, Oakland County Public Transportation Millage, Community Credits, and Fare Revenues; does not include federal or state discretionary grant funding.*

[B] *Includes operations and maintenance costs and operator salaries*

[C] *Includes adjustments for 5310 replacements and vehicle depreciation reserves utilized to offset future costs.*

[D] *Remaining funding needs can likely be covered under the existing Oakland County Public Transportation Millage and/or mitigated through support from various discretionary grant programs.*

TABLE 39: POSSIBLE GRANT FUNDING SOURCES FOR IMPLEMENTATION ACTIVITIES

| Implementation Activity | Federal Grant Programs | State Grant Programs |
|---|---|---|
| General Operations and Maintenance Costs | • Section 5310 [A]<br>• Section 5311 [A, B] | • Local Bus Operating Assistance<br>• Municipal Credits |
| Pilot Programs | • Section 5304<br>• Section 5311<br>• Congestion Mitigation and Air Quality Grants<br>• Carbon Reduction Program | • Service Initiatives Program |
| Revenue Vehicle Procurement | • Carbon Reduction Program (CRP)<br>• Section 5310<br>• Section 5339(c)<br>• Surface Transportation Block Grants<br>• Better Utilizing Investments to Leverage Development Grants<br>• Congestion Mitigation and Air Quality Grants<br>• Carbon Reduction Program | • Capital Assistance<br>• Specialized Services Program |
| Facility Procurement | • Surface Transportation Block Grant Program (STBG)<br>• Better Utilizing Investments to Leverage Development Grants | • Capital Assistance |
| Technology Procurement | | • Service Initiatives Program |
| Fleet and Facility Maintenance Planning and Procurement | • Section 5311<br>• Surface Transportation Block Grants | |
| Training | • Section 5314(b) | • Service Initiatives Program |
| Continued Planning Efforts | • Section 5304<br>• Surface Transportation Block Grants | • Service Initiatives Program<br>• Metropolitan & Statewide Planning and Nonmetropolitan Transportation Planning Program [C] |

[A] *Only applicable to operational and maintenance costs relating to capital assets or activities like vehicles and mobility equipment.*

[B] *Only available for rural areas (populations of less than 50,000); applicant services can span rural and urban areas.*

[C] *Funded in part through Section 5304.*

## 4.4 Public Feedback

In February 2026, the Oakland County Community Transit Plan was posted on the Oakland County Transit website for a ten-day public comment period. A narrated PowerPoint explaining the content of the CTP was also included in this posting. During this comment period, the public was provided an opportunity to review the plan and submit feedback. One written comment was received, which addressed funding sources for the transit program and raised questions regarding fare policies for seniors.

## 4.5 Next Steps

Successfully implementing Oakland County's future transit service model will require ongoing, flexible planning and engagement beyond the initial CTP rollout. As the CSA transit system evolves, OCT and the TSM must remain actively engaged in shaping its development to ensure it continues to meet the needs of County residents and visitors beyond the millage. This means two key things: keeping strong feedback channels open with the public and stakeholders and using performance data and feedback to refine service design. These steps are essential to building a responsive, reliable transit system that supports seamless service across the county.

Once the CTP is accepted, OCT will kick off the process of CTP implementation. At the outset of implementation, OCT will continue to support LSPs as they increase coordination among their services. In addition, OCT will facilitate LSP participation in the SMART scheduling and dispatch software procurement and guide the alignment of operational policies.

### 4.5.1 Continued Public and Stakeholder Engagement

Ongoing engagement with the public and key stakeholders will be essential to increasing Oakland County residents' and visitors' trust in and awareness of TSM-operated services in the CSA. OCT should maintain open lines of communication with the public and stakeholders through regular outreach and opportunities for collaboration. By keeping the public and stakeholders informed and involved, OCT can ensure that TSM-operated services in the CSA remain accessible, transparent, and community driven.

Specific continued service planning and design recommendations include:

- OCT should consider maintaining a public feedback mechanism so that they are able to continually collect current and potential rider feedback during and beyond CTP Implementation.

### 4.5.2 Continued Service Planning and Design

Service planning and design must remain an ongoing, iterative process throughout and beyond CTP implementation. As travel patterns shift and rider needs evolve, OCT should continuously assess and refine service design to ensure the selected model delivers on its goals. This includes reviewing current plans, monitoring performance, incorporating rider and stakeholder feedback to service decisions, and making data-informed adjustments to routes, schedules, and service levels. OCT may consider hiring a consultant to assist with this work, due to the amount of work and level of service planning expertise required.

### Specific continued service planning and design recommendations include:

- OCT should review current plans and anticipate development of new plans every five to 10 years after the start of their implementation.
- Review of current plans and the development of new plans should remain a collaborative process between OCT and the TSM.
- Rider and stakeholder feedback should influence both adjustments to current plans and the development of new plans following the duration of the CTP.

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# APPENDIX A: Local Service Provider Trip Analysis

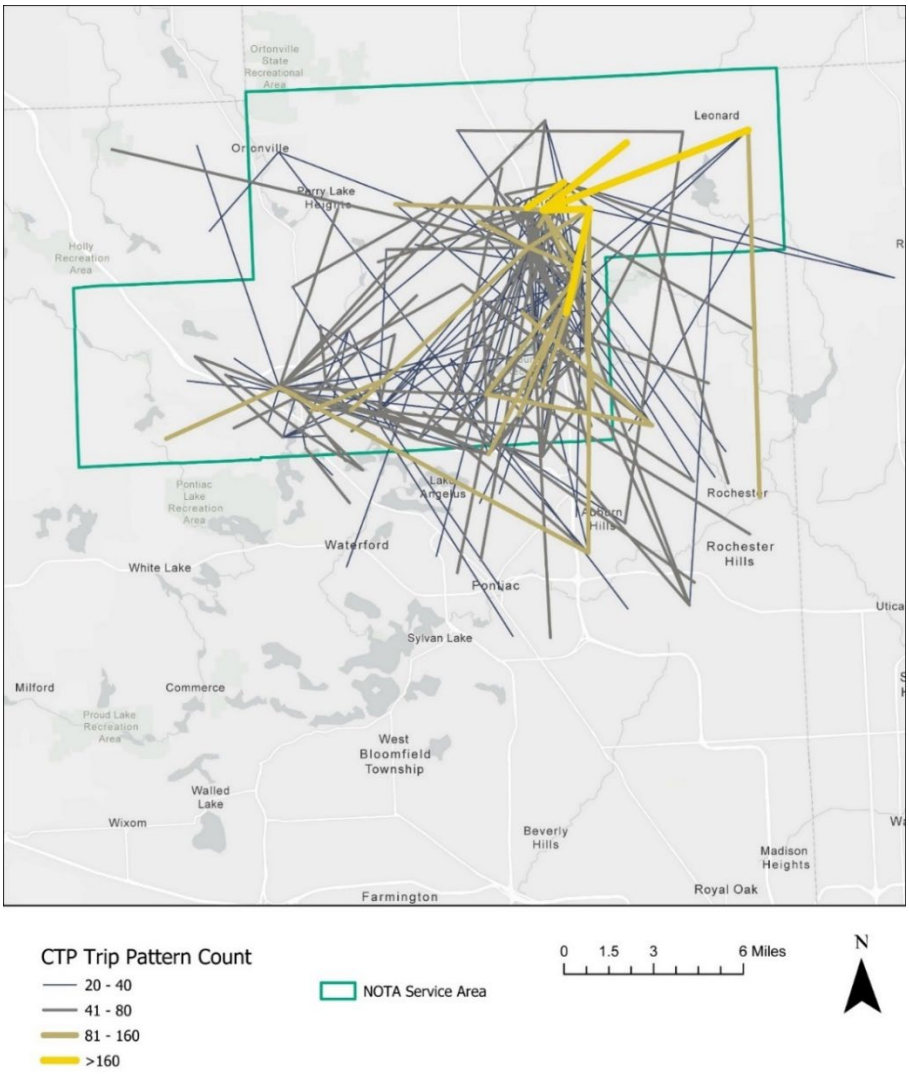
## NOTA

Trips taken using NOTA's transit services, illustrated by **Figure A-1,** were relatively equally distributed over the analysis period of April to July, with more trips taken May through July. Out of the 30,235 total trips taken during this period, 48% were taken before 12:00 PM and 46% were taken between 12:00 PM and 5:00 PM. For trip purposes, 35% were designated as work, 23% as medical, 14% as shopping, 12% as general recreation, and the remaining indicated trip purposes as home, school, church, or other/not provided.

### Top trip activity locations for NOTA riders:

- Oxford Township
- Addison Township
- Orion Township
- Independence Township

FIGURE A-1: NOTA ORIGIN-DESTINATION TRIPS



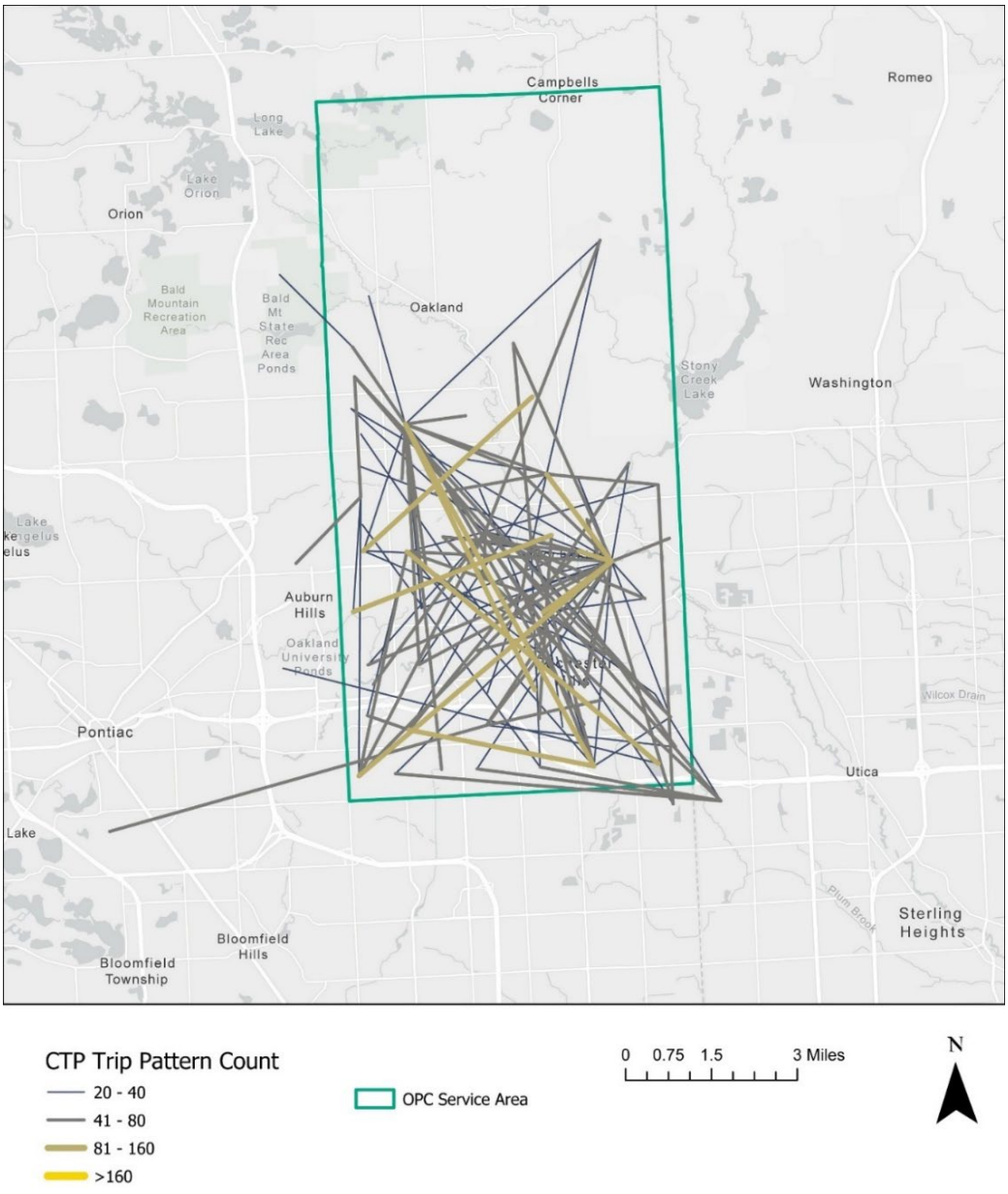
# OPC

Trips taken using OPC's transit services, illustrated by Figure A- 2, were equally distributed over the analysis period of April to July. Out of the 15,471 total trips taken, 45% of trips were taken before 12:00 PM and 53% of trips were taken between 12:00 PM and 5:00PM. For trip purposes, 17% of trips designated the OPC facility in Rochester City, 12% as shopping, 12% as school, 10% as specifically doctor, and the remaining indicated trip purposes as variations of medical (dialysis, hospital, medical offices), home, work, or recreation.

## Top trip activity locations for OPC riders:

- Rochester Hills
- Rochester City
- Oakland Township

FIGURE A- 2: OPC ORIGIN-DESTINATION TRIPS



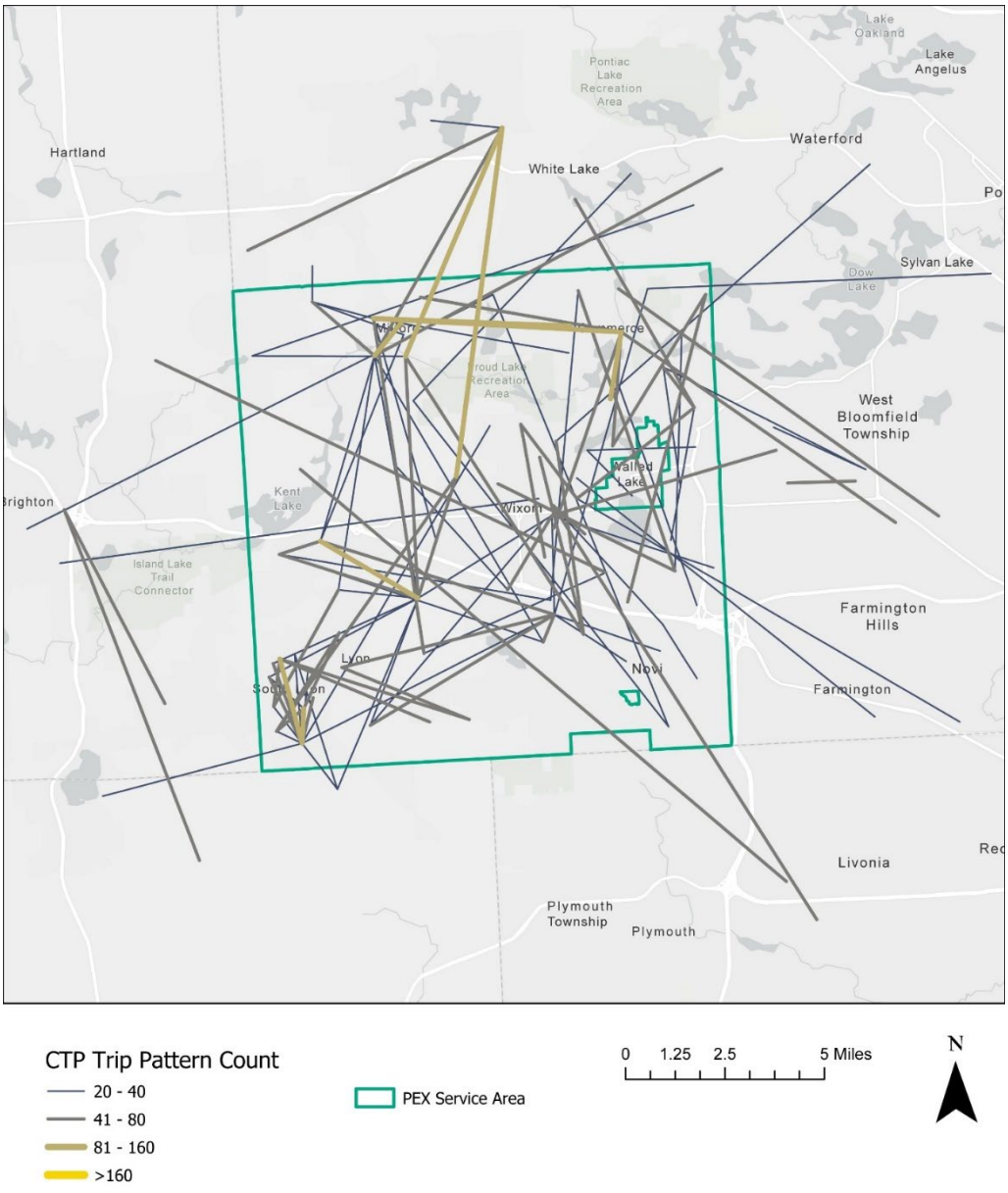
# PEX

Trips taken using PEX's transit services, illustrated by **Figure A-3,**were relatively equally distributed between April and June, with an increase in trips in July. Trips taken in July represent 35% of total trips taken. Out of the 16,066 total trips taken during this period, 47% were taken before 12:00 PM and 45% were taken between 12:00 PM and 5:00 PM. For trip purposes, 32% of trips were designated as medical, 31% as work, 23% as personal, and the remaining indicated trip purposes as dialysis, grocery store, educational, or other.

## Top trip activity locations for PEX riders:

- White Lake Township
- Milford
- Commerce Township
- South Lyon
- Lyon Township

FIGURE A-3: PEX ORIGIN-DESTINATION TRIPS



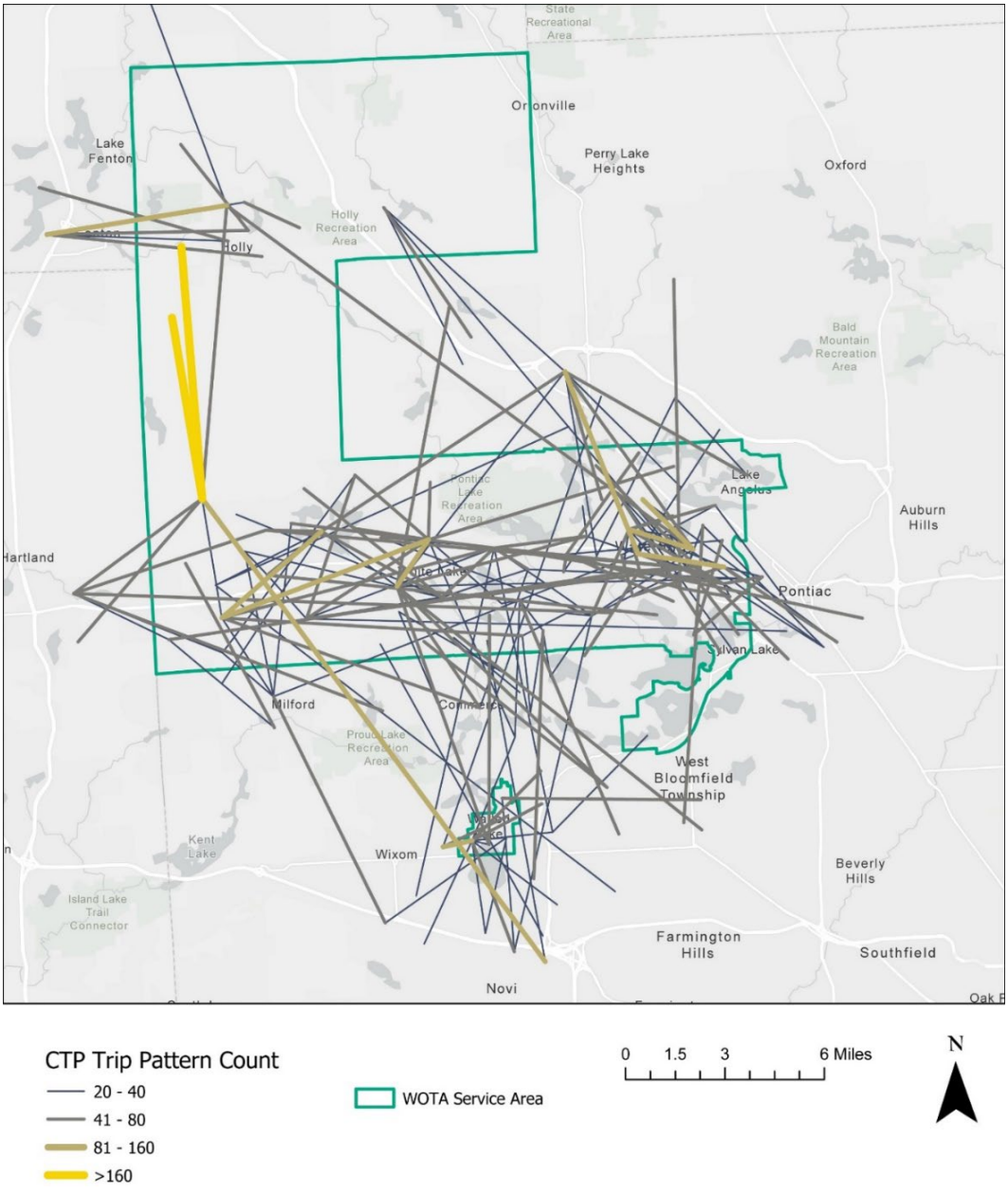
# WOTA

Trips taken using WOTA's transit services, illustrated by **Figure A-4,** were relatively consistent between April and July. Out of the 27,095 total trips taken during this period, 46% of trips during this period were taken before 12:00 PP and 49% were taken between 12:00 PM and 5:00 PM. For trip purposes, 30% were designated as medical, 29% as work, 24% as other, 12% as shopping, and the remaining indicated trip purposes as dialysis, school, DHS, mental health appointments, or transfers.

## Top trip activity locations for WOTA riders:

- Holly
- Highland
- White Lake
- Waterford
- Novi

FIGURE A-4: WOTA ORIGIN-DESTINATION TRIPS



# APPENDIX B: Plan Review

This appendix presents a review of related regional and local plans pertinent to the development of the Oakland County CTP. The purpose of this review is to ensure alignment and integration with existing regional and local transportation strategies, policies, and initiatives. A comprehensive analysis of plan goals, objectives, and key findings or themes is included for each reviewed plan. The aim of examining these is to identify synergies, avoid redundancies, and incorporate regional goals and best practices into the CTP. This ensures that the CTP is well-coordinated with broader transit efforts, ultimately contributing to more cohesive and effective regional transit service options.

## MDOT Michigan Mobility 2045 Plan

The *Michigan Mobility 2045* (MM2045) plan, published in 2021, is MDOT's long-range transportation plan. The plan describes a vision for the future direction for the State's transportation network and provides implementation strategies. MM2045 emphasizes the need to plan across transportation modes and integrates roads and bridges, freight, rail, aviation, active transportation, and transit. The document's guiding principles are preservation, modal choice, future-oriented, and sustainable communities.

MM2045 forecasts growth in urban areas, particularly in automated and advanced manufacturing sectors, with the Detroit metro area contributing significantly to the state's GDP. It anticipates increased demand for urban living and slower growth in low-density areas, advocating for reduced road expansion, enhanced mobility options (transit, biking, walking), innovative technologies like automated transit vehicles, and transit-oriented development. The plan emphasizes multi-mobility options to support an aging population and promote health and equitable access.

The plan highlights that Michigan workers with cars can access 1.1 million jobs within an hour, while transit users can only access 42,000, underscoring the need for investment in transit services. Major investment needs include vehicle replacement and facility maintenance. Six heavily congested road segments in Oakland County are identified, with recommendations to move transit out of traffic, implement transit-signal priority, and adopt electronic fares and Mobility as a Service (MaaS) platforms to reduce congestion and boarding times.

MM2045 includes a *Statewide Transit Strategy* that seeks to support MDOT's Office of Transportation Planning (OTP) and transit agencies across the state in addressing challenges and opportunities that will make public transit safer, more reliable, and more convenient.

The document includes an assessment of statewide needs for public transit, which encompass seven board categories: connectivity gaps and system expansion (including geographic, temporal, and accessibility gaps), state of good repair, funding stability and operational expense growth, evolving technology, transit workforce recruitment and retention, COVID-19 pandemic recovery, and enhanced communication and collaboration. Through the plan, MDOT looked at peer state agencies and engaged with Michigan's transit agencies, metropolitan planning organizations, and the public to identify challenges and recommendations.

### Common themes included:

- Expanding service to limit or close mobility gaps
- Examining rapidly increasing operating expenses
- Seeking long-term and stable sources of funding for transit
- Increasing collaboration among transit operators as well as with MDOT OPT
- Policies requiring roadway projects to consider transit needs as part of the planning process
- Greater incorporation of technology in transit services; and Enhanced recruiting and retention of transit operators and mechanics.

Finally, the Statewide Transit Strategy identified recommendations in five broad categories, some of which pertain to Oakland County Transit.

- **Partnership and Outreach**
  Recommendations include strategies around developing a Cross-Departmental Mobility Working Group that includes internal MDOT divisions and other state agencies. This model might be applicable to Oakland County as a way to consider and address transit issues more holistically. As part of this planning process, Oakland County Transit will engage with other county departments and stakeholders to gather input.
- **Peer Transit Agency Communication**
  There is a desire for more peer transit agency communication as a mechanism for agencies to learn from one-another. There may be opportunities for the Oakland County LSPs to strengthen their collaborations, and to coordinate with other transit agencies across the state.
- **Transit Data Dashboard**
  A transit data dashboard is recommended to track metrics about transit services across the state to help communicate the performance and impact of public transit services.
- **Programs and Funding**
  Program and funding recommendations centered around better understanding transit service needs in addition to the funding levels and opportunities required to support them. Additional federal, state, and local sources may be required for major capital projects and future service expansions.
- **Innovation**
  Innovation strategies are focused on assessing current capabilities and preparing for new technologies. One strategy was to conduct a rural transit technology assessment. Other strategies recommend supporting autonomous transit vehicle projects and developing a statewide electrification plan, which could be expanded on to include other low and no emission propulsion systems. There is also a recommendation to develop a Mobility as a Service (MaaS) platform to support integrating trip planning, ride booking, and fare payment. MDOT OTP is currently in the process of developing this platform, and Oakland County's transit service providers have an opportunity to collaborate on this project. The CTP will consider the role technology can play in improving transit service in the County.

## MDOT Statewide Technology Plan for Rural Public Transit Agencies

MDOT's Office of Passenger Transportation (OPT) developed the *Statewide Technology Plan for Rural Public Transit Agencies*, published in 2022, to identify the role technology can play in improving transit services for both rural agencies and their riders. People's Express participated in a survey conducted to identify challenges and opportunities.

Many of the challenges and opportunities Michigan's rural transit agencies identified in the report are similar to those experienced by Oakland County's LSPs. These include a need for more efficient scheduling and dispatch software, less-time consuming rider scheduling options, improved fare collection processes, and technologies that are geared toward demand-response services.

Through this plan, MDOT identified 37 technology initiatives that may apply to Oakland County's LSPs.

### The top five priorities were:

- Establishing a statewide Rural Transit Technology Committee.
- Developing an online resource library with information and trainings on current, new, trending, and advanced technologies.
- Ensure all transit agencies have and maintain websites with critical service and contact information.
- Developing a statewide Mobility as a Service (MaaS) Platform.
- Conducting a study to determine the best strategies for increasing the use of electronic fare collection.

Oakland County Transit should collaborate with MDOT OPT on future technology initiatives to advance the efficiency of service and to improve the experience of riders.

Since completing the plan, MDOT OPT has been in the process of procuring a statewide MaaS platform that riders will be able to use to find transit services, and eventually to book and pay for their trips. The platform is anticipated to launch in 2025. In a related effort, MDOT has piloted General Transit Feed Specification Flex (GTFS-Flex) data feeds at four transit agencies in northern Michigan. This data specification allows people to discover demand-response services that are available to make a trip and more easily get information on how to use the service. This data will be used by the MaaS platform to help people plan trips on more transit modes, beyond those that are currently discoverable on tools like Google Maps.

Creating GTFS-Flex feeds is an opportunity for Oakland County's transit service providers and would help more people find out about and use transit services.

## Vision 2050 Regional Transportation Plan for Southeast Michigan

As the Metropolitan Planning Organization (MPO) for Southeast Michigan, SEMCOG coordinates multimodal transportation planning in the seven-county region that includes Livingston, Macomb, Monroe, Oakland, St. Clair, Washtenaw, and Wayne counties. SEMCOG's *Vision 2050 Regional Transportation Plan for Southeast Michigan* (Vision 2050) sets a long-term policy agenda for investment in transportation through 2050. Vision

2050 is the guiding framework for regional transportation in Southeastern Michigan through the year 2050 and is a source that Oakland County Transit may consult to calibrate their plan's goals with the region's goals.

The plan introduces seven core policies designed to create a safe, equitable, and resilient transportation system: Education, Equity, Funding, Preservation, Resilience, Safety, and Shared Prosperity. The document identifies deficiencies, trends, and goals in the region and recommends projects to achieve collective priorities and goals. Vision 2050 includes more than 570 mappable projects in Southwest MI, with over 90 planned projects in Oakland County.

### Through a review of existing conditions, the plan found significant:

- Transportation Challenges for Communities in the SEMCOG Region
  Funding gaps, resilience (especially during extreme weather events), pedestrian and nonmotorized accessibility, lack of coordination in asset management, air and water pollution, congestion, safety, gaps in intercity transportation system, and low transit ridership.
- Future Regional Population Growth
  Southeast Michigan's population is expected to grow 6.4% from its 2020 level, especially the senior population.
- Increases in Walking and Biking Activities
  There has been a 110% increase in walking and biking activities since 2019.
- Growing Governmental Support for Public Transit
  The $70 per capita spent on transit operations in Southeast Michigan trails most large US urbanized areas, yet there is growing support among the public and elected officials for funding transit.
- Regional Fragmentation
  The southeast Michigan regional transit system is fragmented and characterized by gaps. The system is comprised of several transit service providers with many different sizes and service patterns.

The plan cites public transit as essential for its' capacity to reduce congestion and pollution and contribute to a more sustainable and multimodal system. Key actions are to support the RTA's master plan, encourage transit-oriented development, and increase the flexibility of funding options.

## RTA Regional Transit Master Plan Update

In the 2023 *RTA Regional Transit Master Plan Update*, RTA identifies top priorities to fund, improve, expand, innovate, and sustain regional transit. The RTA Regional Master Plan applies to all transit service providers and other transit services operating within the RTA's service area. These priorities adhere to the RTA's vision of sufficient and stable funding that will support improved public transit options which advance equity by increasing accessibility and satisfy the integrated mobility needs of Southeast Michigan communities to promote livable, healthy, and sustainable growth.

### RTA's top regional transit priorities affecting Oakland County's LSPs are:

- Build On and Coordinate Demand-Response Services

Offering same-day services, increasing hours of operation, expanding rider eligibility to more people, and streamlining transfers between services are the RTA's recommendations for regional demand-response services. OCT should consider aligning improvements to County demand-response service with these recommendations.

- Grow Mobility Access to Local Communities and Regional Destinations
  Ensuring transit tailored to local needs is available in all communities in the region is key moving forward. OCT should consider expanding the areas LSPs serve and providing access to more destinations.
- Enhance Ride Quality and Promote On-Board Safety
  Real and perceived safety and cleanliness concerns need to be addressed through marketing campaigns, staff training, onboard technology upgrades, and a transit ambassadors program. OCT should coordinate with the RTA regarding strategies to address these needs and offering a regional or local transit ambassadors program to their riders as a resource.
- Upgrade Multimodal Connections to and Between Services
  Improving pedestrian and cyclist infrastructure, promoting complete streets design, enhancing park-and-ride services, and increasing the availability of microtransit and micromobility will are critical to crafting a cohesive regional transportation network. OCT should advocate for these transportation priorities to better connect Oakland County transit services to other transportation options.
- Modernize and Maintain Infrastructure in a State of Good Repair
  To ensure continuous and safe operations, transit facilities and vehicles should be maintained in a state of good repair, and their replacements should integrate innovative and sustainable technologies and best practices. OCT should prioritize facility, vehicle, and technology maintenance and upgrades that contribute to modern regional transit infrastructure in this way.

As a part of the update, a public engagement survey was conducted. Respondents favored promoting transit and increasing ridership, safety and security, and bus stop improvements and were less in favor of zero emission vehicles and infrastructure. The main next step for the RTA is identifying sustainable regional funding sources and developing an expenditure plan that lists planned funded projects over a period of significant time. The plan poses the uncertainty and complexity of implementing new services post-COVID and the recruitment and retention challenges the RTA faces. These challenges bring about opportunities to build partnerships between agencies and pilot new services and technologies for organizations like Oakland County Transit.

The RTA plan includes a section on the 2022 millage that was passed countywide. SMART services expanded, and community-sponsored transportation service have increased by more than 20% in Oakland County. These improvements were funded by the countywide milage.

## OnHand: Expanding Transportation Access Across Southeast Michigan

The RTA's *OnHand: Expanding Transportation Access Across Southeast Michigan (2020)* plan is a coordinated human service transportation plan (CHSTP) that assesses transportation needs and services in

RTA's four-county region and sets a strategy to improve coordination of services to better meet the needs of older adults, people with disabilities, and people with low incomes. The plan focuses on increasing public awareness of services that enhance mobility for these populations, who often have different transportation needs and challenges than the broader population. The CHSTP is also intended to guide future regional transportation investment decisions, developing a strategy to streamline funding and reporting that will enhance coordination among transit service providers in southeast Michigan and infrastructure supporting the accessibility of regional transit options. The CHSTP also developed a Transit Need Index via a robust transit market analysis across the four-county region identifying major service gaps and needs.

The plan identifies challenges in the region along with goals and strategies to address them.

### Key challenges included:

- Public Awareness, Confusion Regarding Available Transit
  There are a large number of transit services and service providers in the RTA region, but this can make it complicated for people to navigate the transportation network or understand what services are available for their trips. This is especially true where services have different hours and eligibility guidelines. Expanded travel training and mobility management programs might be opportunities to address this.
- Service Gaps
  There are geographic service gaps in the region that can make travel across jurisdictions and services challenging. The Oakland County Public Transportation Millage did address these gaps in Oakland County, though there may be opportunities to improve transfer processes among LSPs and to areas outside of the county. Service gaps also exist at certain times of day or days of the week, such as weekday evenings and weekends.
- Development Patterns
  Low density development patterns and increasing growth in the suburbs can increase mobility challenges by moving people further from services and amenities. These areas can also be more difficult to service with fixed route transit.
- Service Capacity
  Limited capacities can make it harder for rider to take certain types of trips like shopping or social events with family and friends. These types of trips are important for quality of life.
- In some areas, it can be difficult to get to transit services due to gaps in the sidewalk network and a lack of amenities at bus stops.

OnHand includes five goals, each with a set of strategies to address them. These are most relevant to Oakland County's LSPs:

- Improving Coordination Among Transit Service Providers
  Polices pertaining to service operations, rider eligibility, and trip scheduling should be regionally standardized. OCT should coordinate with the RTA and LSPs on this effort.

- Increasing Awareness of Existing Services
  Ensuring riders know and understand how to access and use their transit options is critical. Oakland County's LSPs should coordinate with the RTA to increase public awareness of their services and how those services work.
- Develop Partnerships for Supportive Physical Infrastructure
  Organizations providing transit should develop working relationships with municipalities and regional agencies managing development to address gaps in non-transit infrastructure. Oakland County's LSPs should coordinate with development-involved municipalities and regional agencies within their service area to enhance their local transportation infrastructure network.

A CHSTP is required to utilize FTA Section 5310 Enhanced Mobility of Seniors & Individuals with Disabilities program funding. This plan includes a proposed structure for managing FTA Section 5310 program funding with a more regional approach. Since the plan was published, RTA has implemented a regional Section 5310 Program and call for projects process. Oakland County's LSPs are eligible to apply for funding through this program, which has funded vehicle replacements and daily operations (see 2.1.1 Federal Funding).

RTA is currently in the process of updating its CHSTP through the *Mobility 4 All Plan*.

## Mobility 4 All Plan

RTA is currently working on the *Mobility 4 All Plan*, which is an update to the OnHand Plan. Similar to the previous CHSTP, the *Mobility 4 All Plan* will focus on outlining a vision, goals, and strategies for improving transportation access across the region, with a focus on people with disabilities, older adults, and individuals with limited incomes. This plan will identify needs and guide how FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program funding can help meet those needs. Section 5310 funding is an important source of funding for Oakland County's LSPs. To develop this plan, RTA is collaborating with transit service providers in its four-county region, which includes Oakland County. RTA anticipates completing the *Mobility 4 All Plan* in fall 2025.

## SMARTer Mobility Program

The SMARTer Mobility Program is SMART's ongoing planning effort that was launched in early 2022, and is anticipated to conclude in December of 2025. The study will culminate in a comprehensive plan intended to drive decision-making for SMART's services in Macomb, Oakland, and Wayne counties. The study includes existing conditions analysis, origin and destination surveys, passenger surveys, a financial plan and funding evaluation, performance measures and service standards evaluation, transit demand and market analysis, and three rounds of community engagement. Goals of the SMARTer Mobility program are the establishment of microtransit as a permanent service, improvement of technology services, integration of microtransit with fixed route services, and the sustainable expansion of service areas. When complete, the Study will include recommendations for overall service design, system efficiency, operational effectiveness improvements, examination of alternatives, unmet needs, and engagement with stakeholders (including legislators, current and potential riders and affected communities).

As part of the program, several studies/reports have been conducted and published thus far. These are the *SMARTer Existing Conditions Report*, *Mobility Study Market Analysis and Transit Demand Report*, and *On-Board Bus Survey Report*. In addition, as part of the planning process, several cost-constrained SMARTer Bus Network scenarios have been developed and presented for public feedback. The final scenario will include routes that both improve frequency and increase coverage and is anticipated to come out in early 2025.

### According to community engagement efforts, rider issues are ranked in the following order:

1. Reliability
2. Bus amenities
3. Service frequencies
4. Customer service
5. Increased coverage.

Engagement also found the need for additional SMART transit service in areas currently unserved by SMART. These include numerous communities in and adjacent to the CSA, namely Brighton, Stoney Creek, Rochester, recreational areas in Orion and Oxford townships, Waterford (Oakland International Airport and Dixie Highway), Novi, Northern Oakland County, and Wixom.

In the Market Analysis Report, several findings relate to the CSA. Several communities in the CSA are identified as Growth Areas. These are: East Oakland (Oakland Township and Auburn Hills) and Southwest Oakland (Wixom and Lyon Township), with the largest number of building permits concentrated in townships surrounding Novi. The study finds that while Pontiac is the largest trip generator in the County, the next largest generator is Rochester. The study concludes with the identification of numerous service gaps, or areas with high transit propensity. In the CSA this includes areas in Waterford, White Lake, Commerce and West Bloomfield townships, along with areas surrounding Auburn Hills and Novi in the southern/central portion of Oakland County. Milford Township is identified as an area with high transit propensity in the west and Oxford Township in the north of the County. The study recommends the expansion of SMART Flex Zones to help mitigate gaps in the southern part of Oakland County. For the SMARTer Bus Survey, there was an intentional effort to obtain a larger number of surveys from Oakland County, due to Oakland County encompassing the greatest underserved land area of the here counties.

## Livingston County Transit Master Plan

In 2019, Livingston County, Oakland County's neighbor to the west, and the Livingston Essential Transportation Service developed the *Livingston County Transit Master Plan*, highlighting key transit goals and objectives that can support quality of life improvements in the county.

The plan notes that Livingston Essential Transportation Service (LETS), a county department that provides demand-response transit services that are available to the general public, experienced increasing demand and higher volumes of riders than it can accommodate due to rapid population growth and an aging population that relies increasingly on services provided. The focus of the plan is to better understand

increases in demand, efficacy of existing services, and the broader needs of the community that may warrant the provision of additional transit system services. In order to accommodate the increasing need for transit in the county, the plan establishes four major goals and associated actions to meet these goals: improve the system efficiency of current service for existing and new customers; develop new services that expand the customer base and respond to unserved needs; provide regional connections; and collaborate across communities, agencies, and sectors to have multimodal transportation considered as part of the county's development.

One of the plans goals is to provide regional transit connections. The plan identifies that Livingston is a "commuter county" and identifies improving connections to and collaborating to develop new commuter services as opportunities. The plan calls out connections to Ann Arbor, Flint, Lansing, and the Detroit Metropolitan Wayne County Airport (DTW). Oakland County is not specifically mentioned, but Livingston County's proximity to Oakland County establishes it as a good candidate for connecting to Livingston's transit network as an out-of-county provider. Portions of Livingston County are currently included in PEX and WOTA's driving areas. There may be opportunities for OCT and Oakland County's LSPs to collaborate with LETS and coordinate future services.

## Oakland Livingston Human Services Agency Community Needs Assessment

The Oakland Livingston Human Service Agency (OLHSA) is a nonprofit organization that provides support to people experiencing poverty in Oakland and Livingston counties. The *2021-2024 Community Needs Assessment* identifies challenges faced by people living in poverty and resources that can help address needs. The document is centered around four opportunity areas including education, housing, financial stability and living wage. Transportation was also found to be a barrier to accessing education.

## Mass Transportation Authority Strategic Plan

The Mass Transportation Authority (MTA) of Flint developed a transit strategic plan focusing on a period from 2016 to 2026. MTA operates fixed route and demand-response public transit services in Genesee County, which borders northwestern Oakland County. WOTA currently offers residents of Holly Township and the Village of Holly rides to parts of Genesee County, including Fenton, Grand Blanc, and parts of Flint. *MTA's Strategic Plan 2016-2026* presents the agencies visions, core values, goals, and strategies, and high-level actions for implementation. The seven core values that guide the plan are: integrity, dedication to excellence, responsiveness, customer focused, collaboration and partnering, transformational leadership, and innovation.

Two of MTA's goals involve collaborating with outside areas, such as Oakland County. One goal, to "strengthen and update existing services while introducing new and expanded services to meet community needs," includes a strategy to "expand regional routes to increase job access for Genesee County residents." MTA currently operates a daily regional route between downtown Flint and Great Lakes Crossing in Auburn Hills, just outside of the CSA. Another goal is to "enhance strategic partnerships and collaborations with

organizations throughout the region. A strategy for achieving this goal is to consider regional connections with adjoining transit services.

MTA's plan predates Oakland County Transit, there is an opportunity for the county and its transit service providers to create a stronger partnership with MTA to develop and provide feeder services to regional routes that will enhance access to jobs and services across the counties. WOTA can also work with MTA to facilitate connections to their services in Genesee County.

MTA's strategic plan period ends in 2026. Oakland County Transit can also coordinate with MTA on the development of their next plan.

# APPENDIX C: Transit Service Case Studies—Summary Tables

TABLE C- 1: FIXED ROUTE TRANSIT SERVICE CASE STUDY FINDINGS

| Fixed Route Service Policies | SMART (MI) | Pace Suburban Bus (IL) | MVTA (MN) | DART (IA) |
|---|---|---|---|---|
| Service | 40+ routes<br>Route types include:<br>• Major Corridor<br>• Crosstown<br>• Limited Stop<br>• Express | 120+ routes<br>*Most stops are on a "posted stops only" policy, but some are still flag stops.* | 20+ routes<br>Route types include:<br>• Local<br>• Express | 10+ set routes<br>Route types include:<br>• Local<br>• Express |
| Schedule | **Monday-Sunday** 5 AM – 12 AM | **Monday-Sunday** 24/7 | **Monday-Friday** 5 AM – 11 PM<br>**Saturday-Sunday** 7 AM – 11 PM | **Monday-Sunday** 5 AM – 11 PM |
| Service Boundaries | **Service Area:**<br>Macomb County, Oakland County, part of Wayne County<br>*Customers have some restrictions to access within the City of Detroit.* | **Service Area:**<br>Cook, Will, DuPage, Kane, Lake, and McHenry Counties<br>*Customers can only be picked up and dropped off within City of Chicago at posted stops.* | **Service Area:**<br>7 communities in the southern Minneapolis-Saint Paul metro area. | **Service Area:**<br>12 communities within the Des Moines metro area. |
| Rider Eligibility | General Public | General Public | General Public | General Public |
| Fare Structure & Payment | **Full Fare** $2.00<br>**Reduced Fare** $0.50 | **Full Fare** $2.00<br>**Reduced Fare** $1.00<br>**Premium Fare** $4.50<br><br>*Free Fare for select services.* | Fares vary by:<br>• **Category** (Adult, Senior, Youth, Children, Persons with Disabilities, Veterans)<br>• **Time of Day** (Peak Period)<br>• **Route Type** (Local, Express) | **Full Fare** $1.75<br>**Reduced Fare** $0.75 |

TABLE C- 2: FLEX ROUTE CASE STUDY FINDINGS

| Flex Route Service Policies | DART* (IA) | Fairfield County (OH) | MVTA* (MN) | DART (MI) |
|---|---|---|---|---|
| Service | 4 Flex Routes:<br>• Route 4<br>• Route 7<br>• Route 16<br>• Route 17 | 5 Flex Routes (all in Lancaster):<br>• Main<br>• Memorial<br>• North<br>• Sheridan<br>• West | 2 Flex Routes:<br>• Route 420<br>• Route 421 | 3 Flex Routes:<br>• Route 72<br>• Route 73<br>• Route 74 |
| Schedule | Monday-Friday<br>10:00 AM - 5 PM | Monday-Friday<br>7:00 AM – 9:00 PM | Monday-Sunday<br>5:00 AM – 9:00 PM | Monday-Sunday<br>6:00 AM – 10:00 PM |
| Service Boundaries | Deviations:<br>Up to ½ a mile away from published route within the specified service area. | Deviations:<br>Up to ¾ of a mile from published routes. | Deviations:<br>Only within specific route zones. | Deviations:<br>To specific activity centers or any location within specific route zones. |
| Rider Eligibility | General Public | General Public | General Public | General Public |
| Fare Structure & Payment | Full Fare $2.00<br>Reduced Fare $1.00<br>Deviation Fee $0.50 | Full Fare $0.50<br>Reduced Fare $0.25<br>Transfers $0.10 | Full Fare $2.00<br>Reduced Fare $1.00<br>Deviation Fee $0.50 - $1.25 | Full Fare $1.75<br>Reduced Fare $0.75<br>Deviation Fee $1.75 |
| Trip Scheduling | Contact dispatch at least one-hour in advance.<br>• Coordinated with fixed route schedule.<br>• Limited number of deviations for each run. | Contact dispatch or complete online form at least one-hour in advance.<br>• Coordinated with fixed route schedule. | Contact dispatch at least one-hour in advance.<br>• Coordinated with fixed route schedule.<br>• Limited number of deviations for each run. | Contact dispatch at least 30 minutes in advance or request on-board.<br>• Coordinated with fixed route schedule.<br>• Limited deviations for each run. |

**Discontinued flex routes as of April 2025.*

TABLE C- 3: RIDE-SHARE CASE STUDY FINDINGS

| Ride-share Service Policies | DART (IA) | Pace Suburban Bus (IL) | MVTA (MN) |
|---|---|---|---|
| Service | DART On-Call | Traditional Vanpool and Feeder Vanpool | MVTA Connect |
| Schedule | *Northeast Suburban*<br>**Monday** 8:30 AM - 3 PM<br>*Easter Lake*<br>**Thursday – Friday** 8:30 AM – 3:00 PM<br>*Grimes*<br>**Monday– Friday** 6:00 AM – 6:00 PM<br>*Jordan Creek*<br>**Monday – Friday** 7:00 AM – 6:00 PM | *Traditional Vanpool*<br>**Monday - Sunday** 6 AM to 9 PM<br>*Feeder Vanpool*<br>**Monday - Sunday** 6 AM to 9 PM | *Main Zone, Eagan Zone*<br>**Monday – Sunday** 6 AM – 9 PM<br>*Prior Lake/Shakopee Zone*<br>**Monday – Friday** 6 AM – 9 PM |
| Service Boundaries | **4 zones serving 8 Des Moines metro area communities:** Northeast Suburban, Easter Lake, Grimes, Jordan Creek | **6 Counties:** Cook, DuPage, Kane, Lake, McHenry, Will | **3 zones serving 7 Minneapolis-St. Paul metro area communities:** Connect Main, Connect Eagan, Connect Prior Lake/ Shakopee |
| Rider Eligibility | General Public | General Public<br>(21 and older, Groups of 5+ people) | General Public |
| Fare Structure & Payment | **Full Fare** $3.50<br>**Reduced Fare** $0.75 | **Monthly Fare based on:** Daily Round Trip Mileage, Total Daily Round Trips, Total Days/Week Riding<br>**Primary Drivers Ride Free** | **Full Fare** $3.00 (one-way)<br>**Children (under 5)** Free |
| Trip Scheduling | **Through dispatch, at least one day in advance.**<br>*Trip may include other riders.* | **Varies by program and ride frequency.**<br>*Scheduled in advance with dispatch during application.* | **Via *RideMVTA* App at least three hours in advance.**<br>*Trip may include other riders.* |

TABLE C- 4: FIXED-ZONE DEMAND RESPONSE CASE STUDY FINDINGS

| Fixed-Zone Demand Response Service Policies | SMART* (MI) | Pace Suburban Bus (IL) | DART (IA) |
|---|---|---|---|
| Service | SMART Connector | Pace On Demand | DART On-Demand and Flex Connect |
| Schedule | Monday - Friday<br>6:00 AM to 6:00 PM | Monday - Friday<br>6:00 AM to 8:00 PM | Monday - Friday<br>6:00 AM – 6:30 PM |
| Service Boundaries | Trips must be within:<br>• Service area (Macomb County, Oakland County and part of Wayne County)<br>• 10-mile radius of pick-up/drop-off location or closest fixed route | 11 ones serving 14 communities:<br>Arlington Heights, Rolling Meadows, Batavia, Hoffman Estates, Lansing, Naperville, Aurora, Round Lake, St. Charles-Geneva, Vernon Hills, Mundelein, Joliet, Wheaton, Winfield | DART On-Demand Zone<br>Ankeny<br>Flex Connect<br>Urbandale |
| Rider Eligibility | Primarily serves:<br>adults ages 65+, persons with disabilities<br>General Public<br>(must live 1/3 of a mile from a fixed route)* | General Public | General Public |
| Fare Structure & Payment | Full Fare $4.00<br>Reduced Fare $1.00 | Full Fare $2.25<br>Reduced Fare $1.00 | *DART On-Demand* Full Fare $2.25<br>*DART On-Demand* Reduced Fare $1.00<br>*Flex Connect* Free |
| Trip Scheduling | Trips must be scheduled by 4:00 PM the day before minimum, via web portal or dispatch. Specific service operated on a first-come, first-serve basis. | Trips scheduled in advance or in real time on a first-come, first-served basis via *On-Demand* App, web portal or dispatch. | Trips scheduled in advance or in real time on a first-come, first-served basis via the *DART On-Demand* App, web portal or dispatch. |

**Reduced fare customers exempt from 1/3 of a mile from fixed route provision.*

TABLE C- 5: DISTANCE-BASED DEMAND RESPONSE CASE STUDY FINDINGS

| Distance-Based Demand Response Service Policies | SMART (MI) | Pace Suburban Bus (IL) | MVTA* (MN) |
|---|---|---|---|
| Service | **SMART Flex Service** | **Niles Dial-A-Ride** | Same day or advanced registration |
| Schedule | **Daily** 6:00 AM – 11:00 PM | **Monday-Friday** 10:00 AM – 5:00 PM | **Monday-Friday** 6:00 AM – 6:00 PM<br>**Saturday** 7:00 AM – 4:00 PM |
| Service Boundaries | Curb-to-curb service within designated flex service areas | Curb-to-curb service within the demand response zone | Curb-to-curb service within 50 miles |
| Rider Eligibility | **General Public** | **General Public** | **General Public** |
| Fare Structure & Payment | **Full Fare** $2.00 - $8.00<br>*Fare depends on length of trip.* | **Within City of Niles Limits** $3.00<br>**Between or within Local Townships** $4.00<br>**Within City of Buchanan Limits** $1.50 | *Within Fairfield County*<br>**Full Fare:** $2.00<br>*Outside Fairfield County*<br>**Trips 10 miles or less** $7.50<br>**Trips 11-20 miles or less** $15.00<br>**Trips greater than 20 miles** $15.00 + $10.00 every additional 10 miles |
| Trip Scheduling | Reservations made through the SMART Flex app. Specific service operated on a first-come, first-served basis. | Contact dispatch. Specific service provided on a tiered basis by priority. | Contact dispatch or complete an online form at least one-hour in advance. Specific service operated on a first-come, first-served basis. |

# APPENDIX D: Service Model Options—Service Goal Criteria Evaluation Results

This appendix includes the service goal criteria evaluation results for each service model option.

## Existing Service Model Evaluation Results

This section will detail evaluation results for the existing service model, which includes the four local service providers (LSPs) and SMART. Service goal criteria scores and reasoning for those scores are provided by each service goal.

| Service Goal 1 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Reliable and affordable transit service | Medium | • Four LSPs would require multiple fares for trips outside of one service provider. |
| Connected and safe transit service | Medium | • Without the implementation of unified scheduling, dispatch, and user software, service may not be as well connected compared to the other alternatives. |

| Service Goal 2 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Removes mobility barriers | Low | • Continuing to have four LSPs maintains mobility barriers.<br>• Existing service model does not provide users with coordinated transit service and trip scheduling.<br>• Customer service standard operating processes and policies may vary by provider. |
| Improves first mile/last mile accessibility | Medium | • Without the implementation of unified scheduling, dispatch, and user software, seamless connections for first mile/last mile connections may be difficult. |

| Service Goal 3 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Provides more transit coverage to users | Medium | • The existing service model offers service to the general public, but would operate within four LSPs' service boundaries, potentially restricting service coverage for some areas. |

| Service Goal 4 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Improves user experience (seamless transfers, fare payment, real-time arrival information, etc.) | Medium | • The existing service model does not have a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment and real-time arrival information are experienced).<br>• Individualized administrative and software improvements may allow for select LSPs to provide better user experience/localized support. |
| Service is consistent and convenient | Medium | • The existing service model's use of four LSPs to deliver transit service can be improved (support simplified fares, improve transfers and scheduling across the County, etc.) |

| Service Goal 5 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Ease of Use (new user familiarity) | Low | • Due to inconsistent service policies and service models between LSPs, it may be difficult for first time users to make trips. |

| Service Goal 6 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Operational affordability and sustainability | Medium | • Service provided through four LSPs requires potentially redundant overhead costs for functions that could otherwise be consolidated between LSPs.<br>• Sustainability of long-term service may be inhibited by smaller zone boundaries with a four-LSP service model.<br>• Service can still expand under this model but may have a ceiling as demand grows without further optimization of operations |
| Scalability | Low | • Scalability will be least efficient with four local service providers for countywide service. |

| Service Goal 7 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Connectivity to SMART | Low | • A service model with four LSPs may make longer trips to/from SMART inefficient, relative to other LSP configurations.<br>• The existing package does not implement a unified scheduling, dispatch, and user software, requiring users to coordinate trips for each provider. |
| Connectivity to adjacent counties | Medium | • Internal coordination remains difficult for users originating from or destined for other counties, specifically for those who require more than one transfer.<br>• External coordination with other counties is adequate but may be inconsistent due to having multiple LSPs and not coordinated communication. |

| Service Goal 8 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Potential to reduce vehicle miles traveled and emissions | Low | • A four-LSP configuration requires transfers for trips across service areas boundaries and may be less desirable, leading to less demand. |

## Package 1 Evaluation Results

This section will detail evaluation results for Package 1, which includes a modified version of the four LSPs and SMART. Service goal criteria scores and reasoning for those scores are provided by each service goal in this section.

| Service Goal 1 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Reliable and affordable transit service | Medium | • Similar to the existing service model, including four LSPs would require multiple fares for trips outside of one service provider.<br>• Service would be more reliable than the existing configuration due to an implementation of a unified scheduling, dispatch, and user software. |
| Connected and safe transit service | High | • Implementation of the unified scheduling, dispatch, and user software would provide connectivity and seamless transfers. |

| Service Goal 2 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Removes mobility barriers | Medium | • Continuing to have four LSPs maintains mobility barriers.<br>• Package 1 would implement a unified scheduling, dispatch, and user software, which should improve access to transit and customer service. |
| Improves first mile/last mile accessibility | Medium | • Package 1 would offer more demand response and flex route service to the general public. Intersection-to-intersection service, which would require users to travel to the nearest node along the route and may not be accessible to as many riders but may be able to serve larger areas. |

| Service Goal 3 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Provides more transit coverage to users | Medium | • Package 1 would operate within four LSPs' service boundaries, potentially restricting service coverage for some areas. |

| Service Goal 4 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Improves user experience (seamless transfers, fare payment, real-time arrival information, etc.) | High | • Package 1 would implement a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment and real-time arrival information are experienced). |
| Service is consistent and convenient | Medium | • Package 1 would provide service through four LSPs, but implementation of a unified scheduling, dispatch, and user software may improve both convenience and consistency. |

| Service Goal 5 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Ease of Use (new user familiarity) | Medium | • Package 1 could still be challenging for new users due to the operation of service through four LSPs, but the user experience would be improved with the implementation of a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment, real-time arrival information are experienced). |

| Service Goal 6 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Operational affordability and sustainability | Medium | • Service provided through four LSPs requires potentially redundant overhead costs for functions that could otherwise be consolidated between local service providers.<br>• Package 1 would include the implementation of a unified scheduling, dispatch and user software, which would provide some efficiencies and reduce overhead costs.<br>• Sustainability of long-term service may be inhibited by smaller zone boundaries with a four-LSP service model.<br>• Intersection-to-intersection demand response service could lead to reduced costs and/or could allow for more efficient operations and higher passenger capacities compared to curb-to-curb service. |
| Scalability | Low | • Scalability will be least efficient with four LSPs for countywide service. |

| Service Goal 7 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Connectivity to SMART | Medium | • A service model with four LSPs may make longer trips to/from SMART inefficient, relative to other LSP configurations.<br>• Package 1 implements a unified scheduling, dispatch, and user software, which could provide many user benefits and seamless transfers to SMART. The unified software would allow for regional trip coordination and communication between providers (e.g. relief vehicles in peak service). |
| Connectivity to adjacent counties | Medium | • Due to the implementation of a unified scheduling, dispatch, and user software, coordination with other counties would be simplified.<br>• Coordination may remain complex due to having multiple LSPs. |

| Service Goal 8 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Potential to reduce vehicle miles traveled and emissions | Medium | • Unified scheduling, dispatch, and user software could minimize deadheading and wait times, and could optimize scheduling.<br>• A four-LSP configuration would require transfers for trips across service areas boundaries and may be less desirable, leading to less demand.<br>• Large zones offering intersection-to-intersection demand response service may reduce emissions better than curb-to-curb demand response service. |

## Package 2 Evaluation Results

This section will detail evaluation results for Package 2, which includes two LSPs and SMART. Service goal criteria scores and reasoning for those scores are provided by each service goal in this section.

| Service Goal 1 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Reliable and affordable transit service | Medium | • Two LSPs could offer greater affordability and access with a single fare.<br>• Trip coordination and reliability is an issue today, and will likely not be mitigated unless a unified scheduling, dispatch, and user software is implemented. |
| Connected and safe transit service | Medium | • This alternative provides more service than existing, and better service due to the extended geographic boundaries, but would not implement a unified scheduling, dispatch, and user software potentially leading to less connection opportunities. |

| Service Goal 2 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Removes mobility barriers | Medium | • Two LSPs maintains some mobility barriers but would cover a larger area.<br>• Package 2 would not have the unified scheduling, dispatch, and user software and may limit transit connections to other areas.<br>• Customer service standard operating processes and policies may vary by provider. |
| Improves first mile/last mile accessibility | Medium | • Package 2 would offer more demand response and/or flex service to the general public. Curb-to-curb service in zones could provide the most accessible option if the defined zones cover where riders are traveling. |

| Service Goal 3 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Provides more transit coverage to users | Medium | • Package 2 would operate within two LSPs, potentially restricting service coverage.<br>• Consolidating into two LSPs would allow users to travel further for a single fare. |

| Service Goal 4 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Improves user experience (seamless transfers, fare payment, real-time arrival information, etc.) | Medium | • Package 2 would not implement a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment and real-time arrival information are experienced).<br>• Individualized administrative and software improvements may allow for select LSPs to provide better user experience/localized support. |
| Service is consistent and convenient | Medium | • Package 2 would consolidate to utilize two LSPs to operate the transit network, which could make the system more convenient for the user.<br>• Without the implementation of a unified scheduling, dispatch, and user software, there may be less and/or inefficient transfers, contributing to user inconvenience and inconsistency. |

| Service Goal 5 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Ease of Use (new user familiarity) | Low | • Package 2 offers a better experience by serving larger areas and likely leading to fewer transfers, but would not implement a unified scheduling, dispatch, and user software.<br>• Without the implementation of the new software, trip coordination and transfers may be inefficient and inconvenient. |

| Service Goal 6 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Operational affordability and sustainability | Medium | • Service provided through two LSPs may still require potentially redundant overhead costs for functions that could otherwise be consolidated between LSPs.<br>• Sustainability of long-term service may be inhibited by zone boundaries with a two-LSP service model. |
| Scalability | Medium | • Scalability with two LSPs will be more efficient than four LSPs but will be less efficient than one integrated LSP. |

| Service Goal 7 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Connectivity to SMART | Low | • A service model with two LSPs may provide more opportunities to connect to SMART.<br>• Package 2 does not implement a unified scheduling, dispatch, and user software, requiring users to coordinate trips for each provider. |
| Connectivity to adjacent counties | Medium | • Package 2 would not implement a unified scheduling, dispatch, and user software, so coordination with other counties could be more complex.<br>• External coordination with other counties is adequate but may be inconsistent between LSPs/counties due to having multiple LSPs and not coordinated communication. |

| Service Goal 8 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Potential to reduce vehicle miles traveled and emissions | Medium | • A service model with two LSPs may be more attractive to the public as they can travel farther and it may provide more opportunities to lower the overall regional VMT and emissions.<br>• Package 2 would not implement a unified scheduling, dispatch, and user software, and would retain some inefficiencies with scheduling and dead heading. |

## Package 3 Evaluation Results

This section will detail evaluation results for Package 3, which includes one integrated LSP and SMART. Service goal criteria scores and reasoning for those scores are provided by each service goal in this section.

| Service Goal 1 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Reliable and affordable transit service | Medium | • One integrated LSP is most reliable, likely most coordinated/streamlined option. May not be as affordable due to distance-based demand response service.<br>• The implementation of a unified scheduling, dispatch, and user software would improve transfers, making them seamless and reliable. |
| Connected and safe transit service | High | • One integrated LSP may allow for improved service and connections across the County<br>• Implementation of a unified scheduling, dispatch, and user software would provide connectivity and seamless transfers. |

| Service Goal 2 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Removes mobility barriers | High | • One integrated LSP would offer the best mobility, removing service area boundaries in place today and would provide more transit coverage across Oakland County.<br>• Package 3 would implement a unified scheduling, dispatch, and user software, which should improve access to transit and customer service. |
| Improves first mile/last mile accessibility | Medium | • Package 3 would offer more demand response and/or flex service to the general public. Curb-to-curb service with distance-based fares may provide some limits to users. |

| Service Goal 3 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Provides more transit coverage to users | High | • Consolidation into one integrated LSP would allow users to travel further in the County without service area boundary restrictions. |

| Service Goal 4 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Improves user experience (seamless transfers, fare payment, real-time arrival information, etc.) | High | • Package 3 would implement a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment, real-time arrival information are experienced).<br>• Consolidation into one integrated LSP would allow users to travel further in the County for a single fare or with a minimal number or transfers. |
| Service is consistent and convenient | High | • Package 3 would provide service through one integrated LSP, offering users the greatest consistency and convenience.<br>• The implementation of a unified scheduling, dispatch, and user software would improve both convenience and consistency through seamless transfers, fare payment, real-time arrival information, etc. |

| Service Goal 5 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Ease of Use (new user familiarity) | High | • Package 3 would experience the least amount of unfamiliarity because all service would be operated by a single provider.<br>• The user experience would also be improved with the implementation of a unified scheduling, dispatch, and user software (where efficiencies and user benefits such as fare payment, real-time arrival information are experienced). |

| Service Goal 6 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Operational affordability and sustainability | High | • Service provided through one integrated LSP would minimize the redundancy in overhead costs experienced today. It may also allow for more funding opportunities through state and federal programs from potential recognition as a transit agency or through improved coordination with SMART.<br>• The integration of existing LSPs would mitigate sustainability issues related to zone boundaries.<br>• Distance-based demand response service is not as sustainable and affordable as other demand response service types. |
| Scalability | High | • Scalability will be the easiest and most efficient with one integrated LSP. |

| Service Goal 7 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Connectivity to SMART | High | • A service model with one integrated LSP would offer the most efficient mobility for someone making longer trips.<br>• Package 3 implements a unified scheduling, dispatch, and user software, which would provide many user benefits and seamless transfers to SMART. The unified software would allow for regional trip coordination and communication between providers (e.g. relief vehicles in peak service). |
| Connectivity to adjacent counties | High | • Due to the implementation of a unified scheduling, dispatch, and user software, coordination with other counties would be simplified.<br>• Coordination with other counites may be streamlined through communication with one integrated LSP. |

| Service Goal 8 | | |
|---|---|---|
| Evaluation Criteria | Score | Reasoning for Score |
| Potential to reduce vehicle miles traveled and emissions | Medium | • Unified scheduling, dispatch, and user software could minimize deadheading and wait times, and would optimize scheduling.<br>• A configuration with one integrated LSP could allow for longer trips to be made more seamlessly or without a transfer.<br>• A distance-based demand response service would likely produce greater emissions than a localized curb-to-curb or intersection-to-intersection service. |

# APPENDIX E: Sample Pilot Program Service Plans

Sample service plans for microtransit pilot programs and fixed or flex route pilot programs are provided in the following sections.

## Microtransit Pilot Programs

For microtransit pilot programs, the following assumptions should be made when generating an initial service plan:

- Microtransit pilot programs should serve zones covering no more than 10 square miles. Smaller zones help agencies manage service more effectively by making it easier to respond to rider needs, reduce delays, and adjust services quickly. Additionally, it supports scalable operations, enabling adjustments to vehicle types, driver schedules, and overall service capacity.
- Zones served by microtransit pilot programs should cover denser areas with trip generators and relevant trip origins, like town centers, employment centers, or entertainment districts and their surrounding residential areas.
- Peak period vehicle requirements assume that one vehicle will be required per every 2.5 square miles in the zone served (round to the nearest whole number). Vehicle requirements will vary based on the number of trip requests, wait times for trips, and providers' ability to trip chain through dynamic routing capabilities included in trip scheduling, dispatch, and user software.
- To calculate projected annual vehicle hours, it's assumed there are 255 weekdays, 52 Saturdays, and 58 Sundays or holidays each year.
- A 15 percent adjustment should be added to the projected annual vehicle hours to account for deadhead operations.
- A 20 percent increase should be applied to the peak period vehicle requirement to determine the total vehicle requirement, rounded to the nearest whole number.

An example of how these assumptions can be applied to calculate important components of an initial service plan for a microtransit pilot program, like the total vehicles required, operators required, and annual cost, is provided in Table E- 1. These metrics represent the minimum requirements.

TABLE E- 1: MICROTRANSIT SERVICE PILOT PROGRAM EXAMPLE

| Service Characteristic | Value |
|---|---|
| **Inputs** | |
| Zone Size | 2.5 square miles |
| Service Span | **Weekday:** 6:00 AM – 9:00 PM *(15 hours)*<br>**Saturday:** 8:00 AM – 6:00 PM *(10 hours)*<br>**Sunday:** 8:00 AM – 6:00 PM *(10 hours)* |
| **Calculated from Inputs** | |
| Peak Period Vehicle Requirement | 1 vehicle<br><br>= (Zone Size) / 2.5 |
| Projected Annual Vehicle Hours | **Weekday:** 4,399 vehicle hours<br>**Saturday:** 598 vehicle hours<br>**Sunday:** 667 vehicle hours<br>**TOTAL: 5,664 vehicle hours**<br><br>= ([(Service Span in hours) * (Vehicle Requirement)] * (number of weekdays, Saturdays, or Sundays per year)) * 1.15 |
| Total Vehicle Requirement | 2 vehicles<br><br>= (Peak Period Vehicle Requirement) * 1.2 |
| Total Operators per Week | 3 full-time operators<br><br>= ([(daily number of hours in service) * (days per week) * (peak period vehicle requirement)] / (hours in operator workweek) )* 1.2 |
| Annual Cost | $350,000 to $450,000[54]<br><br>= (Projected Annual Vehicle Hours) * (Assumed Cost per Vehicle Hour) |

[54] Annual costs can vary based on a variety of administrative and operational factors. The cost estimate reflects an average rate of $60 to $80 per hour as a representative example in 2025 dollars but may be higher depending on specific service plans for each pilot.

## Fixed or Flex Route Pilot Programs

For fixed or flex route pilot programs, the following assumptions should be made when generating an initial service plan:

- An additional 15 percent should be added to the route frequency to account for operator layovers at each end of the route, in order to calculate the total cycle time.
- Projected annual vehicle hours are based on the assumption of 255 weekdays, 52 Saturdays, and 58 Sundays or holidays per year.
- A 15 percent adjustment should be applied to the projected annual vehicle hours to account for deadhead operations.
- To determine the total vehicle requirement, a 20 percent increase should be applied to the peak period vehicle requirement, rounded to the nearest whole number.
- When estimating operator needs for the pilot program, a 20 percent relief factor should be included, also rounded to the nearest whole number.

An example of how these assumptions can be applied to calculate important components of an initial service plan for a flex route pilot program, like the total vehicles required, operators required, and annual cost, is provided in Table E- 2.These metrics represent the minimum requirements.

TABLE E- 2: FLEX ROUTE PILOT PROGRAM EXAMPLE

| Service Characteristic | Value |
|---|---|
| **Inputs** | |
| Service Span | **Weekday:** 6:00 AM – 9:00 PM *(15 hours)*<br>**Saturday:** 8:00 AM – 6:00 PM *(10 hours)*<br>**Sunday:** 8:00 AM – 6:00 PM *(10 hours)* |
| One-Way Trip Distance | **23.00** miles |
| Frequency | **120** minutes |
| Peak Period Vehicle Requirement | **2** vehicles |
| **Calculated from Inputs** | |
| One-Way Cycle Time | **138 minutes**<br><br>= Frequency * (1.15) |
| Projected Annual Vehicle Hours | **Weekday:** 8,798 vehicle hours<br>**Saturday:** 1,144 vehicle hours<br>**Sunday:** 1,276 vehicle hours<br>**TOTAL: 11,218 vehicle hours**<br><br>= ([(Service Span in hours) * (Peak Period Vehicle Requirement)] * (number of weekdays, Saturdays, or Sundays per year)) * 1.15 |
| Total Vehicles | **3 vehicles**<br><br>= (Peak Period Vehicle Requirement)*1.2 |
| Total Operators per Week | **5 full-time operators**<br><br>= ([(daily number of hours in service) * (days per week)* (peak period vehicle requirement)] / (hours in operator workweek) ) * 1.2 |
| Annual Cost | **$675,000** to **$900,000**[55]<br><br>= (Projected Annual Vehicle Hours) * (Assumed Cost per Vehicle Hour) |

[55] Annual costs can vary based on a variety of administrative and operational factors. The cost estimate reflects an average rate of $60 to $80 per hour as a representative example in 2025 dollars but may be higher depending on specific service plans for each pilot.

# APPENDIX F: LSP Financial Outlook Analysis Summary

This financial outlook developed for CTP implementation is a planning-level exercise. It was developed using each LSP's FY 2025 budget and 2024 annual total service metrics as a baseline. Revenue and expenses for each LSP were projected for the years 2027, 2030, and 2032 to provide a snapshot of each LSPs' finances at the beginning of the short-, mid-, and long-term implementation phases. The outcome of this analysis is intended to assist with future planning but is not a detailed financial analysis of each LSP.

## Revenue and Expense Projection Methodology

Revenue and total expenses were projected to balance LSPs' estimated annual budgets in 2027, 2030, and 2032 as a means of understanding LSP funding needs during short-, mid-, and long-term CTP implementation. Total expenses consisted of total baseline expenses, or those required for LSPs to operate the same level of service they do today, in addition to added expenses, meaning operations and maintenance or capital expenses incurred as part of CTP implementation activities. Assumptions regarding vehicle replacement were also incorporated into these projections.

### The following conditions were assumed for CTP implementation (2026-2032):

1. Inflation is three percent, year over year.
2. SEMCOG Regional Development Forecast population and job estimates were used to determine total population and jobs in each LSP's service area.

REVENUE

1. The percentage of total revenue from the Oakland County Public Transportation Millage (the millage) distributed to the providers will remain the same.
    a. The rate of the millage will remain at $0.95 per $1,000 of assessed value (0.95 mills).
    b. Millage revenue is grown by 3.1% each year to generally align with Oakland County's FY 2026 to 2028 budget forecast.
2. LSPs will continue to receive annual Local Bus Operating Assistance (LBO) and Municipal Credits funding from the State of Michigan.
    a. Increases in LBO funding will be proportional to population growth in LSPs' service areas in addition to inflation.
    b. The amount of Municipal Credit funding each LSP receives will remain the same.
3. LSPs receiving Community Credit funding will continue to receive Community Credit funding.
    a. Increases in Community Credit funding will be proportional to population and job growth in addition to inflation.
4. Future funding LSPs may receive from the state and federal discretionary grant programs is uncertain and may not be equal to the funding received in 2025.
5. Fare revenues are projected based on planning-level ridership growth and an average fare assumption.
    a. Annual ridership by LSP is projected from latest annual ridership totals (Q4 2024 to Q3 2025) multiplied by growth rate assumptions

i. 2027 assumes growth of 7.5% (from 2025) as a conservative estimate (SEMCOG population and employment projections estimate 1-3% growth in LSP service areas)
ii. 2030 assumes growth of 15% (from 2025) as a conservative estimate (SEMCOG population and employment projections estimate 2.5-5% growth in LSP service areas)
iii. 2032 assumes growth related to SEMCOG population and employment projections as overall demand response demand may begin to flatten. These rates range between 17-20% (from 2025)

b. Fare revenue is calculated by multiplying projected annual ridership per LSP by an average fare assumption of $2.00 (2025 dollars) adjusted by a 3% inflation factor each year.
i. Average fares for Q1 2025 ranged between approximately $1.75 and $2.50 per LSP. These were calculated by dividing reported fare revenue by ridership
ii. The $2.00 assumption is viewed as conservative and higher fair revenues may occur collectively.

## EXPENSES AND FLEET ASSUMPTIONS

1. Annually recurring operations and maintenance expenses and capital expenses reported as part of the LSP's FY 2025 budgets are assumed to continue to recur as baseline expenses.
2. LSPs will implement the pilot program recommended for them in their individual provider implementation plan (see APPENDIX G: Provider Implementation Plans).
    a. Both microtransit and fixed or flex route pilot programs have an operating cost of $65 (2025 USD) per vehicle hour, which includes operator salaries and general operations and maintenance costs for pilot programs.
3. LSPs will mostly procure transit passenger vans (e.g., Ford Transit Vans) to fill gaps in their fleet.
    a. LSPs will move towards more consistent vehicle types across all their fleets.
    b. Transit Passenger Vans vehicles will be replaced when they meet a useful life criteria of approximately six years (approximately one to two years beyond minimum useful life criteria). It is assumed all vehicles will meet millage criteria by their useful life.
    c. Minivans currently part of LSPs' fleets will be replaced by Ford transit passenger vans.
    d. Transit passenger vans will cost $115,000 each (2025 USD), based on higher end estimates of similar state contract prices.
    e. Cutaway vehicles will be replaced when they meet a useful life criteria of approximately eight years (approximately one to two years beyond minimum useful life criteria). It is assumed all vehicles will meet millage criteria by their useful life.
    f. Cutaway vehicles will cost $130,000 each (2025 USD), based on higher end estimates of similar state contract prices.
4. Section 5310 vehicles currently in LSP's fleets were assumed to be those procured through SMART.
    a. It is assumed that approximately 75% of existing 5310 vehicles will be replaced through the program upon reaching their identified useful life (refer to 3) and not lead to capital costs to OCT.
    b. Vehicles purchased through the 5310 program are prioritized by the RTA for replacement needs over service expansion.
5. LSPs are required to budget for capital reserves that account for vehicle depreciation (20% depreciation in value for each year the vehicle has been in service) since 2023. Deprecation value

and reserves were estimated based on anticipated fleet needs and future planning assumptions. These values are used to offset vehicle costs in the Financial Outlook.
    a. For planning purposes, OCT anticipates these reserves may be utilized to offset LSP fleet costs (i.e., replacement or expansion) and potentially other capital costs.
    b. OCT recognizes that vehicle costs will often exceed depreciation values at the end of vehicle's useful life and may lead to additional shortfalls. OCT anticipates continuing to provide funding to cover future shortfalls due to rising vehicle costs.
6. Annual salaries of additional administrative staff are $70,000 in 2025 USD, based on current non-executive LSP administrative staff salaries.
7. LSPs' will acquire scheduling and dispatch software in 2026 that allows them to effectively coordinate trips with each other and other regional providers.
    a. LSPs will need to pay a licensing fee for this scheduling and dispatch software starting in 2027.
8. Mobility managers hired by LSPs using grant funding from the RTA's Mobility4All Program will be paid only using that grant funding and will not incur an additional cost to LSPs.
9. Facilities leased in Oakland County are assumed to cost $20 per square foot, annually. This cost may vary significantly by property/area.

## Fleet Needs Estimates Methodology

As part of added capital expense projections, the number of revenue vehicles LSPs will need to add to or replace within their fleets was estimated for 2027, 2030, and 2032. A summary of each LSP's fleet inventory in 2027, 2030, and 2032 is provided in Table F- 1, A Data derived *by OCT from available LSP fleet inventory information.*

Table F- 2, and **Table F- 3**. These summaries factor in additional revenue vehicles needed for pilot programs and transit demand growth. They also include totals of potential vehicle requests anticipated by LSP (encompassing replacement and expansion requests).

TABLE F- 1: 2027 REVENUE VEHICLE FLEET INVENTORY BY LSP [A]

| | Revenue Vehicle Fleet` | | | | Potential Vehicle Requests | |
|---|---|---|---|---|---|---|
| | Cutaways | Minivans and Smaller Vans | Transit Passenger Vans | TOTAL Revenue Vehicle Fleet | Cutaways | Transit Passenger Vans |
| NOTA | 0 | 9 | 55 | **64** | 0 | 26 |
| OPC | 20 | 6 | 13 | **39** | 18 | 8 |
| PEX | 0 | 5 | 46 | **51** | 2 | 5 |
| WOTA | 16 | 12 | 37 | **65** | 9 | 13 |
| Total | 36 | 32 | 151 | 219 | 29 | 52 |

[A] *Data derived by OCT from available LSP fleet inventory information.*

TABLE F- 2: 2030 REVENUE VEHICLE FLEET INVENTORY BY LSP [A]

| | Revenue Vehicle Fleet` | | | | Potential Vehicle Requests | |
|---|---|---|---|---|---|---|
| | Cutaways | Minivans and Smaller Vans | Transit Passenger Vans | TOTAL Revenue Vehicle Fleet | Cutaways | Transit Passenger Vans |
| NOTA | 0 | 0 | 70 | 70 | 0 | 44 |
| OPC | 20 | 0 | 23 | 43 | 0 | 12 |
| PEX | 10 | 0 | 59 | 69 | 0 | 32 |
| WOTA | 16 | 0 | 54 | 70 | 0 | 29 |
| Total | 46 | 0 | 206 | 252 | 0 | 117 |

[A] *Data derived by OCT from available LSP fleet inventory information.*

TABLE F- 3: 2032 REVENUE VEHICLE FLEET INVENTORY BY LSP [A]

| | Revenue Vehicle Fleet | | | | Potential Vehicle Requests | |
|---|---|---|---|---|---|---|
| | Cutaways | Minivans and Smaller Vans | Transit Passenger Vans | TOTAL Revenue Vehicle Fleet | Cutaways | Transit Passenger Vans |
| NOTA | 0 | 0 | 73 | 73 | 0 | 13 |
| OPC | 20 | 0 | 25 | 45 | 2 | 6 |
| PEX | 10 | 0 | 63 | 73 | 0 | 15 |
| WOTA | 16 | 0 | 57 | 73 | 5 | 7 |
| Total | 46 | 0 | 218 | 264 | 7 | 41 |

[A] *Data derived by OCT from available LSP fleet inventory information.*

Many revenue vehicles in LSPs' fleets will reach the end of their useful life during CTP implementation and need to be retired and replaced.

Not all vehicles due for replacement in 2027 must be replaced immediately to maintain current service levels. Once revenue vehicles reach a certain age, though they may meet the useful life benchmark for replacement, they can undergo more frequent inspection and maintenance to be kept in operation. As long as LSPs have adequate spare revenue vehicles to cover for those undergoing repairs, they may choose to delay some replacements if funding is limited in 2027, 2030, or 2032. At a minimum, LSPs should aim to procure the additional revenue vehicles needed to support CSA transit demand growth and pilot programs launched in the short-term.

It is important to note that a portion of LSPs' revenue vehicles were procured through SMART using FTA Section 5310 grant funding that is distributed by SMART. Vehicles procured through SMART using Section 5310 funding are leased to LSPs and should be replaced through the Section 5310 program whenever possible. LSPs should work closely with OCT and the RTA to understand the Section 5310 program funding priorities to bolster their application in a given year.

# APPENDIX G: Provider Implementation Plans

The implementation plans prepared for each of the four local service providers (LSPs) are included in the following sections. Each provider implementation plan places the countywide strategies outlined in Chapter 4: Implementation Plan into actionable steps tailored to the unique operational context of each LSP. Maintaining the structure and key elements of countywide CTP implementation, each provider implementation plan reflects the specific priorities, operational considerations, and resource needs of the LSP it is written for.

# NOTA Implementation Plan

The recommended approach and strategic actions required for the Northern Oakland Transportation Authority (NOTA) to effectively implement the Oakland County Community Transit Plan (CTP) are communicated in this document. It is designed to serve as a companion to CTP **Chapter 4: Implementation Plan**, translating broader recommendations and strategies laid out in the final chapter of the CTP into actionable steps specific to NOTA. For a more detailed overview of CTP implementation, including explanations of or details regarding various processes, please refer to **Chapter 4: Implementation Plan**.

## Short-Term Implementation (2026 – 2029): Alignment

Short-term implementation focuses primarily on policy alignment across the four local service providers (LSP) operating in Oakland County's community service area (CSA), in addition to initial service and fleet expansion through pilot programs. Additional context regarding short-term CTP implementation efforts can be found in **Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment**.

### Short-Term NOTA Service Operation

Short-term NOTA service operation strategies will focus on initial configuration, improvement, and expansion of NOTA services in Oakland County. See **Short-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

#### *Local Service Provider Configuration*

See **Short-Term Local Service Provider Configuration** in **Chapter 4: Implementation Plan** as a reference.

| Short-Term Recommendation |
| --- |
| Collaboratively align NOTA operating policies and standard procedures so they are consistent with those of the other LSPs. |

**Short-Term Strategies**

- Collaboratively align NOTA's operating policies and procedures, including rider eligibility, service hours, scheduling windows, fares, service standards, and staff trainings, with those of the other LSPs.
- Coordinate any needed procurements of vehicles, spare parts, and in-vehicle technology with OCT and the other LSPs during Public Transportation Service Agreement (PTSA) contracting.
- Designate a current NOTA staff member to act as an administrative liaison to OCT.
    - This liaison should collaborate with other LSPs on coordinated communication and branding efforts.
- Assign a current NOTA staff member to support rider engagement in collaboration with OCT.

## *Service Expansion*

See **Short-Term Service Expansion** in **Chapter 4: Implementation Plan** as a reference.

### Short-Term Recommendation

Consider launching one three-year pilot program improving or expanding an existing service in an area with high transit demand identified in the market analysis. Hire additional operators to support continued expansion of demand response services.

### Short-Term Strategies

- Following OCT's pilot program application process, consider launching a microtransit or other preferred pilot program.
  - Market analysis suggests an opportunity to launch a microtransit pilot program in the Oxford area.
  - If a microtransit pilot program cannot be launched in Oxford, instead consider:
    - Launching a microtransit pilot program in Lake Orion or Southwestern Orion Township (north of Auburn Hills).
    - Collaborating with WOTA to launch a fixed or flex route pilot between Clarkston and northeast Waterford Township.
- Additional operators may be required to support the expansion of demand response services and the pilot program. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for full-time equivalent (FTE) operator and support staff hires.
  - Total need: 12 operator FTE and 1 dispatcher FTE
    - Microtransit pilot program: 3 operator FTE and 1 dispatcher FTE
    - Demand response expansion: 9 operator FTE

### *Fleet Needs*

See **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Procure vehicles needed to support pilot programs and growing demand through MDOT OPT.

**Short-Term Strategies**

- Work with OCT and MDOT OPT to become an MDOT-authorized transit provider eligible for procurement through MDOT OPT.
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting (see **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** for sample) while exploring opportunities to collaborate with other LSPs.
- Procure vehicles needed for expansion (pilot program and demand response needs) and replacement through MDOT OPT. Listed below are suggested vehicle requests.[56]
    - Total requests: 26 transit passenger vans (including 7 Section 5310-funded vehicles due for replacement)
        - Vehicles required for expansion: 6 transit passenger vans (2 for pilot programs, 4 for demand response expansion)
        - Replacement vehicle requests: 20 transit passenger vans
- Take an inventory of NOTA assets necessary to support operations, e.g. spare parts, technology, or tablets.

## Short-Term NOTA Facilities, Technology, and Maintenance

Short-term NOTA facility needs, maintenance policies, and technology look to meet immediate needs while laying the foundation for future LSP resource sharing. See **Short-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[56] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life; however, expansion of cutaways was also included as related to potential needs associated with pilot programs. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *NOTA Facilities*

See Short-Term Local Service Provider Facilities in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Assess current facility assets and address immediate outstanding NOTA facility needs.

**Short-Term Strategies**

- Conduct an inventory and condition assessment of NOTA facility assets, reviewing any existing facility reports and needs, with OCT.
    - Prioritize immediate and future facility needs.
- Conduct a regular facility assessment every three years in collaboration with OCT.

### *Technology*

See Short-Term Technology in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Adopt the same scheduling, dispatch, and user software as the other LSPs and procure lacking tech.

**Short-Term Strategies**

- Align scheduling and dispatch software with other LSPs, ideally via SMART's PSDS procurement.
    - Ensure that existing NOTA in-vehicle GPS-enabled devices (tablets) are compatible with procured scheduling and dispatch software.
    - Participate in training for new scheduling and dispatch software.
- Procure and install security cameras in all NOTA revenue vehicles without them.
- Engage in RTA's Mobility Wallet pilot when available by providing required information and confirming participation, in alignment with OCT guidance.

### *Maintenance*

See **Short-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

| Short-Term Recommendation |
| --- |
| Collaborate with the other LSPs to align maintenance policies and standard procedures so that they are consistent across all LSPs. |

| Short-Term Strategies |
| --- |
| ▶ In partnership with the other LSPs and OCT, review and update NOTA preventative and corrective fleet and facility maintenance standards so they are aligned with FTA, MDOT, RTA, and SMART guidelines and consistent across LSPs.<br>▶ Collaborate with OCT to develop NOTA fleet and facility preventative maintenance plans. |

## Short-Term NOTA Service Policies

Establishing consistent service policies in the short-term is a key step in streamlining service LSP delivery across the CSA to support a smoother transition to future integration. See **Short-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Short-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

| Short-Term Recommendation |
| --- |
| Adopt the same rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements as the other LSPs. |

| Short-Term Strategies |
| --- |
| ▶ Designate an existing staff member to participate in OCT-led meetings with other LSPs to develop and annually reaffirm administrative policies as part of the annual PTSA contracting process.<br>▶ Adopt a PTSA with OCT that includes agreed-upon administrative policies. |

### *Funding*

See Short-Term Funding in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Collaborate with OCT to identify new operations and maintenance and capital funding sources.

**Short-Term Strategies**

- Assign an existing NOTA administrative staff member to work with OCT during annual LSP budget reviews as NOTA's grant application manager.
- NOTA's grant application manager should collaborate with OCT to identify NOTA's additional funding needs and whether state or federal grants could help meet them.
- Collaborate with OCT to identify and apply for grants, following the application and award steps required by agencies like MDOT, RTA, or FTA.
- Attend the grants management planning workshop hosted by OCT.

## Mid-Term Implementation (2030-2032): Coordination

Mid-term implementation builds on short-term progress by strengthening inter-LSP coordination through continued standardization of service provision and planning tools across LSPs. Additional context regarding mid-term CTP implementation efforts can be found in Section 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination.

### Mid-Term NOTA Service Operation

Building on short-term alignment, mid-term service operation focuses on standardizing inter-LSP coordination to enhance service efficiency and responsiveness. See Mid-Term Service Operation in 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination for reference.

### *Local Service Provider Configuration*

See Mid-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed throughout the process of determining how best to integrate operations across LSPs.

**Mid-Term Strategies**

- Participate in the review of LSPs' organizational charts facilitated by OCT.
- Participate in and support the implementation of recommendations from OCT's organizational development plan for LSP integration.

### *Service Expansion*

See Mid-Term Service Expansion in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Continue to run and evaluate pilot programs launched in the short-term. Hire additional operators to support continued expansion of demand response services.

**Mid-Term Strategies**

- Determine if the NOTA pilot program launched in the short-term meets the provided short-term quarterly benchmarks for pilot programs.
- Continue to run the NOTA pilot program, if launched in the short-term, through the mid-term.
- Collaborate with OCT and the other LSPs to review the CTP market analysis and compare it to 2026 to 2030 ridership trends and service provision growth.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 15 operator FTE

### *Fleet Needs*

See **Mid-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

| **Mid-Term Recommendation** |
| --- |
| Continue procuring vehicles needed through MDOT OPT. |

**Mid-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[57]
  - Total requests: 44 transit passenger vans (including 10 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 6 transit passenger vans
    - Replacement vehicle requests: 38 transit passenger vans
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting while exploring opportunities to collaborate with other LSPs.
- Use previous inventory of NOTA assets and collaborate with the other LSPs to identify future needs for assets supporting operations, like spare parts, technology, or tablets.

## Mid-Term NOTA Facilities, Technology, and Maintenance

After addressing immediate facility, technology, and maintenance needs in the short-term, LSPs should begin exploring shared resource management opportunities in the mid-term. See **Mid-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[57] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *NOTA Facilities*

See Mid-Term Local Service Provider Facilities in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed to assess whether combining existing LSP facilities would improve efficiency and help meet growing demand for service.

**Mid-Term Strategies**

- Support the OCT-hired consultant team by providing necessary information for a benefit-cost analysis focused on determining if existing and future facility integration will optimize LSP service provision.

### *Technology*

See Mid-Term Technology in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Reevaluate scheduling, dispatch, and user software effectiveness as needed.

**Mid-Term Strategies**

- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is working relative to LSP needs.
- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is integrating well with LSP fare payment systems.

### *Maintenance*

See Mid-Term Maintenance in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Procure contracts for fleet and facility maintenance collectively with the other LSPs.

- Participate with OCT in determining whether procuring joint agreements for all or most contracted maintenance activities will help optimize LSPs' operations.

## Mid-Term NOTA Service Policies

Mid-term service policy recommendations aim to refine short-term alignment, maintaining administrative consistency across LSPs while enabling CSA-wide flexibility and innovation. See **Mid-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Mid-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue to collaborate as needed with the other LSPs to adapt unified service policies and procedures.

**Mid-Term Strategies**

- During PTSA contracting, participate with other LSPs to review administrative policies.
- Update service policies collectively with the other LSPs to support better service coordination between all LSPs.

### *Funding*

See **Mid-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Provide OCT with the necessary revenue and expenditure details for its review of the Oakland County Public Transportation Millage.

## Long-Term Implementation (2032+): Integration

Long-term implementation aims to fully implement Oakland County's future service model, unifying LSPs under a transit service manager (TSM) as described in the **Mid-Term Local Service Provider Configuration** section of **Chapter 4: Implementation Plan** while maintaining LSPs as operating divisions, contingent on millage renewal. Additional context regarding long-term CTP implementation efforts can be found in **Section 4.2.3 Long-Term Implementation (2032+): Integration**.

## Long-Term NOTA Service Operation

Long-term service operations aim to fully realize earlier coordination and standardization efforts by consolidating LSPs under the TSM if cost-effective, while transitioning successful pilots to permanent services and maintaining consistent fleet management practices. See **Long-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

### *Local Service Provider Configuration*

See Long-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

If the Oakland County Public Transportation Millage is renewed, implement the LSP integration option recommended by the organizational development plan completed during the mid-term.

### *Service Expansion*

See Long-Term

Service Expansion in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

Transition successful pilot programs to permanent services. Hire additional operators to support continued expansion of demand response services.

**Long-Term Strategies**

- Review the pilot program launched in the short-term using the formal evaluation process to determine whether to transition it to a permanent service during the 2032 PTSA contracting process (see Mid-Term Service Expansion in Chapter 4: Implementation Plan).
- Consider launching another recommended microtransit or fixed or flex route pilot program.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 6 operator FTE

### *Fleet Needs*

See **Long-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow fleet policies and procedures developed from 2026 to 2032.

**Long-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[58]
  - Total requests: 13 transit passenger vans (including 8 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 3 transit passenger vans
    - Replacement vehicle requests: 10 transit passenger vans

## Long-Term NOTA Facilities, Technology, and Maintenance

Long-term strategies optimize earlier infrastructure investments, pursue consolidation where beneficial, and ensure responsiveness to demand through ongoing evaluation. See **Long-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

### *NOTA Facilities*

See **Long-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Integrate facilities recommended by the mid-term facility integration assessment, following the direction of the TSM.

[58] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *Technology*

See **Long-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed.

### *Maintenance*

See **Long-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Collaborate with the TSM to develop long-range fleet and facility replacement plans.

**Long-Term Strategies**

- Participate in, provide the necessary information for, and commit to implementing recommendations from the long-range fleet and facility replacement plans facilitated by the TSM.

## Long-Term NOTA Service Policies

Long-term, attention must shift to securing renewal of the county's transportation millage to sustain service improvements and uninterrupted delivery. See **Long-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Long-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow administrative policies and procedures developed from 2026 to 2032.

***Funding***

See **Long-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

| Long-Term Recommendation |
| --- |
| Collaboratively participate in the education campaign for Oakland County Public Transportation Millage renewal efforts led by OCT to ensure continued service delivery within the CSA. |

| Long-Term Strategies |
| --- |
| ▶ Collaboratively participate in, provide the necessary information for, and commit to implementing the Oakland County Public Transportation Millage education campaign facilitated by OCT.<br>▶ If the Millage is not renewed in November 2032, follow the termination plan prepared by OCT. |

## NOTA Financial Outlook (2026 – 2032)

NOTA's financial outlook over the course of CTP implementation is provided in **Table G-1** which summarizes 2027, 2030, and 2032 revenue and expenses as snapshots of NOTA's projected finances in the short-, mid-, and long-term implementation phases.

As needed, NOTA should consider applying to the following federal and state discretionary grant programs:

- Federal Grant Programs
  - Section 5339(c)
  - Carbon Reduction Program (CRP)
  - Section 5310
  - Surface Transportation Block Grants
  - Better Utilizing Investments to Leverage Development Grants
  - Congestion Mitigation and Air Quality Grants

- State Grant Programs
  - Capital Assistance
  - Specialized Services Program

Reference **Section 2.1 Governance and Funding** for more information on the grant programs listed. See **Section 4.3 CTP Implementation: Financial Outlook (2026 – 2032)** and **APPENDIX F: LSP Financial Outlook Analysis Summary** for a discussion of the development of revenue and expense projections. NOTA can also consider delaying the launch of the NOTA pilot program recommended as part of CTP implementation if it does not align with immediate fiscal priorities, such as acquiring revenue vehicles.

TABLE G-1: NOTA FINANCIAL OUTLOOK, 2026-2032 (MILLIONS OF 2025 U.S. DOLLARS)

| | 2027 (Short-Term) | 2030 (Mid-Term) | 2032 (Long-Term) |
|---|---|---|---|
| **TOTAL Revenue [A]** | **$ 10.8** | **$ 13.8** | **$ 14.1** |
| O&M Expenses | $ 7.9 | $ 9.2 | $ 10.1 |
| Capital Expenses | $ 1.3 | $ 1.4 | $ 1.5 |
| **TOTAL Baseline Expenses** | **$ 9.2** | **$ 10.6** | **$ 11.6** |
| Pilot Programs [B] | $ 0.4 | $ 0.4 | $ 0.5 |
| **TOTAL Added O&M Expenses** | $ 0.4 | $ 0.4 | $ 0.5 |
| Fleet Needs [C] | $ 0.61 | $ 2.7 | $ - |
| LSP Facilities | $ - | $ - | $ - |
| Technology | $ 0.027 | $ 0.029 | $ 0.031 |
| Administration | $ 0.074 | $ 0.081 | $ 0.086 |
| **TOTAL Added Capital Expenses** | $ 0.71 | $ 2.8 | $ 0.12 |
| **GRAND TOTAL Added Expenses** | **$ 1.1** | **$ 3.2** | **$ 0.62** |
| **GRAND TOTAL Expenses** | **$ 10.3** | **$ 13.8** | **$ 12.2** |

[A] *Includes Michigan Local Bus Operating Assistance, Oakland County Public Transportation Millage, Community Credits, and Fare Revenues; does not include federal or state discretionary grant funding.*

[B] *Includes operations and maintenance costs and operator salaries.*

[C] *Includes adjustments for 5310 replacements and vehicle depreciation reserves utilized to offset future costs.*

# OPC Implementation Plan

The recommended approach and strategic actions required for the OPC Social and Activity Center (OPC) to effectively implement the Oakland County Community Transit Plan (CTP) are communicated in this document. It is designed to serve as a companion to CTP **Chapter 4: Implementation Plan**, translating broader recommendations and strategies laid out in the final chapter of the CTP into actionable steps specific to OPC. For a more detailed overview of CTP implementation, including explanations of or details regarding various processes, please refer to **Chapter 4: Implementation Plan**.

## Short-Term Implementation (2026 – 2029): Alignment

Short-term implementation focuses primarily on policy alignment across the four local service providers (LSP) operating in Oakland County's community service area (CSA), in addition to initial service and fleet expansion through pilot programs. Additional context regarding short-term CTP implementation efforts can be found in **Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment**.

### Short-Term OPC Service Operation

Short-term OPC service operation strategies will focus on initial configuration, improvement, and expansion of OPC services in Oakland County. See **Short-Term Service Operation** in **Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment** for reference.

#### *Local Service Provider Configuration*

See **Short-Term Local Service Provider Configuration** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Collaboratively align OPC operating policies and standard procedures so they are consistent with those of the other LSPs.

**Short-Term Strategies**

- Collaboratively align OPC operating policies and procedures, including rider eligibility, service hours, scheduling windows, fares, service standards, and staff trainings, with those of the other LSPs.
- Coordinate any needed procurements of vehicles, spare parts, and in-vehicle technology with OCT and the other LSPs during Public Transportation Service Agreement (PTSA) contracting.
- Designate a current OPC staff member to act as an administrative liaison to OCT
    - This liaison should join a committee of other LSP's liaisons collaborating on branding efforts.
- Assign a current OPC staff member to support rider engagement in collaboration with OCT.

## *Service Expansion*

See **Short-Term Service Expansion** in **Chapter 4: Implementation Plan** as a reference.

### Short-Term Recommendation

Consider launching one three-year pilot program improving or expanding an existing service in an area with high transit demand identified in the market analysis. Hire additional operators to support continued expansion of demand response services.

### Short-Term Strategies

- Following OCT's pilot program application process, consider launching a microtransit or other preferred pilot program.
  - CTP market analysis and SMARTer Mobility Program study results suggest an opportunity to launch a microtransit pilot program in the Rochester/Rochester Hills area. This pilot would be funded by and launched in partnership with SMART.
  - If a microtransit pilot program cannot be launched in Rochester/Rochester Hills area, consider collaborating with SMART to launch a fixed or flex route pilot program in a similar area instead.
- Additional operators may be required to support the expansion of demand response services and the pilot program. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for full-time equivalent (FTE) operator and support staff hires.
  - Total need: 9 operator FTE and 1 dispatcher FTE
    - Microtransit pilot program: 3 operator FTE and 1 dispatcher FTE
    - Demand response expansion: 6 operator FTE

### *Fleet Needs*

See **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Procure vehicles needed to support pilot programs and growing demand through MDOT OPT.

**Short-Term Strategies**

- Work with OCT and MDOT OPT to become an MDOT-authorized transit provider eligible for procurement through MDOT OPT.
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting (see **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** for sample) while exploring opportunities to collaborate with other LSPs.
- Procure vehicles needed for expansion (pilot program and demand response needs) and replacement. Listed below are suggested vehicle requests.[59]
    - Total requests: 8 transit passenger vans, 18 cutaway vehicles (including 15 Section 5310-funded vehicles due for replacement)
        - Vehicles required for expansion: 6 transit passenger vans (3 for pilot program and 3 for demand response expansion)
        - Replacement vehicle requests: 18 cutaway vehicles, 2 transit passenger vans
- Take an inventory of OPC assets necessary to support operations, e.g. spare parts, technology, or tablets.

## Short-Term OPC Facilities, Technology, and Maintenance

Short-term OPC facility needs, maintenance policies, and technology look to meet immediate needs while laying the foundation for future LSP resource sharing. See **Short-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[59] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life; however, expansion of cutaways was also included as related to potential needs associated with pilot programs. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *OPC Facilities*

See **Short-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Assess current facility assets and address immediate outstanding facility needs.

**Short-Term Strategies**

- Conduct an inventory and condition assessment of OPC facility assets, reviewing any existing facility reports and needs, with OCT.
  - Prioritize immediate and future facility needs.
- Conduct a regular facility assessment every three years in collaboration with OCT.

### *Technology*

See **Short-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Adopt the same scheduling, dispatch, and user software as the other LSPs and procure lacking tech.

**Short-Term Strategies**

- Align scheduling and dispatch software with other LSPs, ideally via SMART's PSDS procurement.
  - Ensure that existing OPC in-vehicle GPS-enabled devices (tablets) are compatible with procured scheduling and dispatch software.
  - Participate in training for new scheduling and dispatch software.
- Procure and install security cameras in all OPC revenue vehicles without them.
- Engage in RTA's Mobility Wallet pilot when available by providing required information and confirming participation, in alignment with OCT guidance.

### *Maintenance*

See **Short-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Collaborate with the other LSPs to align maintenance policies and standard procedures so that they are consistent across all LSPs.

**Short-Term Strategies**

- In partnership with the other LSPs and OCT, review and update OPC's preventative and corrective fleet and facility maintenance standards so they are aligned with FTA, MDOT, RTA, and SMART guidelines and consistent across LSPs.
- Collaborate with OCT to develop OPC fleet and facility preventative maintenance plans.

## Short-Term OPC Service Policies

Establishing consistent service policies in the short-term is a key step in streamlining service LSP delivery across the CSA to support a smoother transition to future integration. See **Short-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Short-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Adopt the same rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements as the other LSPs.

**Short-Term Strategies**

- Designate an existing staff member to participate in OCT-led meetings with other LSPs to develop and annually reaffirm administrative policies as part of the annual PTSA contracting process.
- Adopt a PTSA with OCT that includes agreed-upon administrative policies.

### *Funding*

See Short-Term Funding in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Collaborate with OCT to identify new operations and maintenance and capital funding sources.

**Short-Term Strategies**

- Assign an existing OPC administrative staff member to work with OCT during annual LSP budget reviews as OPC's grant application manager.
- OPC's grant application manager should collaborate with OCT to identify OPC's additional funding needs and whether state or federal grants could help meet them.
- Collaborate with OCT to identify and apply for grants, following the application and award steps required by agencies like MDOT, RTA, or FTA.
- Attend the grants management planning workshop hosted by OCT.

## Mid-Term Implementation (2030-2032): Coordination

Mid-term implementation builds on short-term progress by strengthening inter-LSP coordination through continued standardization of service provision and planning tools across LSPs. Additional context regarding mid-term CTP implementation efforts can be found in Section 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination.

### Mid-Term OPC Service Operation

Building on short-term alignment, mid-term service operation focuses on standardizing inter-LSP coordination to enhance service efficiency and responsiveness. See Mid-Term Service Operation in Chapter 4: Implementation Plan for reference.

### *Local Service Provider Configuration*

See Mid-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed throughout the process of determining how best to integrate operations across LSPs.

**Mid-Term Strategies**

- Participate in the review of LSPs' organizational charts facilitated by OCT.
- Participate in and support the implementation of recommendations from OCT's organizational development plan for LSP integration.

### *Service Expansion*

See Mid-Term Service Expansion in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Continue to run and evaluate pilot programs launched in the short-term. Hire additional operators to support continued expansion of demand response services.

**Mid-Term Strategies**

- Determine if the OPC pilot program launched in the short-term meets the provided short-term quarterly benchmarks for pilot programs.
- Continue to run the OPC pilot program launched, if launched in the short-term, through the mid-term.
- Collaborate with OCT and the other LSPs to review the CTP market analysis and compare it to 2026 to 2030 ridership trends and service provision growth.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 9 operator FTE

### *Fleet Needs*

See **Mid-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue procuring vehicles needed through MDOT OPT.

**Mid-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[60]
  - Total requests: 12 transit passenger vans (including 2 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 4 transit passenger vans
    - Replacement vehicle requests: 8 transit passenger vans
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting while exploring opportunities to collaborate with other LSPs.
- Use previous inventory of OPC assets and collaborate with the other LSPs to identify future needs for assets supporting operations, like spare parts, technology, or tablets.

## Mid-Term OPC Facilities, Technology, and Maintenance

After addressing immediate facility, technology, and maintenance needs in the short-term, LSPs should begin exploring shared resource management opportunities in the mid-term. See **Mid-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[60] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *OPC Facilities*

See **Mid-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed to assess whether combining existing LSP facilities would improve efficiency and help meet growing demand for service.

**Mid-Term Strategies**

- Support the OCT-hired consultant team by providing necessary information for a benefit-cost analysis focused on determining if existing and future facility integration will optimize LSP service provision.

### *Technology*

See **Mid-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Reevaluate scheduling, dispatch, and user software effectiveness as needed.

**Mid-Term Strategies**

- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is working relative to LSP needs.
- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is integrating well with LSP fare payment systems.

### *Maintenance*

See **Mid-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Procure contracts for fleet and facility maintenance collectively with the other LSPs.

- Participate with OCT in determining whether procuring joint agreements for all or most contracted maintenance activities will help optimize LSPs' operations.

## Mid-Term OPC Service Policies

Mid-term service policy recommendations aim to refine short-term alignment, maintaining administrative consistency across LSPs while enabling CSA-wide flexibility and innovation. See Mid-Term Service Policies in Chapter 4: Implementation Plan for reference.

### *Administration*

See Mid-Term Administration in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Continue to collaborate as needed with the other LSPs to adapt unified service policies and procedures.

**Mid-Term Strategies**

- During PTSA contracting, participate with other LSPs to review administrative policies.
- Update service policies collectively with the other LSPs to support better service coordination between all LSPs.

### *Funding*

See Mid-Term Funding in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Provide OCT with the necessary revenue and expenditure details for its review of the Oakland County Public Transportation Millage.

## Long-Term Implementation (2032+): Integration

Long-term implementation aims to fully implement Oakland County's future service model, unifying LSPs under a transit service manager (TSM) as described in the Mid-Term Local Service Provider Configuration section of Chapter 4: Implementation Plan while maintaining LSPs as operating divisions, contingent on millage renewal. Additional context regarding long-term CTP implementation efforts can be found in Section 4.2.3 Long-Term Implementation (2032+): Integration.

## Long-Term OPC Service Operation

Long-term service operations aim to fully realize earlier coordination and standardization efforts by consolidating LSPs under the TSM if cost-effective, while transitioning successful pilots to permanent services and maintaining consistent fleet management practices. See Long-Term Service Operation in Chapter 4: Implementation Plan for reference.

### *Local Service Provider Configuration*

See Long-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

If the Oakland County Public Transportation Millage is renewed, implement the LSP integration option recommended by the organizational development plan completed during the mid-term.

### *Service Expansion*

See Long-Term

Service Expansion in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

Transition successful pilot programs to permanent services. Hire additional operators to support continued expansion of demand response services.

**Long-Term Strategies**

- Review the pilot program launched in the short-term using the formal evaluation process to determine whether to transition it to a permanent service during the 2032 PTSA contracting process (see Mid-Term Service Expansion in Chapter 4: Implementation Plan).
- Consider launching another recommended microtransit or fixed or flex route pilot program.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 3 operator FTE

### *Fleet Needs*

See **Long-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow fleet policies and procedures developed from 2026 to 2032.

**Long-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[61]
  - Total requests: 2 cutaway vehicles, 6 transit passenger vans (including 9 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 2 transit passenger vans
    - Replacement vehicle requests: 2 cutaway vehicles, 4 transit passenger vans

## Long-Term OPC Facilities, Technology, and Maintenance

Long-term strategies optimize earlier infrastructure investments, pursue consolidation where beneficial, and ensure responsiveness to demand through ongoing evaluation. See **Long-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

### *OPC Facilities*

See **Long-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Integrate facilities recommended by the mid-term facility integration assessment, following the direction of the TSM.

### *Technology*

See **Long-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed.

[61] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Public Transportation Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *Maintenance*

See **Long-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Collaborate with the TSM to develop long-range fleet and facility replacement plans.

**Long-Term Strategies**

- Participate in, provide the necessary information for, and commit to implementing recommendations from the long-range fleet and facility replacement plans facilitated by the TSM.

## Long-Term OPC Service Policies

Long-term, attention must shift to securing renewal of the county's transportation millage to sustain service improvements and uninterrupted delivery. See **Long-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Long-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow administrative policies and procedures developed from 2026 to 2032.

### *Funding*

See **Long-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Collaboratively participate in the education campaign for Oakland County Public Transportation Millage renewal efforts led by OCT to ensure continued service delivery within the CSA.

**Long-Term Strategies**

- Collaboratively participate in, provide the necessary information for, and commit to implementing the Oakland County Public Transportation Millage education campaign facilitated by OCT.
- If the Millage is not renewed in November 2032, follow the termination plan prepared by OCT.

## OPC Financial Outlook (2026 – 2032)

OPC's financial outlook over the course of CTP implementation is provided in Table G-2, which summarizes 2027, 2030, and 2032 revenue and expenses as snapshots of OPC's projected finances in the short-, mid-, and long-term implementation phases.

As needed, OPC should consider applying to the following federal and state discretionary grant programs:

- Federal Grant Programs
  - Section 5339(c)
  - Carbon Reduction Program (CRP)
  - Section 5310
  - Surface Transportation Block Grants
  - Better Utilizing Investments to Leverage Development Grants
  - Congestion Mitigation and Air Quality Grants
- State Grant Programs
  - Capital Assistance
  - Specialized Services Program

OPC could also consider applying to the following federal and state discretionary grant programs to help fully cover added short-term operations and maintenance expenses from OPC's pilot program:

- Federal Grant Programs
  - Section 5304
  - Congestion Mitigation & Air Quality
  - Carbon Reduction Program
- State Grant Programs
  - Service Initiatives Program

Reference Section 2.1 Governance and Funding for more information on the grant programs listed. See Section 4.3 CTP Implementation: Financial Outlook (2026 – 2032) and APPENDIX F: LSP Financial Outlook Analysis Summary for a discussion of the development of revenue and expense projections. OPC can also consider delaying the launch of the OPC pilot program recommended as part of CTP implementation if it does not align with immediate fiscal priorities, such as acquiring revenue vehicles.

TABLE G-2: OPC FINANCIAL OUTLOOK, 2026-2032 (MILLIONS OF 2025 U.S. DOLLARS)

| | 2027 (Short-Term) | 2030 (Mid-Term) | 2032 (Long-Term) |
|---|---|---|---|
| **TOTAL Revenue** [A] | $ 5.5 | $ 5.1 | $ 5.5 |
| O&M Expenses | $ 3.2 | $ 3.8 | $ 4.1 |
| Capital Expenses | $ 0.3 | $ 0.3 | $ 0.4 |
| **TOTAL Baseline Expenses** | $ 3.5 | $ 4.1 | $ 4.5 |
| Pilot Programs [B] | $ 0.8 | $ 0.9 | $ 0.9 |
| **TOTAL Added O&M Expenses** | $ 0.8 | $ 0.9 | $ 0.9 |
| Fleet Needs [C] | $ 1.1 | $ - | $ - |
| LSP Facilities | $ - | $ - | $ - |
| Technology | $ 0.027 | $ 0.029 | $ 0.031 |
| Administration | $ 0.074 | $ 0.081 | $ 0.086 |
| **TOTAL Added Capital Expenses** | $ 1.2 | $ 0.11 | $ 0.12 |
| **GRAND TOTAL Added Expenses** | $ 2.0 | $ 1.0 | $ 1.0 |
| **GRAND TOTAL Expenses** | $ 5.5 | $ 5.1 | $ 5.5 |

[A] *Includes Michigan Local Bus Operating Assistance, Oakland County Public Transportation Millage, Community Credits, and Fare Revenues; does not include federal or state discretionary grant funding.*

[B] *Includes operations and maintenance costs and operator salaries.*

[C] *Includes adjustments for 5310 replacements and vehicle depreciation reserves utilized to offset future costs.*

# PEX Implementation Plan

The recommended approach and strategic actions required for People's Express (PEX) to effectively implement the Oakland County Community Transit Plan (CTP) are communicated in this document. It is designed to serve as a companion to CTP Chapter 4: Implementation Plan, translating broader recommendations and strategies laid out in the final chapter of the CTP into actionable steps specific to PEX. For a more detailed overview of CTP implementation, including explanations of or details regarding various processes, please refer to Chapter 4: Implementation Plan.

## Short-Term Implementation (2026 – 2029): Alignment

Short-term implementation focuses primarily on policy alignment across the four local service providers (LSP) operating in Oakland County's community service area (CSA), in addition to initial service and fleet expansion through pilot programs. Additional context regarding short-term CTP implementation efforts can be found in Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment.

### Short-Term PEX Service Operation

Short-term PEX service operation strategies will focus on initial configuration, improvement, and expansion of PEX services in Oakland County. See Short-Term Service Operation in Chapter 4: Implementation Plan for reference.

#### *Local Service Provider Configuration*

See Short-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Collaboratively align PEX operating policies and standard procedures so they are consistent with those of the other LSPs.

**Short-Term Strategies**

- Collaboratively align PEX operating policies and procedures, including rider eligibility, service hours, scheduling windows, fares, service standards, and staff trainings, with those of the other LSPs.
- Coordinate any needed procurements of vehicles, spare parts, and in-vehicle technology with OCT and the other LSPs during Public Transportation Service Agreement (PTSA) contracting.
- Designate a current PEX staff member to act as an administrative liaison to OCT.
    - This liaison should join a committee of other LSP's liaisons collaborating on branding efforts.
- Assign a current PEX staff member to support rider engagement in collaboration with OCT.

## *Service Expansion*

See **Short-Term Service Expansion** in **Chapter 4: Implementation Plan** as a reference.

### Short-Term Recommendation

Consider launching one three-year pilot program improving or expanding an existing service in an area with high transit demand identified in the market analysis. Hire additional operators to support continued expansion of demand response services.

### Short-Term Strategies

- Following OCT's pilot program application process, consider launching a fixed/ flex route pilot or other preferred pilot program.
    - Market analysis suggests an opportunity to launch a fixed or flex route pilot program between the southeastern Commerce Township area and the northwestern Novi area. This pilot would benefit from additional collaboration/coordination with SMART due to the overlap of jurisdictional boundaries and markets.
    - If a fixed or flex route pilot program cannot be launched in this area, consider launching a microtransit pilot program in South Lyon instead.
- Additional operators may be required to support the expansion of demand response services and the pilot program. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for full-time equivalent (FTE) operator and support staff hires.
    - Total need: 17 operator FTE and 1 dispatcher FTE
        - Fixed/flex pilot program: 5 operator FTE and 1 dispatcher FTE
        - Demand response expansion: 12 operator FTE

### *Fleet Needs*

See **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Procure vehicles needed to support pilot programs and growing demand through MDOT OPT.

**Short-Term Strategies**

- Maintain PEX's status as an MDOT-authorized public transit provider eligible to procure vehicles through MDOT.
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting (see **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** for sample) while exploring opportunities to collaborate with other LSPs.
- Procure vehicles needed for expansion (pilot program and demand response needs) and replacement through MDOT OPT. Listed below are suggested vehicle requests.[62]
    - Total requests: 5 transit passenger vans, 2 cutaway vehicles
        - Vehicles required for expansion: 2 cutaways (for pilot program), 5 transit passenger vans (for demand response expansion)
        - Replacement vehicle requests: 0 cutaway vehicles, 0 transit passenger vans
- Take an inventory of PEX assets necessary to support operations, e.g. spare parts, technology, or tablets.

## Short-Term PEX Facilities, Technology, and Maintenance

Short-term PEX facility needs, maintenance policies, and technology look to meet immediate needs while laying the foundation for future LSP resource sharing. See **Short-Term Facilities, Technology, and Maintenance** in **Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment** for reference.

[62] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life; however, expansion of cutaways was also included as related to potential needs associated with pilot programs. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *PEX Facilities*

See **Short-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Assess current facility assets and address immediate outstanding PEX facility needs.

**Short-Term Strategies**

- Conduct an inventory and condition assessment of PEX facility assets, reviewing any existing facility reports and needs, with OCT.
  - Prioritize immediate and future facility needs.
- Following OCT's facility acquisition process, consider leasing an approximately 15,000 square foot building in the Wixom area to house staff and equipment for Oakland County trips and meet immediate facility needs. [A]
- Conduct a regular facility assessment every three years in collaboration with OCT.

[A] *Includes space needed for administrative staff, operations staff, light preventative maintenance, and outdoor vehicle storage.*

### *Technology*

See **Short-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Adopt the same scheduling, dispatch, and user software as the other LSPs and procure lacking tech.

**Short-Term Strategies**

- Align scheduling and dispatch software with other LSPs, ideally via SMART's PSDS procurement.
  - Procure in-vehicle GPS-enabled devices (tablets) that are compatible with scheduling and dispatch software procured in the short-term via OCT's material procurement processes.
  - Participate in training for new scheduling and dispatch software.
- Procure and install security cameras in all PEX revenue vehicles without them.
- Engage in RTA's Mobility Wallet pilot when available by providing required information and confirming participation, in alignment with OCT guidance.

### *Maintenance*

See Short-Term Maintenance in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Collaborate with the other LSPs to align maintenance policies and standard procedures so that they are consistent across all LSPs.

**Short-Term Strategies**

- In partnership with the other LSPs and OCT, review and update PEX preventative and corrective fleet and facility maintenance standards so they are aligned with FTA, MDOT, RTA, and SMART guidelines and consistent across LSPs.
- Collaborate with OCT to develop PEX fleet and facility preventative maintenance plans.

## Short-Term PEX Service Policies

Establishing consistent service policies in the short-term is a key step in streamlining service LSP delivery across the CSA to support a smoother transition to future integration. See Short-Term Service Policies in Chapter 4: Implementation Plan for reference.

### *Administration*

See Short-Term Administration in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Adopt the same rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements as the other LSPs.

**Short-Term Strategies**

- Designate an existing staff member to participate in OCT-led meetings with other LSPs to develop and annually reaffirm administrative policies as part of the annual PTSA contracting process.
- Adopt a PTSA with OCT that includes agreed-upon administrative policies.

***Funding***

See **Short-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Collaborate with OCT to identify new operations and maintenance and capital funding sources.

**Short-Term Strategies**

- Assign an existing PEX administrative staff member to work with OCT during annual LSP budget reviews as PEX's grant application manager.
- PEX's grant application manager should collaborate with OCT to identify PEX's additional funding needs and whether state or federal grants could help meet them.
- Collaborate with OCT to identify and apply for grants, following the application and award steps required by agencies like MDOT, RTA, or FTA.
- Attend the grants management planning workshop hosted by OCT.

## Mid-Term Implementation (2030-2032): Coordination

Mid-term implementation builds on short-term progress by strengthening inter-LSP coordination through continued standardization of service provision and planning tools across LSPs. Additional context regarding mid-term CTP implementation efforts can be found in **Section 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination.**

### Mid-Term PEX Service Operation

Building on short-term alignment, mid-term service operation focuses on standardizing inter-LSP coordination to enhance service efficiency and responsiveness. See **Mid-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

### *Local Service Provider Configuration*

See Mid-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed throughout the process of determining how best to integrate operations across LSPs.

**Mid-Term Strategies**

- Participate in the review of LSPs' organizational charts facilitated by OCT.
- Participate in and support the implementation of recommendations from OCT's organizational development plan for LSP integration.

### *Service Expansion*

See Mid-Term Service Expansion in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Continue to run and evaluate pilot programs launched in the short-term. Hire additional operators to support continued expansion of demand response services.

**Mid-Term Strategies**

- Determine if the PEX pilot program launched in the short-term meets the provided short-term quarterly benchmarks for pilot programs.
- Continue to run the PEX pilot program, if launched in the short-term, through the mid-term.
- Collaborate with OCT and the other LSPs to review the CTP market analysis and compare it to 2026 to 2030 ridership trends and service provision growth.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 12 operator FTE

### *Fleet Needs*

See **Mid-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue procuring vehicles needed through MDOT OPT.

**Mid-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[63]
  - Total requests: 39 transit passenger vans
    - Vehicles required for expansion: 5 transit passenger vans
    - Replacement vehicle requests: 34 transit passenger vans
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting while exploring opportunities to collaborate with other LSPs.
- Use previous inventory of PEX assets and collaborate with the other LSPs to identify future needs for assets supporting operations, like spare parts, technology, or tablets.

## Mid-Term PEX Facilities, Technology, and Maintenance

After addressing immediate facility, technology, and maintenance needs in the short-term, LSPs should begin exploring shared resource management opportunities in the mid-term. See **Mid-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[63] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *PEX Facilities*

See Mid-Term Local Service Provider Facilities in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed to assess whether combining existing LSP facilities would improve efficiency and help meet growing demand for service.

**Mid-Term Strategies**

- Support the OCT-hired consultant team by providing necessary information for a benefit-cost analysis focused on determining if existing and future facility integration will optimize LSP service provision.

### *Technology*

See Mid-Term Technology in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Reevaluate scheduling, dispatch, and user software effectiveness as needed.

**Mid-Term Strategies**

- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is working relative to LSP needs.
- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is integrating well with LSP fare payment systems.

### *Maintenance*

See Mid-Term Maintenance in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Procure contracts for fleet and facility maintenance collectively with the other LSPs.

- Participate with OCT in determining whether procuring joint agreements for all or most contracted maintenance activities will help optimize LSPs' operations.

## Mid-Term PEX Service Policies

Mid-term service policy recommendations aim to refine short-term alignment, maintaining administrative consistency across LSPs while enabling CSA-wide flexibility and innovation. See **Mid-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Mid-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue to collaborate as needed with the other LSPs to adapt unified service policies and procedures.

**Mid-Term Strategies**

- During PTSA contracting, participate with other LSPs to review administrative policies.
- Update service policies collectively with the other LSPs to support better service coordination between all LSPs.

### *Funding*

See **Mid-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Provide OCT with the necessary revenue and expenditure details for its review of the Oakland County Public Transportation Millage.

## Long-Term Implementation (2032+): Integration

Long-term implementation aims to fully implement Oakland County's future service model, unifying LSPs under a transit service manager (TSM) as described in the **Mid-Term Local Service Provider Configuration** section of **Chapter 4: Implementation Plan** while maintaining LSPs as operating divisions, contingent on millage renewal. Additional context regarding long-term CTP implementation efforts can be found in **Section 4.2.3 Long-Term Implementation (2032+): Integration**.

## Long-Term PEX Service Operation

Long-term service operations aim to fully realize earlier coordination and standardization efforts by consolidating LSPs under the TSM if cost-effective, while transitioning successful pilots to permanent services and maintaining consistent fleet management practices. See **Long-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

### *Local Service Provider Configuration*

See Long-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

If the Oakland County Public Transportation Millage is renewed, implement the LSP integration option recommended by the organizational development plan completed during the mid-term.

### *Service Expansion*

See Long-Term

Service Expansion in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

Transition successful pilot programs to permanent services. Hire additional operators to support continued expansion of demand response services.

**Long-Term Strategies**

- Review the pilot program launched in the short-term using the formal evaluation process to determine whether to transition it to a permanent service during the 2032 PTSA contracting process (see Mid-Term Service Expansion in Chapter 4: Implementation Plan).
- Consider launching another recommended microtransit or fixed or flex route pilot program.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 9 operator FTE

### *Fleet Needs*

See **Long-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow fleet policies and procedures developed from 2026 to 2032.

**Long-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[64]
  - Total requests: 21 transit passenger vans
    - Vehicles required for expansion: 4 transit passenger vans
    - Replacement vehicle requests: 17 transit passenger vans

## Long-Term PEX Facilities, Technology, and Maintenance

Long-term strategies optimize earlier infrastructure investments, pursue consolidation where beneficial, and ensure responsiveness to demand through ongoing evaluation. See **Long-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

### *PEX Facilities*

See **Long-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Integrate facilities recommended by the mid-term facility integration assessment, following the direction of the TSM.

[64] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *Technology*

See **Long-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed.

### *Maintenance*

See **Long-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Collaborate with the TSM to develop long-range fleet and facility replacement plans.

**Long-Term Strategies**

- Participate in, provide the necessary information for, and commit to implementing recommendations from the long-range fleet and facility replacement plans facilitated by the TSM.

## Long-Term PEX Service Policies

Long-term, attention must shift to securing renewal of the county's transportation millage to sustain service improvements and uninterrupted delivery. See **Long-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Long-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow administrative policies and procedures developed from 2026 to 2032.

***Funding***

See **Long-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

| Long-Term Recommendation |
| --- |
| Collaboratively participate in the education campaign for Oakland County Public Transportation Millage renewal efforts led by OCT to ensure continued service delivery within the CSA. |

| Long-Term Strategies |
| --- |
| ▶ Collaboratively participate in, provide the necessary information for, and commit to implementing the Oakland County Public Transportation Millage education campaign facilitated by OCT.<br>▶ If the millage is not renewed in November 2032, follow the termination plan prepared by OCT. |

## PEX Financial Outlook (2026 – 2032)

PEX's financial outlook over the course of CTP implementation is provided in **Table G-3**, which summarizes 2027, 2030, and 2032 revenue and expenses as snapshots of PEX's projected finances in the short-, mid-, and long-term implementation phases.

As needed, PEX should consider applying to the following federal and state discretionary grant programs:

- Federal Grant Programs
  - Section 5339(c)
  - Carbon Reduction Program (CRP)
  - Section 5310
  - Surface Transportation Block Grants
  - Better Utilizing Investments to Leverage Development Grants
  - Congestion Mitigation and Air Quality Grants
- State Grant Programs
  - Capital Assistance
  - Specialized Services Program

Reference **Section 2.1 Governance and Funding** for more information on the grant programs listed. See **Section 4.3 CTP Implementation: Financial Outlook (2026 – 2032)** and **APPENDIX F: LSP Financial Outlook Analysis Summary** for a discussion of the development of revenue and expense projections. PEX can also consider delaying the launch of the PEX pilot program recommended as part of CTP implementation if it does not align with immediate fiscal priorities, such as acquiring revenue vehicles or addressing facility needs.

TABLE G-3: PEX FINANCIAL OUTLOOK, 2026-2032 (MILLIONS OF 2025 U.S. DOLLARS)

| | 2027 (Short-Term) | 2030 (Mid-Term) | 2032 (Long-Term) |
|---|---|---|---|
| **TOTAL Revenue** [A] | $ 10.6 | $ 10.7 | $ 11.9 |
| O&M Expenses | $ 5.3 | $ 6.2 | $ 6.8 |
| Capital Expenses | $ 1.3 | $ 1.4 | $ 1.5 |
| **TOTAL Baseline Expenses** | $ 6.6 | $ 7.6 | $ 8.3 |
| Pilot Programs [B] | $ 0.4 | $ 0.4 | $ 0.5 |
| **TOTAL Added O&M Expenses** | $ 0.4 | $ 0.4 | $ 0.5 |
| Fleet Needs [C] | $ 3.2 | $ 1.5 | $ 0.57 |
| LSP Facilities | $ 0.32 | $ 0.35 | $ 0.37 |
| Technology | $ 0.027 | $ 0.029 | $ 0.031 |
| Administration | $ 0.074 | $ 0.081 | $ 0.086 |
| **TOTAL Added Capital Expenses** | $ 3.6 | $ 2.0 | $ 1.1 |
| **GRAND TOTAL Added Expenses** | $ 4.0 | $ 2.4 | $ 1.6 |
| **GRAND TOTAL Expenses** | $ 10.6 | $ 10.0 | $ 9.9 |

[A] *Includes Michigan Local Bus Operating Assistance, Oakland County Public Transportation Millage, Community Credits, and Fare Revenues; does not include federal or state discretionary grant funding.*

[B] *Includes operations and maintenance costs and operator salaries.*

[C] *Includes adjustments for 5310 replacements and vehicle depreciation reserves utilized to offset future costs.*

# WOTA Implementation Plan

The recommended approach and strategic actions required for the Western Oakland Transportation Authority (WOTA) to effectively implement the Oakland County Community Transit Plan (CTP) are communicated in this document. It is designed to serve as a companion to CTP **Chapter 4: Implementation Plan**, translating broader recommendations and strategies laid out in the final chapter of the CTP into actionable steps specific to WOTA. For a more detailed overview of CTP implementation, including explanations of or details regarding various processes, please refer to **Chapter 4: Implementation Plan**.

## Short-Term Implementation (2026 – 2029): Alignment

Short-term implementation focuses primarily on policy alignment across the four local service providers (LSP) operating in Oakland County's community service area (CSA), in addition to initial service and fleet expansion through pilot programs. Additional context regarding short-term CTP implementation efforts can be found in **Section 4.2.1 Short-Term Implementation (2026 – 2029): Alignment**.

### Short-Term WOTA Service Operation

Short-term WOTA service operation strategies will focus on initial configuration, improvement, and expansion of WOTA services in Oakland County. See **Short-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

#### *Local Service Provider Configuration*

See **Short-Term Local Service Provider Configuration** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Collaboratively align WOTA operating policies and standard procedures so they are consistent with those of the other LSPs.

**Short-Term Strategies**

- Collaboratively align WOTA operating policies and procedures, including rider eligibility, service hours, scheduling windows, fares, service standards, and staff trainings, with those of the other LSPs.
- Coordinate any needed procurements of vehicles, spare parts, and in-vehicle technology with OCT and the other LSPs during Public Transportation Service Agreement (PTSA) contracting.
- Designate a current WOTA staff member to act as an administrative liaison to OCT.
    - This liaison should join a committee of other LSP's liaisons collaborating on branding efforts.
- Assign a current WOTA staff member to support rider engagement in collaboration with OCT.

## *Service Expansion*

See **Short-Term Service Expansion** in **Chapter 4: Implementation Plan** as a reference.

### Short-Term Recommendation

Consider launching one three-year pilot program improving or expanding an existing service in an area with high transit demand identified in the market analysis. Hire additional operators to support continued expansion of demand response services.

### Short-Term Strategies

- Following OCT's pilot program application process, consider launching a fixed/flex or other preferred pilot program.
    - Pilot may be the flex route funded by FY2025 - 26 Section 5310 award from the Regional Transportation Authority (RTA).
        - Market analysis also suggests an opportunity to launch a microtransit pilot program in the Holly area and could be considered as an alternative.
- Additional operators may be required to support the expansion of demand response services and the pilot program. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for full-time equivalent (FTE) operator and support staff hires.
    - Total need: 14 operator FTE and 1 dispatcher FTE
        - Fixed/flex pilot program: 5 operator FTE and 1 dispatcher FTE
        - Demand response expansion: 9 operator FTE

### *Fleet Needs*

See **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Procure vehicles needed to support pilot programs and growing demand through MDOT OPT.

**Short-Term Strategies**

- Maintain WOTA's status as an MDOT-authorized public transit provider eligible to procure vehicles through MDOT OPT.
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting (see **Short-Term Fleet Needs** in **Chapter 4: Implementation Plan** for sample) while exploring opportunities to collaborate with other LSPs.
- Procure vehicles needed for expansion (pilot program and demand response needs) and replacement through MDOT OPT. Listed below are suggested vehicle requests.[65]
    - Total requests: 13 transit passenger vans, 9 cutaway vehicles (including 5 Section 5310-funded vehicles due for replacement)
        - Vehicles required for expansion: 4 cutaways (for pilot program), 4 transit passenger vans (for demand response expansion)
        - Replacement vehicle requests: 5 cutaway vehicles, 9 transit passenger vans
- Take an inventory of WOTA assets necessary to support operations, e.g. spare parts, technology, or tablets.

## Short-Term WOTA Facilities, Technology, and Maintenance

Short-term WOTA facility needs, maintenance policies, and technology look to meet immediate needs while laying the foundation for future LSP resource sharing. See **Short-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[65] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life; however, expansion of cutaways was also included as related to potential needs associated with pilot programs. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *WOTA Facilities*

See **Short-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Assess current facility assets and address immediate outstanding WOTA facility needs.

**Short-Term Strategies**

- Conduct an inventory and condition assessment of WOTA facility assets, reviewing any existing facility reports and needs, with OCT.
  - Prioritize immediate and future facility needs.
- Following OCT's facility acquisition process, consider leasing an approximately 15,000 square foot building in the southeastern White Lake Township area to house staff and equipment for Oakland County trips and meet immediate facility needs. [A]
  - Coordinate with MDOT and the RTA to determine how to align WOTA facility needs with required facility planning processes.
- Conduct a regular facility assessment every three years in collaboration with OCT.

[A] *Includes space needed for administrative staff, operations staff, light preventative maintenance, and outdoor vehicle storage.*

### *Technology*

See **Short-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Adopt the same scheduling, dispatch, and user software as the other LSPs and procure lacking tech.

**Short-Term Strategies**

- Align scheduling and dispatch software with other LSPs, ideally via SMART's PSDS procurement.
  - Ensure that existing WOTA in-vehicle GPS-enabled devices (tablets) that are compatible with procured scheduling and dispatch software.
  - Participate in training for new scheduling and dispatch software.
- Engage in RTA's Mobility Wallet pilot when available by providing required information and confirming participation, in alignment with OCT guidance.

### *Maintenance*

See **Short-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Collaborate with the other LSPs to align maintenance policies and standard procedures so that they are consistent across all LSPs.

**Short-Term Strategies**

- In partnership with the other LSPs and OCT, review and update WOTA preventative and corrective fleet and facility maintenance standards so they are aligned with FTA, MDOT, RTA, and SMART guidelines and consistent across LSPs.
- Collaborate with OCT to develop updated WOTA fleet and facility preventative maintenance plans.

## Short-Term WOTA Service Policies

Establishing consistent service policies in the short-term is a key step in streamlining service LSP delivery across the CSA to support a smoother transition to future integration. See **Short-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Short-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Short-Term Recommendation**

Adopt the same rider eligibility, service hours, fares, service and safety standards, scheduling windows, and staff training requirements as the other LSPs.

**Short-Term Strategies**

- Designate an existing staff member to participate in OCT-led meetings with other LSPs to develop and annually reaffirm administrative policies as part of the annual PTSA contracting process.
- Adopt a PTSA with OCT that includes agreed-upon administrative policies.

### *Funding*

See Short-Term Funding in Chapter 4: Implementation Plan as a reference.

**Short-Term Recommendation**

Collaborate with OCT to identify new operations and maintenance and capital funding sources.

**Short-Term Strategies**

- Assign an existing WOTA administrative staff member to work with OCT during annual LSP budget reviews as WOTA's grant application manager.
- WOTA's grant application manager should collaborate with OCT to identify WOTA's additional funding needs and whether state or federal grants could help meet them.
- Collaborate with OCT to identify and apply for grants, following the application and award steps required by agencies like MDOT, RTA, or FTA.
- Attend the grants management planning workshop hosted by OCT.

## Mid-Term Implementation (2030-2032): Coordination

Mid-term implementation builds on short-term progress by strengthening inter-LSP coordination through continued standardization of service provision and planning tools across LSPs. Additional context regarding mid-term CTP implementation efforts can be found in Section 4.2.2 Mid-Term Implementation (2030 – 2032): Coordination.

### Mid-Term WOTA Service Operation

Building on short-term alignment, mid-term service operation focuses on standardizing inter-LSP coordination to enhance service efficiency and responsiveness. See Mid-Term Service Operation in Chapter 4: Implementation Plan for reference.

### *Local Service Provider Configuration*

See Mid-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed throughout the process of determining how best to integrate operations across LSPs.

**Mid-Term Strategies**

- Participate in the review of LSPs' organizational charts facilitated by OCT.
- Participate in and support the implementation of recommendations from OCT's organizational development plan for LSP integration.

### *Service Expansion*

See Mid-Term Service Expansion in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Continue to run and evaluate pilot programs launched in the short-term. Hire additional operators to support continued expansion of demand response services.

**Mid-Term Strategies**

- Determine if the WOTA pilot programs launched in the short-term meets the provided short-term quarterly benchmarks for pilot programs.
- Continue to run the WOTA pilot programs, if launched in the short-term, through the mid-term.
- Collaborate with OCT and the other LSPs to review the CTP market analysis and compare it to 2026 to 2030 ridership trends and service provision growth.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 12 operator FTE

### *Fleet Needs*

See **Mid-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue procuring vehicles needed through MDOT OPT.

**Mid-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[66]
  - Total requests: 29 transit passenger vans (including 5 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 5 transit passenger vans
    - Replacement vehicle requests: 24 transit passenger vans
- Continue to use OCT's process for estimating annual vehicle needs prior to annual PTSA contracting while exploring opportunities to collaborate with other LSPs.
- Use previous inventory of WOTA assets and collaborate with the other LSPs to identify future needs for assets supporting operations, like spare parts, technology, or tablets.

## Mid-Term WOTA Facilities, Technology, and Maintenance

After addressing immediate facility, technology, and maintenance needs in the short-term, LSPs should begin exploring shared resource management opportunities in the mid-term. See **Mid-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

[66] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *WOTA Facilities*

See Mid-Term Local Service Provider Facilities in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Collaborate with OCT as needed to assess whether combining existing LSP facilities would improve efficiency and help meet growing demand for service.

**Mid-Term Strategies**

- Support the OCT-hired consultant team by providing necessary information for a benefit-cost analysis focused on determining if existing and future facility integration will optimize LSP service provision.

### *Technology*

See Mid-Term Technology in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Reevaluate scheduling, dispatch, and user software effectiveness as needed.

**Mid-Term Strategies**

- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is working relative to LSP needs.
- Collaborate with OCT and the other LSPs to evaluate whether the procured scheduling, dispatch, and user software is integrating well with LSP fare payment systems.

### *Maintenance*

See Mid-Term Maintenance in Chapter 4: Implementation Plan as a reference.

**Mid-Term Recommendation**

Procure contracts for fleet and facility maintenance collectively with the other LSPs.

- Participate with OCT in determining whether procuring joint agreements for all or most contracted maintenance activities will help optimize LSPs' operations.

## Mid-Term WOTA Service Policies

Mid-term service policy recommendations aim to refine short-term alignment, maintaining administrative consistency across LSPs while enabling CSA-wide flexibility and innovation. See **Mid-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Mid-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Continue to collaborate as needed with the other LSPs to adapt unified service policies and procedures.

**Mid-Term Strategies**

- During PTSA contracting, participate with other LSPs to review administrative policies.
- Update service policies collectively with the other LSPs to support better service coordination between all LSPs.

### *Funding*

See **Mid-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

**Mid-Term Recommendation**

Provide OCT with the necessary revenue and expenditure details for its review of the Oakland County Public Transportation Millage.

## Long-Term Implementation (2032+): Integration

Long-term implementation aims to fully implement Oakland County's future service model, unifying LSPs under a transit service manager (TSM) as described in the **Mid-Term Local Service Provider Configuration** section of **Chapter 4: Implementation Plan** while maintaining LSPs as operating divisions, contingent on millage renewal. Additional context regarding long-term CTP implementation efforts can be found in **Section 4.2.3 Long-Term Implementation (2032+): Integration**.

## Long-Term WOTA Service Operation

Long-term service operations aim to fully realize earlier coordination and standardization efforts by consolidating LSPs under the TSM if cost-effective, while transitioning successful pilots to permanent services and maintaining consistent fleet management practices. See **Long-Term Service Operation** in **Chapter 4: Implementation Plan** for reference.

### *Local Service Provider Configuration*

See Long-Term Local Service Provider Configuration in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

If the Oakland County Public Transportation Millage is renewed, implement the LSP integration option recommended by the organizational development plan completed during the mid-term.

### *Service Expansion*

See Long-Term

Service Expansion in Chapter 4: Implementation Plan as a reference.

**Long-Term Recommendation**

Transition successful pilot programs to permanent services. Hire additional operators to support continued expansion of demand response services.

**Long-Term Strategies**

- Review the pilot program launched in the short-term using the formal evaluation process to determine whether to transition it to a permanent service during the 2032 PTSA contracting process (see Mid-Term Service Expansion in Chapter 4: Implementation Plan).
- Consider launching another recommended microtransit or fixed or flex route pilot program.
- Additional operators may be required to support the expansion of demand response services. These needs should be reassessed and tailored to the specific services being provided as more details are identified. Listed below are suggestions for FTE operator and support staff hires.
    - Demand response expansion: 6 operator FTE

### *Fleet Needs*

See **Long-Term Fleet Needs** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow fleet policies and procedures developed from 2026 to 2032.

**Long-Term Strategies**

- Continue to procure vehicles needed for expansion and replacement through MDOT OPT. Listed below are suggested vehicle requests.[67]
  - Total requests: 5 cutaway vehicles, 7 transit passenger vans (including 9 Section 5310-funded vehicles due for replacement)
    - Vehicles required for expansion: 3 transit passenger vans
    - Replacement vehicle requests: 5, cutaway vehicles, 4 transit passenger vans

## Long-Term WOTA Facilities, Technology, and Maintenance

Long-term strategies optimize earlier infrastructure investments, pursue consolidation where beneficial, and ensure responsiveness to demand through ongoing evaluation. See **Long-Term Facilities, Technology, and Maintenance** in **Chapter 4: Implementation Plan** for reference.

### *WOTA Facilities*

See **Long-Term Local Service Provider Facilities** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Integrate facilities recommended by the mid-term facility integration assessment, following the direction of the TSM.

[67] For high-level fleet planning purposes, vehicles for demand response expansion were assumed to be transit passenger vans only (e.g., Ford Transit vans) and include a 20% spare ratio assumption. Minivan and other van types were also replaced with transit passenger vans once they reach their useful life. Existing cutaway vehicles were retained and replaced once they reach their useful life. Refer to **Appendix F** for additional fleet estimate details and assumptions. Fleet needs are assumed to be funded by a variety of resources including Oakland County Transit Millage, LSP capital funds, and 5310 and other discretionary grant programs.

### *Technology*

See **Long-Term Technology** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to reevaluate scheduling, dispatch, and user software effectiveness as needed.

### *Maintenance*

See **Long-Term Maintenance** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Collaborate with the TSM to develop long-range fleet and facility replacement plans.

**Long-Term Strategies**

- Participate in, provide the necessary information for, and commit to implementing recommendations from the long-range fleet and facility replacement plans facilitated by the TSM.

## Long-Term WOTA Service Policies

Long-term, attention must shift to securing renewal of the county's transportation millage to sustain service improvements and uninterrupted delivery. See **Long-Term Service Policies** in **Chapter 4: Implementation Plan** for reference.

### *Administration*

See **Long-Term Administration** in **Chapter 4: Implementation Plan** as a reference.

**Long-Term Recommendation**

Continue to follow administrative policies and procedures developed from 2026 to 2032.

***Funding***

See **Long-Term Funding** in **Chapter 4: Implementation Plan** as a reference.

| Long-Term Recommendation |
| --- |
| Collaboratively participate in the education campaign for Oakland County Public Transportation Millage renewal efforts led by OCT to ensure continued service delivery within the CSA. |

| Long-Term Strategies |
| --- |
| ▶ Collaboratively participate in, provide the necessary information for, and commit to implementing the Oakland County Public Transportation Millage education campaign facilitated by OCT.<br>▶ If the millage is not renewed in November 2032, follow the termination plan prepared by OCT. |

## WOTA Financial Outlook (2026 – 2032)

WOTA's financial outlook over the course of CTP implementation is provided in **Table G-4**, which summarizes 2027, 2030, and 2032 revenue and expenses as snapshots of WOTA's projected finances in the short-, mid-, and long-term implementation phases.

As needed, WOTA should consider applying to the following federal and state discretionary grant programs:

- Federal Grant Programs
  - Section 5339(c)
  - Carbon Reduction Program (CRP)
  - Section 5310
  - Surface Transportation Block Grants
  - Better Utilizing Investments to Leverage Development Grants
  - Congestion Mitigation and Air Quality Grants

- State Grant Programs
  - Capital Assistance
  - Specialized Services Program

Reference **Section 2.1 Governance and Funding** for more information on the grant programs listed. See **Section 4.3 CTP Implementation: Financial Outlook (2026 – 2032)** and **APPENDIX F: LSP Financial Outlook Analysis Summary** for a discussion of the development of revenue and expense projections. WOTA can also consider delaying the launch of the WOTA pilot program recommended as part of CTP implementation if it does not align with immediate fiscal priorities, such as acquiring revenue vehicles or addressing facility needs.

TABLE G-4: WOTA FINANCIAL OUTLOOK, 2026-2032 (MILLIONS OF 2025 U.S. DOLLARS)

| | 2027 (Short-Term) | 2030 (Mid-Term) | 2032 (Long-Term) |
|---|---|---|---|
| **TOTAL Revenue [A]** | $ 9.7 | $ 11.6 | $ 11.1 |
| O&M Expenses | $ 6.6 | $ 7.8 | $ 8.4 |
| Capital Expenses | $ 0.9 | $ 0.9 | $ 1.0 |
| **TOTAL Baseline Expenses** | $ 7.5 | $ 8.7 | $ 9.4 |
| Pilot Programs [B] | $ 0.8 | $ 0.9 | $ 0.9 |
| **TOTAL Added O&M Expenses** | $ 0.8 | $ 0.9 | $ 0.9 |
| Fleet Needs [C] | $ 1.0 | $ 1.5 | $ - |
| LSP Facilities | $ 0.32 | $ 0.35 | $ 0.37 |
| Technology | $ 0.027 | $ 0.029 | $ 0.031 |
| Administration | $ 0.074 | $ 0.081 | $ 0.086 |
| **TOTAL Added Capital Expenses** | $ 1.4 | $ 2.0 | $ 0.5 |
| **GRAND TOTAL Added Expenses** | $ 2.2 | $ 2.9 | $ 1.4 |
| **GRAND TOTAL Expenses** | $ 9.7 | $ 11.6 | $ 10.8 |

[A] *Funding sources included: State of Michigan Local Bus Operating Assistance, Oakland County Public Transportation Millage, Community Credits, and Fare Revenues*

[B] *Includes operations and maintenance costs and operator salaries.*

[C] *Includes adjustments for 5310 replacements and vehicle depreciation reserves utilized to offset future costs.*